Exploration of the current out of home landscape within small and independent outlets in Scotland

Out of home 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.

Background

Food Standards Scotland (FSS) and Public Health Scotland (PHS) are working collaboratively to develop an Eating Out, Eating Well (EOEW) framework for out of home (OOH) food outlets in Scotland. Within the EOEW framework there will be a Code of Practice (COP) for children’s menus.

The EOEW framework and COP for children’s menus are being developed to support OOH outlets to provide and promote healthy food and drink options for their customers as outlined as a commitment within the Scottish Government (SG) Out of Home Action Plan. The framework and COP for children’s menus support the achievement of the Scottish Dietary Goals and the SG ambition to halve childhood obesity by 2030. They will also support the delivery of the SG Good Food Nation ambition and wider food policies on food waste, local sourcing, and climate change.

To further inform the development of the EOEW framework and COP for children’s menus, in collaboration with PHS, FSS commissioned Taylor McKenzie to explore the following in a range of independent OOH outlets in Scotland:

- The type of foods and drinks available.
- Views on the benefits and barriers of the proposed principles within the EOEW framework and COP for children’s menus, and the type of support that would be required.

This research took place during a period of significant uncertainty for outlets within the OOH sector following on from the COVID-19 pandemic and rising cost of living.

Methodology

Data collection took place between November 2022 and February 2023. Both qualitative and quantitative data was collected from independent OOH outlets in Scotland. The qualitative element included 23 in-depth interviews and the quantitative element included 243 interviews.

The outlets included in this research covered a mix of region, location type and outlet type. However, the percentage distribution of outlet types is unlikely to be representative of the Scottish OOH landscape.

See the glossary on page 8 for more information on the types of outlets included.

Research findings

Current menu offering

Outlets within the quantitative research were asked about their current menus and what the most commonly sold items were. They reported that soup, chicken, fish, sandwiches, steaks and burgers were the most popular items sold, followed by chips, toasties, vegan food and pizza. Similarly, they shared that coffee, wine, beer, tea, regular soft drinks and sugar free soft drinks were the most popular drinks, followed by lager and water.

Fruit and vegetables

Most outlets within the qualitative research offered fruit or vegetables on their menu in some capacity; specifically, restaurants and some cafés. The offering tended to be fruit salads, side salads and vegetable sides. The main reasons for limiting their fruit and vegetable offering was due to perceived wastage and increasing costs associated with this food group.

Vegetables were used as a core ingredient[1] on menus by 58% of outlets within the quantitative research. Just over half (51%) of outlets within the quantitative research offered fruit-based desserts and just over a quarter (26%) offered fruit as a side dish.

Deep-fried foods

For 12% of outlets within the quantitative research, deep-fried food accounted for at least half of the food on the menu. On average across all outlets within the quantitative research, 19% of the food on menus was deep-fried.

[1] Core ingredient refers to when vegetables were incorporated within the main element of the dish rather than served alongside, e.g., carrots within a bolognese as opposed to peas alongside a steak pie.

For those outlets within the qualitative research who offered deep-fried food, it was usually in the form of chips. Although chips made up a small part of the menu, it was a large percentage of what was ordered. For most, around 20% of their menu was made up of deep-fried food. For some of the takeaways their menus were sitting closer to 80% of deep-fried food.

Method of food preparation

On average, 15% of food served across all outlets within the quantitative research was premade or bought in (i.e., not cooked from scratch). Additionally, 35% of outlets within the quantitative research stated that none of their food was premade or bought in, and all food is cooked from scratch.

Children's menus[2]

Overall, 48% of outlets within the quantitative research had a specific children's menu and an additional 34% offered small portions from the main menu. The remaining 23% of outlets did not cater specifically for children. This was similar for outlets within the qualitative research with 43% offering a children specific menu and 26% making substitutes to adapt the main menu for children.

The outlets within the quantitative research were asked about their current children's menus and what the most common items sold were. They reported that sandwiches, meat dishes (burgers etc.), chicken (including nuggets), pizza, pasta (including macaroni), and soup were the products sold most often. When prompted, 18% of the outlets mentioned some kind of deep-fried food as the most common menu items for children.

When encouraged to define the type of most popular drink, fruit juice and smoothies were most common, followed by sugar free juice/squash and then water or plain milk.

Calorie information

For the outlets within the qualitative research, 17% provided calorie information on their menus but only one outlet provided this information on their children's menu.

Only 2% of outlets within the quantitative research included calorie information on their menus, including their children's menus.

Meal deals

[2] A children's menu is an out of home (OOH) food or drink menu which is typically marketed to children under 12 years old.

When asked about the format of their children's menus, 44% of outlets within the quantitative research who offered a children's menu stated that they included a meal deal option. The outlets stated that their meal deals were generally in the form of a main meal, a dessert and a drink. They reported that sugar free juice/squash, water and plain milk were the most common drinks available within a meal deal followed by fruit juices/smoothies and sugary juice drinks/squash. Additionally, the outlets within the quantitative research reported that 61% of meal deals included the option of a portion of fruit and vegetables.

For all outlets within the qualitative research, 22% reported having a meal deal available for children. This usually included a main meal, side and a drink. Some outlets explained that due to wastage concerns they opted for non-perishable sides (such as raisins) instead of fresh fruit and vegetables.

Attitudes to the provision of healthy food

Outlets within the qualitative research stated that providing healthy food is not a priority for their business unless it is a priority for their customers, with only 26% reporting that providing healthy food was a priority.

Generally, awareness of recognition schemes[3] was low across the outlets within qualitative research.

For the outlets within the quantitative research, fewer than 1 in 3 outlets viewed recognition schemes as a benefit to their business.

The EOEW Framework and COP for children's' menus

The outlets were introduced to the high-level proposed principles of the EOEW framework and asked for their thoughts on the benefits, barriers and support required if they were to adopt the proposed principles.

For all outlets reducing food waste, local sourcing and ethical sourcing were deemed by far the most relevant and important principles of the EOEW framework. Conversely, the action on calories, portion sizes and increasing healthy choices were the principles deemed least relevant and important. The outlets within the qualitative research scored each principle based on how relevant it was to their business (see table 1).

[3] A scheme which rewards businesses with public recognition for their achievements and to encourage others to join.

Table 1 – The relevance scores the qualitative outlets provided for each proposed EOEW principle and their reason for each score

Proposed principle	Relevance Score	Reason for score
Action on calories	5/10	• This principle could be off putting for customers and as a result have a negative impact on their business. • Lack of time and knowledge needed to work out precisely how many calories are in the food. • time consuming for those with specials or frequently changing menus.
Action on portion sizes	5.5/10	• The cost of providing a half portion may not match the cost of the product. • Concerns that customers may opt for the smaller portion size over the larger one, leading to less profit for the business
Increase fruit, vegetables, fibre and oily fish	6.5/10	• Full-service restaurants found this to be of high relevance as they have more opportunities to increase the fruit, vegetable, oil rich fish and fibre content. • Those with more rigid and less diverse menus, such as bakeries, felt they would find this more challenging.
Reducing levels of fat, sugar and salt in recipes and pre-packed products	6.7/10	• The outlets reported that there could be concerns about increased costs for those who use pre-made products, and they worry that swapping for healthier options may increase costs. • Some see this principle as beneficial to them due to the rising prices of certain ingredients and so this would help them to reduce costs.
Promotions to support increasing uptake of healthier choices	5.4/10	• Outlets generally felt that this would be easy to achieve but some were reluctant due to cost. • Some highlighted that customer choice is out within their control, and they are unwilling to promote something if it is unprofitable for them. • Bakeries and takeaways felt their customers are not seeking healthier choices.
Action on increasing healthier choices	4.7/10	• They would need to see a change in demand before adapting their menu. • Some were already adopting characteristics of this principle, by offering salads and promoting healthy specials. • There was less relevance for those outlets who view themselves as providing a one-off treat or indulgence.

Reduced food waste	8.8/10	• All outlet types agreed that reducing food waste was incredibly relevant and important to them. • Concerns that adopting other principles could increase food waste e.g., increasing fruit and vegetable provision and healthier options and therefore make this more challenging.
Local and ethical sourcing	8.8/10	• Most would strive to achieve this; however, cost is the main barrier. • Outlets offering cuisines such as Indian and Chinese take-aways, would find it hard to maintain authenticity in their cooking using local ingredients so opt to purchase produce from global suppliers.

As a whole the outlets understood the significance of investing in children's health in order to prepare them for the future. However, for some of the outlets within the qualitative research they did not feel it was their responsibility to make changes. They felt the responsibility lies with parents and schools to teach children to make healthier choices.

Support required to implement the EOEW Framework and COP for children's menus

Quantitatively, outlets felt that the main support required would be funding, this is either direct funding or support through local suppliers to reduce the costs of healthy food items. Outlets within the quantitative research also stated that sector specific guidance and documents in accessible languages are the support materials which have the highest level of importance. This was followed by promotional materials that can be used by the outlet and an online support/dedicated support teams for those working towards the framework

Qualitatively, almost all of the outlets felt that the support provided needs to be simple. One of the biggest areas of concern for outlets was calorie calculation required to implement calorie labelling, with many feeling they would need support to do this.

Overall, this research indicated that 30% of independent OOH outlets in Scotland are likely to adopt the EOEW Framework and 38% are likely to adopt the COP for children's menus.

Conclusion

This research highlighted that there are areas within the OOH environment where improvements can be made to achieve a healthier eating out experience. High levels of deep fried food, pre bought products and menus which have limited fruit and vegetable inclusion highlight the need for the proposed EOEW framework and COP for children’s menus.

There is an understanding that the change to OOH menus is required, specifically for children's menus. However, for many outlets the EOEW framework does not currently feel relevant to them, and they are unsure what their role is in this, thus highlighting a need for OOH outlets to understand why the EOEW framework and COP for children’s menus is required, and what they can do to make a difference. Additionally, this research has provided important insight into the support that outlets will require to help them adopt the framework.

This research will be valuable for the further development of the EOEW framework and COP for children’s menus.

Glossary

Outlet Type	Example
Quick service outlets	Takeaways e.g. chip shops, Chinese and Indian takeaway
Daytime and retail-based outlets	Cafés, coffee shops, bakeries, grocery shops
Leisure based outlets	Pub hotel
Full-service outlets	Family friendly local Italian restaurant