



Small and Micro FBO Survey 2025 - Scotland

Authors: IFF Research

Contents

List of Figures	3
Infographic.....	4
Executive Summary	5
Background and methodology	7
Experiences and perceptions of FSS.....	11
Information and communication.....	15
Business experience of food safety processes and interventions.....	17
Food hypersensitivities and provision of allergen information.....	20
Barriers facing businesses.....	24
Online sales and the use of third-party platforms	26
Food Crimes	28
Importing and Exporting.....	30
Conclusions	31

List of Figures

Figure 1. Business awareness of FSS.....	11
Figure 2. Businesses' confidence in FSS to achieve its goals.....	12
Figure 3. Agreement with statements regarding food safety or hygiene standards and regulations.....	14
Figure 4. Sources for food safety guidelines and regulations.....	16
Figure 5. Experiences of food safety processes and interventions.....	17
Figure 6. Frequency of activities conducted by businesses that have written procedures in place.....	18
Figure 7. How businesses provided allergen information to customers.....	20
Figure 8. Types of allergen and ingredient information that businesses provide to customers.....	21
Figure 9. How often customers are asked if they have allergies.....	22
Figure 10. Training methods for staff and managers.....	23
Figure 11. Concerns, threats and barriers to the success of businesses.....	24
Figure 12. Types of staff businesses were struggling to recruit.....	25
Figure 13. Social media accounts used by businesses.....	26
Figure 14. Food crimes that businesses were victims of in the last 12 months.....	29

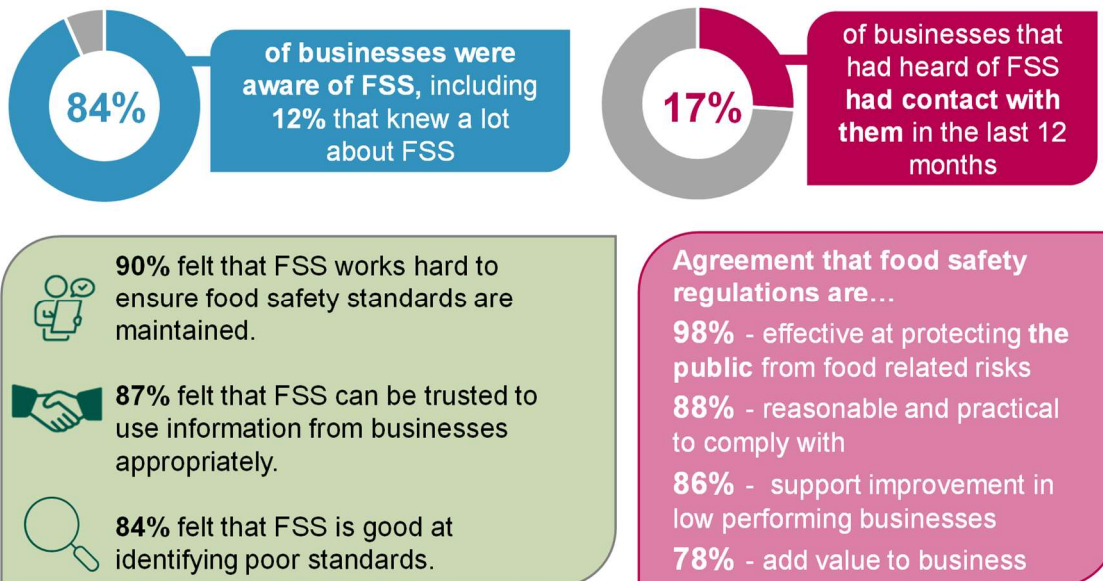
Infographic

Small and Micro Food Business Operator (FBO) Survey Scotland (2025)

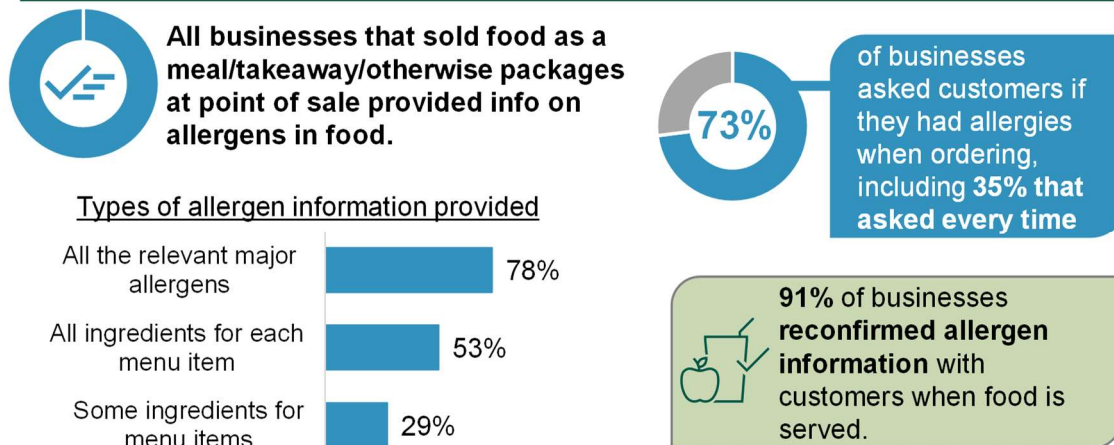
Food Standards Scotland

IFF Research

FBO perceptions of FSS



Food hypersensitivities and allergens



Food safety information and regulation



Executive Summary

The Small and Micro Food Business Operator (FBO) Tracking Survey monitors the perceptions, experiences, and regulatory awareness of small and micro food businesses. The 2025 wave marks the fifth iteration of the study in England, Wales and Northern Ireland and the first to include Scottish FBOs, enabling Food Standards Scotland (FSS) to gather dedicated insights. The research aims to deepen understanding of regulatory attitudes, assess trust in FSS as a modern and accountable regulator, and explore how businesses operate within the wider food safety system.

The study was conducted by IFF Research. Fieldwork consisted of structured telephone interviews with a sample of 150 small and micro FBOs operating in Scotland. Interviews were carried out with respondents responsible for food safety within their businesses, covering a broad mix of sectors, Food Hygiene Information Scheme ratings, and business sizes. The achieved sample was weighted to reflect the underlying population of eligible Scottish FBOs.

Key Findings

Businesses generally expressed high levels of confidence in FSS's ability to maintain and improve food safety and standards. While most businesses were aware of FSS, many reported limited knowledge about its functions. Direct contact with FSS over the preceding year was infrequent, though those who had interacted with the organisation typically rated their experience positively, particularly in terms of ease of access, clarity, trustworthiness, and approachability.

Most businesses felt well informed about the regulations affecting them, although some reported gaps due to limited regulatory contact or a perception that certain regulations were not applicable to their activities. Local authorities were the most common source of information on food safety, alongside suppliers and the FSS website. The prevalence of businesses with a subscription to FSS news and alerts services were low.

More than half of businesses had undergone a food hygiene inspection within the past year, and a notable proportion had received advisory support or training from regulators. Experience of formal enforcement was not captured among the businesses surveyed. Many businesses had procedures for managing recalls or withdrawals, though mock recall exercises were not widely carried out.

All businesses involved in selling meals or takeaway food provided allergen information to customers, using a combination of written and verbal communication. Allergen information was most commonly provided to staff through proactive staff discussions during ordering and through staff training approaches such as verbal updates, formal training sessions, and online learning.

Businesses reported a range of operational barriers, with financial pressures, changing consumer behaviour, and staff-related costs frequently mentioned. Recruitment difficulties

were concentrated in specialist and customer-facing roles. Most businesses maintained a social media presence, though only a minority used online channels to accept customer orders. Few businesses used third-party delivery platforms.

Awareness of the Scottish Food Crime and Incidents Unit (SFCIU) was relatively low, and only a small minority of businesses reported being victims of food crime within the previous year. Engagement in importing and exporting activities was limited, and very few businesses anticipated entering international trade in future.

Insights on key differences by business type

Micro businesses were more likely to rely solely on written allergen information and less likely to obtain food safety information from training providers. They also tended to use online channels less frequently for business operations.

Small businesses, particularly those with more employees, were more likely to make use of training providers, maintain a business website, and use online platforms for information. They showed a greater likelihood of seeking regulatory information proactively, including through the FSS website.

Service-sector businesses were more likely to have concerns about staffing pressures and business rates. They were also less aware of FSS's online guidance for recalls and withdrawals.

Businesses trading online reported lower confidence in how well FSS understands their needs and in the effectiveness of FSS communication within the food industry. However, they were also more likely to make active use of the FSS website as a source of guidance.

Conclusion

The findings indicate that small and micro-Scottish FBOs generally maintain strong levels of confidence in FSS and feel well informed about regulatory requirements. However, the findings suggest there may be varying levels of awareness of FSS's role, engagement with regulatory communications, and understanding of recall guidance and allergen management practices. Financial pressures, recruitment challenges, and shifts in consumer behaviour present ongoing barriers to business resilience.

Background and methodology

Background to the survey and research objectives

The Food Standards Agency (FSA) has been tracking small and micro Food Business Operators (FBO) in England, Wales and Northern Ireland since 2018 in order to better understand attitudes towards food-related topics, and trust in the FSA and food system. This has helped FSA inform engagement and intervention activity targeted at businesses with fewer than 50 staff.

This represents the fifth wave of the tracking survey from 2025, when the survey was extended to include Scottish FBOs, enabling Food Standards Scotland (FSS) to gather comparable insights under the same objectives.

The tracking survey covers the following aims:

- To ‘unpack’ attitudes towards regulation and deepen insights and knowledge of small and micro enterprises in Scotland
- To measure trust in the FSS and the extent to which FSS is considered a modern, accountable regulator

Findings specific to FBOs in England, Northern Ireland and Wales are presented in a separate report published by the FSA.

Research methodology

Fieldwork was conducted by IFF Research, an independent research company. Following a period of cognitive fieldwork where the questionnaire was tested among a small subset of businesses, a total of 150 interviews were conducted via a Computer-Assisted Telephone Interviewing (CATI) methodology. All interviews were with small (10-49 employees) and micro (less than 10 employees) FBOs based in Scotland. The interviews lasted 20 minutes on average.

The sample was selected from FSS’s business database which was matched by company name and address using a commercial sample provider (Market Location). The sample was drawn on the 28 August 2025 using country, size, Food Hygiene Information Scheme (FHIS) rating, and sector targets. An additional sample was incorporated on 28 October 2025 to further support the achievement of targets within the food and beverage sector. Screener questions at the start of the survey ensured that only in-scope businesses completed the survey. To be in scope, an FBO needed to have at least one site, have less than 49 employees, sell or serve food products for human consumption in line with the approach taken since 2018. FBOs that were part of a franchise were also screened out of the survey. Targets are shown in Table 1.

Table 1. Interview targets by sector, rating, and number of employees

Sector grouping	Scotland
Manufacturing	15
Wholesale	15
Retail	30
Accommodation	15
Food and beverage service activities	75
FHIS rating	Scotland
Improvement required	15
Pass	110
Awaiting inspection / Exempt	25
Number of employees	Scotland
Fewer than 10	105
Between 10 and 19	30
Between 20 and 49	15
Total	150

In line with the overall target, a total of 150 small and micro FBOs in Scotland were surveyed. The final profile of completed interviews in Scotland for Wave 5 is shown in Table 2 below:

Table 2. Profile of completed Wave 5 interviews

Sector grouping	Scotland
Manufacturing	16
Wholesale	21
Retail	30
Accommodation	17
Food and beverage service activities	66
FHIS rating	Scotland
Improvement required	19
Pass	117
Awaiting inspection / Exempt	14
Number of employees	Scotland
Fewer than 10	105
Between 10 and 19	29
Between 20 and 49	16
Total	150

The data was weighted to be representative of the micro and small FBO population across Scotland at the time of sampling. IFF Research obtained information on the underlying population of businesses eligible for the tracker in terms of sector and size from NOMIS on 24 July 2025. The most recent business population data available was filtered on small and micro FBOs (i.e., less than 50 employees) operating in Scotland and sectors in-scope for the research (using the UK Standard Industrial Classification).¹

Once eligible business population counts had been obtained, the incidence of Food Hygiene Information Scheme (FHIS) ratings in Scotland was applied to derive the number of eligible businesses in rating groupings.

Notes on the report

Throughout the report references to business size are based on number of employees unless otherwise specified. Sole trader refers to a self-employed business owner with no employees.

The term ‘service activities’ is used throughout the report as shorthand for the ‘food and beverage service activities’ sector. This sector incorporates restaurants, cafes, pubs, and other catering businesses.

When percentages are provided in the text for sub-groups such as by size and sector, the sub-group percentage shown is statistically significantly different to the average of those not in this sub-group, at the 95% confidence level. The phrasing “most likely”, “more likely than average” or “particularly likely” etc. is used as a shorthand for this. All differences reported are statistically significant unless otherwise stated.

Please note that in some cases, response codes have been combined for reporting (e.g., ‘Very confident’ and ‘Fairly confident’ reported together as ‘Confident’). As percentages are rounded to zero decimal places, minor rounding differences occur between the combined figure and the sum of the individual codes.

Unless explicitly noted, all findings are based on weighted data. Unweighted bases (the number of responses from which the findings are derived) are displayed on tables and charts as appropriate, to give an indication of the robustness of results.

It is important to note that, with a total sample size of 150, some questions and several subgroups have fewer than 50 respondents. Please be cautious when interpreting or generalising these findings to the wider population. In some instances, where questions are routed to a very small subset of respondents, results are reported in a qualitative style, and unweighted figures are used (e.g. *20 out of 60 businesses*).

As Scottish FBOs were included for the first time in Wave 5, the data cannot be compared with earlier waves.

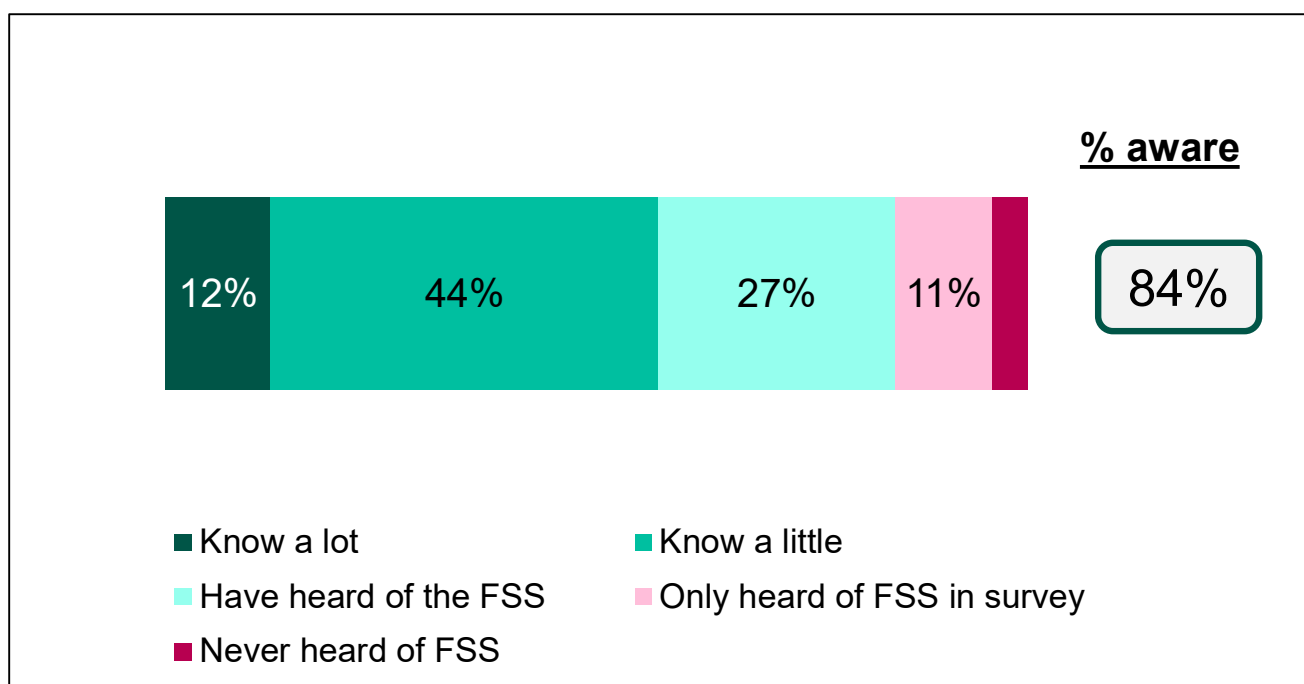
Experiences and perceptions of FSS

This chapter covers awareness and knowledge of FSS and businesses' contact with them over the past 12 months. It examines how small and micro businesses rate these interactions in terms of trustworthiness, ease, approachability, and clarity, and explores their confidence in FSS to deliver effectively across key areas of food safety and standards. The chapter will also explore perceptions of food standards and regulations.

Awareness and knowledge of FSS

Most FBOs were aware of FSS (84%), as shown in Figure 1. However, most did not know much about FSS, with over seven in ten (72%) saying they only knew a little about FSS or had only heard of them, and 6% saying that they have never heard of them. Only a minority (12%) reported knowing a lot about FSS.

Figure 1. Business awareness of FSS



C13. How much, if anything, do you know about Food Standards Scotland (FSS)? Base: All businesses (150).

Contact with FSS

Those who had heard of FSS were asked whether they had had any interactions or contact with FSS in the last 12 months. Less than one-in-five businesses who had heard of FSS had some form of contact with them in the last 12 months (17%). Businesses that sold food or drink as a meal or takeaway were more likely to have had contact (22%).

Businesses were then asked if they had been in contact with FSS in the last 12 months and through what form of communication they did so. Four in five businesses had not contacted

FSS in the last 12 months (80%) with just under a fifth having visited the FSS's website (17%). Only 1 individual that had heard of FSS had called the helpline.

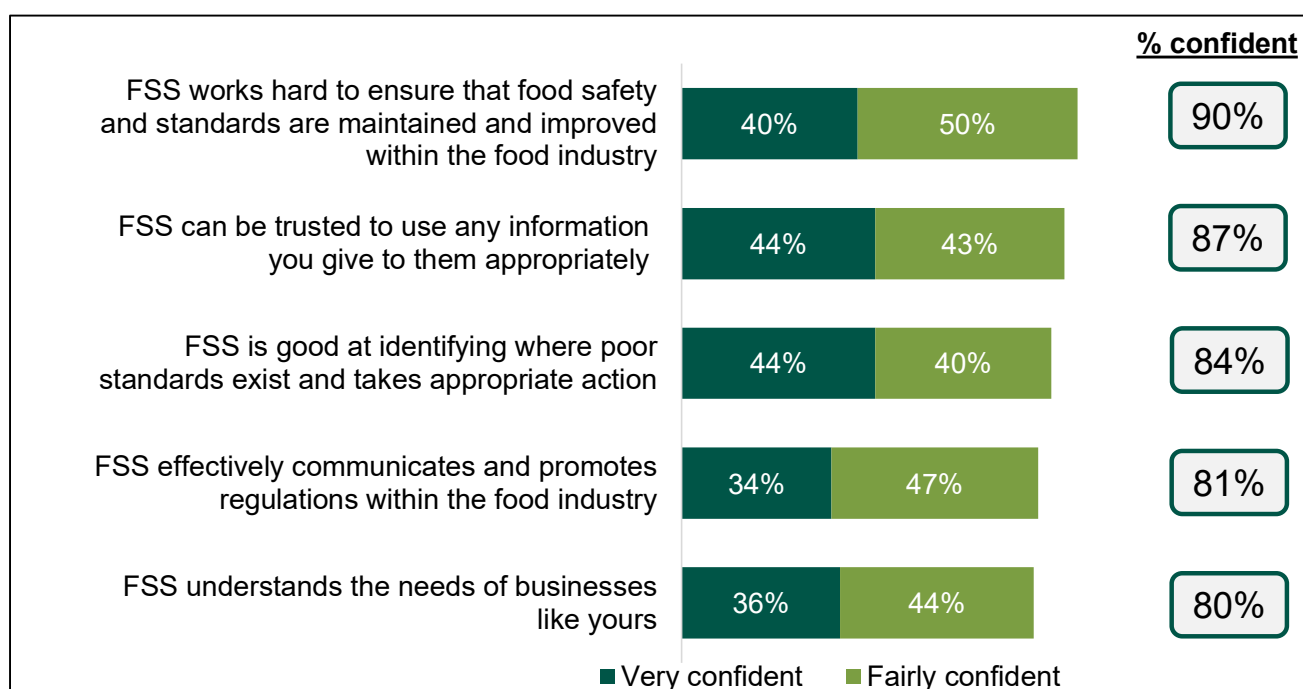
Ratings of contact with FSS

Businesses were asked to rate FSS based on their experiences of contacting them. It should be noted that there was a low number of businesses that were asked this question owing to the low proportion of businesses that had contacted the FSS (25). Most businesses rated FSS high for ease of use or access (23 out of 25), trustworthiness (22 out of 25), clarity of communication (21 out of 25) and approachability (21 out of 25). FSS did not receive any low ratings, except from for approachability, where 1 individual rated FSS as low.

Confidence in the FSS

Businesses that had heard of FSS were asked to rate their agreement to a series of statements about FSS achieving certain goals. Overall confidence was high, as shown in Figure 2.

Figure 2. Businesses' confidence in FSS to achieve its goals



C16. How confident are you that FSS...? Base: Businesses that have heard of FSS (130).

Nine-in-ten businesses were confident that FSS works hard to ensure that food safety and standards are maintained and improved (90%). Businesses that had not had a food hygiene inspection in the last 12 months were less confident that FSS works hard to maintain food safety and standards (84% vs 95% of those that had an inspection).

Although confidence was high among businesses that FSS understands the needs of businesses like theirs (80%), 15% of businesses were not confident in this statement. Businesses that trade online were less likely to be confident that FSS understands their

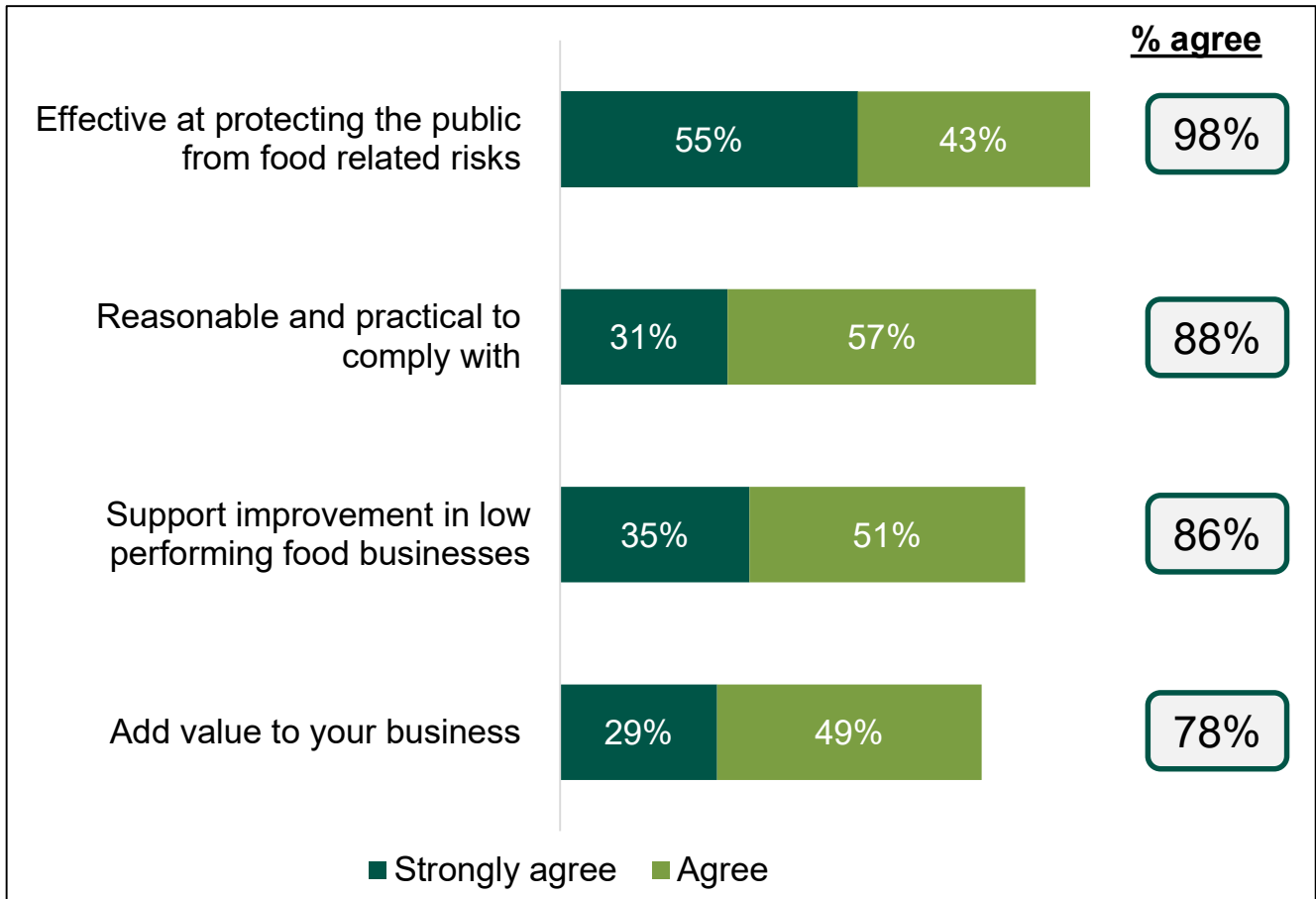
needs than businesses that do not trade online (68% vs 85%). Conversely, businesses that trade online were also less likely to be confident that FSS effectively communicates and promotes regulations within the food industry (70% vs 85% of those that do not trade online).

Confidence in food safety standards and regulations

Businesses were asked the extent to which they agreed with a series of statements regarding food safety or hygiene standards and regulations, as shown in Figure 3. Almost all businesses (98%) agreed that food safety regulations are effective at protecting the public from food related risks. Most businesses also agreed that the regulations are reasonable and practical to comply with (88%) and that they support improvement in low performing food businesses (86%). Over three-quarters (78%) of businesses agreed that food safety standards and regulations add value to their business.

Businesses that had a food hygiene or standards inspection in the last 12 months were more likely to agree that food safety standards or regulations add value to their business than those that had not had an inspection (86% vs 69% respectively). Agreement with this statement was also more likely among businesses in the food and beverage service sector (87%).

Figure 3. Agreement with statements regarding food safety or hygiene standards and regulations



C1. To what extent would you agree or disagree that food safety/hygiene standards and regulations... Base: All businesses (150).

Information and communication

This chapter investigates how informed businesses feel about all regulations affecting them, and the most commonly used sources of information on food safety guidelines and regulations. It will also examine levels of engagement with the FSS news and alerts service and explore how businesses encourage customers to make healthier choices.

How informed businesses feel about regulations affecting their business

All businesses were asked how well informed they feel about regulations that affect their food business overall. It is important to note that all survey respondents identified themselves as the person in the business primarily responsible for food safety and therefore they were likely to be typically more informed about regulations than other staff members.

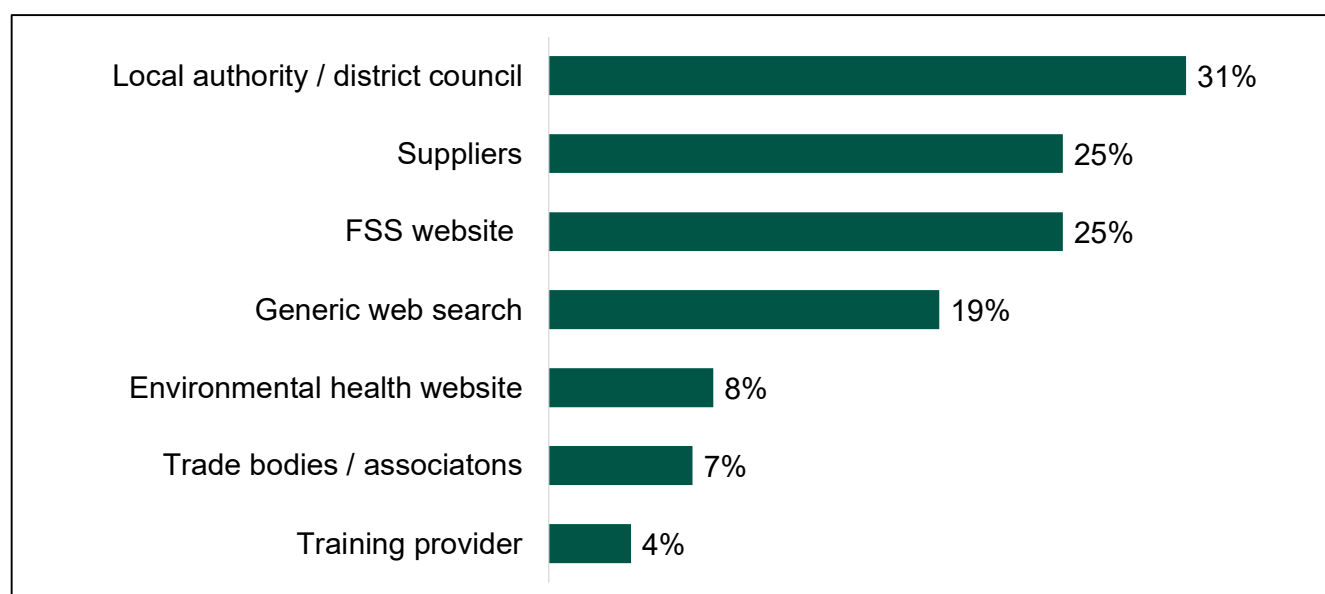
The majority of businesses (83%) felt either very or quite well informed about regulations affecting their business. Businesses that had a food hygiene or standards inspection in the past 12 months were more likely to feel informed about regulations affecting their business (89% vs 77% of those that had not had an inspection).

The most common reason that businesses reported not feeling informed about regulations included: they do not feel that the regulations are applicable to their business, they haven't looked into it and a lack of contact from regulators.

Sources of information about food safety

Businesses were asked where they get information about food safety guidelines and regulations, food allergies and product recalls, as seen in **Figure 4**. Almost all (98%) cited at least one source, most commonly the local authority or district council (31%), followed by suppliers and the FSS website (25% for both).

Figure 4. Sources for food safety guidelines and regulations



E2. Where do you get information about food safety guidelines and regulations, food allergies and product recalls? Base: All businesses (150). Responses less than 4% not charted.

The use of suppliers as a source of information about food safety guidelines and regulations was more common amongst small businesses (29% of those with less than 10 employees) than businesses with 10 or more employees (10%). In contrast, businesses with 10 or more employees were more likely to get information from a training provider than smaller businesses (10% vs 2%).

Use of the FSS website was more common amongst businesses that trade online (36% vs 20% of those that do not trade online) and businesses that had a food hygiene or standards inspection in the last 12 months (36% vs 12% of those that have not).

Subscription to the FSS news and alerts service

Businesses were asked if they have ever subscribed to the FSS news and alerts service. One-in-ten businesses were subscribed (11%), and over three-quarters were not subscribed (78%). Subscriptions were less common among businesses that received pre-packaged food or drink to be sold (4%).

Encouraging customers to make healthier choices

All businesses except wholesalers were asked what steps they had taken to help customers make healthier choices. Over a third (37%) of these businesses had taken steps to help customers make healthier choices in the last 12 months. Businesses that had taken steps were then asked which steps these were. The most common step was providing a wider range of healthier options (35 out of 48 businesses). This was followed by changes to ingredients or cooking methods (21 out of 48), promotions on food which is lower in calories, sugar, salt or fat (15 out of 48) and reducing portion sizes (14 out of 48).

Business experience of food safety processes and interventions

This chapter covers businesses' experience of interventions undertaken in relation to food hygiene and food safety, and the clarity of communication relating to these events. It goes on to explore the mechanisms they have in place to respond to recall or withdrawal requests, including training procedures, and use of FSS template guidance.

Experience of food safety processes and interventions

As shown in Figure 5, over half of businesses (54%) had received an inspection by their local authority in the last 12 months. A third (33%) had received advice or training about meeting food safety standards or hygiene regulations. No businesses in the survey had experience of enforcement taken against their business.

Figure 5. Experiences of food safety processes and interventions



D1. Which of the following has your business experienced or been involved in over the last 12 months? Base: All businesses (150).

Businesses interactions with Local Authorities

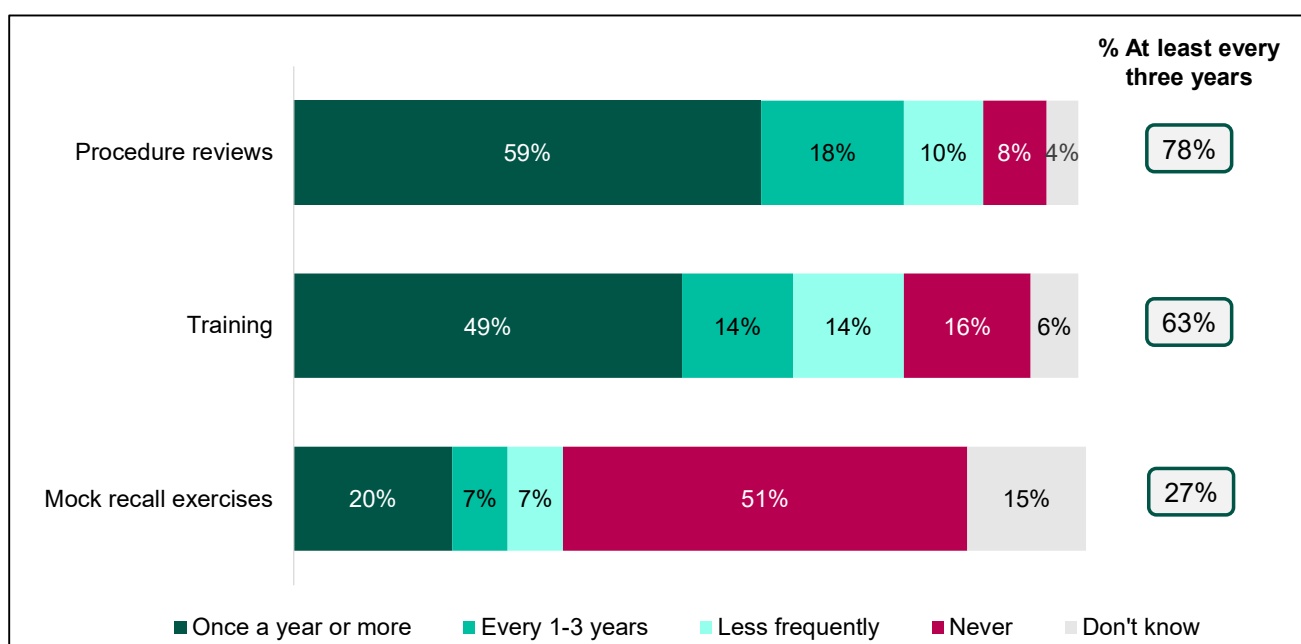
All businesses were asked whether they were aware all food businesses, including online businesses need to be registered with the Local Authority. Nearly all businesses were aware (95%). Businesses that were aware they needed to be registered were asked whether they registered using the online or paper form. Nearly a third used the paper form to register (31%), around a quarter registered online (24%) but nearly half did not know (45%).

After businesses had registered, just over half received any guidance information (51%). A slightly smaller proportion had received an advisory visit (45%) or received a visit within one month of starting to trade (34%). Only 9% of businesses experienced none of those.

Written procedures

Just under six in ten businesses (59%) reported having written procedures in place for managing a recall or withdrawal. As Figure 6 shows, businesses with written procedures in place were most likely to conduct procedure reviews at least every three years (78%). Just under two thirds of businesses with written procedures in place also conducted training at least every three years (63%). Of the activities listed, businesses were least likely to conduct mock recall exercises, with less than a third (27%) conducting them at least every three years and half (51%) never doing so.

Figure 6. Frequency of activities conducted by businesses that have written procedures in place



D5. And thinking about these procedures to deal with a recall or withdrawal, how regularly do you conduct...? Base: Businesses with written procedures in place to guide them on how to deal with a recall or withdrawal (83).

Point of sale notices

Retailers and businesses selling food directly to the public were asked how they would describe their approach to displaying point of sale notices for a recall or withdrawal. This question applied to 30 businesses so caution should be taken when interpreting these results. The most common way that businesses displayed Point of Sale Notices was at the till or point of sale signage (9 out of 30), followed by using external signage and putting details on social media (both 6 out of 30). Only 4 out of 30 businesses displayed a notice in writing but did not specify how, and the same proportion removed the product from sale. Of the 30 businesses that answered the question, seven said it was not applicable to them or they'd never needed to.

Awareness of FSS guidance

Just under a third (32%) of all FBOs had heard of FSS's online guidance and templates for dealing with recalls and withdrawals, while nearly seven in ten (68%) had not heard of the online guidance. Businesses in the service activities sector were more likely to have not heard of the online guidance and templates (76%).

Food hypersensitivities and provision of allergen information

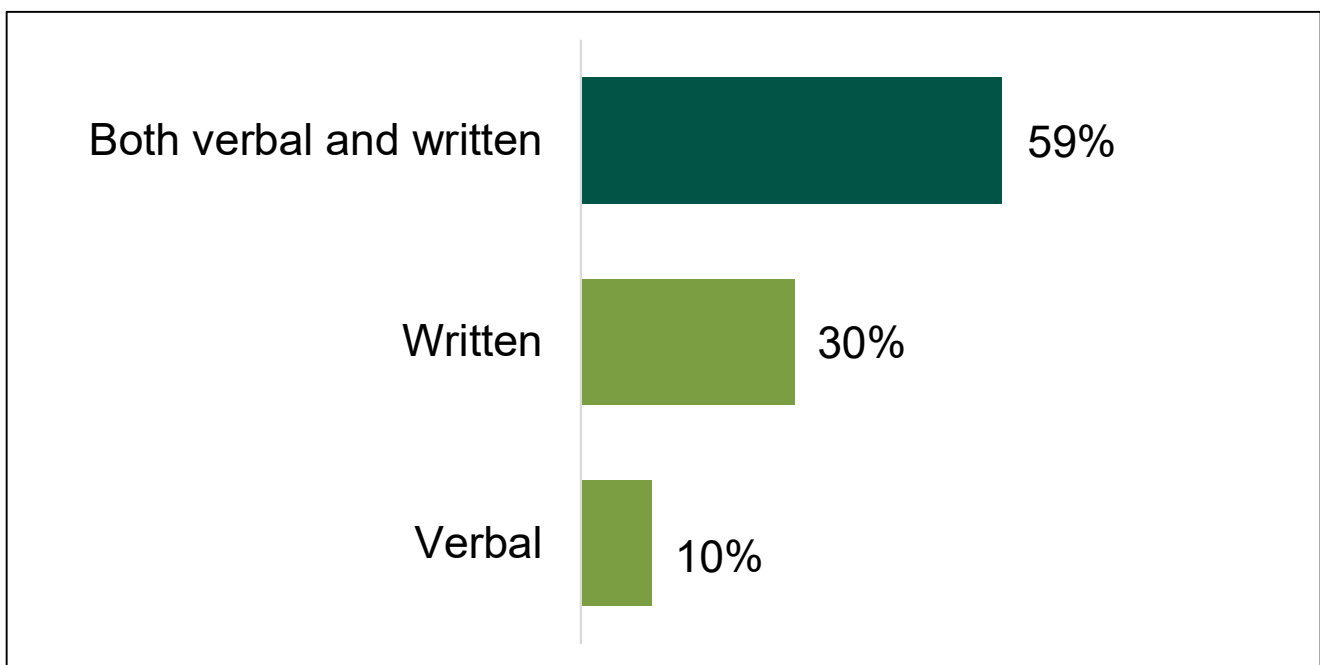
This chapter explores how businesses manage allergen risks and communicate with customers. It covers the provision and type of allergen information, whether it is proactively displayed or given on request, and practices for checking and reconfirming allergy requirements during ordering and service. The chapter also examines awareness and use of guidance and tools, and methods of staff training on allergens.

Written or verbal allergen information

Businesses were asked whether they provide any written or verbal allergen information to customers or others to whom they supply food. Among businesses selling food as a meal, takeaway, or otherwise packaged at the point of sale, all (100%) reported providing allergen information.

As illustrated in Figure 7, six-in-ten businesses (59%) delivered allergen information through both written and verbal channels. Three-in-ten (30%) relied solely on written information, while one-in-ten (10%) communicated allergen information only verbally. Micro FBOs (those with less than 10 employees) were more likely to rely solely on written information than FBOs with 10 or more employees (36% vs 15%).

Figure 7. How businesses provided allergen information to customers



C11a. Does your business provide any written or verbal allergen information to customers or people you provide food to? Base: Businesses that sell food as a meal or takeaway or otherwise packages at point of sale (84).

Businesses that provided written allergen information to customers were asked whether this information was made available without customers needing to request it. Three-in-ten (30%)

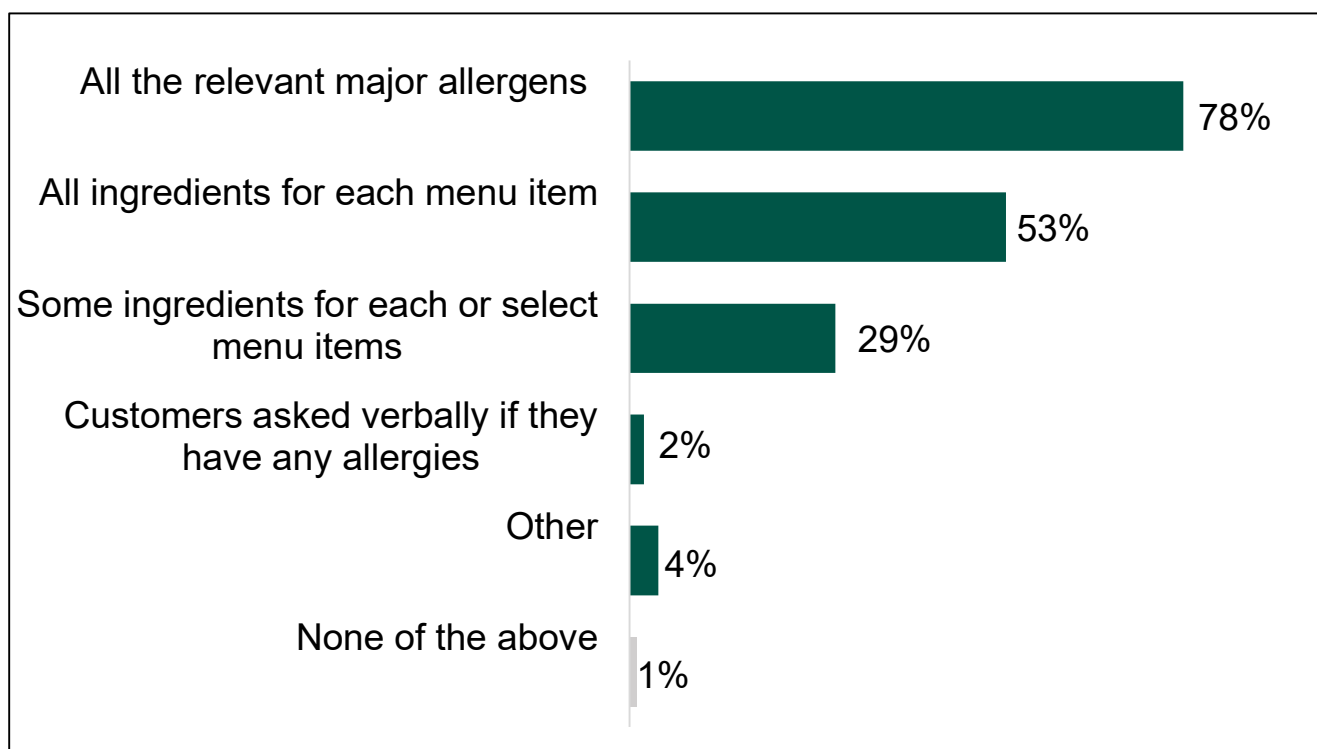
reported that written allergen information is proactively displayed to customers, while almost double (58%) said it is provided only upon request. The remaining 12% indicated that their approach varies. FBOs that received pre-packaged food or drink to be sold were more likely to proactively display written allergen information (45%).

Allergies covered

More than three-quarters of businesses (78%) that provided information on allergens, provided information on all the relevant major allergens present in menu items. Over half of businesses (53%) reported offering full ingredient lists for each menu item.

A smaller proportion (29%) said they provide information on only some ingredients or only for selected menu items, such as highlighting nuts or gluten but not all allergens. Very few businesses relied solely on verbal checks with customers (2%), and just 1% reported that they provided none of the listed types of allergen information in Figure 8.

Figure 8. Types of allergen and ingredient information that businesses provide to customers



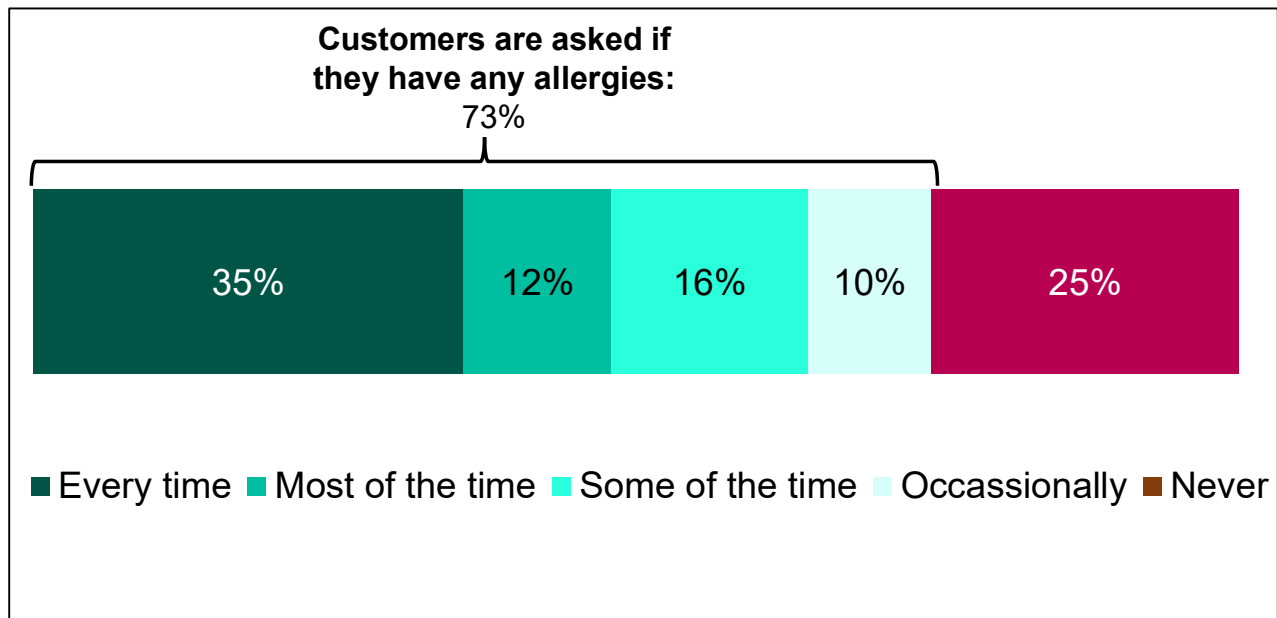
C11e. Which of the following information about allergens and ingredients, if any, does your establishment provide information on? Base: Businesses that provide information on allergens (84).

Frequency of asking about allergies

Almost three-quarters of businesses that sell food as a meal or a takeaway (or otherwise packaged at point of sale) (73%) reported asking customers about allergies when they were ordering food, as shown in Figure 9. This includes over a third (35%) that ask every time,

12% that ask most of the time, 16% that ask some of the time and one-in-ten (10%) that ask occasionally. In contrast, a quarter (25%) of these businesses reported that they never ask customers whether they have any allergies when they are ordering food.

Figure 9. How often customers are asked if they have allergies



C11f. How often are customers asked if they have any allergies when ordering food at your business? Base: Businesses that sell food as a meal or takeaway or otherwise packages at point of sale (84).

Businesses were also asked whether allergen information reconfirmed with customers when their food is served, in the case that a person has made their allergen requirement known.

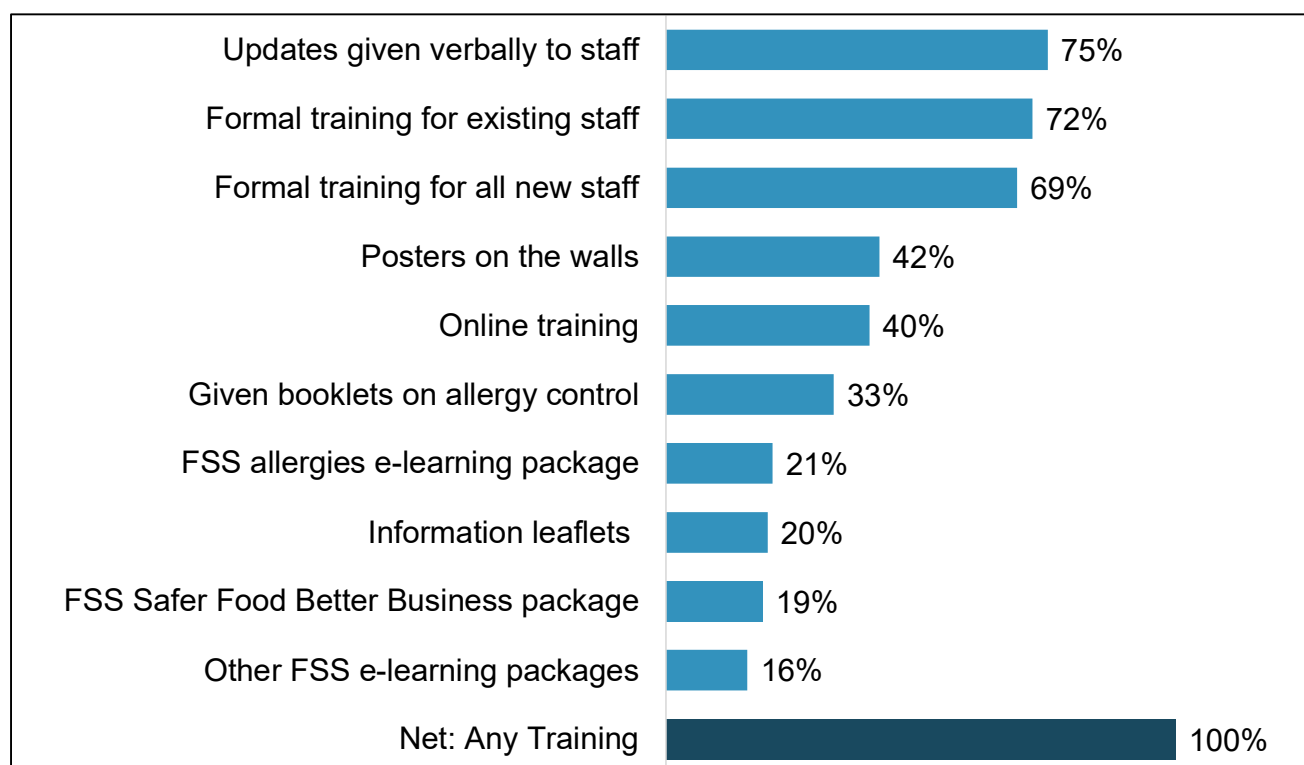
Most businesses (91%) reported reconfirming allergen information in some form. Most commonly, this was done verbally by staff (79%). Smaller proportions used labels, flags or stickers to identify allergen-safe items (22%) or served the customer's food separately (1%). However, only a minority (4%) of these businesses said they do not reconfirm allergen information at the point of service.

How staff are provided with information and training

All businesses (100%) reported using at least one method to train or inform staff on food safety guidelines and regulations, including food allergens, as shown in Figure 1. The most common approaches were verbal updates provided during work (75%), followed by formal training for existing staff (72%) and formal training for all new staff (69%). Over four-in-ten businesses informed staff using posters on the walls (42%), and a similar proportion used online training either by the business or an external provider (40%).

Other resources were less widely used, including booklets on allergy control (33%), the FSS allergies e-learning package (21%), information leaflets (20%), the FSS Safer Food Better Business package (19%), and other FSS e-learning packages (16%).

Figure 10. Training methods for staff and managers



C12. How are staff and managers provided with information and training on food safety guidelines and regulations including food allergies? Base: Businesses that sell food as a meal or takeaway or otherwise packages at point of sale (84). Responses less than 5% not charted.

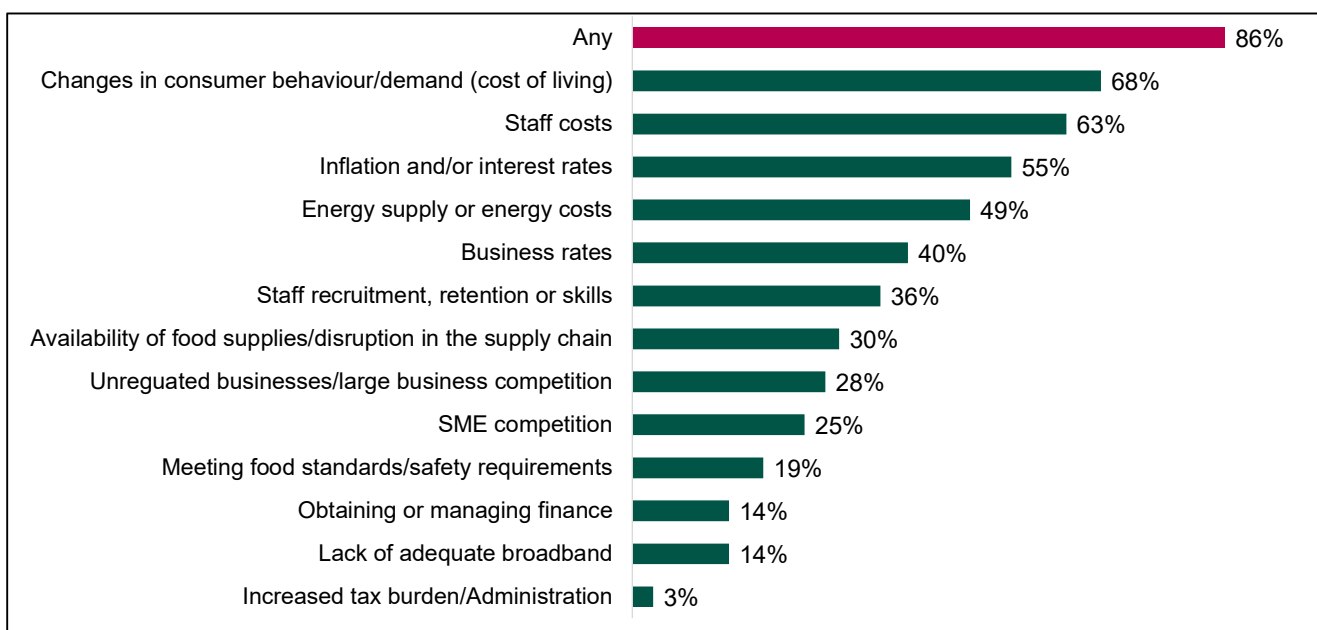
Barriers facing businesses

This chapter will present the proportion of businesses that were facing barriers to their business and what these barriers were. It will examine the list of concerns or threats posed to businesses in the survey. Lastly, it will examine the types of staff that businesses are struggling to recruit.

Barriers facing businesses

Businesses were presented with a list of potential threats and concerns and asked to select which they felt were particular barriers to the success of their business. As seen in Figure 11, most businesses (86%) said at least one of the listed threats was a barrier to the success of their business. The most common barrier was changes in consumer behaviour and demand due to the increased cost of living (68%), followed by staff costs (63%) and high inflation or increased interest rates (55%).

Figure 11. Concerns, threats and barriers to the success of businesses



B1. Please tell me whether the following possible concerns, threats, or barriers to the success of your business currently apply to your business. Base: All businesses (150).

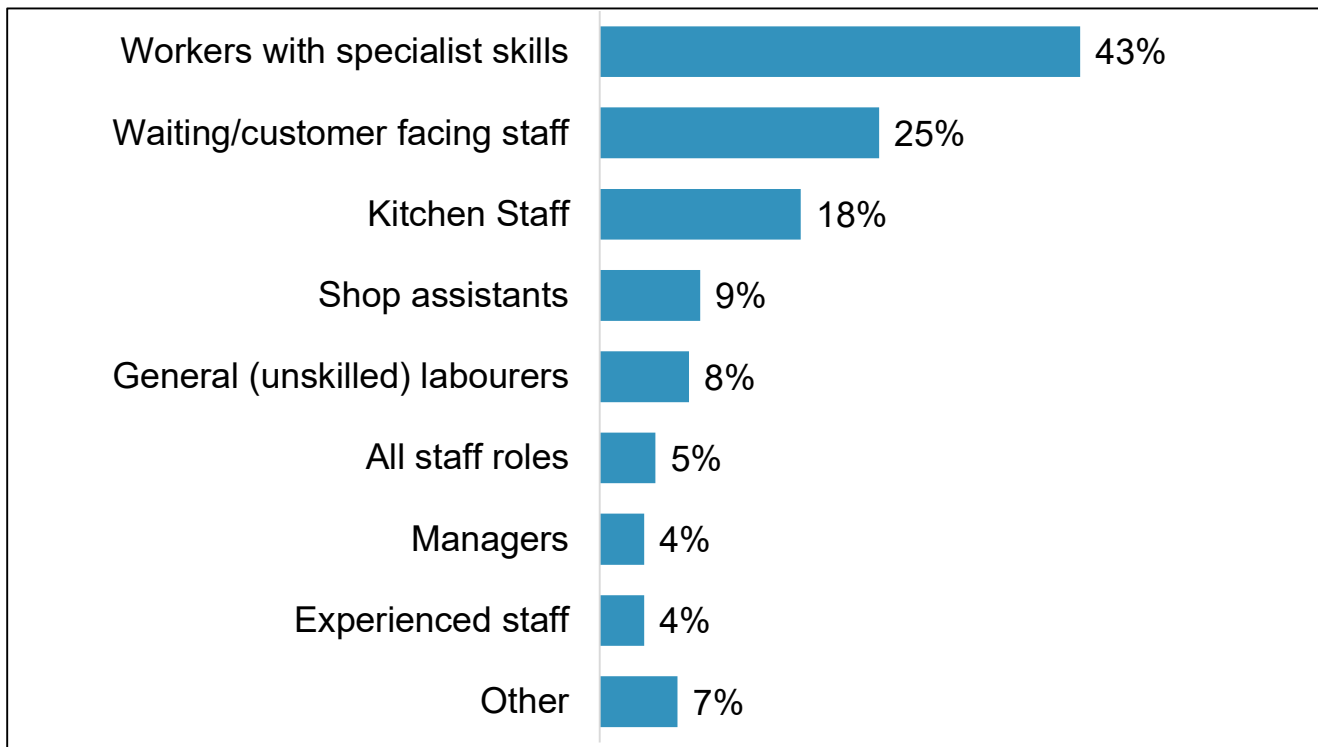
Businesses in the service activities sector were more likely to have concerns about staff costs (72%) and business rates (49%) than other sectors. Businesses with 10 or more employees were also more likely to be concerned about business rates (56%) than smaller businesses (35% of those with less than 10 employees).

Recruitment issues

Over a third (36%) of FBOs were concerned about staffing. These businesses were asked to specify which types of staff they were struggling to recruit, shown in Figure 12. Over four-in-

ten of these businesses were struggling to recruit workers with specialist skills (43%). A quarter of businesses were struggling to recruit waiting or customer facing staff (25%), followed by kitchen staff (18%).

Figure 12. Types of staff businesses were struggling to recruit.



B2. What types of staff are you struggling to recruit? Base: Businesses struggling to recruit staff (51). Responses less than 4% not charted.

Online sales and the use of third-party platforms

This chapter outlines the online presence of companies and how they use their own website, social media, and third-party platforms when taking orders for food. It examines whether FBOs have a website, use a third-party website, or social media to take orders.

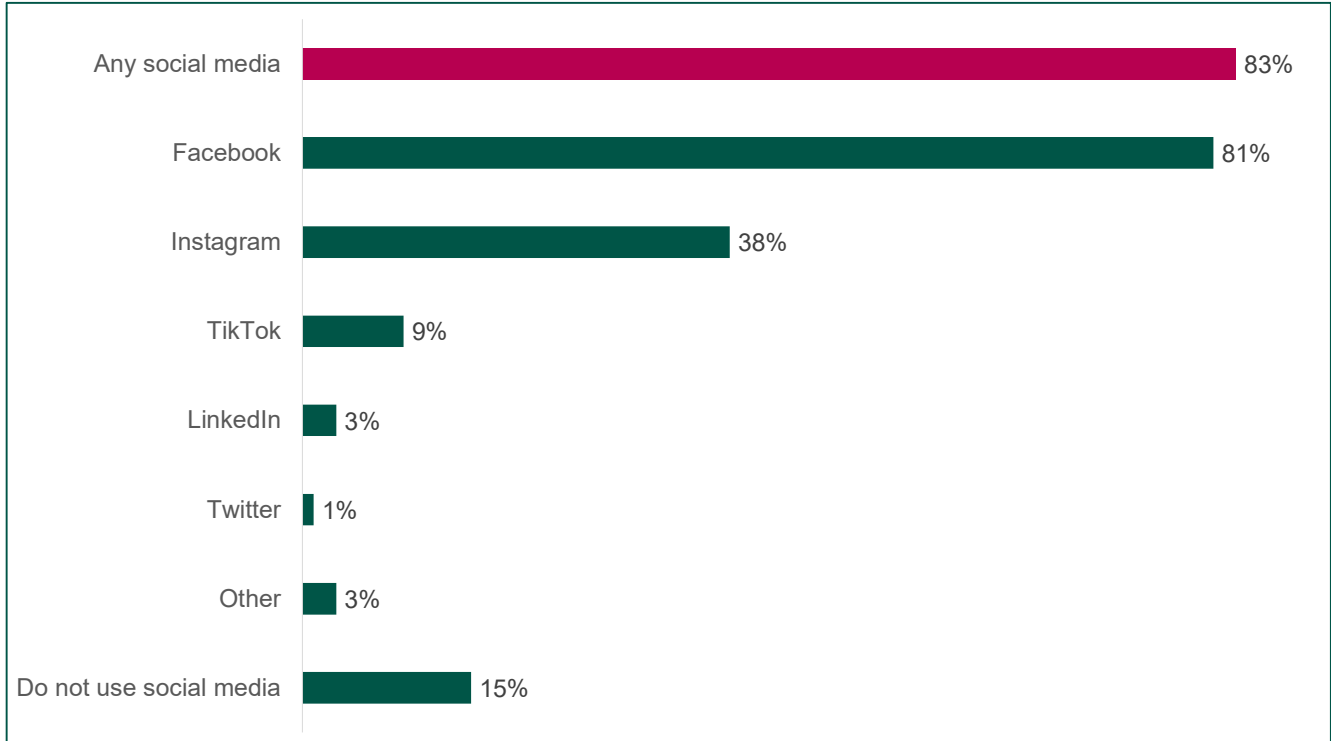
Companies use of their own website

Over half of businesses had a website (54%). This was more common among businesses with 10 or more employees (79%) than smaller businesses (47% of those with less than 10 employees). FBOs were asked whether they used their website to take food orders. A fifth (21%) of businesses with a website reported that they used it to take orders.

Businesses' use of social media and third-party platforms

All businesses were asked which, if any, social media accounts their business used. The majority of businesses (83%) had some form of social media presence, with the most common type being Facebook (81%), followed by Instagram (38%), as shown in Figure 13. Businesses that sold food as a meal or takeaway were more likely to have a Facebook or Instagram account (87% and 46% respectively).

Figure 13. Social media accounts used by businesses



A8. What, if any, social media accounts does your business use? Base: All businesses (150).

A small amount (15%) of businesses used their social media accounts to take orders, while the majority did not (84%). Businesses that did take orders through social media mostly did so through Facebook (13% of those with a social media account), followed by Instagram (5%).

Businesses were asked what third-party platforms, if any, they use to sell food products. Only 19% of businesses used third-party platforms to sell food. The most common third-party platform used by businesses was Just Eat (8 out of 18), closely followed by Deliveroo (5 out of 18).

Online sales

All businesses that trade online were asked how much of their sales turnover was currently accounted for by online sales, across all platforms used. The majority (73%) said that less than a quarter of their sales turnover was accounted for by online sales, and a further 13% said less than a half.

Food Crimes

This chapter explores businesses' awareness of the Scottish Food Crime and Incident's Unit (SFCIU), the dedicated law enforcement function of Food Standards Scotland. It then examines the prevalence of a variety of food crimes.

Awareness of the SFCIU

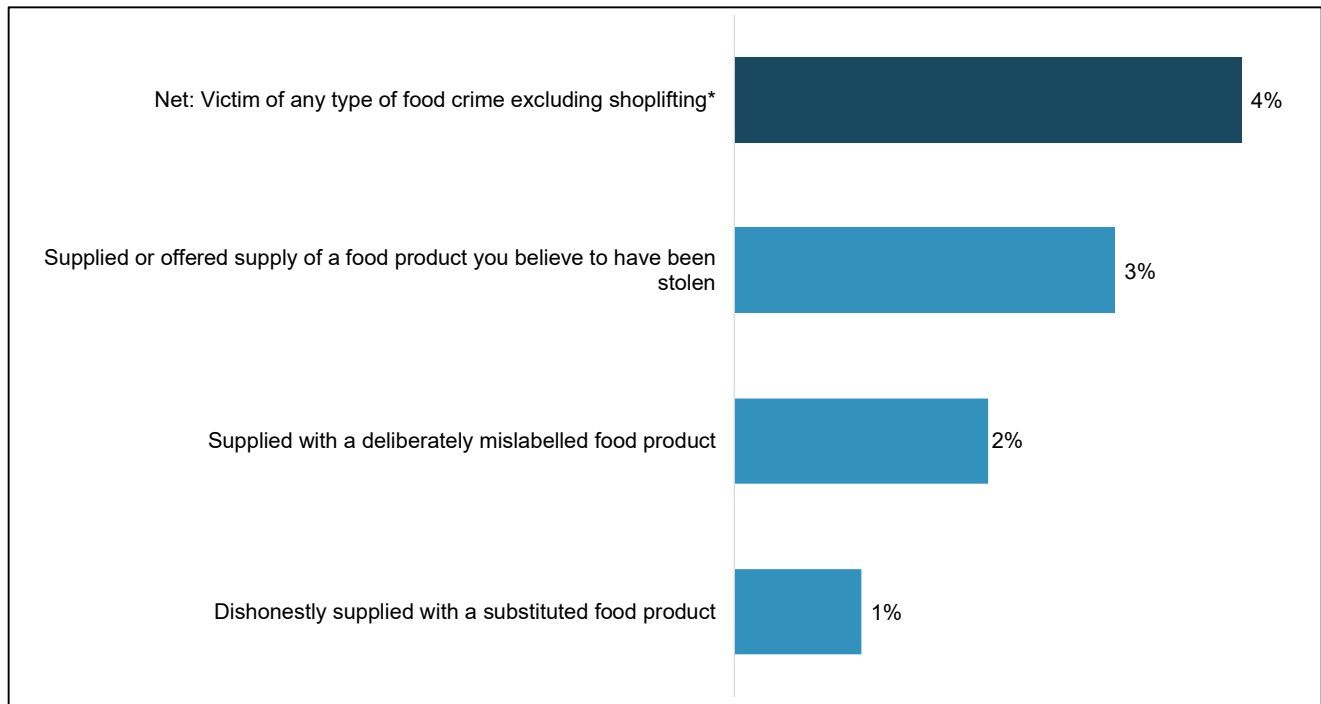
All businesses were asked whether they were aware of the Scottish Food Crime and Incident's Unit (SFCIU). A minority (14%) of businesses were aware of the SFCIU, with most respondents (86%) having no awareness of them.

Businesses who were aware of the SFCIU were subsequently asked whether they were aware of the SFCIU's Risk Profiling Tool for helping businesses prevent food crime. Of the 22 businesses that were aware of the SFCIU, 7 were aware of the SFCIU's Risk Profiling Tool to help their business prevent food crime. Thirteen of the 22 businesses aware of the SFCIU were not aware of the SFCIU's Risk Profiling Tool.

Proportions of businesses experiencing food crimes

All businesses were asked whether they had been the victim of any type of food crimes over the last 12 months. As shown in Figure 14, a minority (4%) of businesses had been victims of any food crime excluding shoplifting in the last 12 months. The most common food crime businesses said they had experienced was being supplied or offered a food product they believed to have been stolen (3%), followed by being supplied with a deliberately mislabelled food product (2%) and being dishonestly supplied with a substituted food product (1%).

Figure 14. Food crimes that businesses were victims of in the last 12 months



E5. To the best of your knowledge, has your business been the victim of any of the following food crimes over the last 12 months? Base: All businesses (150). NOTE: Shoplifting is not an SFCIU matter and so is excluded from the overall. 17% of businesses had experienced shoplifting in the last 12 months but this was excluded from the chart as it is not an SFCIU issue.

Importing and Exporting

This short chapter provides evidence on the proportion of FBOs that have ever imported or exported goods or services, and how they imported or exported. It also covers whether those that do not currently import or export intend to do so in the future.

Overall proportions of businesses importing and exporting

Under one in ten businesses (8%) had ever imported or exported goods or services. Among the 92% of businesses that had not engaged in importing or exporting, almost all (98%) reported no intention of doing so in the future.

Businesses that had imported or exported were asked about specific destinations. Nearly all (13 out of 14) had conducted trade between EU countries and Great Britain or Northern Ireland (excluding the Republic of Ireland). Around two-thirds (9 out of 14) had traded between non-EU countries and Great Britain or Northern Ireland. 8 out of 14 had traded between Northern Island and Great Britain and 5 out of 14 had traded between the Republic of Ireland and Great Britain.

Conclusions

This chapter is organised around the two research objectives set for Wave 5, before presenting an overall conclusion on overall performance.

Objective 1. Attitudes Towards Regulation and Insights Into Small and Micro Food Businesses

Attitudes Towards Regulation

Businesses generally demonstrated a strong awareness of regulatory requirements and expressed a high degree of confidence in the ability of Food Standards Scotland (FSS) to maintain and improve food safety and standards. Although most businesses were aware of FSS, many reported only limited knowledge of its work, and direct engagement with the organisation over the previous year was relatively uncommon. Where contact did occur, businesses consistently described their experience in positive terms, with high ratings for clarity, ease of engagement, trustworthiness, and approachability.

Most respondents reported feeling well informed about the regulations affecting their operations, although some indicated gaps in their understanding due to limited regulator contact or the perception that certain regulatory elements had limited relevance to their activities. Local authorities remained the most frequently used source of regulatory information, supplemented by suppliers and the FSS website.

Insights Into Small and Micro Food Businesses

Operational practices among small and micro FBOs revealed areas of confidence as well as ongoing challenges. A significant proportion had undergone a food hygiene inspection within the previous year and many had also received advisory guidance or training, reinforcing their sense of being well informed. Written procedures for managing food recalls or withdrawals were common, though more complex exercises such as mock recalls were less frequently undertaken.

All relevant businesses provided allergen information to customers, using written, verbal, or combined approaches. Staff training on food safety and allergen awareness was delivered through multiple channels, including verbal briefings, formal training sessions, and online learning.

External pressures continued to affect business performance. Many businesses reported concerns linked to financial pressures, operational costs, and changing consumer behaviour. Recruitment challenges persisted, particularly in securing specialist roles and customer facing staff. Digital engagement was widespread in the form of social media use, but comparatively few businesses used online systems to take orders or relied on third party platforms. Awareness of the Scottish Food Crime and Incidents Unit remained low, and only a small minority had experienced food crime facing staff. Digital engagement was

widespread in the form of social media use, but comparatively few businesses used online systems to take orders or relied on third party platforms.

Objective 2. Trust in the FSA as a Modern and Accountable Regulator

Trust in FSS was consistently strong among businesses familiar with the organisation. Respondents expressed confidence that FSS works effectively to uphold food safety and standards. Businesses generally believed that FSS strives to communicate clearly and operate in a way that supports compliance. However, lower levels of confidence were evident among businesses engaged in online trading, who were less assured that FSS fully understood their business needs or communicated effectively across the food sector.

Despite this, the overall picture suggests that FSS is regarded as a dependable and credible regulator. Businesses that had direct contact with the organisation reported positive experiences, reinforcing perceptions of FSS as accessible and transparent.

Overall Conclusion

The findings from the survey indicate that small and micro FBOs in Scotland demonstrate strong levels of confidence in FSS and feel well supported in meeting their regulatory obligations. Businesses generally maintain effective operational practices, particularly in allergen management and food safety processes, although more advanced procedures such as mock recalls remain less established.

External pressures, including financial constraints, staffing challenges, and shifts in customer behaviour, continue to shape the operating landscape. Nevertheless, the overall relationship between FSS and the businesses it regulates is characterised by trust, positive engagement, and confidence in the regulator's commitment to upholding food safety and standards. The findings suggest that there may be varying levels of awareness of FSS resources, engagement with regulatory communication, and understanding of recall guidance and allergen management practices among businesses.

Celebrating
 60 *years of*
IFF Research



www.iffresearch.com



info@iffresearch.com



IFF Research