AN ASSESSMENT OF OUT OF HOME FOOD AND DRINK IN SCOTLAND

Commissioned by Food Standards Agency in Scotland

Prepared by NPD Group Inc.

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Contents

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Anne Milne

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List of Figures

List of Tables

Glossary of terms

Eating Out of the Home

Any occasion where a consumer had something to eat or drink that was purchased for immediate consumption outside of the home. For example, a sandwich purchased at a supermarket would be included, however a grocery shop would not be included. Take-away and home delivered food, such as pizzas are also included.

Raw Sample

Total number of completed eater occasions/transactions from panellists

Sales

Estimate of total consumer expenditures for commercial foodservice meals and snacks, excluding any tip.

Visits/Traffic

Total consumer-reported meals or snacks from commercial foodservice outlets. “Heads” through the door.

Servings

The number of times a food or beverage was ordered at a commercial restaurant.

Average Individual Spend

Average amount paid for one person’s food and beverage. Does not include tip, but does include VAT.

Major Brands

The 26 largest brands in the UK with regard to market share: Asda, Bakers Oven, Beefeater, Boots, Brewers Fayre, Burger King, Caffe Nero, Co-op, Costa Coffee, Dominos, Greggs, Harvester, KFC, Marks & Spencer, McDonalds, Morrisons, Nandos, Pizza Express, Pizza Hut, Pret A Manger, Sainsburys, Starbucks, Subway, Tesco, Toby Carvery, Wetherspoon.

Small Brands

All brands listed in CREST dictionary which were not coded as 'Major'- did not have the same market penetration as the Major Brands, but are still well known nationally. Details available from NPD Inc.

Independents

Small usually locally based businesses with very few, if any, additional premises.

Average Price Per Item (**)

Average Individual Spend divided by Items per person

Average Items Per Eater / Order Size / Basket (*)

Average number of different food items per person, per meal/snack. (*) Order size does not include same item multiples or refills. (**) CREST does not collect item price thus can’t size market value for specific product (e.g. burgers, cereal, etc.)

Incidence / Menu Importance

The percentage of orders (or visits) that include a specific food or beverage item, group of items, or category of items.

Per Capita

Number of times the average GB or consumer in Scotland eats an out of home meal or snack in a given year. This can be looked at by any filter with matching population counts (e.g. age, income, gender, etc.). The Population for Scotland used in calculations is detailed in Appendix 1. (source: ONS):

Change versus the Same Period Year Ago

YOY (Year on Year) or Percentage change from Year Ago (PCYA) the % change versus same time period year ago (e.g. annual, quarter, month, etc.).

Frequency

How often a typical consumer frequents a specific brand, category, channel, or segment of the industry in a 4-week period

Socio-economic groups

- Groups A, B, C1, C2, D and E are based on employment status as follows:
    - A: HIGHER MANAGERIAL/ADMINISTRATIVE
    - B: INTERMEDIATE MANAGERIAL/ADMINISTRATIVE
    - C1: SUPERVISORY/CLERICAL,JUNIOR MANAGERIAL
    - C2: SKILLED MANUAL WORKERS
    - D: SEMI-SKILLED/UNSKILLED MANUAL WORKERS
    - E: ON STATE BENEFIT/UNEMPLOYED

Total Out of Home (OOH)

The entire foodservices industry- which includes all channels and sub-channels. Definitions are provided in Appendix 2.

Table 1: Total Out Of Home Channels

Commercial				**Non-Commercial**	
Quick Service	**Pubs**	**Full Service**	**Travel & Leisure**	**Workplace**	**College & University**
Burger	Pubs	FS Traditional	Hotels	Canteen	Canteen
Fish & Chip		FS Ethnic	In Store	Vending	Vending
Chicken		FS Pizza	Bar/Club		
Sandwich		Café/Bistro	Motorway		
Bakery			On Board Cat		
Coffee			Other		
Pizza/Italian					
Ethnic					
Supermarket					
Petrol			Non-Commercial Vending		

Summary

Background

Overweight and obesity is caused in large part by an over-consumption of calories, which may be encouraged by the easy availability of calorie-rich foods, beverages and meals when eating out of the home (OOH).

Aim

Because of a lack of published data on eating OOH, the aim of this project was primarily to obtain a general overview of OOH catering provision in Scotland and information on foods and beverages purchased by consumers OOH.

Methods

Data analysis was undertaken by NPD Group Inc, using CREST (Consumer Reports on Eating Share Trends). The majority of data presented in this report came from consumer research panel data collected between January 2010 and December 2012. The data was based on over thirteen thousand eating occasions covering all food and beverage purchased OOH in Scotland. Children up to 16 were only included if they were accompanied by an adult. Bespoke food and beverage categories were created from CREST data and analysed for percentage incidence (proportion of total OOH visits) and by total number of servings.

Main findings

Visits

- There were nearly 1 billion (950 million) visits OOH in Scotland in 2012 and an annual purchase of over 2 billion servings of foods and drinks. The average number of visits per capita in Scotland decreased slightly from 187 in 2010 to 180 in 2012. The total spend on OOH occasions was £4.2 billion with an average spend per visit of £4.38.
- There was a similar number of total visits per capita and similar pattern of visits in Scotland and Great Britain (GB). Independent retailers/caterers had the largest share of visits in Scotland (53%). Major Brands made up 33% of all visits. The top 3 Brands in Scotland were McDonalds, Greggs and Tesco with 5.6%, 4.3% and 3.5% of OOH visits respectively.
- Quick Service Restaurants (QSR) accounted for almost 50% of visits. There was a slight bias in Scotland towards QS Ethnic (Indian and Chinese meals), QS Bakery and QS Fish and Chips.

Food and Beverage consumption

- Chips/French Fries was the most commonly consumed food category, eaten at nearly 10% of all visits. Cakes/Biscuits/ Pastries were consumed on 9% of visits. Speciality Coffee/Hot Chocolate and Regular Cola were both consumed on 10% of visits.
- Plain Fruit and Vegetable consumption (excluding sandwiches, mixed salads (mainly dressed) and fruit juice) was consumed on 2% or fewer visits by both adults and children.

- There was a similar pattern of food and beverage consumption in Scotland and GB. However consumers in Scotland were 33% more likely to consume Chinese/Asian Meals compared to GB, and 50% more likely to consume Regular Fizzy Drinks excluding Cola. The proportion of visits which included plain Fruit and Vegetables was much lower in Scotland compared to GB for both adults and children.
- Independent caterers/retailers had the largest share of servings for most food and beverage categories, most notably over 80% and 90% of Indian and Chinese Dishes respectively, 90% of Water (Bottled & Tap) was purchased through Independent caterers/retailers.
- Major Brands dominated some categories e.g. Fried and Breaded Chicken, Burgers, Pies/Pastries/Sausage Rolls and Chips/French Fries and Total Cola. Forty-seven percent of Regular and Diet Cola was purchased from Major Brands.
- There was a similar pattern of consumption among 0-12 year olds in Scotland and GB. Children in Scotland were more likely to consume Burgers, Pizza, Pies, Pasties and Sausage Rolls, and Chinese/Asian main dishes compared with the same age in GB and compared to other age groups. The incidence of Total Cola and Total Fizzy Drinks excluding Cola was higher among 0-12 year olds in Scotland than GB, 22% of all visits by 0-12 year olds in Scotland included Cola.

Other results

- The proportion of visits which included foods and beverages on promotion increased between 2009 and 2012, including over 25% of visits in 2012. The food categories that were most likely to be purchased on promotion were Fried Chicken (54%), Cheese Burgers (53%) and Pizza (43%). There was a similar pattern of promotional activity in Scotland and GB. Upsized Meal Deals were reported more frequently in Scotland compared to GB.
- In general, nutrition information was available from the Major Brands but not from Independent caterers/retailers.
- Less than 4% of consumers reported that their motivation to eat out was to have something light/balanced. The only food category which increased on occasions when consumers wanted something light/balanced was Diet Cola (13.1% Incidence vs. 8.4%).

Conclusion

From a public health perspective, these results provided a disheartening overview of eating OOH in Scotland with consumers reporting frequent consumption of calorie dense, high fat/sugar foods and drinks. The data do however provide a rich source of information which can usefully inform Food Standards Agency Scotland FSAS and Scottish Government policy on nutrition.

1. Introduction

There is a pressing need to reduce the rising levels of obesity in Scotland. Overweight and obesity is caused in large part, by an over-consumption of calories, which may be encouraged by the easy availability of large portion sizes and calorie rich foods, beverages and meals.

Obesity is posing a serious risk to the health of the Scottish population as detailed in Scottish Government (SG) policy documents[1]. At a population level, intakes of fats, sugars and salt persist at levels considerably higher than the Scottish Dietary Goals[2]. There is a need to create environments in which access to healthier, less calorie rich food and beverages and smaller portion sizes becomes the norm in Scotland and people find it easier to consume a healthy balanced diet.

The SG and FSAS have been engaging with retailers, manufacturers and caterers with the aim of achieving population reduction in calorie consumption through a draft voluntary framework for action *Supporting Healthy Choices*[3] published in May 2013. The framework document states that the balance of products available to consumers in Scotland needs to shift in favour of those that contain fewer calories, fats, sugars and salt. This includes reducing the calories and salt content of foods and beverages purchased Out of Home (OOH).

Food and beverage consumed OOH makes up an important part of our diet. Evidence from the Living Cost and Food Survey (LCF) indicates that eating out accounts for around 12% of total energy intake[4].

The market for OOH food and beverage purchase is very diverse ranging from formal restaurant dining to eating on the go, and includes quick service restaurants, workplace canteens, pub chains, coffee shops, vending machines, supermarkets, corner shops etc.

It has been suggested that food offered OOH is often higher in energy and fat than food prepared and cooked at home[5]. It is difficult to get a true picture of the nutritional content of food eaten OOH because of the diversity of the food sector, the additional challenge of recording food intakes away from home, and because there is no requirement for nutritional labelling of unpackaged food.

Recent analysis by FSAS on Scottish data from the LCF found that food eaten OOH in Scotland had a mean energy density (calorie content per gram) which was 30% higher than food eaten at home[6]. The World Cancer Research Fund (WCRF) reported that eating energy dense foods is likely to result in the consumption of excess energy and hence promote weight gain and obesity[7].

FSAS have used market data from Kantar WorldPanel (KWP) to monitor foods and beverages purchased into the home, KWP data does not include food and beverage purchased OOH.

Because of the lack of published information available on OOH food and beverage purchases in Scotland, the current study was commissioned by FSAS to better understand the OOH eating environment and provide data to help develop policy on tackling calorie and salt reduction OOH in Scotland. NPD Group Inc, have the required expertise covering the OOH landscape. The CREST (Consumer Reports on Eating Share Trends) service was used in the production of this report.

2. Aims and Objectives

The primary aim of this project was to a) obtain a general overview of OOH catering provision in Scotland and the foods and beverages purchase by consumers OOH. Secondary aims were to b) better understand the behavioural and social context of eating out of the home and c) gather information on the availability of nutrition information.

a) A general overview of OOH catering provision in Scotland

The OOH market is very diverse including workplace canteens, pub chains, coffee shops, vending machines, as well as different types of restaurants (See Appendix 2 for definition of OOH channels). The aim was to obtain top- line general information on the size of the market, the importance of the different sectors, the current market situation, recent trends and comparisons of the headline data between Scotland and the rest of Great Britain (excluding Scotland).

Including:

- The current size of the OOH foodservice market and recent and future trends
- A breakdown by the different OOH food and beverage providers, including the main chains important to the Scottish market
- The foods and beverages consumed most frequently

b) Understand the behavioural and social context of eating out of the home

There is a need to understand more about which consumers eat out most, for example by age, gender, and social class and where and when they eat out, where they take their children, and how this compares to the rest of GB.

Including:

- The key drivers for consumers in Scotland eating out of the home
- The consumers eating out most in terms of age, gender, social class
- Where different consumers eat out in terms of age, gender, social class
- The channels which are most important in relation to eating out with children
- Differences in eating out by time of day/day of week

c) Information on the products and meals most commonly consumed

Including:

- The main products, meals and beverages most commonly consumed
- The availability of nutrition information

3. Data and Methodology

Data analyses were undertaken by NPD Group Inc, using their CREST (Consumer Reports on Eating Share Trends) service. CREST is an online consumer survey that has been on-going since 2007. It is run in Great Britain (GB) and also tracks consumers across the globe.

The sample of consumers was drawn from an existing consumer research panel (managed by Lightspeed Research), and was geographically and demographically balanced to represent the GB population. A review of the samples sizes within Scotland was undertaken to ensure the CREST service could provide robust and detailed information and insight on the Scottish OOH market.

Data were collected between January 2010 and December 2012 from 13,271 OOH eating occasions by around 1,800 unique panellists in Scotland, covering all foods and beverages purchased. Over 6,500 online questionnaires were completed monthly in GB equating to over 80,000 completed annually. The survey is continuous and online invitations were sent out to panellists every week. The number of invites sent out each week was monitored and adjusted to ensure a balanced sample.

Panellists were invited to fill out the questionnaire about their eating and drinking behaviour over the last 24 hours. The survey asks consumers to report their individual purchase of prepared meals, snacks and drinks, from any source, including both commercial and non-commercial outlets. This includes all meals and beverages not prepared at home including, dining out, take-away, workplace canteens, vending etc.

The survey only included adults (16+); children up to 16 were only included if they were accompanied by an adult. There was deliberate oversampling of women with children and the hardest to reach youngest (16-24) and oldest (55+) age groups. Panellists were all residents, so the results do not include food eaten out by tourists.

The online questionnaire covered:

- Where consumers purchased food and beverage - restaurant type, specific chains
- What consumers were eating and drinking- product/menu choice, mix of food and beverages consumed
- Why consumers make their choices- consumer preferences, satisfaction with chain, attitudes for product choice
- When consumers were eating- consumer perceived daypart (e.g. Breakfast, Lunch, Dinner), time of day, weekend (Sat-Sun) versus weekdays (Mon-Fri)
- Who eats out - demographics of eaters, age and presence of children
- How much consumers spent in total

See Appendix 3 for more information on the online questionnaire

3.1 Data analysis

After the data collection was complete, files were downloaded for analysis. Data checking was carried out to code open ended comments from the survey.

The sample was weighted to the population of GB in terms of age, sex, household size, number of children, socio-economic status and region by using projection factors. Projection factors were calculated by comparing panellist demographics to the population of GB (for example if there is a higher representation of women on the panel, these panellists will have a lower weighting than men). Data was also adjusted for known biases based on historical data e.g. panellists were more likely to report breakfast, as breakfast appears at the top of the survey.

Food and beverage purchase information was collected at a menu item level in the survey from some of the major chains, including McDonalds, Burger King, KFC and Subway. Bespoke custom food category definitions were created from all standard and chain menu items in CREST to meet the specific requirements for this project, allowing food and beverage purchase to be looked at from a nutritional perspective e.g. separation of diet and regular cola. The custom categories are listed in Appendix 4.

The Incidence (% of visits which included the food category) and total servings (the number of times a food or beverage category was ordered) of each food or beverage category were calculated based on 2 years of data 2011 and 2012 to maximise the sample. Where possible the top 25 food and top 12 beverage categories were analysed by % incidence and share of servings and compared among major channels, brands and Independents. For statistical reasons some food and beverage categories were excluded because the numbers were too low or not provided for Scotland. Where sample sizes were limited, total GB data were used to determine the top selling items.

Because no information on calories, fats, sugars, salt and portion sizes were provided by the majority of OOH businesses, nutrition information has not been included in this report.

4. Results

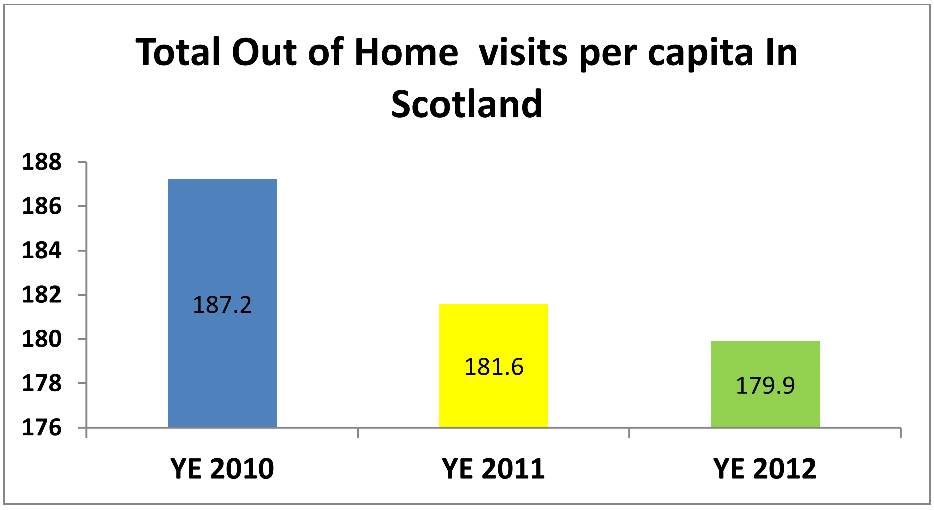
4.1 Overview of Scottish out of home market

Scottish (and British) citizens ate out more frequently in the Commercial OOH market than most other Europeans- with the exception of Italy (Table 2). There were nearly 1 billion (950 million) visits to the total OOH market in Scotland in 2012. Over 30% of these visits were snack occasions. The average annual visits in Scotland including non-commercial visits (ie Education /Workplace Canteens and Vending)declined from 187 in 2010 to 180 in 2012 (Fig 3).

Table 2: Global comparison of annual visits

Country	Average Annual Visits
Italy	176
Great Britain	151
Scotland	146
Spain	137
Germany	108
France	89
Russia	83

Figure 1: Total of Home Visits per capita in Scotland



Note: The commercial market included all major channels in Out-of-Home Foodservice, excluding canteens and non-commercial vending.

The total spend on OOH[1] occasions in Scotland was £4.2 billion compared to a total of £49.6 billion in GB. Whilst the GB market was in slight growth in 2012, the Scottish market was lagging behind with sales and traffic both declining by around 1% compared to 2011.
The average spend per visit was slightly less in Scotland at £4.38 on 2.4 items compared to £4.50 in GB for 2.5 items.

4.11 Overview of channels

QSR (Quick Service Restaurants) dominated in both Scotland and GB markets accounting for half the market. The number of OOH visits in Scotland and the share of total visits in Scotland and GB are detailed in Tables 3 and 4. There was a similar pattern of visits between Scotland and GB.

Table 3: Scotland Major Channels - Visits (000)

	YE Dec 11	YE Dec 12
TOTAL OUT OF HOME (OOH)	953,442	949,914
QSR	488,866	471,097
Pubs	73,522	74,734
Full Service (incl Cafe/Bistro)	107,547	104,240
Travel & Leisure	111,849	111,614
Canteen (Workplace)	117,588	126,516
Canteen (College/Uni)	*Low sample*	12,635
Vending Total	42,011	49,078

Table 4: Share of Total OOH Visits (%)- YE Dec 12 Scotland and GB

	% share 2012 Scotland	% share 2012 total GB
QSR	49.6	50.9
Pubs	7.9	11.1
Full Service (incl Cafe/Bistro)	8.6	10.5
Travel & Leisure	11.7	10.7
Canteen (Workplace)	13.3	11.0
Vending Total	5.2	4.2
Canteen (College/Uni)	1.3	1.5

Scotland differed slightly from GB in that the share of visits to Travel and Leisure (11.7 vs 10.7) and also Workplace Canteen (13.3% vs 11%). was higher in Scotland. Vending was also more prominent in Scotland compared to GB(5.2% vs 4.2%).

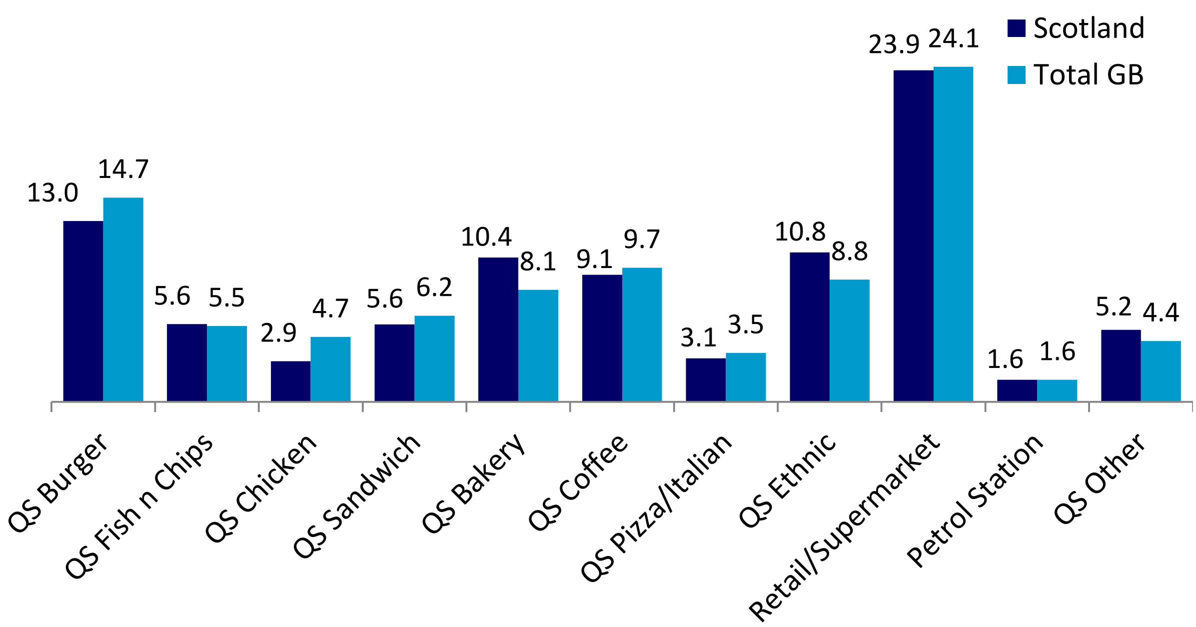
[1] For purposes of this report OOH refers to Total Out of Home Market

The QSR market breaks down into many subsectors, so it was important to isolate and analyse these separately (Table 5). The largest share was the Retail/Supermarket sector for food and beverages consumed OOH (12.2% compared to 13.4% for GB). This included the purchase of prepared meals, snacks and beverages for consumption OOH as well as sit in restaurant meals. QS Burger had a 7.1% share in Scotland compared to 8.3% for GB. There was a bias in Scotland towards QS Ethnic (Indian and Chinese meals), QS Bakery and QS Fish and Chips. Per Capita visits were highest at Retail/Supermarket with the average Scottish consumer visiting this sub-channel 23.9 times per year (Figure 2).

Table 5: Share of OOH Visits to QSR (%)- YE Dec 12 Scotland and GB

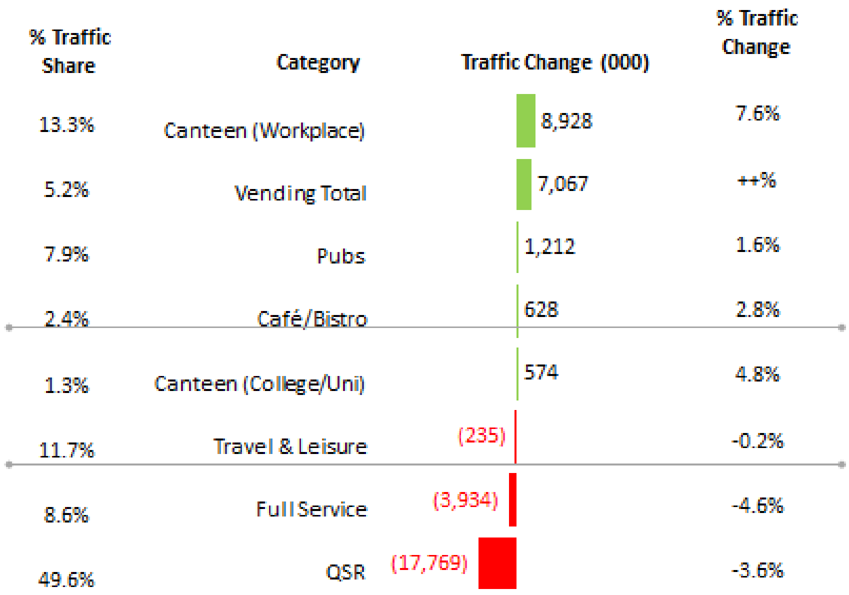
	% share 2012 Scotland	% share 2012 total GB
Retail/Supermarket	12.2	13.4
QS Burger	7.1	8.3
QS Ethnic	6.1	4.8
QS Bakery	5.7	4.5
QS Coffee	4.7	5.4
QS Fish and Chips	3.4	3.0
QS Sandwich	3.1	3.5
QS Other	2.9	2.4
QS Pizza/Italian	1.8	2.0
QS Chicken	1.7	2.6
Petrol Station	1.3	0.9

Figure 2: QSR Categories- Visits per Capita (average annual visits per person)- 2YE Dec 12



The Scottish market moved very slightly away from QSR in 2012 compared with 2011, with most growth attributed to Canteens, Café/Bistro and Pubs (Figure 3). Within the QSR channel there was some growth for QS Ethnic, QS Hotel, QS Sandwich and QS Fish and Chips (Table 6).

Figure 3: Traffic Share (%), Traffic Change (000) and % Traffic Change of major channels in Scotland- YE Dec 12 vs. YE Dec 11



Note: ++ =a large change where there may be some uncertainty for trend.

Table 6: QSR Category Traffic Share of Total OOH- YE Dec 12 vs. YE Dec 11

Category	Scotland	Change	GB	Change
Retail/Supermarket	12.2%	⇩	13.4%	⇧
QS Burger	7.1%	⇩	8.3%	⇧
QS Ethnic	6.1%	⇧	4.8%	⇩
QS Bakery	5.7%	⇩	4.5%	⇧
FS Traditional	5.1%	⇩	4.2%	⇩
QS Coffee	4.7%	⇩	5.4%	⇧
Hotel	4.7%	⇧	4.2%	⇩
QS Fish & Chips	3.4%	⇧	3.0%	⇩
QS Sandwich	3.1%	⇧	3.5%	⇧
QS Other	2.9%	⇧	2.4%	⇩

4.12 Independents and Brands

Independent retailers/caterers can be defined as small usually locally based businesses with very few if any additional premises. 53% of OOH visits were to Independent retailers/caterers. Independent retailers/ caterers grew by 3.6% in Scotland in 2012.

Major Brands made up 33% of the total visits to OOH in Scotland (see Glossary of terms for definition of major and small brands). The top 12 Major Brands had a combined market share of 27% (Table 7). Small Brands accounted for 14% of visits in Scotland and grew by 9.2% in 2012. Overall visits to Major Brands fell by 9.3% in Scotland in 2012 compared to 2011 as Independents and Small Brands gained shares (Figure 4).

Figure 4: Scotland Total OOH- Traffic Share & % Traffic Change- YE Dec 12 vs. YE Dec 11

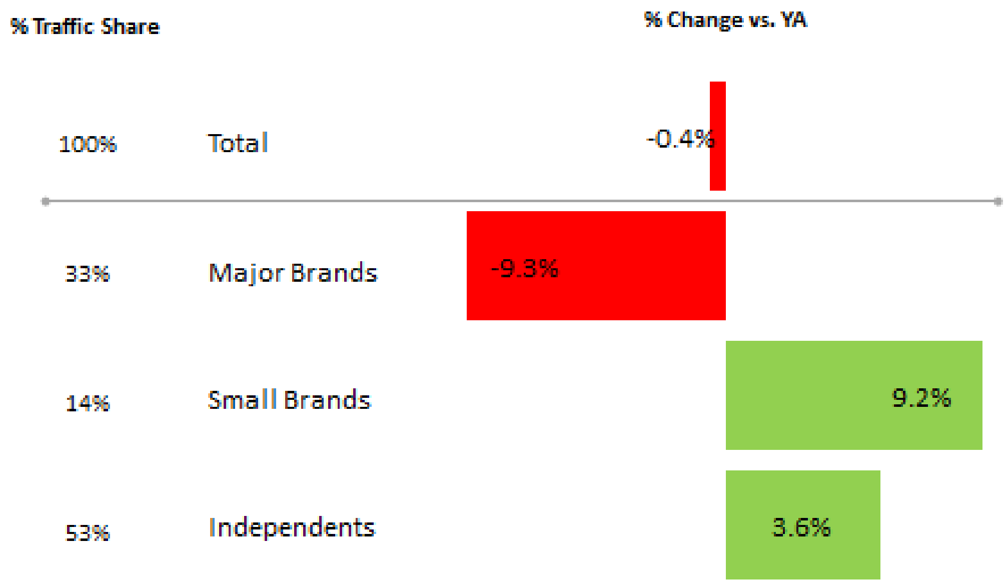


Table 7: % Traffic Share Total OOH Ye Dec '12 for Major Brands

Category	Scotland	Change
McDonald's	5.6%	⇧
Greggs	4.3%	⇩
Tesco	3.5%	⇩
Asda	2.1%	⇩
Morrisons	1.8%	⇩
Brewers Fayre	1.5%	*
Wetherspoon	1.5%	⇧
KFC	1.4%	*
Sainsbury's	1.3%	⇧
Costa Coffee	1.3%	*
Starbucks	1.2%	*
Subway	1.2%	⇩

**Not available, sample size below recommended threshold for trending.*

4.2 Key demographics and occasions

4.21 Age Group

Figure 5 shows the average annual visits per capita by age group and the change since 2010. Thirty-five to forty-nine year olds have the highest rate of annual visits at 268 per year. Despite a slight fall in total visits overall, under 18 year olds increased their visit rate in the 2 years to end of 2012.

Figure 5: Per Capita Visits (average annual visits) to Scotland Total OOH by age

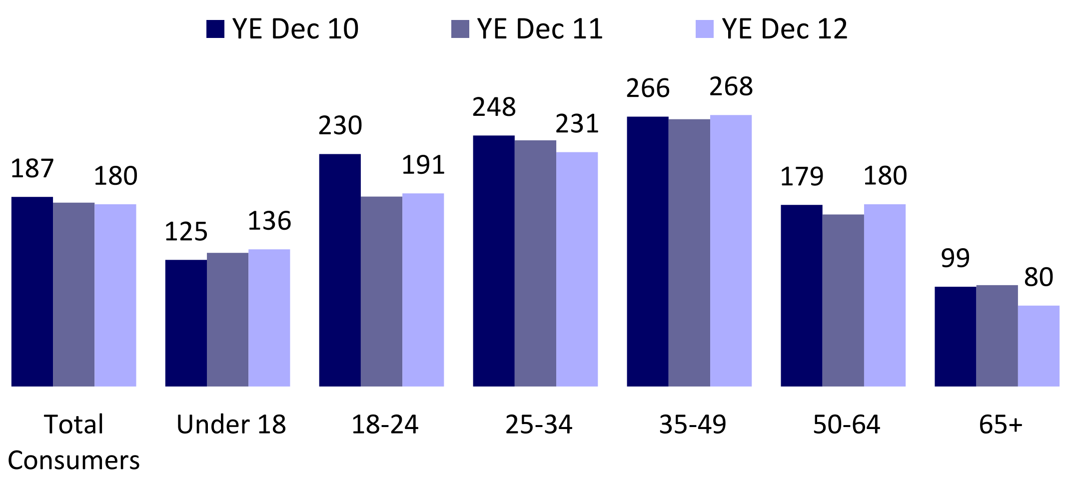


Table 8 : Percentage Share of Visits by Age and Channel in Scotland - YE Dec 12

	Total Scotland	QSR	Pubs	Full Service	Café/ Bistro	Travel & Leisure	Workplace Canteen	Vending Total
0-12	9.0%	11.7%	7.7%	11.2%	9.9%	11.0%	1.0%	0.0%
13-17	5.7%	8.0%	4.1%	6.9%	4.2%	2.0%	2.0%	0.9%
18-24	10.0%	8.6%	12.6%	5.7%	7.4%	10.3%	11.0%	17.7%
25-34	17.1%	18.4%	17.2%	16.3%	11.2%	13.0%	15.8%	18.4%
35-49	30.8%	31.1%	23.8%	27.4%	26.5%	22.0%	44.7%	35.1%
50-64	19.6%	17.2%	20.2%	19.4%	24.5%	23.1%	23.3%	26.6%
65+	7.8%	5.0%	14.4%	13.2%	16.2%	18.6%	2.2%	1.3%

Not surprisingly, 35-49 year olds had the highest share of traffic at Workplace Canteens- which they visit more frequently. 18-24 year olds have a higher share of visits to Vending compared to other channels with 17.7% share of Vending versus 10% share overall (Table 8).

The QSR Ethnic channel had more visits by all age groups in Scotland compared to GB (Table 9). The QSR Ethnic channel also had a higher proportion of visits by under18 year olds accounting for 14.9% of all annual visits, suggesting that QS Ethnic is more popular with families in Scotland.

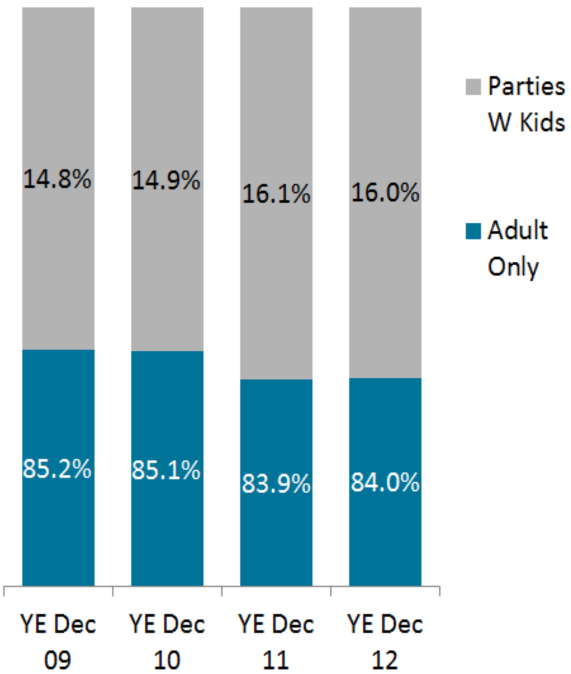
Table 9: Per Capita Visits (average annual visits) to Scotland QS Ethnic by age- 2YE Dec 12

Age group	Scotland	Total GB
Total	10.8	8.8
<18	14.9	10.8
18-24	7.5	6.8
25-34	14.1	13.3
35-49	15.8	12.5
50-64	8.6	6.1
65+	*	2.2

** = sample below recommended threshold*

Figure 6 shows that there was a lower proportion of OOH meal occasions for Parties with Children (defined here as aged 17 and under) in Scotland compared to the rest of GB (14.2% versus 16% in 2012). This may have been driven by more Workplace Canteen visits in Scotland (13.3% compared to 11% in 2012). QSR and FSR had a higher proportion of families compared to the other Major Channels (Figure 7).

Figure 6: Share of Total OOH Meal Occasions (%) by Party composition- Scotland vs. the Rest of GB (excluding Scotland)



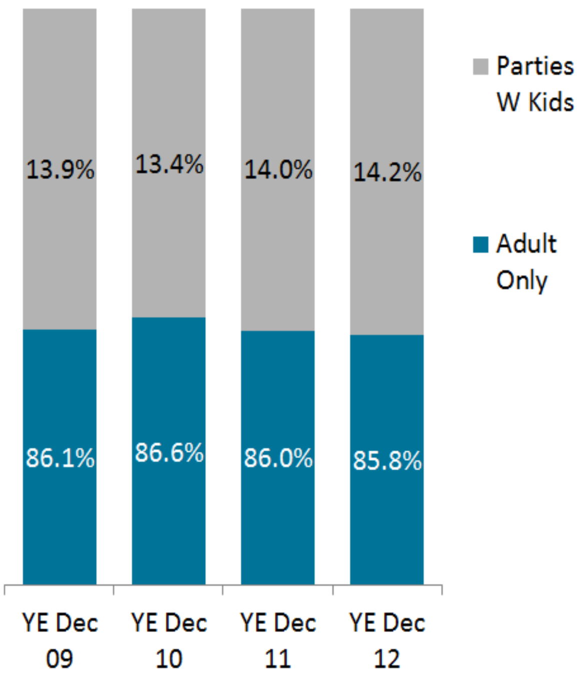
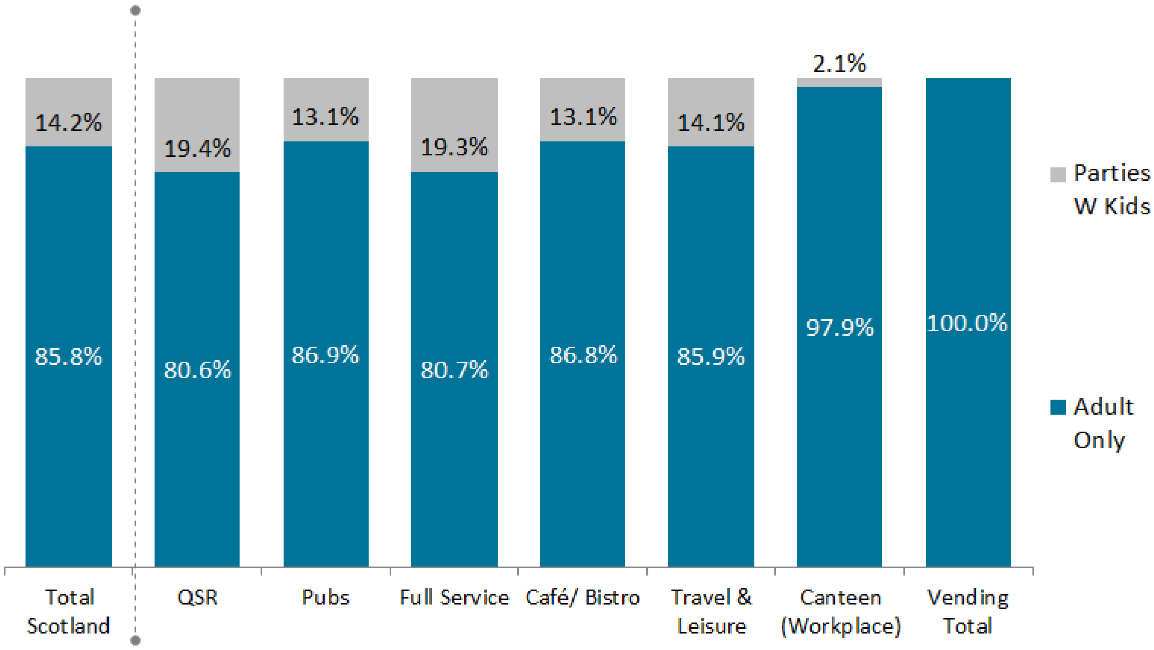


Figure 7: Share of Meal Occasions (%) by Party Composition- Channel comparison in Scotland- YE Dec 12



4.22 Gender

There was a slightly higher proportion of total OOH visits by males within the Scottish market (50.5% versus 49.6% males in GB), probably driven by more visits to the Workplace

Canteen compared to GB. In Scotland, Pubs (52.9%), Travel and Leisure (56.6%) and Workplace Canteens (52.8%), all had a higher share of visits by men, whereas more women visited Full Service Restaurants (55.0%) and Café/Bistro (62.8%).

4.23 Socio economic status

Social groups ABC1s had the majority of visits (60.4%) in Scotland compared to 39.6% for C2DEs. C2DEs had a higher than average proportion of visits to QSR (44.5%) and pubs (42.3%) whilst ABC1s had a higher than average proportion of visits to Full-Service Restaurants (72.3%), Café /Bistros (63.5%), travel & leisure (66.9%), Canteen (67.3%) (Figure 8).

4.24 Day of week/Daypart

71% of all OOH visits were between Monday and Friday, with a higher percentage for Workplace canteen (87.4%) and Vending (82.4%). A lower percentage of visits were on weekdays for QSR (68.9%), Full Service Restaurants (62.3%), and Travel and Leisure (60.1%).

The highest proportion of visits to OOH were at lunchtime (32.1%), followed by dinner (26.3%). It was interesting to note that over 30% of OOH visits were snack occasions (Figure 9). In 2012 11% of visits were for breakfast, and this proportion has increased in Scotland since 2010 (9.2%). Morning snack gained share (8.2%) in 2012 compared to 2011 (7.9%), but lunchtime snack and evening snack have lost share (data not shown).

Figure 8: Share of Visits (%) by Social Group- Channel comparison in Scotland

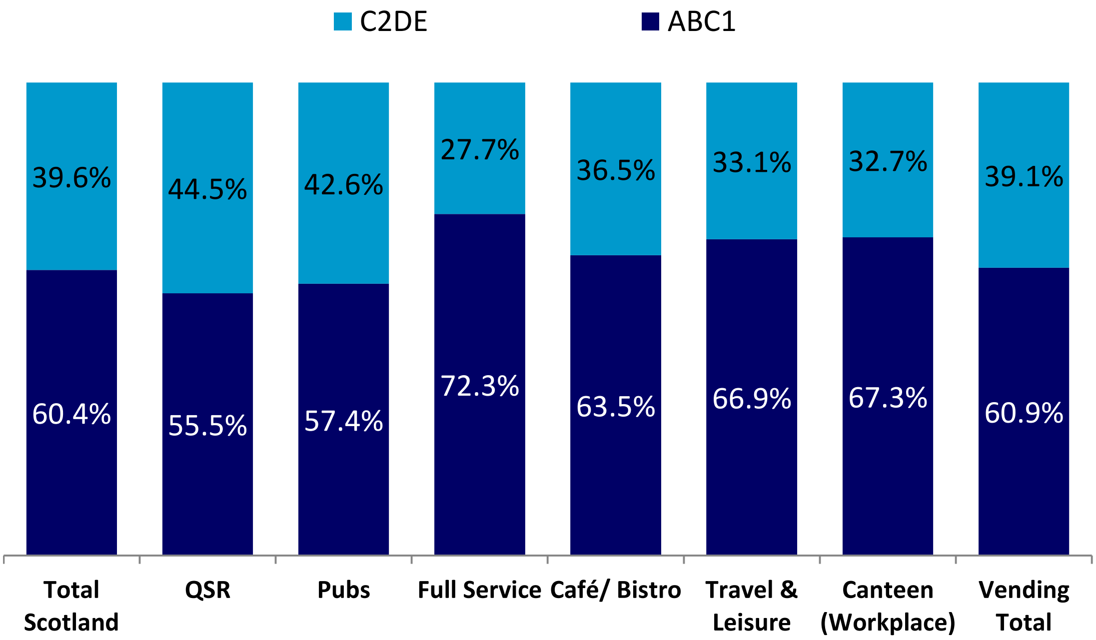
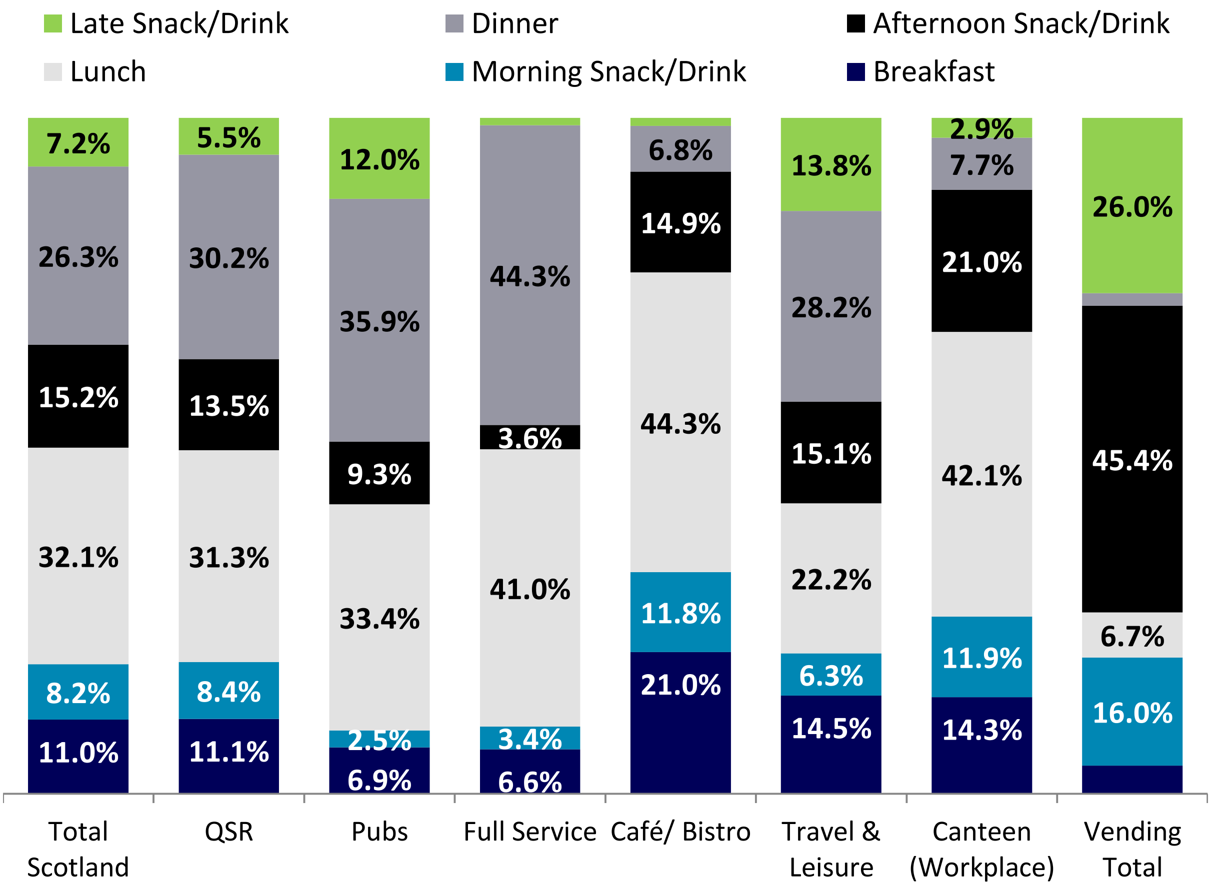


Figure 9: Share of Visits (%) by Daypart- Channel comparison in Scotland



4.3 Key Food and Beverage Trends

There was an estimated annual total of over 2 billion servings of foods and beverages OOH in Scotland in 2011/2012 (4.53 billion in the two years ending Dec 12). See Table 10 for the main (top 25) food categories purchased OOH in Scotland. These categories capture 43% of the total food servings purchased OOH in Scotland (1.95 billion/4.53 billion in 2YE Dec 12).

The most commonly purchased food category out of home based on incidence (i.e. the % of visits that include a specific food or beverage item) was Chips/French Fries, purchased on 9.5% of all eating OOH occasions, followed by Cakes/Biscuits/ Pastries (8.7%). In terms of number of servings (i.e. the number of times a food or beverage was ordered) the Cakes/Biscuits/ Pastries has the largest number of servings, followed by Chips/French Fries. It is worth noting that Sandwiches were presented in different categories, but if combined would have the highest % incidence and number of servings.

Table 10: Top 25 food categories by % Incidence in GB and Scotland Total OOH- 2YE Dec 12

	GB	Scotland		
Food Category	**Incidence GB (%)**	**Incidence Scotland (%)**	**Percentage change Scotland (vs. 2YE Dec 10)**	**Servings Scotland 2YE Dec 2012 (000)**
Chips/French Fries	12.1	9.5	-1.1	181,403
Cakes/ Biscuits/ Pastries	8.4	8.7	-0.1	181,504
Meat Main Dish	8.3	6.5	-1.5	141,487
Cured Meat Sandwich	4.9	5.3	0.8	103,165
Chinese/ Asian Main Dish	3.9	5.2	-0.2	125,748
Vegetable/Cheese/Egg Sandwich	4.3	4.6	-0.1	89,863
Total Pizza	4.4	4.4	0.6	87,039
Bacon	3.7	4.0	0.7	75,586
Pies/ Pasties/ Sausage Rolls	3.6	3.8	0.4	76,129
Cheese Burger	4.0	3.7	0.2	73,434
Poultry Sandwich	3.9	3.7	-0.9	72,957
Other Potatoes	4.2	3.6	0.0	74,997
Fried/Breaded Fish	3.4	3.5	0.1	70,010
Confectionery	3.4	3.5	0.3	69,499
Total Pasta	2.5	3.1	0.2	61,928
Sausage	3.2	3.1	0.0	59,692
Puddings/ Desserts	3.1	2.9	-0.5	57,098
Ice Cream	3.4	2.9	-0.3	55,468
Crisps/ Popcorn/ Salty Snacks	2.7	2.8	0.4	54,020
Meat MD Meals	3.7	2.8	-0.4	NA
Salad (No Meat/Fish)	3.5	2.7	-0.2	53,581
Fried/Breaded Chicken	2.9	2.2	-0.3	44,278
Indian Main Dish	2.3	2.1	-0.4	48,218
Vegetables (excluding potatoes)	2.5	2.0	-0.3	37,898

Fish/Seafood Sandwich	2.4	1.9	-0.5	38,061

Table 11 provides the main beverage categories purchased OOH in Scotland. Speciality coffee/hot chocolate was the most common beverage with 10.5% Incidence in Scotland, however if Regular Cola and other Fizzy Drinks were combined, this would be the top category by a large margin, both in terms of % incidence and number of servings (nearly 340 million servings over 2 years)

Table 11: Top 12 Beverage categories by % incidence in GB and Scotland Total OOH- 2YE Dec 12

Drink Category	Incidence * GB (%)	Incidence Scotland (%)	% change Scotland (vs. 2YE Dec 10)	Servings Scotland 2YE Dec 2012 (000)
Speciality Coffee/ Hot Chocolate	10.4	10.5	2.1	205,615
Regular Cola	10.0	9.9	1.4	194,370
Diet Cola	7.4	9.1	-0.9	177,226
Regular Fizzy Drinks excluding Cola	4.7	7.2	0.7	144,318
Water (Bottled + Tap)	7.6	7.1	-0.5	139,347
Juice Drinks	5.1	4.8	1.2	98,335
Pure Juice	3.2	2.9	-0.9	58,009
Irn Bru (part of Fizzy Drinks excluding Cola)	0.3	3.0	*	57,624
Energy/ Sports Drinks	1.3	1.1	*	25,391
Milkshakes	1.3	0.8	*	18,653
Squash/ Cordial	0.8	0.9	*	16,393
Diet Fizzy Drinks excluding Cola	0.4	0.5	*	9,093

Table 12 shows the top 10 food and beverage categories for growth in QSR in the last 2 years. ‘Other Fizzy Drinks excluding Cola’ which would include drinks such as Irn Bru and Specialty Coffee showed the most growth. There was also a slight increase in the purchase of pies, pasties and sausage rolls of over 1%.

Table 12: Top 10 growing food and beverage categories (by Incidence percentage change 2YE Dec 12 vs. 2YE Dec 10) in QSR Scotland

Food/Beverage Category	2YE Dec 10	2YE Dec 12	Percentage Change
Other Fizzy Drinks excluding Cola	8.2	9.9	1.7
Speciality Coffee/ Hot Chocolate	8.0	9.7	1.7
Pies/ Pasties/ Sausage Rolls	4.0	5.5	1.5
Pizza	3.7	4.5	0.8
Cheese Burger	5.5	6.1	0.6
Bacon	2.3	2.8	0.5
Regular Cola	10.5	10.9	0.4
Beef Burger	2.3	2.6	0.3
Sausage	1.9	2.2	0.3

4.31 Key Food Trends

With QSR accounting for almost half of all visits in Scotland it is unsurprising that this has the largest share of servings for all food categories (Table 13 and Table 14). However it is worth noting that the QSR channel includes the dominant Retail/Supermarket sub channel. Vending was particularly important for confectionary and crisps/popcorn/salty snacks with over a third of all confectionary sold through vending.

Table 13: Top 25 Food Categories by % Share of Servings by Channel in Scotland- 2YE Dec 12

Note QSR includes retail/supermarkets

	Share of Servings by Channel (%)							
Category	**QSR**	**Pubs**	**Full Service(FSR)**	**Café/ Bistro**	**Travel & Leisure**	**Canteen (Workplace)**	**Canteen (College/ Uni)**	**Vending Total**
Chips/French Fries	59.8	13.1	10.5	1.0	6.4	7.9	1.2	0.1
Cakes/ Biscuits/ Pastries	48.8	3.3	7.7	5.1	17.5	10.5	2.0	5.2
Meat MD	16.5	29.1	24.6	0.6	19.1	9.0	0.9	0.2
Cured Meat Sandwich	56.7	6.1	3.9	4.5	6.5	19.5	2.7	0.0
Chinese/ Asian Main Dish	76.6	1.6	17.4	0.1	2.7	1.4	0.3	0.0
Vegetable/Cheese/Egg Sandwich	57.9	6.5	4.6	2.8	8.5	17.5	1.8	0.4
Total Pizza	50.5	6.2	27.5	0.6	5.6	7.5	1.8	0.2
Bacon	36.2	10.5	9.1	4.7	16.7	21.0	1.4	0.4
Pies/ Pasties/ Sausage Rolls	74.0	5.2	2.6	0.5	10.2	6.6	0.9	0.0
Cheese Burger	83.0	7.3	3.7	0.1	3.3	1.9	0.6	0.0
Poultry Sandwich	69.5	2.8	3.9	3.8	6.7	10.9	1.7	0.7
Fried/Breaded Fish	53.1	18.6	12.5	1.2	9.6	4.5	0.5	0.0
Confectionery	45.0	0.0	0.8	0.2	6.7	13.0	0.6	33.7
Total Pasta	12.7	17.1	34.6	2.7	12.2	17.5	3.0	0.2
Sausage	35.4	12.8	10.0	6.9	18.3	15.4	1.2	0.0
Puddings/ Desserts	26.2	13.7	29.0	3.2	20.5	3.5	2.6	1.4
Ice Cream	29.2	17.6	21.5	2.5	26.9	0.5	0.6	1.2
Crisps/ Popcorn/ Salty Snacks	53.5	3.8	1.2	1.1	10.1	11.6	0.8	17.9
Fried/Breaded Chicken	73.0	6.4	9.7	0.6	7.5	2.6	0.2	0.0

Indian Main Dish Total	63.1	4.6	22.3	0.4	2.5	7.1	0.0	0.0
Vegetables (excl potatoes)	15.8	21.6	22.0	1.5	21.7	14.7	2.7	0.0
Fish/Seafood Sandwich	54.7	7.2	7.1	3.9	12.2	10.9	4.0	0.0
Other Sandwiches	47.1	6.1	4.4	6.5	17.3	12.7	2.7	3.0
Wraps	58.1	6.2	7.8	1.4	9.3	14.1	3.1	0.0
Fruit	47.5	2.9	7.0	0.4	17.7	23.5	0.2	0.7

Table 14: Top 25 food categories in QSR Scotland- with share of Total OOH servings- 2YE Dec 12

Food Category	QSR Incidence (%)	QSR Servings (000)	QSR share of Total OOH Servings (%)
Chips/French Fries	11.3	108,422	59.8
Cakes/ Biscuits/ Pastries	8.5	88,533	48.8
Chinese/ Asian Main Dish	8.3	96,268	76.6
Cheese Burger	6.1	60,946	83.0
Cured Meat Sandwich	6.0	58,537	56.7
Pies/ Pasties/ Sausage Rolls	5.5	56,352	74.0
Vegetable/Cheese/Egg S'wich	5.4	52,064	57.9
Poultry Sandwich	5.2	50,741	69.5
Total Pizza	4.5	43,964	50.5
Fried/Breaded Fish	3.7	37,156	53.1
Confectionery	3.2	31,268	45.0
Fried/Breaded Chicken	3.1	32,305	73.0
Crisps/ Popcorn/ Salty Snacks	3.0	28,913	53.5
Chicken Burger	2.9	28,857	79.5
Bacon	2.8	27,339	36.2
Indian Main Dish Total	2.7	30,436	63.1
Beef Burger	2.6	26,045	74.5
Meat Main Dish	2.2	23,347	16.5
Sausage	2.2	21,121	35.4
Fish/Seafood Sandwich	2.1	20,834	54.7
Wraps	2.1	21,109	58.1
Ice Cream	1.7	16,190	29.2
Puddings/ Desserts	1.5	14,988	26.2
Other Sandwiches	1.5	14,580	47.1
Fruit	1.4	13,108	47.5

Appendix 5 shows the full analysis of food incidence by Independents and Major Brands. For most food categories a large proportion was sold through the Independents retailers/ caterers. For example, Chinese meals had the highest proportion (94%) followed by Indian meals (84%) and Fried/Breaded fish (67%). For most other categories, the largest proportion of servings came from the Major Brands, for example, 75% of all Cheeseburgers and 74% of all Fried/Breaded Chicken came from McDonalds, Burger King and KFC. Between 38-56% of all sandwich categories were bought from Major Brands, such as Tesco, Greggs and Subway. The proportion of servings which came from Major Brands was similar between Scotland and GB (Table 15).

Table 15: Major Brands Share of Food Servings (%) – 2YE Dec 12

	Major Brands Share of Servings (%)	
	Scotland	**GB**
Cheese Burger	74.5	79.3
Fried/Breaded Chicken	73.6	80.4
Poultry Sandwich	56.2	55.1
Pies/ Pasties/ Sausage Rolls	54.4	49.3
Fish/Seafood Sandwich	46.3	44.7
Fruit	45.9	31.3
Total Pizza	44.3	45.6
Vegetable/Cheese/Egg Sandwich	43.6	42.9
Cured Meat Sandwich	43.0	43.7
Chips/French Fries	41.7	45.4
Crisps/ Popcorn/ Salty Snacks	40.8	41.4
Ice Cream	39.2	38.3
Wraps	39.1	49.8
Cakes/ Biscuits/ Pastries	37.7	39.1
Other Sandwiches	37.6	30.6
Bacon	29.3	28.2
Meat Main Dish	29.1	28
Puddings/ Desserts	28.3	27.3
Sausage	26.8	25.2
Vegetables (excl potatoes)	25.1	26.8
Total Pasta	23.3	23.4
Confectionery	22.6	24.4
Fried/Breaded Fish	19.5	16.1
Indian Main Dish	8.4	10.3
Chinese/ Asian Main Dish	3.3	4.3

4.32 Key Beverage Trends

The majority of beverage servings came from the QSR channel with Costa Coffee accounting for the largest individual share (7.7%) of all Speciality Coffee servings (Appendix 5).

The Independent retailers / caterers had a slightly larger share of beverage servings compared to the Major Brands (Appendix 5). However Major Brands still make up a significant proportion for some categories, for example, at least 47% of all Cola. Cola incidence is highest among Fast Food brands, for example 25.5% of all visits to McDonalds included a Regular Cola (see Appendix 5). Incidence of Cola was also high at retailers such as Asda and QSR Bakeries such as Greggs. 65% of Other Fizzy Drinks excluding Cola and 90% of Water (Bottled & Tap) were sold through Independent Retailer/Caterers. It is worth noting that FSR and Canteens (which are dominated by Independent retailers/caterers) have a high share of Water servings compared to other Beverage categories (Table 16). Scottish consumers were more likely to consume ‘Total Fizzy Drinks excluding Cola’ compared to GB (Table 17), with the most common brand in this category being Irn Bru (Appendix 5).

The most common beverage serving size was between 0.33 and 0.44 litres for all beverages (Table 18). Based on GB data, Energy/ Sports Drinks were more commonly found in larger sizes than other categories. There was little difference between Scotland and GB in beverage sizes purchased. Smaller sizes of Energy/ Sports Drinks and Pure Juice were reported in Scotland compared to GB. Reported Serving sizes of Squash/ Cordial and Juice Drinks tended to be slightly larger in Scotland compared to GB. However it is important to note that Beverage size information is based on consumer recall and may not be accurate.

Table 16: Top Beverage Categories- by % share of Servings by Channel in Scotland- 2E Dec 12

Note QSR includes retail/supermarkets

	Share of Servings by Channel (%)							
Category	**QSR**	**Pubs**	**FSR**	**Café/ Bistro**	**Travel & Leisure**	**Canteen (Workplace)**	**Canteen (College/ Uni)**	**Vending Total**
Speciality Coffee/ Hot Chocolate	46.3	4.4	6.3	5.7	14.0	16.4	1.1	5.8
Regular Cola	54.0	10.4	10.1	1.2	9.2	8.6	2.1	4.3
Diet Cola	57.8	11.1	13.0	1.2	5.7	8.5	0.1	2.6
Total Fizzy Drinks excluding Cola	64.4	6.0	7.3	1.8	8.8	7.2	1.3	3.3
Pure Juice	40.6	16.3	15.2	2.3	17.5	5.5	1.9	0.7
Juice Drinks	42.9	9.0	8.2	2.3	24.7	9.5	1.2	2.2
Water (Bottled + Tap)	37.0	6.6	14.9	1.0	17.2	19.5	2.2	1.8

Table 17: Top Beverage Category -by % Incidence – 2YE Dec 12

	(%)	
	Scotland	GB
Speciality Coffee/ Hot Chocolate	10.5	10.4
Total Cola	18.9	17.3
Regular Cola	9.9	10.0
Diet Cola	9.1	7.4
Total Fizzy Drinks (excluding Cola)	7.6	5.0
Regular Fizzy Drinks(excluding Cola)	7.2	4.7
Diet Fizzy Drinks (excluding Cola)	0.5	0.4

Table 18: Share of Servings in Total OOH Scotland, by Beverage Size (%)- 2YE Dec 12

		Share of Servings by Beverage Size in Litres (%)					
Beverages		< 0.33	0.33-0.4	>0.4-0.5	>0.5-0.75	>0.75-1.0	> 1.0
Regular Cola	Scotland	21.4	48.9	23.7	*	*	*
	Total GB	19.0	49.1	25.7	3.0	1.0	2.1
Diet Cola	Scotland	12.0	54.4	25.2	5.6	*	*
	Total GB	14.4	50.7	27.1	5.0	1.2	1.6
Total Fizzy Drinks	Scotland	12.9	54.2	23.0	*	*	*
(excluding Cola)	Total GB	18.7	49.5	23.8	3.9	1.7	2.4
Regular Fizzy	Scotland	11.2	54.2	24.0	*	*	*
Drinks (excluding Cola)	Total GB	17.6	50.9	23.8	3.8	1.6	2.3
Diet Fizzy Drinks	Scotland	*	*	*	*	*	*
(excluding Cola)	Total GB	27.1	38.9	23.0	*	*	*
Irn Bru	Scotland	8.6	57.6	24.6	*	*	*
	Total GB	9.4	55.7	26.1	*	*	*
Energy/ Sports	Scotland	*	32.3	25.3	*	*	*
Drinks	Total GB	19.2	29.2	31.5	9.9	5.3	4.8
Squash/ Cordial	Scotland	23.1	53.7	*	*	*	*
	Total GB	31.8	41.5	22.4	*	*	*
Pure Juice	Scotland	45.0	38.2	*	*	*	*
	Total GB	40.1	41.0	13.7	2.9	1.7	*
Juice Drinks	Scotland	29.2	34.5	26.3	*	*	*
	Total GB	30.9	39.5	20.8	4.4	2.5	1.9
Water (Bottled +	Scotland	22.4	39.5	25.3	*	*	*

Tap)	**Total GB**	26.4	37.1	24.4	5.7	4.0	2.5
Milkshakes	**Scotland**	*	*	*	*	*	*
	Total GB	18.2	41.5	30.7	*	*	*

4.33 Key Food and Beverage Trends among 0-12 year olds

The food and beverage information among 0-12 year olds detailed in this report only refers to those occasions when children were with an adult. As you would expect, Soft Drinks are more prominent among 0-12 year olds compared to all ages. Add-on items like Ice Cream, Side Dishes and Chips/Fries also over-indexed among children- likely driven by the family friendly(FSR) channel. Twenty-two percent of all visits from 0-12 year olds included Cola. There were similar patterns of consumption among 0-12 year olds between Scotland and GB, with a few exceptions. The incidence of Total Cola and Total Fizzy Drinks excluding Cola was higher among 0-12 year olds in Scotland than GB. Scottish children also had higher consumption of Burgers, Pizza, Pies, Pasties and Sausage Rolls, and Chinese/Asian Main Dishes compared with the same age group in GB and compared to other age groups. This is likely driven by the family takeaway occasion- which appears to be more popular in Scottish households. The proportion of visits which included fruit and vegetables was much lower in Scotland compared to GB (Table 20).

Table 19 Food and Beverage Incidence (%) among 0-12 year olds vs. Total Scotland 2YE Dec 12

	Incidence (%)			
	Scotland		GB	
	0-12 year olds	All ages	0-12 year olds	All ages
Total Cola	22.3	18.9	19.6	17.3
Chips/French Fries	17.3	9.5	19.7	12.1
Juice Drinks	15.5	4.8	16.6	5.1
Regular Cola	12.4	9.9	12.1	10.0
Total Fizzy Drinks excluding Cola	11.8	7.6	8.3	5.0
Regular Fizzy Drinks excluding Cola	11.4	7.2	7.9	4.7
Ice Cream	10.1	2.9	10.1	3.4
Diet Cola	9.9	9.1	7.5	7.4
Cheese Burger	9.6	3.7	5.6	4.0
Total Pizza	8.9	4.4	7.9	4.4
Fried/Breaded Chicken	8.4	2.2	9.0	2.9
Chinese/ Asian Main Dish	8.2	5.2	5.0	3.9
Water (Bottled + Tap)	7.4	7.1	8.8	7.6
Cakes/ Biscuits/ Pastries	6.7	8.7	9.3	8.4
Pure Juice	4.9	2.9	6.4	3.2
Pies/ Pasties/ Sausage Rolls	4.2	3.8	3.3	3.6
Vegetable/Cheese/Egg Sandwich	4.1	4.6	3.5	4.3
Beef Burger	3.8	1.8	3.7	1.9
Chicken Burger	3.8	1.8	2.9	2.2
Fried/Breaded Fish	3.8	3.5	4.6	3.4
Meat Main Dish	3.8	6.5	7.2	8.3
Speciality Coffee/ Hot Chocolate	3.6	10.5	3.5	10.4
Squash/ Cordial	3.6	0.9	3.0	0.8
Cured Meat Sandwich	3.4	5.3	3.2	4.9
Sausage	3.3	3.1	3.5	3.2
Total Pasta	3.2	3.1	3.2	2.5
Milkshakes	3.0	0.8	4.1	1.3
Other Potatoes	2.5	3.6	3.8	4.2
Irn Bru	2.3	3.0	0.2	0.3
Puddings/ Desserts	2.2	2.9	2.2	3.1
Confectionery	2.2	3.5	2.0	3.4
Indian Main Dish	2.1	2.1	2.1	2.3
Salad (No Meat/Fish)	2.1	2.7	2.7	3.5
Fruit	1.9	1.4	2.4	1.9
Fish/Seafood Sandwich	1.7	1.9	1.6	2.3
Vegetables (excl potatoes)	1.6	2.0	2.7	2.5
Bacon	1.2	4.0	1.9	3.7

Table 20: Key Food and Beverage Facts

Food and beverage category	Key Food and Beverage Facts
Chips/French Fries	• Chips were the most popular food category in Scotland with a 9.5% incidence in relation to total OOH food purchases equating to over 90 million servings per year. • The incidence in Scotland was slightly lower than purchased in GB (12.1%). More than half of all chips purchased were from QSR (60%) with 19.8% from McDonalds (18 million servings per year), 4.9% from KFC (4.5 million servings) and 2.7% from Burger King (2.4 million servings per year). • Thirteen percent of chips were purchased from Pubs and 11% from FSR.
Burgers	• Burgers were in the top 10 fastest growing food and beverage items. • Cheese burgers were the most popular. McDonalds alone accounted for 65% of all Cheese Burgers.
Cakes/Biscuits/Pastries	• Doughnuts were the top seller for biscuits/cakes/pastries. • 49% of Cakes, Biscuits and Pastries were bought from QSR. • Greggs was the top brand in Scotland with an 8.8% share of servings. Biscuits consumption was slightly higher among Scottish consumers, however other sweet treats (Cakes, Pastries, Other Desserts) had similar or lower Incidence.
Confectionery	• Candy consumption was slightly higher among Scottish consumers, however Chocolate had similar or lower Incidence. • The majority of Confectionery servings originated from Brands. • One third of all Confectionery purchases OOH were made from Vending machines.
Fried chicken	• Like Burgers, the vast majority of fried chicken originated from Brands.

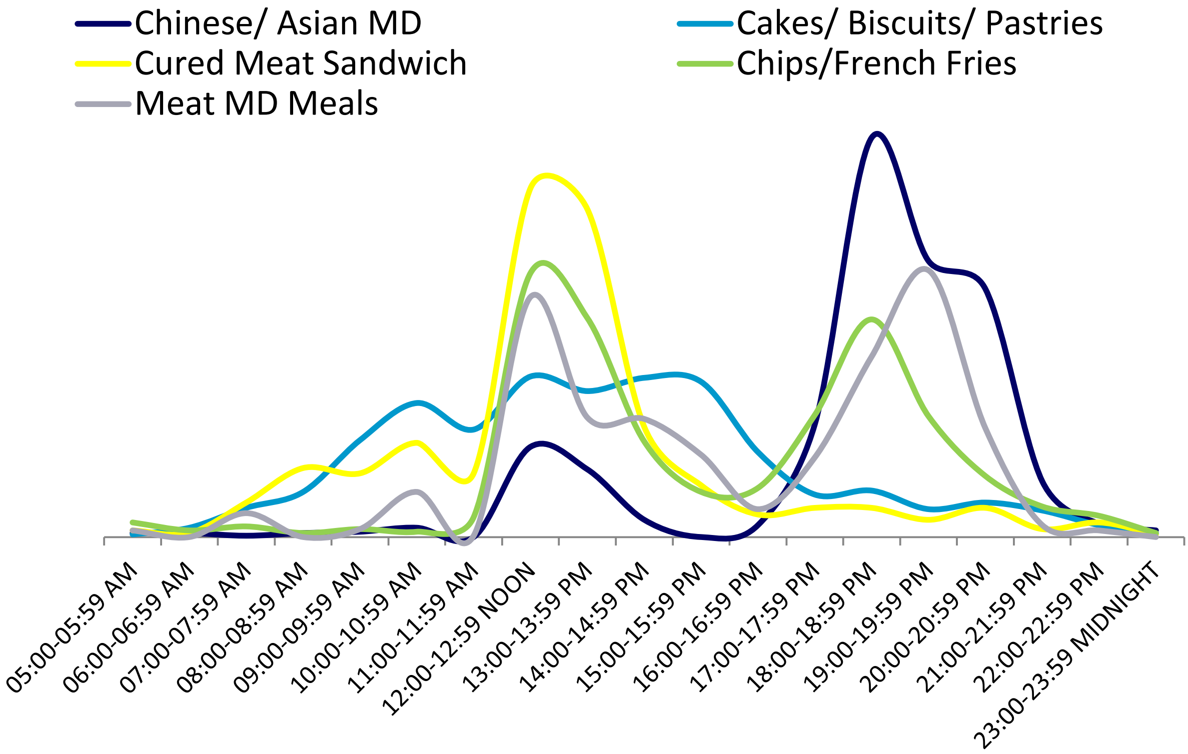
Pizza	• Pizza was the fastest growing food category in Scotland. • The majority of Pizza was purchased from Brands. • Pizza Hut Full Service and Delivery accounted for more than 20% of all Pizza servings.
Chinese/Asian meals	• Scottish consumers were 30% more likely to consume Chinese/Asian meals compared to GB. • The Independent caterers accounted for 94% of all Servings.
Plain Fruit and Vegetables	• Plain Fruit and Vegetable consumption (excluding sandwiches, mixed salads (mainly dressed) and fruit juice) consumed on only 2% or fewer visits by both adults and children. The proportion of visits which included Fruit and Vegetables was lower in Scotland compared to GB for both adults and children.
Sandwiches	• Cured meat/ poultry/cheese/vegetable/egg/fish/seafood sandwiches if combined together would have comprised the most commonly purchased food category. • Around 50% were purchased from the Major Brands including Supermarkets (eg Greggs, Subway,Tesco).
Pies, pastries and sausage rolls	• Pies, Pastries and Sausage Rolls were one of the fastest growing categories between 2011 and 2012 in Scotland. • Greggs had 40% share of servings of pies/pasties /sausage roll OOH in Scotland with the Independent retailers/ caterers making up much of the rest.
Meat Main Dish	• Meat Main Dish was the third most popular food category with a 6.5% incidence overall, lower than GB. Nearly 30% of Meat Main Dishes were consumed in Pubs with a further 25% from Full Service Restaurants.
Speciality Coffees/Hot Chocolate	• Speciality Coffee/Hot Chocolate was both consumed on 10% of all visits. This was similar to GB.
Soft drinks	• Regular Cola was the most commonly consumed soft drink, consumed on 10% of all OOH visits, followed by Diet Cola consumed on 9% of visits. • Other Fizzy Drinks excluding Cola were more popular

	in Scotland, mainly due to the higher consumption of Irn-Bru. • Around one-third of all eating OOH occasions included a soft drink, with around two-thirds of servings being non-diet. • Around 50% of all eating OOH occasions for children included a soft drink. • More than 30% of Regular Cola and Other Fizzy Drinks were sold on promotion.
Water	• Water had a 7% incidence overall, with a similar incidence for children. The incidence of visits including water consumption was 5% for QSR visits, compared to 20% for total Cola.

4.4 Meal time Peaks

There are clear meal time peaks for certain food categories- with sandwiches showing lunchtime peaks and Chinese/ Asian Main Dish more important in the evenings. Cakes, biscuits and pastries are consumed more evenly throughout the day.

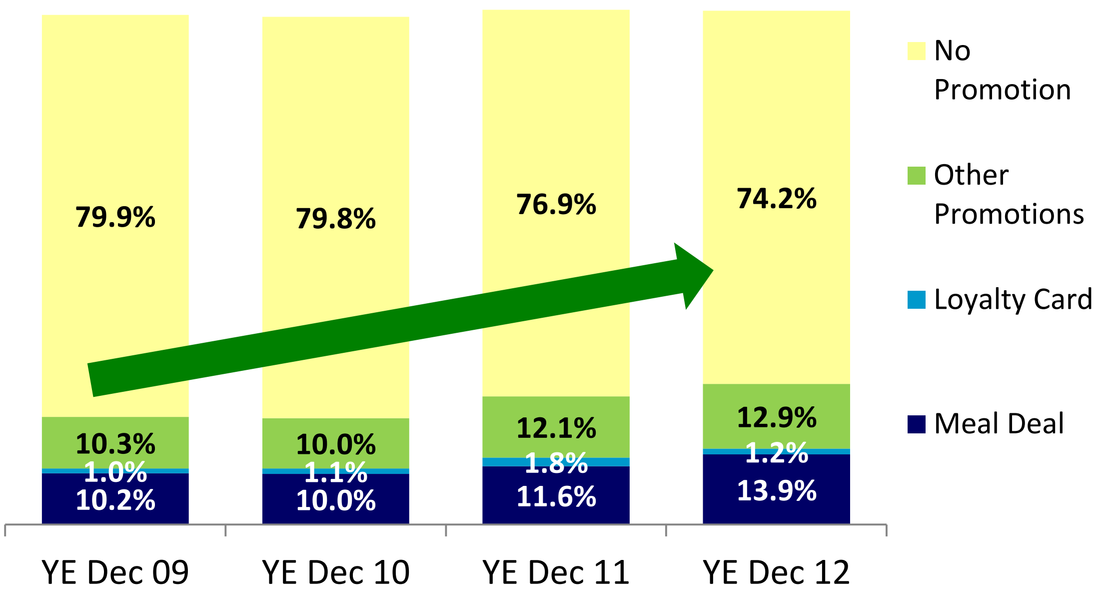
Figure 10: Top 5 Food Categories by clock time- Scotland Total OOH- 2YE Dec 12



4.5 Promotions

Promotions have steadily increased in Scotland and now account for over 25% of all visits to the OOH market.

Figure 11: Share of Total OOH Visits in Scotland- by Promotion- over time



Note- this is a multi-choice question and so will not add up to 100%

Figure 12 Share Visits (%) in Scotland by Promotion- Channel Comparison- YE Dec 12

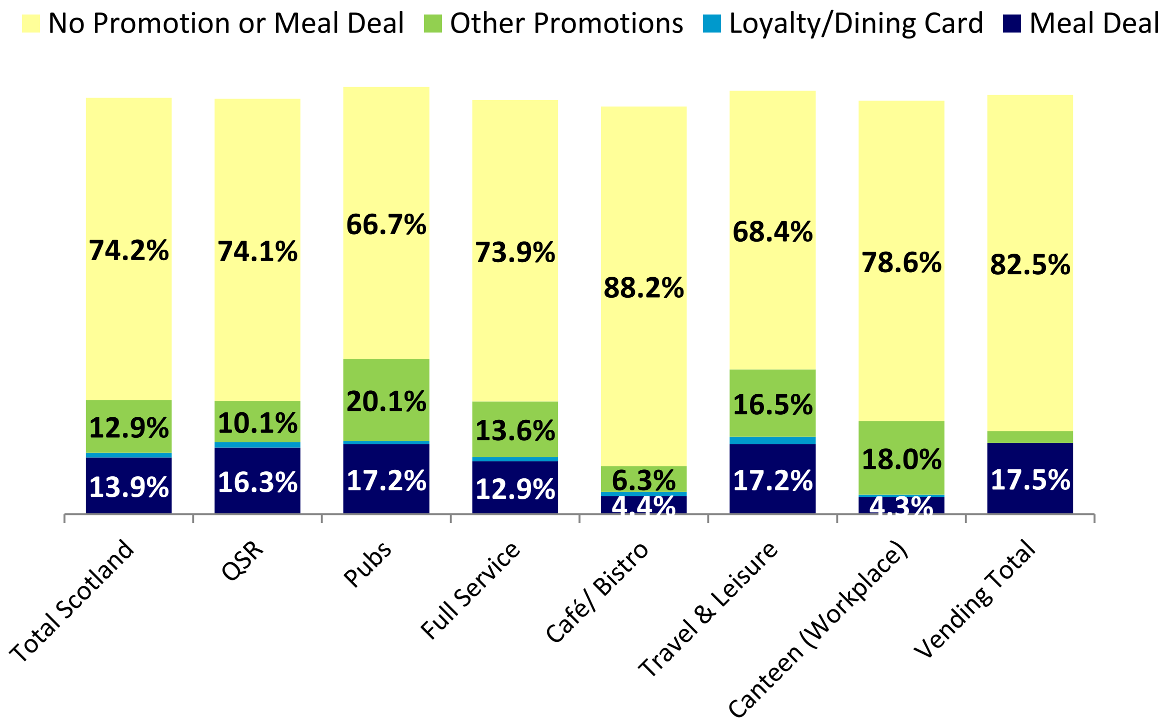
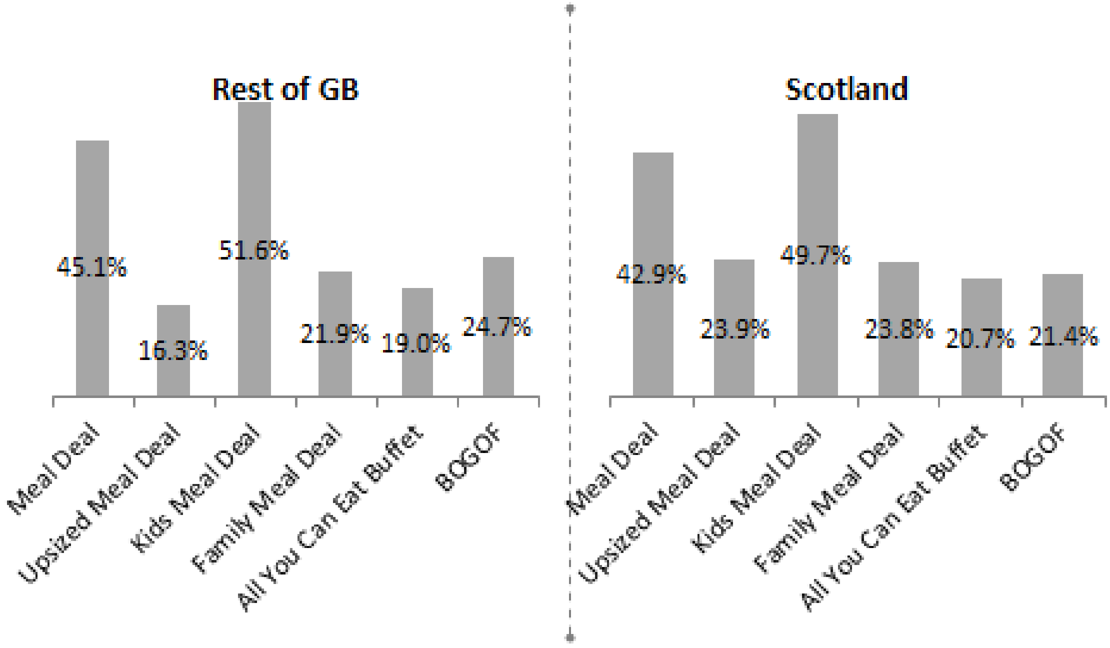


Figure 12 shows the distribution of promotions across the Channels. Promotions were much less prominent at Café/Bistro, whereas nearly one third of all Pub visits were on Promotion.

Looking at Meal Deal splits, there was little difference between Scotland and the rest of GB- although upsized Meal Deals were more prominent in Scotland (Figure 12).

Figure 13 Distribution of Meal Deal Traffic by Type in Scotland- YE Dec 12



Note: Meal Deal Types will not add up to 100% due to overlapping scenarios

In terms of the Top Food and Beverages, there was a similar pattern of promotional activity in Scotland and GB. The food categories that were most likely to be on promotion were Fried Chicken (54.5%), Cheese Burgers (52.7%) and Pizza (43.2%) (Table 22).

Table 21 Top Food and Beverages- % of Servings on Promotion- 2YE Dec 12

	Scotland	GB
Fried/Breaded Chicken	54.5	48.5
Cheese Burger	52.7	47.5
Total Pizza	43.2	47.8
Wraps	38.9	37.8
Vegetables (excl potatoes)	36.9	30.5
Juice Drinks	36.9	43.6
Chips/French Fries	35.3	35.0
Fish/Seafood Sandwich	34.9	29.1
Crisps/ Popcorn/ Salty Snacks	34.2	29.2
Total Fizzy Drinks excluding Cola	33.7	38.9
Regular Cola	32.9	36.6

Total Pasta	31.9	35.5
Diet Cola	31.7	35.7
Meat Main Dish	31.6	29.2
Poultry Sandwich	30.6	32.6
Water (Bottled + Tap)	30.3	28.4
Pure Juice	30.2	37.3
Ice Cream	28.9	28.4
Cured Meat Sandwich	26.1	27.6
Vegetable/Cheese/Egg Sandwich	25.3	27.7
Speciality Coffee/ Hot Chocolate	24.5	24.5
Bacon	24.1	29.9
Confectionery	23.9	20.3
Puddings/ Desserts	22.8	29.0
Indian Main Dish	21.5	25.1
Cakes/ Biscuits/ Pastries	21.1	26.3
Fried/Breaded Fish	20.6	25.3
Sausage	20.4	23.4
Other Sandwiches	17.2	16.8
Chinese/ Asian Main Dish	16.9	18.6
Pies/ Pasties/ Sausage Rolls	16.0	18.8

4.6 Motivations

Reported motivations to go out were very similar between Scotland and the rest of GB- although in Scotland people were slightly less likely to go out for 'Socialising' versus more functional motivations, such as 'I was at work'.

Scots were more likely to visit QSR restaurants to satisfy hunger, whereas socialising was the prominent reason for visiting FSR, Café /Bistros and Pubs (fig 14)

Figure 14: Distribution of traffic by top Motivations by Channel in Scotland YE 12

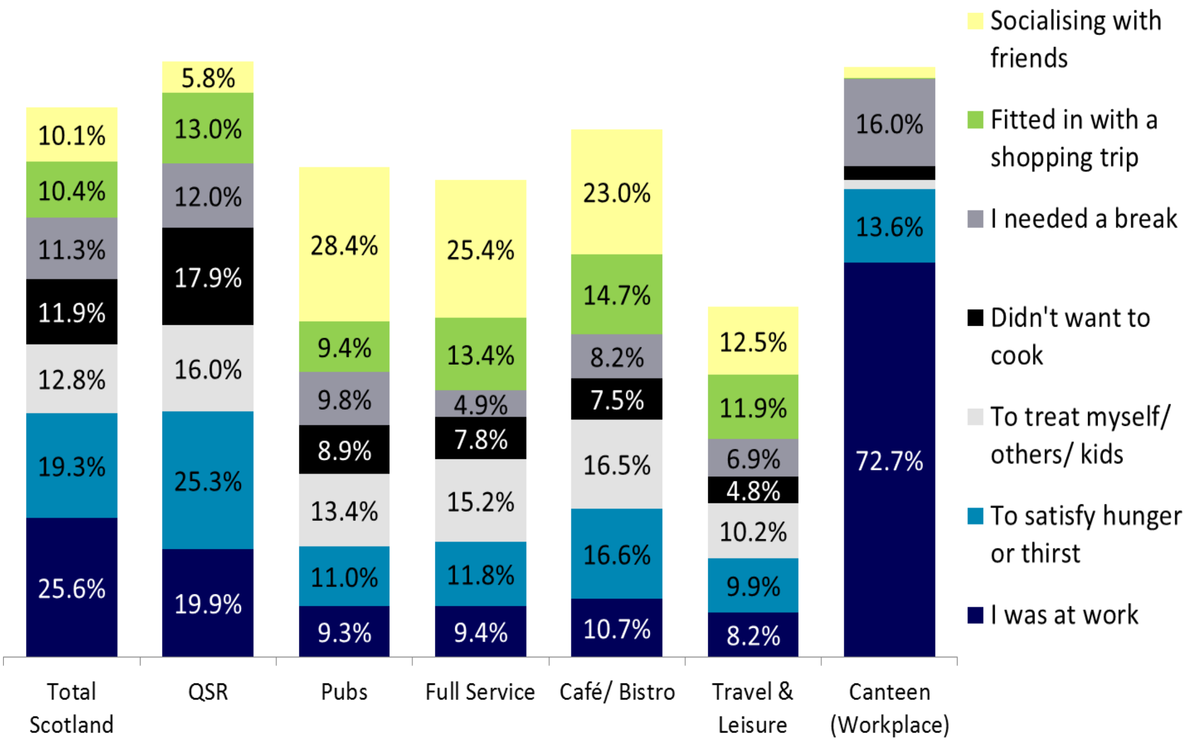


Table 22: Motivations for Going Out- % Share of Meal Occasions- Scotland vs. the rest of GB (excluding Scotland)- YE Dec 12

	Scotland	Rest of GB
I was at work	25.6%	22.7%
To satisfy hunger or thirst	19.3%	20.8%
To treat myself/ others/ kids	12.8%	12.7%
Didn't want to cook	11.9%	11.7%
I needed a break	11.3%	12.5%
Fitted in with a shopping trip	10.4%	9.5%
Socialising with friends	10.1%	11.1%
Other Motivation	8.2%	9.1%
Travel/ Events/ Holiday	6.7%	7.7%
To spend time with family	6.5%	7.3%
Dining as a couple	4.9%	5.0%
Wanted something light/ balanced	3.9%	3.7%
Celebration (special occasion)	3.2%	4.0%

Wanting something light/balanced as a motivation to go out is reported slightly more frequently in Scotland compared to the rest of GB. However the only food category which over-indexes for occasions when consumers ‘wanted a light/healthy meal’ was Diet Cola (13.1% Incidence vs. 8.4%).

5. Discussion

The current study was commissioned by FSAS to better understand the OOH eating environment in Scotland so that policy on tackling calorie and salt reduction could be further developed. Until now, little has been published on actual consumer behaviour relating to foods and beverages purchased out of the home in Scotland.

Methods

The use of market research data means that the raw data collected was not unique to this project and standard CREST methodologies have had to be adapted where possible to match the focus on nutrition. For our current purposes, we were able to develop coding rules for food categories which could be easily and cost-effectively replicated to allow monitoring in future if required.

A key strength of this analysis was that data were collected from a large sample of households. The sample was selected to be representative of GB and cover all key demographic groups. The household sampling period was over a longer time period, and the size of the sample was larger than equivalent food surveys in Scotland e.g. the Living Costs and Food Survey. There were limitations to the data collected for children. Data were only collected for children (under 16 years old) when they were accompanied by an adult.

Coding of each individual product on the menu was only available for the Major Brands. There were limits to the amount of data available from Scotland and only the most frequently purchased individual menu items were captured. For some categories purchased less frequently the sample was too small to use Scotland data, and it was necessary to use GB data as a proxy measure.

All the major chains tracked by CREST provided nutrition information, however not all menu items were detailed. The information available from Independent retailers/caterers in particular was very limited. Because no information on calories, fats, sugars, salt and portion sizes were available for the majority of OOH businesses, nutrition information has not been included in this report.

Overview of findings

GB and Scotland have very similar OOH eating and drinking patterns with only a few notable differences. Scotland has a slight bias towards Independent retailers/caterers compared to GB, which make up over 50% of the OOH market in Scotland. Workplace canteen, and QS Ethnic, including Chinese and Asian meals were more popular with families. The Independent retailers/caterers accounted for 93.8% of all servings of Chinese meals which were consumed more frequently in Scotland. In Scotland there was also recent growth in OOH visits by the under 18 age group – signs that Scottish teenagers are buying into this market at an earlier age. Education on nutrition should encompass food purchased OOH to help children and their parents make informed choices.

Almost 50% of servings were purchased from Brands. It was clear from the analyses that a small number of Major Brands contributed a large proportion of portions purchased within the top selling categories of foods and drinks, including items known to be high in calories, fat and salt. Reformulating these foods and beverages and/or providing healthier alternatives could have a significant impact on population calorie, fat and salt consumption. Some of the largest contributing categories from the Major Brands may have already been reformulated, which might make it more challenging to achieve further reductions, but even small step changes could have a significant impact over the longer term.

There was little evidence that children were able to consume a healthy diet OOH, with Cola, Chips, and Other Fizzy Drinks the most frequently consumed items, and fruit and vegetables rarely purchased. Providing healthier more varied menus for children including more plain fruit and vegetables, and offering smaller portion sizes across the adult menu may help families make better and more varied choices for their children.

Promotions

Over 50% of Cheese Burgers and Fried Chicken were purchased on promotion in Scotland, which was higher than GB. Upsize meal deals were also more common in Scotland (24% versus 16%). Upsize meal deals may encourage excess consumption of calories and the catering industry needs to increasingly promote healthier choices and reduce the promotion of upsize meals.

Motivations

Perhaps surprisingly, the Scottish consumer appears to have slightly more motivation to be healthier when compared to GB consumers, however this was only followed through in terms of actual food choices by opting for Diet Cola. It was not clear whether this was due to preference or a lack of other healthy options. Consumers may be looking for a quick fix or an easier choice to make on health. Calorie counts on menus, educating consumers and more healthy choices should all help consumers to fulfil this motivation.

Next steps

This project has provided a rich source of information on the OOH market and consumer behaviour in Scotland, which will inform FSAS and Scottish Government policy on nutrition. From a public health perspective, these results provided a disheartening overview of eating OOH in Scotland with consumers reporting frequent consumption of calorie rich high fat/sugar/salt foods and high fat/sugar drinks.

The data has highlighted where nutrition information is scarce and also has identified the key players who have the greatest influence over the foods and beverages purchased in Scotland and across the UK.

Results presented here could be further developed to set a baseline for monitoring future OOH food and beverage purchasing trends, with the expectation that enhanced efforts by caterers in Scotland will encourage consumers to eat more healthily across the whole day.

6. References

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[3] Scottish Government & Food Standards Agency in Scotland. (2013). "Supporting healthy choices: a draft framework for voluntary action." http://www.scotland.gov.uk/Resource/0042/00422516.pdf

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[6] Wrieden, W. L. and K. L. Barton. (2011). "The Scottish Diet: Estimations of energy density and expenditure." http://www.foodbase.org.uk//admintools/reportdocuments/749-1-1277_S14035_Energy_Density_Final_Report.pdf

[7] http://www.wcrf-uk.org/cancer_prevention/recommendations/energy_density_and_cancer.php

7. Appendices

Appendix 1 Estimated Population Figures for Scotland (source ONS)

: Estimated Population Figures for Scotland (000)

	2010	2011	2012
Total	5,222	5,251	5,282
<18	1,038	1,035	1,034
18-24	499	499	498
25-34	662	680	702
35-49	1,127	1,111	1,090
50-64	1,018	1,034	1,036
65+	879	893	923
Male	2,530	2,547	2,565
Female	2,692	2,704	2,717

Appendix 2 Definitions of channels and sub-channels

Total Commercial

The entire foodservices industry- which includes all channels and sub-channels below but excludes Canteens and Non-Commercial Vending

Quick Service Restaurants (QSR)

The largest channel in the out of home market- including Quick Service Restaurants in the following categories:

- QS Burger
  - McDonald's
  - Burger King
  - QS Burger Other
- QS Fish n Chips
- QS Chicken
  - KFC
  - Nandos
  - QS Chicken Other
- QS Sandwich
  - Subway
  - Pret A Manger
  - QS Sandwich Other
- QS Bakery
  - Greggs
  - QS Bakery Other
- QS Coffee
  - Costa Coffee
  - Starbucks
  - Caffé Nero
  - QS Coffee Shops Other
- QS Pizza/Italian
  - Domino's Pizza
  - Pizza Hut Delivery *(note the full Pizza Hut read is split into their Full Service and Quick Service functions)*
  - QS Pizza Other
- QS Ethnic
  - QS Indian
  - QS Kebab
  - QS Oriental/Chinese
  - QS Ethnic Other
- Retail/Supermarket
  - Tesco

        - Sainsbury
        - ASDA
        - Boots
        - M&S Off-Premises
        - Co-op
        - Morrisons
        - Retail/Grocery Other
    - Petrol Station
    - QS Other

Pubs

This channel includes predominantly food-led pubs including the following major chains:

- Wetherspoon
- Brewers Fayre
- Beefeater
- Harvester
- Toby Carvery
- FS Pub Other

Full Service Restaurants (FSR)

Any restaurant with table service (waiter/waitress) including the following major chains and categories:

- FS Traditional
- FS Pizza/Italian
    - Pizza Hut Full Service *(note the full Pizza Hut read is split into their Full Service and Quick Service functions)*
    - Pizza Express
- FS Pizza/Italian Other
- FS Ethnic
- FS French
- FS Greek
- FS Indian
- FS Japanese
- FS Oriental/Chinese/
- FS Mexican/Spanish

Café/Bistro

Independent Cafés

Travel & Leisure

Travel & Leisure includes the following categories

- Hotel
- In-Store Restaurant (e.g. Debenhams Café)
- Bar/Club
- Motorway Service Stations
- On-Board Catering (airplane, train, etc)
- Ice Cream Shop
- Leisure/Entertainment Other (e.g. cinemas, theme parks, bowling alleys, etc)

Vending (Commercial)

Any Vending machine not located in the Workplace or School/University

Total Non-Commercial:

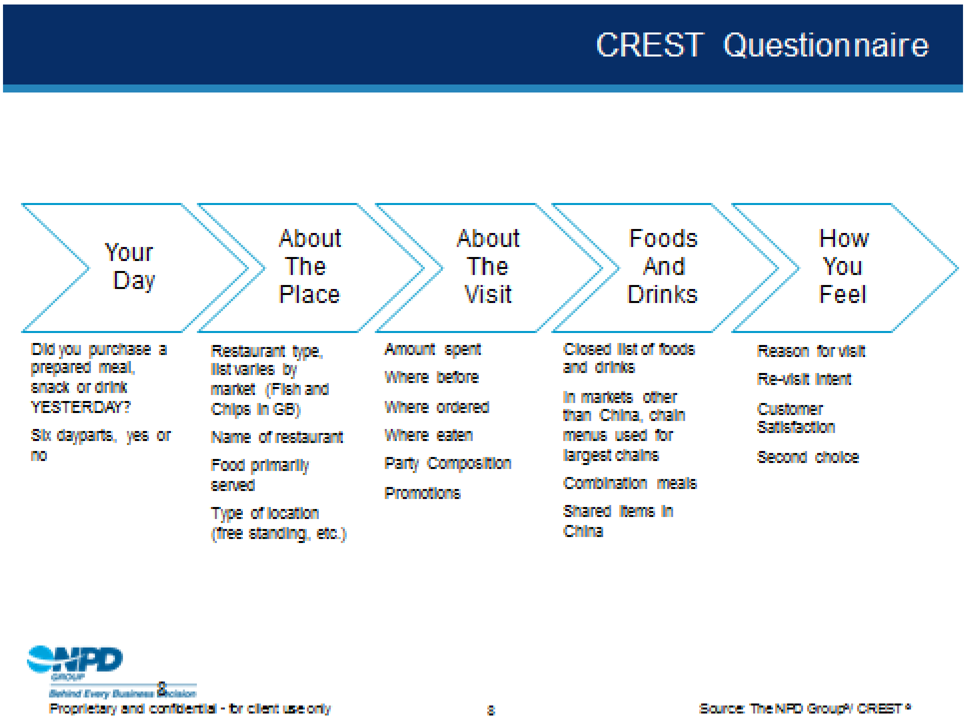
Canteens and Non-Commercial Vending:

- Canteen (Workplace)
- Canteen (College/Uni)
- Vending (Non-Commercial)
  - Vending (Workplace)
  - Vending (College/Uni)

Total Vending

Combines Non-Commercial and Commercial Vending into a total read

Appendix 3 CREST Questionnaire



Appendix 4 Food Categories

Speciality Coffee/ Hot Chocolate	Indian Main Dish
Total Cola	Thai/Korean/Viet Main Dish
Regular Cola	Meat Main Dish
Diet Cola	Total Pasta
Total Fizzy Drinks excluding Cola	Total Pizza
Regular Fizzy Drinks excluding Cola	Cakes/ Biscuits/ Pastries
Diet Fizzy Drinks excluding Cola	Puddings/ Desserts
Irn Bru	Confectionery
Energy/ Sports Drinks	Fruit
Squash/ Cordial	Crisps/ Salty Snacks
Juice Drinks	Salad (Meat/Fish)
Pure Juice	Salad (No Meat/Fish)
Water (Bottled + Tap)	Vegetables (excl potatoes)
Milkshakes	Bacon
Total Potatoes	Sausage
Beef Burger	Poultry Sandwich
Cheese Burger	Fish/Seafood Sandwich
Burgers w/ Cured Meats	Vegetable/Cheese/Egg Sandwich
Chicken Burger	Cured Meat Sandwich
Other Burgers	Other Sandwich
Fried/Breaded Chicken	Total Pie (Meat/Vegetable)
Fried/Breaded Fish	Pie Based Meals
Pies/ Pasties/ Sausage Rolls	Meat Main Dish
Chinese MD Total	Meat Main Dish Meals

Food and drink category definitions are available from NPD if required.

Appendix 5 Top Food Categories in Scotland- Top Items by Chain/Independents- 2YE Dec 12

*/Italics= data from Total GB used due to small sample sizes in Scotland

Category	Total OOH Scotland			Top chains / Independents				
	Incidence (%)	**Index vs. Total OOH GB**	**Total Servings (millions)**	**Chain**	**Incidence (%)**	**Total servings (000)**	**Share of Total OOH Servings (%)**	**Top 3 Items**
Chips/French Fries	9.5	79	181.4	Independents	8.5	83,833	46.2	Chips/French Fries
				Mcdonalds	33.6	35,906	19.8	Fries Small, Fries Medium, Fries Large
				KFC	34.7	8,979	4.9	Fries Regular, Fries Large
				Burger King	24.4	4,818	2.7	Fries Small, Fries Medium, Fries Large
				JD Wetherspoon	16.6	4,739	2.6	Chips/French Fries
Cakes/ Biscuits/ Pastries	8.7	104	181.5	Independents	7.9	85,205	46.9	Non-specified Cakes, Biscuits/ Scones, Pastries/ Turnovers/ Danishes
				Greggs	18.7	15,972	8.8	Donut, non-specified cakes, pastries/ turnovers/ danishes
				Tesco	9.3	7,258	4.0	*Non-specified Cakes, Muffin, Cookie**
				Starbucks	28.9	6,959	3.8	*Muffin, Non-specified Cakes, Cookie**
				Costa	23.8	6,518	3.6	*Non-specified Cakes, Donut, Cookie**

Meat MD	6.5	78	141.5	Independents	6.6	75,012	53	Chicken- other, Beef- steak, Meat MD (other)
				Toby Carvery	87.4	7,480	5.3	*Traditional Roast Beef, Traditional Roast Pork, Traditional Roast- other**
				JD Wetherspoon	17.2	5,019	3.5	*Traditional Roast Beef, Traditional roast chicken, chicken- other**
				*Harvester**	*43.6*	*NA*	*3.4*	*Chicken- non fried, Beef-steak, Chicken-other*
				*Brewers Fayre**	*29.7*	*NA*	*3.1*	*Traditional Roast Beef, Traditional roast chicken, Beef-steak**
Cured Meat Sandwich	5.3	108	103.2	Independents	4.3	43,013	41.7	Hot Bacon Sandwich, Ham Sandwich, Ham Salad Sandwich
				Subway	37.0	9,004	8.7	*Hot Italian BMT-6, Ham- 6, Hot Italian BMT- 12**
				Greggs	9.7	7,988	7.7	*Hot Bacon Sandwich, Ham Salad Sandwich, BLT**
				Tesco	9.8	6,440	6.2	*BLT, Ham Sandwich, Ham Salad Sandwich**
				Sainsburys*	7.9	NA	3.7	*BLT, Ham Sandwich, Ham Salad Sandwich**
Chinese/ Asian MD	5.2	133	125.7	Independents	9.3	117,932	93.8	Chinese MD, Chinese MD Rice, Chinese MD other
Vegetable/ Cheese/Egg	4.6	107	89.9	Independents	3.6	36,985	41.2	Cheese Sandwich, Hot Cheese Sandwich, Egg Mayo Sandwich

Sandwich				Greggs	10.6	8,697	9.7	*Cheese Sandwich, Egg Mayo Sandwich, Hot Cheese Sandwich**
				Tesco	11.1	7,325	8.2	*Cheese Sandwich, Egg Mayo Sandwich, Egg Sandwich**
				Asda	11.1	4,435	4.9	*Cheese Sandwich, Egg Mayo Sandwich, Egg Sandwich**
				*Sainsburys**	*7.9*	*NA*	*4.1*	*Cheese Sandwich, Egg Mayo Sandwich, Egg Sandwich**
Total Pizza	4.4	100	87.0	Independents	3.4	33,974	39	Regular crust, Thin crust, Deep pan
				Pizza Hut FS	85.9	10,183	11.7	*Thin crust, other**
				Pizza Hut Delivery	95.5	9,313	10.7	*Deep Pan crust, Thin crust, other**
				Dominos	92.1	9,233	10.6	*Regular crust, Deep Pan crust, Thin crust**
Bacon	4.0	108	75.6	Independents	4.2	41,150	54.4	Bacon
				*JD Wetherspoon**	*12.8*	*NA*	*5.8*	Bacon
				Greggs	4.9	4,027	5.3	Bacon
				Tesco	4.4	2,920	3.9	Bacon
				*Asda**	*6.3*	*NA*	*2.9*	Bacon
Pies/ Pasties/ Sausage Rolls	3.8	106	76.1	Greggs	35.2	30,999	40.7	Sausage Roll, Pasty, Meat/Veg Pie
				Independents	2.6	26,977	35.4	Meat/Veg Pie, Sausage Roll, Pasty
				*Tesco**	*4.7*	*NA*	*3.9*	*Pasty, Meat/Veg Pie, Sausage Roll**

				*Sainsbury**	*4.7*	*NA*	*3.1*	*Sausage Roll, Pasty, Meat/Veg Pie**
				*ASDA**	*3.9*	*NA*	*1.8*	*Pasty, Sausage Roll, Meat/Veg Pie**
Cheese Burger	3.7	93	73.4	McDonald's	41.6	46,724	63.6	Cheeseburger, Big Mac, Quarter Pounder with Cheese
				Independents	1.4	13,987	19	Beef Burger w Cheese
				Burger King	24.1	4,804	6.5	*Double cheeseburger, Regular cheeseburger,Whopper with cheese**
				*JD Wetherspoon**	*2.9*	*NA*	*1.2*	Beef Burger w Cheese
Poultry Sandwich	3.7	95	73.0	Independents	2.1	20,995	28.8	Chicken Sandwich, Chicken Salad Sandwich, Hot Chicken Sandwich
				Greggs	12.4	10,367	14.2	*Chicken Salad Sandwich, chicken sandwich, Hot Chicken sandwich**
				Subway	28.5	6,886	9.4	*Chicken Tikka-6, Chicken & Bacon-6, Hot Chicken-6**
				*Tesco**	*9.1*	*NA*	*7.0*	*chicken sandwich, Chicken Salad Sandwich**
Other Potatoes	3.6	86	75.0	Independents	3.2	34,587	46.1	Jacket Potato, Roast potato, other Potato
				*Toby Carvery**	*55.3*	*NA*	*8.0*	*Roast Potato, Mashed Potato**
				*JD Wetherspoon**	*6.6*	*NA*	*2.6*	*Jacket Potato, Roast Potato, Mashed Potato**
				*Brewers Fayre**	*11.9*	*NA*	*2.5*	*Roast Potato, Mashed Potato, Jacket Potato**

				*Harvester**	*11.3*	*NA*	*1.7*	*Jacket Potato, Mashed potato, other Potato**
Fried/Breaded Fish	3.5	103	70.0	Independents	4.6	47,218	67.4	Other white fish- fried, Haddock-fried, Cod-fried
				*McDonalds**	*1.6*	*NA*	*2.9*	*Fish Fingers- 3 piece Kids**
				*JD Wetherspoon**	*5.4*	*NA*	*2.6*	*Haddock- fried, Cod- fried, Scampi*
				*Brewers Fayre**	*8.6*	*NA*	*2.2*	*Cod- fried, Scampi**
				*Harvester**	*8.0*	*NA*	*1.6*	*Cod- fried**
Confectionery	3.5	103	69.5	Independents	4.3	43,460	62.5	Chocolate Bar, Candy
				Tesco	8.2	5,571	8.0	*Chocolate Bar, Candy**
				*Sainsburys**	*6.3*	*NA*	*4.2*	*Chocolate Bar, Candy**
				*Asda**	*5.0*	*NA*	*2.4*	*Chocolate Bar, Candy**
Total Pasta	3.1	124	61.9	Independents	3.2	32,898	53.1	Pasta Other, Macaroni & Cheese, Lasagne
				*Pizza Hut FS**	*17.6*	*NA*	*3.5*	*Spaghetti, Macaroni and cheese, Pasta- other**
				*JD Wetherspoon**	*5.0*	*NA*	*3.2*	*Lasagne, Pasta- other, Spaghetti**
				*Brewers Fayre**	*7.8*	*NA*	*2.6*	*Lasagne, Spaghetti, Macaroni and cheese,**
Sausage	3.1	97	59.7	Independents	*3.5*	35,048	58.7	Sausage
				*JD Wetherspoon**	*12.6*	*NA*	*6.6*	Sausage
				*Brewers Fayre**	*6.5*	*NA*	*1.7*	Sausage
				*Greggs**	*1.4*	NA	*1.4*	Sausage
Puddings/ Desserts	2.9	94	57.1	Independents	3.2	32,883	57.6	Dessert- other, Traditional Pudding, Cheesecake
				*McDonalds**	*2.1*	NA	*4.2*	*Apple Pie, Dessert- other**

				*Tesco**	*2.3*	NA	*2.3*	*Dessert-other, Cheesecake**
				*Sainsburys**	*2.9*	NA	*2.1*	*Dessert-other, Cheesecake**
				*Dominos**	*8.5*	NA	*1.6*	*Dessert-other, Domino's Waffles, Cheesecake**
Ice Cream	2.9	85	55.5	Independents	2.7	26,258	47.3	Ice Cream
				McDonalds	8.0	8,561	15.4	*McFlurry Dairy Milk, Ice Cream Sundae, Ice Cream**
				*Harvester**	*17.5*	NA	*3.5*	Ice Cream
				*Toby Carvery**	*16.7*	NA	*2.6*	Ice Cream
				*KFC**	*4.5*	NA	*2.4*	*Rolo Ice Cream Tub, Avalanche**
Crisps/ Popcorn/ Salty Snacks	2.8	104	54.0	Independents	2.5	24,689	45.7	Crisps/Salty Snacks, Popcorn
				Tesco	11.0	7,218	13.4	Crisps/Salty Snacks, Popcorn
				*Sainsbury**	*7.7*	*NA*	*6.5*	Crisps/Salty Snacks, Popcorn
				*Boots**	*12.6*	*NA*	*3.8*	Crisps/Salty Snacks, Popcorn
				*ASDA**	*4.5*	*NA*	*2.8*	Crisps/Salty Snacks, Popcorn
Meat MD Meals	2.8	76	N/A	*Toby Carvery**	*55.1*	*NA*	*NA*	*Vegetables- non fried, Traditional Roast Beef, Traditional Roast Chicken**
				*Beefeater**	*21.9*	*NA*	*NA*	*Chips/French Fries, Beef- steak, Ice cream**
				*Harvester**	*24.0*	*NA*	*NA*	*Chips/French Fries, Salad- Mixed (No Meat), Chicken- non fried**
				*Wetherspoon**	*8.3*	*NA*	*NA*	*Vegetables- non fried, Beef steak, Roast Potatoes**
				Independents	2.5	*NA*	*NA*	Vegetables- non fried, Chips/French Fries, Chicken-other

Salad (No Meat/Fish)	2.7	77	53.6	Independents	3.0	31,747	59.3	Salad-Mixed (No Meat/Fish), Salad-Mixed, Salad-Other
				Pizza Hut FS	32.7	3,631	6.8	Salad Station Bowl, Side Salad, Salad Station Plate*
				Harvester*	39.3	NA	7.7	Salad-Mixed (No Meat/Fish), Salad-Other*
				KFC*	8.1	NA	4.1	Coleslaw, Salad-mixed*
Fried/Breaded Chicken	2.2	76	44.3	McDonald's	15.1	16,165	36.5	McNuggets- 6 pieces, McNuggets- 4 pieces (with kids meal), Chicken Select Strips- 5 pieces*
				KFC	28.7	9,938	22.4	Chicken Pieces, Popcorn chicken, Crispy strip*
				Independents	0.9	9,336	21.1	Fried Chicken (Bone), Chicken Nuggets/ Strips- Other
				Burger King*	16.3	NA	6.5	Chicken Bites*
				Dominos*	15.1	NA	2.9	Chicken Strippers, Chicken Kickers, Chicken Combo*
Indian MD Total	2.1	91	48.2	Independents	3.3	40,313	83.6	Indian MD Other, Indian MD Rice, Indian MD
Vegetables (excl potatoes)	2.0	80	37.9	Independents	2.1	20,874	55.1	Vegetables- non fried
				Toby Carvery*	39.1	NA	8.1	Vegetables- non fried*
				KFC*	7.0	NA	5.1	Corn cobette*

Appendix 6: Top Beverage Categories in Scotland- Top Items by Chain/Independents- 2YE Dec 12

*/Italics= data from Total GB used due to small sample sizes in Scotland

Category	Total OOH Scotland			Top chains / Independents				
	Incidence (%)	**Index vs. Total OOH GB**	**Total Servings (millions)**	**Chain**	**Incidence (%)**	**Total servings (000)**	**Share of Total OOH Servings (%)**	**Top 3 Items**
Speciality Coffee/ Hot Chocolate	10.5	101	205.6	Independents	9.4	95,972	46.7	Latte, Cappuccino, Hot Chocolate
				Costa Coffee	59.9	15,823	7.7	Latte, Cappuccino, Hot Chocolate
				Starbucks	53.8	12,891	6.3	Latte, Cappuccino, Hot Chocolate
				McDonald's	7.4	7,949	3.9	Cappuccino, Latte, Hot Chocolate
				Greggs	8.6	7,090	3.4	Cappuccino, Latte, Hot Chocolate
				Caffé Nero	30.5	4,733	2.3	Latte, Cappuccino, Hot Chocolate
Regular Cola	9.9	99	194.4	Independents	7.7	77,180	60.2	Coca Cola, Pepsi, Other Regular Cola
				McDonalds	25.5	27,205	14.0	Coca Cola
				Greggs	10.5	8,793	4.5	Coca Cola, Cherry Coke, Pepsi
				KFC	27.3	7,055	3.6	Pepsi

				ASDA	17.3	6,814	3.5	Coca Cola, Cherry Coke, Pepsi
				Burger King	23.9	4,732	2.4	Coca Cola
Diet Cola	9.1	123	177.2	Independents	7.0	70,172	61.8	Diet coke, Coke Zero, Pepsi Max
				McDonalds	18.0	19,422	11.0	Diet Cole, Coke Zero
				Tesco	10.9	7,649	4.3	Diet coke, Coke Zero, Pepsi Max
				Greggs	8.9	7,467	4.2	Diet Coke, Coke Zero, Pepsi Max
				KFC	22.2	5,738	3.2	Diet Pepsi
				ASDA	12.3	5,019	2.8	Diet Coke, Coke Zero, Pepsi Max
Total Fizzy Drinks excluding Cola	7.6	152	153.4	Independents	4.1	79,384	65.3	Irn Bru, Other brand, Fanta
				McDonalds	14.6	15,717	10.2	Sprite, Fanta
				Burger King	24.6	5,153	3.4	Fanta, Sprite
				Greggs	5.5	4,505	2.9	Irn Bru, Fanta, 7up
				*KFC**	*14.1*	*NA*	*4.9*	Tango, 7up
Water (Bottled + Tap)	7.1	93	139.3	Independents	6.9	69,100	89.5	Tap water, don't know brand, Other brand, Volvic
				Tesco	7.8	5,191	3.7	*Buxton, Tap, Evian**
				Greggs	4.4	3,634	2.6	Buxton, Evian, don't know brand

				*Sainsbury's**	*9.5*	*NA*	*2.8*	*Tap, Buxton, Evian**
				*Asda**	*10.1*	*NA*	*2.2*	*Buxton, Evian, Tap**
				*Boots**	*13.1*	*NA*	*1.4*	*Buxton, Evian, don't know brand**
Juice Drinks	4.8	94	98.3	Independents	3.7	36,953	58.2	don't know brand, other brand, Fruit Shoot
				Tesco	8.8	5,776	5.9	*other brand, Fruit Shoot, Oasis**
				McDonalds	3.7	3,993	4.1	*Fruit Shoot*
				*Greggs**	*5.1*	*NA*	*3.2*	*Oasis, Fruit Shoot, Flavoured Volvic**
				*Asda**	*8.5*	*NA*	*3.0*	*Fruit Shoot H20, Fruit Shoot, Caprisun**
Pure Juice	2.9	91	58	Independents	2.3	22,811	62.9	*don't know brand, other juice brand, Tropicana**
				McDonalds	4.2	4,451	7.7	Tropicana
				*Tesco**	*6.3*	*NA*	*5.8*	*other juice brand, Tropicana, don't know brand**
				*Sainsbury's**	*5.1*	*NA*	*3.5*	*Tropicana, other juice brand, don't know brand**
				*Asda**	*2.8*	*NA*	*1.4*	*Tropicana, other juice brand, don't know brand**