The out of home environment in Scotland (2021)

‘Out of home (OOH)’ refers to:
• Any food or drink bought and eaten away from home, including ‘on the go’
• Any takeaway or home delivered food, such as pizzas.

Introduction

The COVID-19 pandemic continued to affect the OOH sector in 2021 with further national lockdowns and restrictions on trading, resulting in consumers interacting with the OOH sector in different ways.

This summary briefing compares data from 2019, a benchmark for pre-pandemic behaviour, with 2020 and 2021 (pandemic years). It is the latest in a series of publications from Food Standards Scotland (FSS) on the OOH environment.

Key Findings

- In 2021, the OOH market in Scotland increased in value and average number of consumer trips per week, compared to 2020. However these were still lower compared to 2019.
- Quick service restaurants were the only channel to see growth in 2021 versus 2019, likely due to their ability to pivot to delivery and takeaway during the COVID-19 pandemic restrictions.
- Spend for full service restaurants and pubs and bars reduced the most, by 40% in 2021 compared to 2019.
- In 2021, those aged 35-54 experienced the largest reduction in average number of trips OOH, whilst those aged 55 and over had the smallest reduction compared to 2019.
- Consumers from social class C2DE visited OOH more frequently than consumers from social class ABC1.
- All food and drink categories experienced a reduction in the number of trips where these were purchased in 2021 compared to 2019. Savoury snacks were the most impacted while main meals the least impacted.
- The top 10 food categories purchased most frequently remained fairly consistent over the three years, with coffee being purchased the most followed by sandwiches.
- The takeaway and delivery market has seen strong growth over the pandemic years in Scotland, with an increase in value of over 88% in 2021 compared to 2019, with a value of £1.5 billion.

- In 2021, food technology such as restaurant web apps (e.g. McDonald's and Domino's) and aggregators[1] played a key role in the growth of delivery, with an increase of 24.9 million trips using these methods since 2019.
- In 2021, 50 million OOH trips featured a promotion, which was less than in 2020 and 2019.

Methodology

FSS worked with Kantar who provided data on how we interact with the OOH food and drink environment for 2019, 2020 and 2021. This allowed us to explore how our eating behaviours have changed over the two years of the pandemic (2020 and 2021) compared to a pre-pandemic year (2019).

The information comes from a panel of consumers who record all their food and drinks bought OOH, including takeaways.[2]

Data was collected from anywhere consumers can buy food and non-alcoholic drinks, such as:

- Quick service restaurants (e.g. McDonald's, KFC, Domino's Pizza, independents such as fish & chip shops)
- Full service restaurants (e.g. Pizza Hut, Nando's, independents)
- Cafes and coffee shops (e.g. Costa Coffee, Starbucks, independents)
- Convenience (e.g. supermarket convenience stores, independents)
- Pubs and bars (e.g. Wetherspoons, Brewers Fayre, independents)
- Bakery and sandwich (e.g. Greggs, Subway, independents)
- Supermarket cafes and front of store (main store outlets and supermarket cafes)
- Other, including workplace, leisure, hotels, travel, vending and garage forecourts.

General impact

In 2021, the COVID-19 pandemic and the related restrictions continued to have an impact on the OOH sector, particularly when areas of Scotland entered full lockdown at the start of the year. The value of the total OOH market in Scotland was £3.6 billion in 2021, an increase of 21% compared to 2020 (£2.9 billion), but still 22% below the value for 2019 (£4.6 billion).

Throughout 2021, the average number of trips consumers made OOH was 2.9 per week, an 11% increase compared to 2020 (2.7 trips) and a 30% decrease compared to 2019 (4.2 trips).

The spend in the OOH market fluctuated throughout 2021, depending on the level of restrictions. The difference in spend between 2021 and 2019 is set out in table 1 below.

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[1] A third party that facilitates the order of food from a restaurant to a consumer, e.g. Just Eat, Deliveroo.
[2] The panel has a Scottish sample, but where Scottish data was not robust enough GB-wide data was used.

Table 1: Difference in OOH spend per month (2021 vs. 2019)

Month (4 week average)[3]	Difference in spend (2021 vs. 2019)
January	-47%
February	-53%
March	-46%
April	-47%
May	-14%
June	-8%
July	-2%
August	-10%
September	-11%
October	-19%
November	-4%
November (2)	-13%
December	-12%

Spend in quick service restaurants was impacted the least by the pandemic, with a 26% increase in 2021 compared to 2019. This is likely due to their ability to adapt by providing more options for delivery and takeaway. Full service restaurants, pubs and bars were impacted the most, with a 40% reduction in spend in 2021 compared to 2019.

Differences in behaviours by consumer groups

In Scotland, the number of trips reduced across all age groups compared to 2019. This was the highest for those aged 35 to 54, with a decrease of 100 trips on average in 2021 compared to 2019.

For social class group, the table below shows the average number of trips for 2021 was highest for consumers from social class group C2DE and lowest for consumers from social class group ABC1. Consumers from social class group ABC1 spent more per trip than consumers from social class group C2DE in 2021, with average spend of £6.32 and £4.78, respectively.

[3] Note two data points are included for November as covers 4 week ending 1 Nov and 29 Nov 2021.

Table 2: Average number of trips and spend per trip by social class group (2021)

Social class group	Average no. of trips (2021)	Average spend per trip (2021)
Total Scotland	152	£5.58
ABC1 (Highest)	132	£6.32
C2DE (Lowest)	182	£4.78

Where did consumers visit and what did they eat?

Compared to 2019, trips chosen for practical reasons, such as ease and speed, increased in 2021. When comparing the three years, there has been an overall decrease in the percentage share of OOH lunch trips, and an increase for evening meal/tea time trips, as shown in table 3 below. This may be due to less consumers travelling for work and therefore not eating OOH at lunch time.

Table 3: No. of trips OOH (% share) by meal occasion (2021 & 2019)

Meal Occasion	No. of trips OOH (% share) 2019	No. of trips OOH (% share) 2021
Breakfast	14.1	14.5
Lunch	31.2	26.2
Evening meal/teatime	16.9	22.9
Snacking	37.8	36.4

In Scotland, the frequency in which consumers purchased different types of food and drinks such as main meals, quick meals and drinks declined in 2021 compared to 2019. As shown in table 4 below, savoury snacks were the most impacted and main meals the least.

Table 4: Change (%) in number of OOH trips by food and drink category (2021 vs. 2019)

Food & drink category	Change (%) in number of trips (2021 vs. 2019)
Hot drinks	-31.5%
Cold drinks	-39.3%
Savoury snacks	-56.6%
Sweet snacks	-33.4%
Quick meals	-29.5%
Main meals	-18.3%

Delivery and takeaway

Unlike the wider OOH market, takeaways (including deliveries) grew in 2021 with a market value of £1.5 billion, an 88% increase compared to 2019. The proportion of OOH trips as takeaway more than tripled since 2019, with 35% of trips, an additional 122 million trips.

The delivery market also increased in value in 2021 compared to 2019, with an increase of 155%. The ability to order deliveries using food technology such as restaurant web apps (e.g. McDonald's and Domino's) and third party apps (e.g. Just Eat, Deliveroo), played a key role in this growth, with an increase of nearly 25 million trips using these methods compared to 2019.

With regards to cuisine type purchased as takeaway, the table below shows burgers held the largest share followed by chicken meals.

Table 5: No. of trips (% share) by cuisine type for takeaway (2021)

Cuisine type (top 5)	No. of trips (% share) for 2021
Burgers	26%
Chicken meals	24%
Chinese	16%
Fish	13%
Pizza	12%

Promotions

Out of Home promotions: Information on promotions in the out of home market is entirely consumer defined.

In 2021, 50 million OOH trips in Scotland featured a promotion[4], which was less than in both 2020 and 2019, by 2.7 million and 3.5 million, respectively.

With regards to where promotions are being used, there was a reduction in the share of trips featuring a promotion for convenience stores and full service restaurants in 2021 vs. 2019. Bakery and sandwich shops, had the largest increase in share of trips.

For the types of foods that featured a promotion, sandwiches and carbonated drinks were the top two items in 2021, with 22.4 and 15.4 million trips, respectively.

Summary and conclusion

The impact of the COVID-19 pandemic on the OOH food and drink environment has continued into 2021. Quick service restaurants were the only channel to see growth, likely due to their ability to adapt by providing options for delivery and takeaway.

The OOH sector is a significant contributor to the overall diet, and remains a key area for intervention to improve the food environment and ultimately, the Scottish diet.
Many popular foods and drinks purchased OOH are less healthy, and often high in calories, fat, salt and sugar.

[4] note this is as reported by panellists, and may not capture all promotions

FSS will use the data from this report to develop policy actions for the OOH environment, to work towards ensuring that the Scottish population have diets conducive to good health.