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

Taylor McKenzie Research
December 2022 – February 2023

Food Standards Scotland

Public Health Scotland

TMcK
Taylor McKenzie
Research & Marketing Ltd.

Contents

Project Background

'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

Background to the research

As stated within the Scottish Government's Out of Home Action Plan, Food Standards Scotland (FSS) and Public Health Scotland (PHS) are working collaboratively to develop a voluntary Eating Out, Eating Well (EOEW) Framework to support 'out of home' (OOH) food outlets to provide healthier foods. The EOEW framework will include a Code of Practice (COP) for children's menus. The framework and COP for children's menus support the achievement of the Scottish Dietary Goals and the Scottish Government's (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.

Research aim

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

Who did we speak to…

Qualitative research

Taylor McKenzie conducted 23 x 1.5 hr in-depth interviews with SME (small medium enterprises) food outlets across Scotland.

Outlet Type

- 6 x 'Fast Food' e.g., chip shop owner, chicken shop, Chinese take-away
- 6 x Cafes / Coffee shops
- 4 x Bakeries
- 7 x Full-service restaurants e.g., family friendly local Italian restaurant

R6 Takeaway

R10 Takeaway (Indian)

R3 Coffee shop / Sandwich deli

R7 Coffee shop & Ice cream parlour

R5 Italian Bakery/Deli

R1 Family friendly pub

R2 Italian restaurant

R4 Restaurant

R13 Takeaway (Pizza & Indian)

R15 Takeaway

R11 Coffee shop / Sandwich deli

R20 Café

R9 Bakery

R8 Tourist attraction with restaurant

R12 Family friendly pub

R17 Scottish bistro

R18 Takeaway (Chinese)

R21 Takeaway (Chinese)

R19 Café

R22 Distillery cafe

R14 Bakery

R23 Bakery

R16 Italian restaurant

The questionnaire used for this section of the research can be found here.

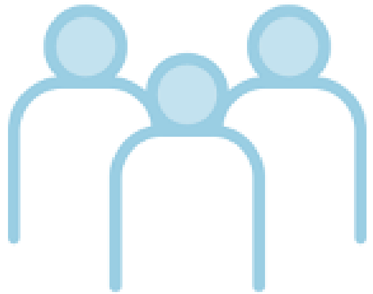
Who did we speak to…

Quantitative research

Taylor McKenzie contacted 3488 independent food outlets across Scotland.

A total of 243 quantitative interviews were conducted with independently operated out of home food outlets across Scotland.

All respondents were responsible for the design of their menu (chefs, owners and managers).



Interviews were self completed via a mix of CAWI (Computer assisted web interviewing) & CATI (Computer assisted telephone interviews)

Interviews took place between 18th January and 9th February 2023.

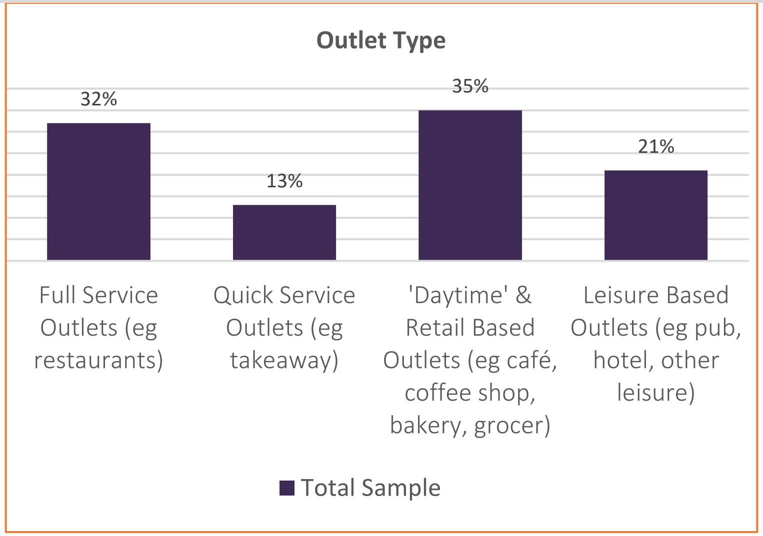
Interviews took an average of 28 minutes to complete.

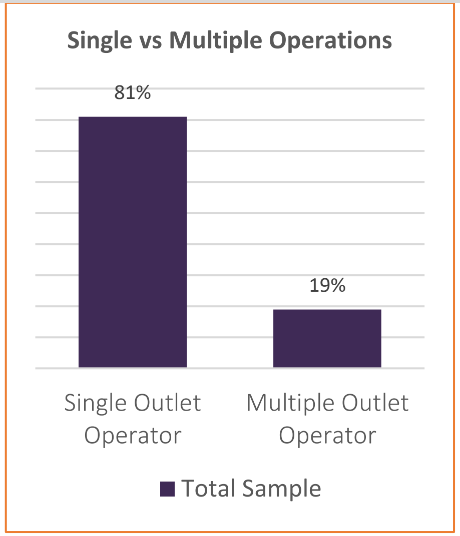
[The questionnaire used for this section of the research can be found here.]

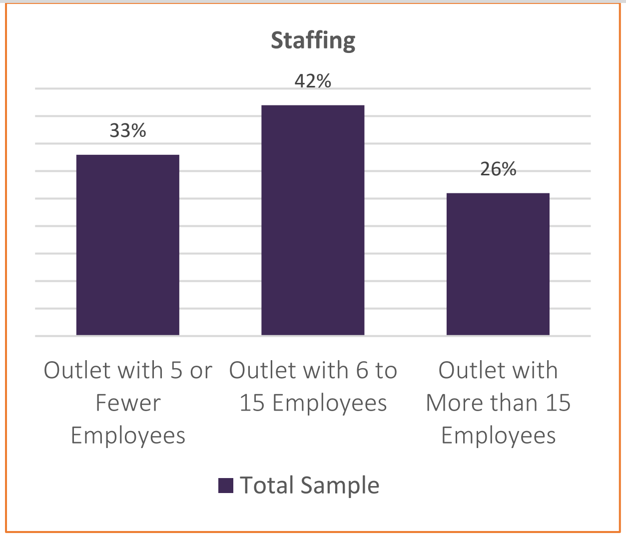
Who did we speak to… Outlet Profile

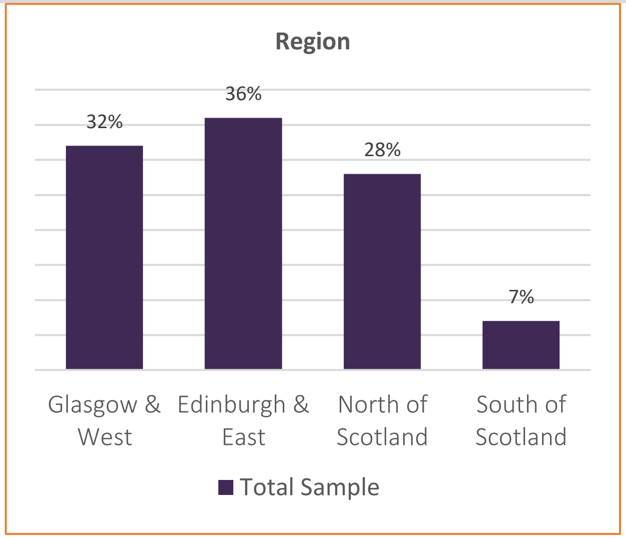
Quantitative research

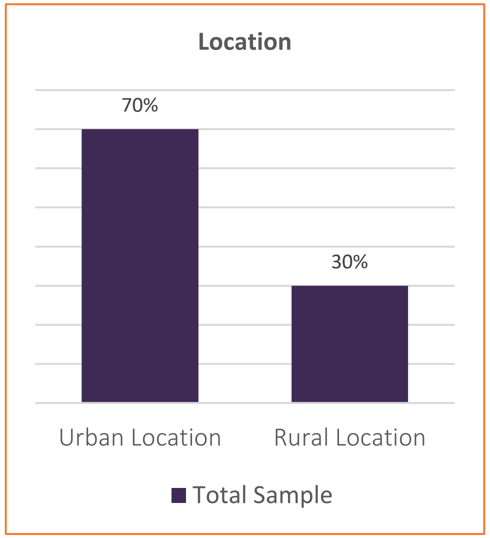
All respondents operate their business in Scotland and a mix of region, location type and outlet type was achieved. The % distribution of outlet types is unlikely to be representative of the Scottish landscape. We found it extremely difficult to engage with quick service restaurants in the quantitative phase . Mostly due to time pressure (on their side) and lack of interest in taking part.

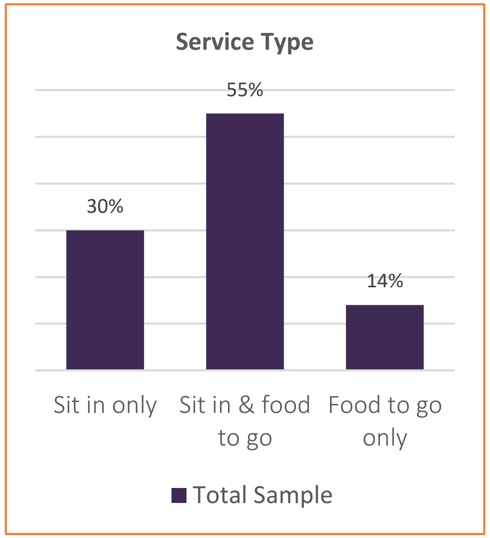


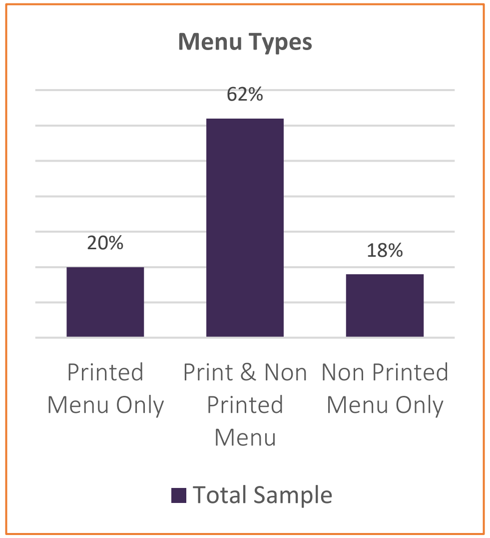


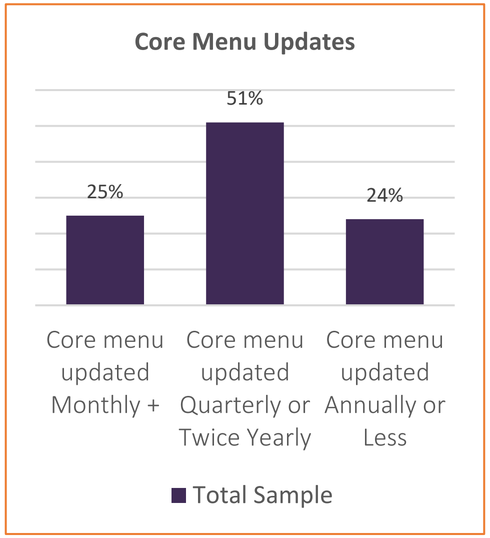


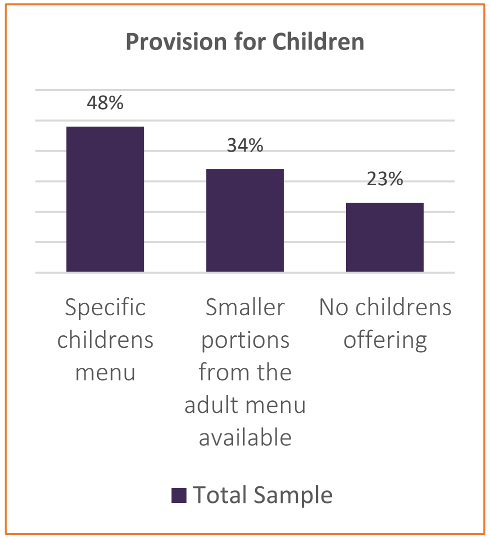












Current Landscape

The current financial and geopolitical climate is having a substantial impact across the industry

Qualitative research

Over the last 12 months there has been a significant amount of uncertainty for business within the food and beverage industry, because of this most have not been making significant changes to their businesses, instead the focus is on surviving these difficult times.

Main challenges currently faced by businesses:

- Recruitment
- Cost increases with utilities
- Increasing cost of supplies
- Supply chain problems – being let down by suppliers
- Changes to footfall – specifically in city centre venues
- Lack of trust in Government interventions for some (due to lock downs)

The economic impact of the last 12 months means customers have less disposable income and costs are rising all the time, this is impacting catering businesses' ability to plan for the future. Many are more apprehensive to make changes to their menu/business due to this uncertainty. They stick to what works.

"Main challenges are the footfall, the offices not being open meant that there was less office footfall compared with previously. December last year was destroyed with working from home 'rules', but we now have a lot more people coming in again."
(R20, Cafe)

"In the next 12 months we want to make more money and concentrate on surviving, the plan is to get through the next 12 months."
(R17, Full-service restaurant)

"Our revenue is up but all the costs are up too. "
(R4, Full-service restaurant)

There is significant anxiety around what the next 12 months will hold for the target audience. Most feel that in their current positions they are not able to plan big changes for the future, they are only focussing on survival.

Issues with supply chains are pushing businesses to look locally for produce…

Qualitative research

Almost all of the establishments spoken to in the qualitative research have had issues over the last 12 months with supply chains.

Off the back of Brexit and many ongoing worldwide supply issues, many feel that they are unable to access the products they have previously ordered at the same low prices

- Increased shipping/transfer costs are leading to higher costs of both pre packaged and fresh products.

Other pain points include delays due to issues with transport, which are leading to delays in product arrivals. Many feel that suppliers abroad are much more 'flaky' than before and can often run out of produce at the last minute or change what is available with little notice.

However, there is an opportunity for this to lead to increased local supply.

Due to issues with suppliers abroad many are looking to invest in local suppliers to resolve issues with supply chains. But some feel that local suppliers often have higher costs making them less appealing to smaller establishments.

"Price of stock in the last 12 months has gone up significantly - we used to get oil for £32 but it's gone up to £48. Local sourcing is hard for us, a lot of what we want we can't get."
(R18, Take-away)

"We have challenges with sourcing ingredients, both availability and increased costs of buying products, changes have been happening since Brexit."
(R23, Bakery)

Business owners are being pushed towards local suppliers due to increasing issues with importing products from overseas, many need support to access local produce and build up relationships to improve cost and reliability.

Consumer habits have changed in the last few years…

Qualitative research

There is a perceived shift in the way that consumers are eating out of home.

Many are seen to be ‘sitting in’ less frequently and ‘ordering out’ more than they have in previous years. Therefore, when they are dining out/visiting out of home establishments they are looking for a treat and often an indulgence. And when they are ordering out they are looking for increased value (typically achieved through higher volume or meal deals).

Due to ongoing issues with public transport there has also been a shift in the times that people are dining out, with visits to restaurants starting earlier in the evening and customers not staying as long, this is impacting profits as people are often not ordering as many drinks/courses.

This shift in habits is particularly evident when dining out in restaurants with children; families are dining out less often due to increasing prices. Therefore, on trips out they are less mindful of what is being consumed by their children. They are more willing to indulge experience for their family to guarantee a ‘happy time for all’.

“Coming back from covid has created a lot of change in habits. The elderly were forced to cocoon themselves; they are now starting to come out again. But there are significantly less people out late at night. The state of the economy is also a problem. Things were picking up, but the challenge is how to maintain with the financial concerns people will have.”
(R1, Full-service restaurant)

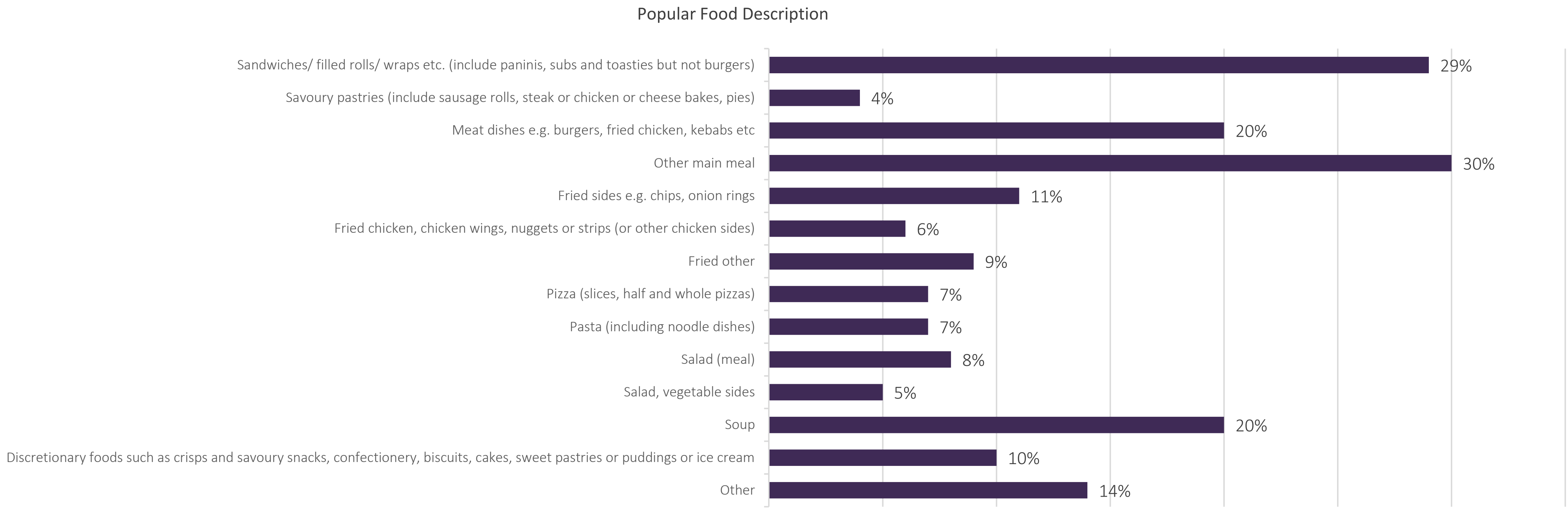
“When eating out it’s important that children are happy. It’s not an everyday occurrence so a treat is not such a bad thing. It’s only important that there is a choice. The parents are the ones to educate the child to make the right choice. I just want happy kids so if that’s chicken nuggets so be it.”
(Survey response, Full-service restaurant)

Changing consumer habits and the impact that the cost-of-living crisis is having on the industry is significant; at the time of reporting business owners are anxious of any change. The shift in consumer patterns and increasing costs across the industry means that most businesses are pushing to survive, not to make changes to their current models.

Menus – Popular Food Right Now

Quantitative research

The audience were asked in the quantitative research about their current menus and most popular items sold. The most popular food types were soup, chicken, fish, sandwiches, steaks and burgers, followed by chips.

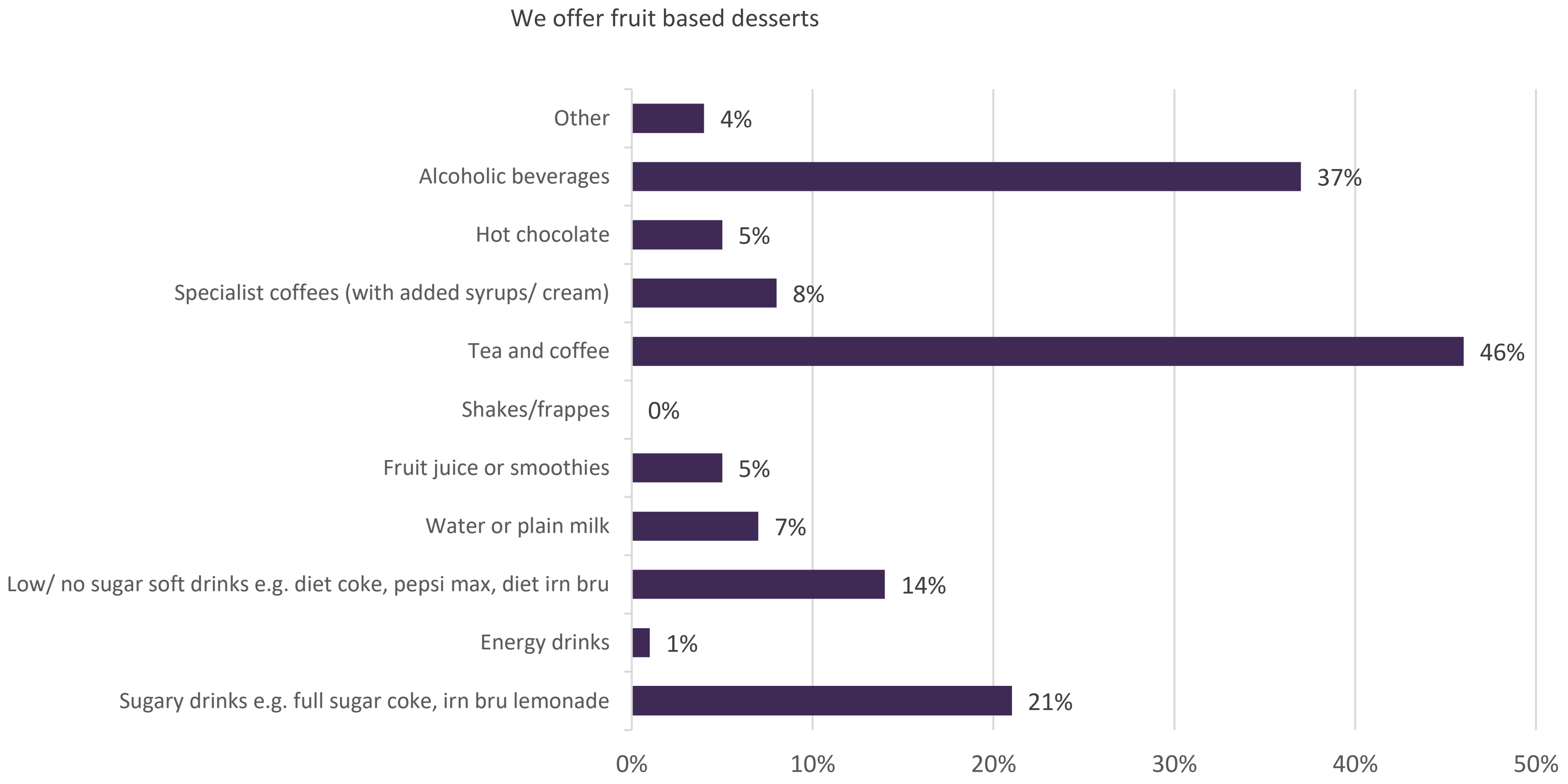


The 3 most popular food types (soup, chicken and fish) could be classed as healthy options, dependent on the method of cooking and other ingredients used in the final dish.

Menus – Popular Drinks Right Now

Quantitative research

The most popular drink types sold were, in ranked order, tea and coffee, wine, beer, sugary and diet soft drinks, followed by water and plain milk. Any mention of juice ranked lower on the list at #14 (and any mention of fruit juice at #29).

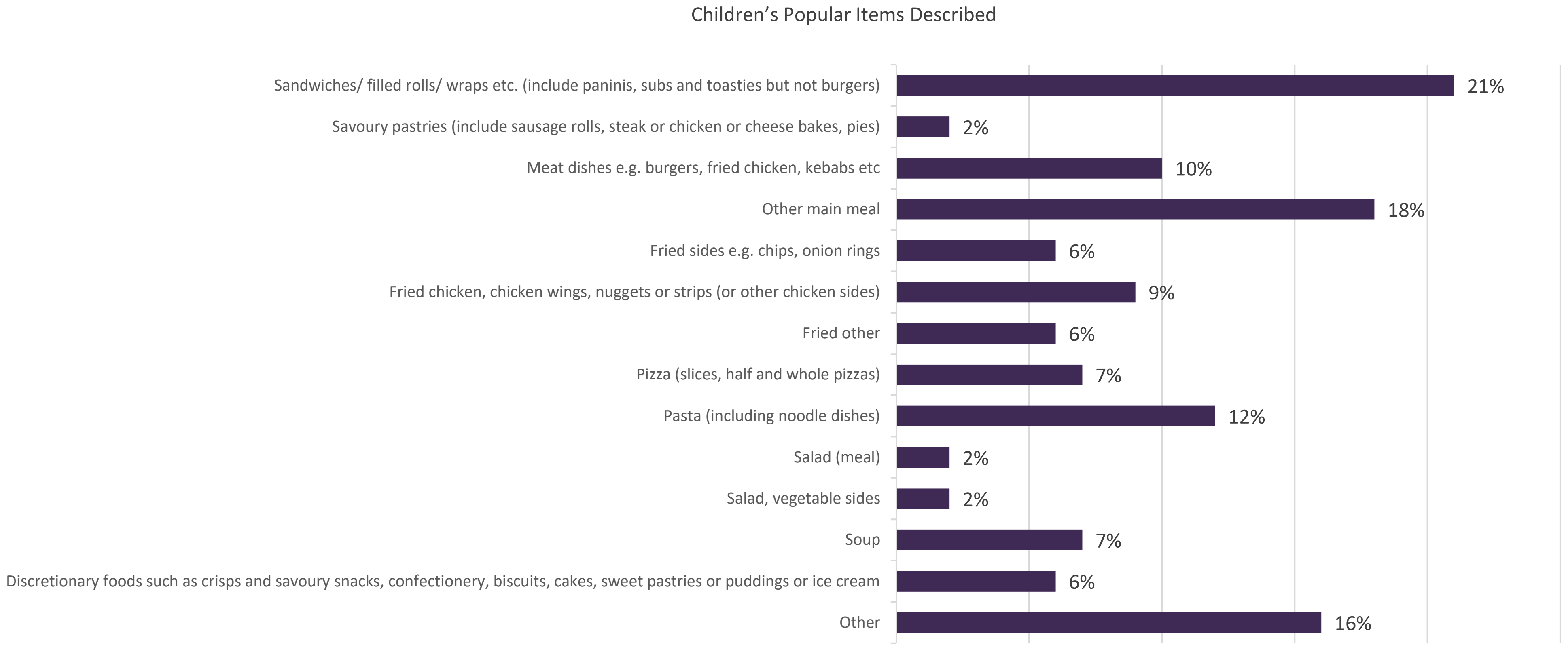


When prompted to describe what type of drink the most popular drink is, sugary drinks emerged in 3rd place after tea/coffee and alcohol.

Menus – Popular Food for Children Right Now

Quantitative research

The most popular children's items were: sandwiches, pasta, meat dishes (burgers etc), chicken, pizza and soup.

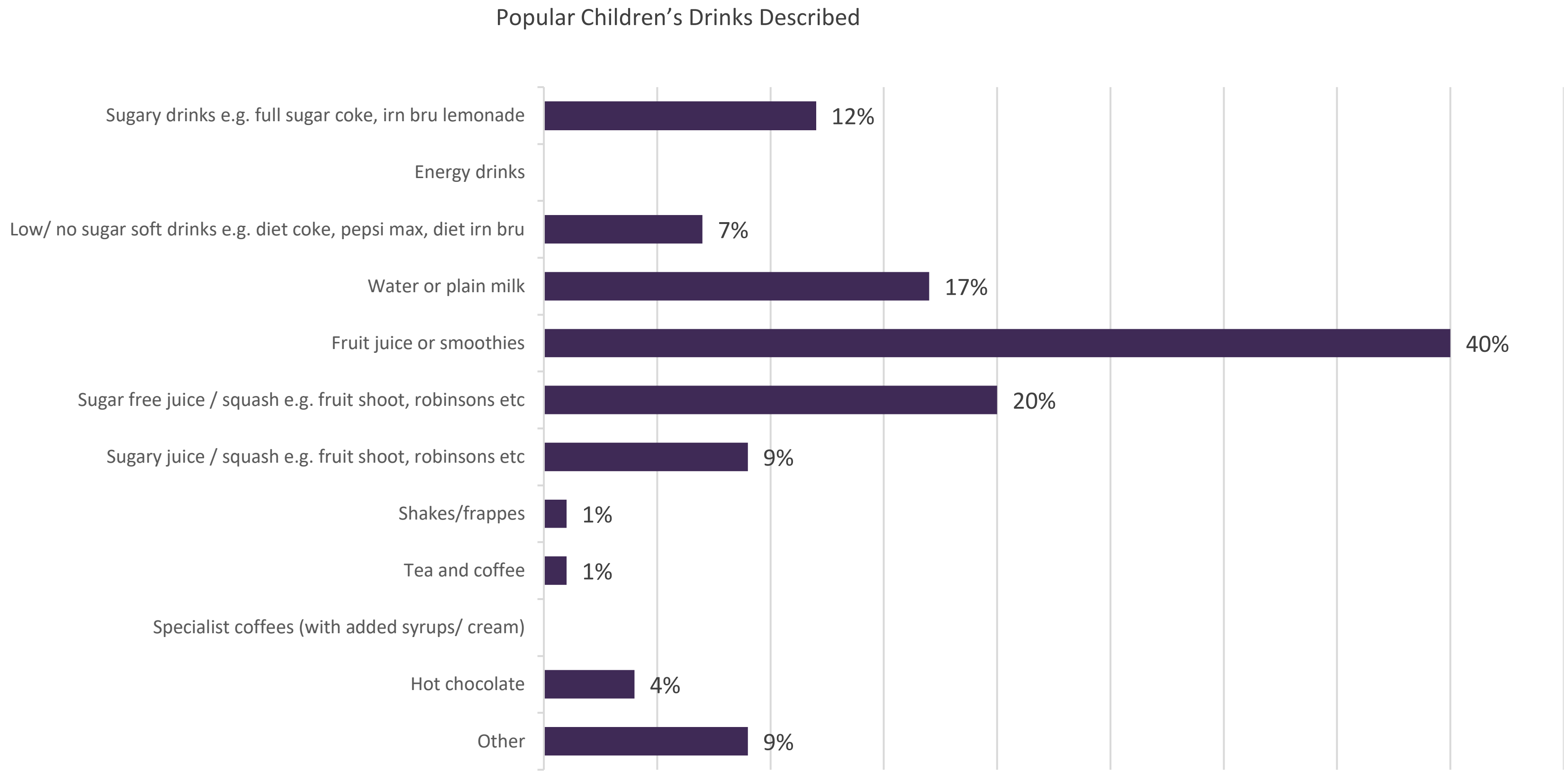


When prompted, 9% of outlets mentioned fried chicken, 6% mentioned fried foods that fell into the other category and 6% mentioned fried sides – this equates to almost 1 in 5 (18%) mentioning some kind of fried food as most popular for children.

Menus – Popular Drinks for Children Right Now

Quantitative research

The most popular drinks mentioned spontaneously for children were juice, fruit juice (especially apple but also orange), smoothies, squash (both sugar free and low/no sugar), water, milk and soft drinks (both sugar free and low/no sugar).



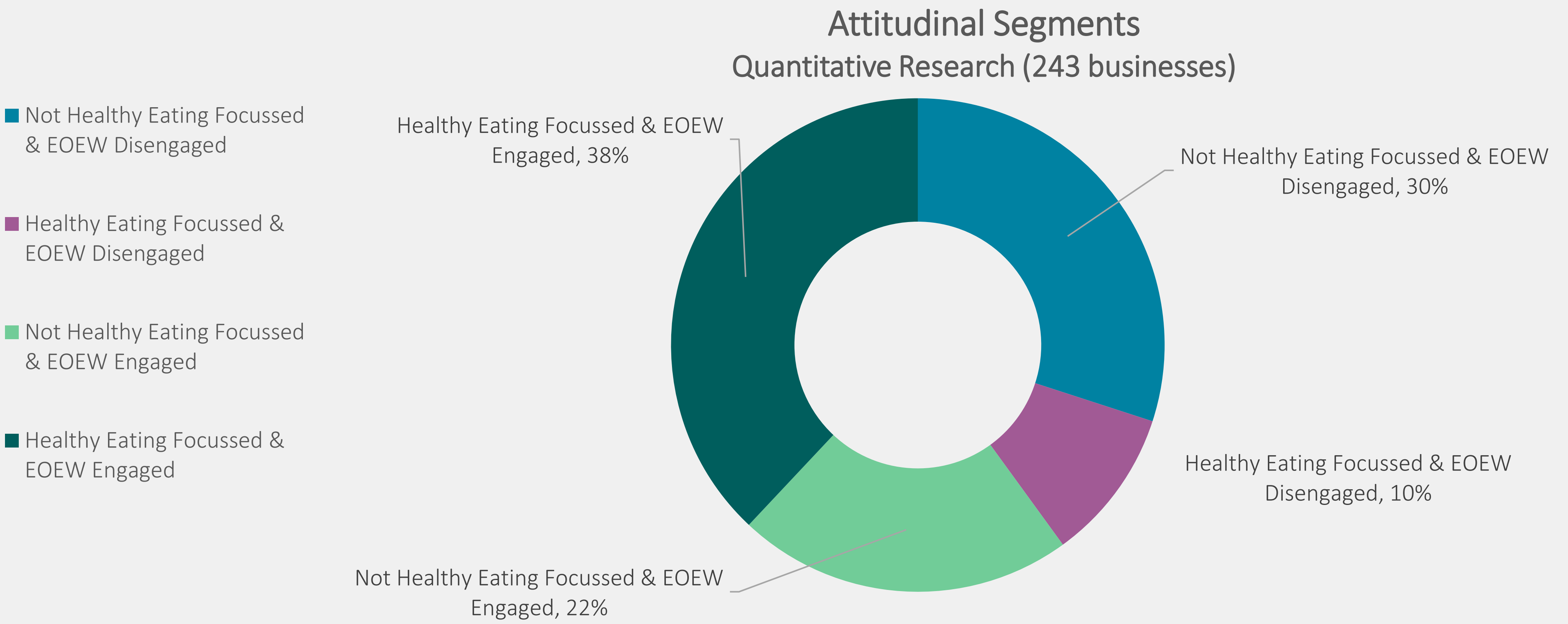
When prompted to define the type of drink most popular, fruit juice and smoothies were most common, followed by sugar free juice/squash and then water or plain milk.

Attitudes & Beliefs
Customer Segments

Attitudinal Segments

Quantitative research

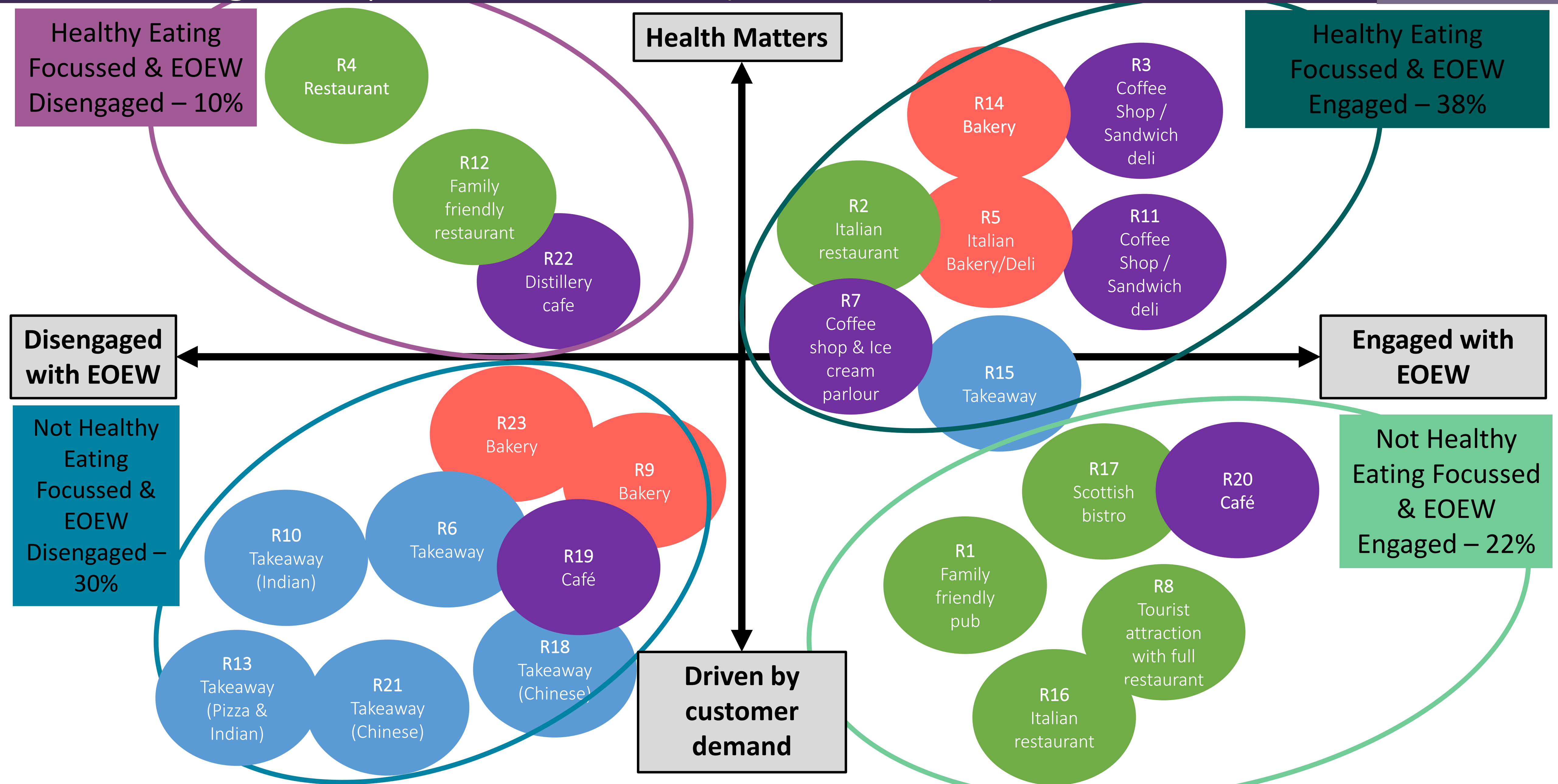
Based on their attitudes towards the food offering in their premises, healthy eating and thoughts about the EOEW framework, we identified 4 attitudinal segments in both the qualitative and quantitative research.



Overall, 48% of the businesses we spoke to quantitatively emerge as healthy eating focused in terms of their attitudes and 60% appear to want some level of engagement with the EOEW framework.

Defining the differences in the marketplace and bringing the outlet types to life through the qualitative research (23 businesses)

Qualitative research



Overall Audience Insights

Insights

Food businesses say they have a good understanding of healthy and nutritious food. Belief that customers are looking for an indulgent high-quality experience or looking for good value and big portions.

Regarding the EOEW framework itself, the most widely held belief is that for it to be successful, customers need to be made aware of it through advertising and this is closely followed by needing to see a clear business benefit for it to be considered.

Those who are engaged with the EOEW framework are more likely to say that they could offer a healthier menu if they had more support. Those who are disengaged believe they are limited on how healthy their food could be. Those not healthy eating focussed are more likely to say their current offering is working for them and they worry that adding healthier options could impact sales.

Those engaged with the framework are much more likely to see the potential business benefit from being part of it and the recognition it would bring (even on initial exposure).

Those disengaged are much more likely to believe they are far too busy to participate in a framework such as this and are extremely unlikely to see any of the benefits and hence are much less likely to be interested in finding out more.

Summary of key needs and opportunities for the segments

	Healthy Eating Focussed & EOEW Disengaged (Fine dining / local restaurants)	Not Healthy Eating Focussed & EOEW Engaged (family focussed / bar food / speciality food)	Healthy Eating Focussed & EOEW Engaged (Independent café / deli)	Not Healthy Eating Focussed & EOEW Disengaged (Fast food)
How does this segment define healthy food?	• High quality ingredients. • Locally sourced and fresh food. • A curated menu using seasonal ingredients.	• Not all fried food. • Vegetables included in offering/available. • Food that is low in calories.	• Home cooked/in-house meals. • 'Hearty' food with 'Good' calories. • Food containing few refined. ingredients/ingredients you can't pronounce.	• They define healthy food as 'not what they offer' and not what their customers want. • Currently see no demand for healthy food in their area so do not offer it.
What support does this segment need in order to implement EOEW?	• Education on how to make unique healthy meals using different types of seasonal produce. • Practical support for activation of regulations.	• Education on healthy alternatives to comfort food • Point of contact to help implement changes / educate • Help with suppliers to identify what is healthy	• Advice/recognition to show they are health conscious • Help with time-management for implementation – very time limited. • Advice on how to count calories, as they usually offer specials.	• Education/support on how to adapt their lengthy menus. • Financial support if change is applied and training is needed. • Sector specific guidance and in an accessible language.
How can the EOEW framework appeal to this segment?	• This segment are motivated by recognition, positive exposure is appealing. • Opportunity to develop a healthy and high-quality dining experience.	• Simple changes to menu to improve health without impacting offer – particularly through children's menu support. • Recognition of being healthy when most think they are not could help to boost sales. • If demand is not there they will revert back.	• They already regard themselves as healthy, they see this as a way for increased exposure for the quality food they sell. • If wastage is too high or it is too time intensive, they'll stop; already have low profit margins / other concerns.	• Huge worry they won't survive; will only change if mandatory. • Many admit that their food offer is a big part of the health issues being discussed. EOEW framework is unlikely to impact this groups offer in its current format.

Case Studies Per Segment

Healthy Eating Focussed & EOEW Disengaged

R4
Restaurant

R4 is the manager of a busy, high-end restaurant in a large city. He feels that the experience offered at his restaurant is an occasional indulgence. When visits to this restaurant are usually reserved for special occasions, his guests should be able to enjoy themselves without having to think about what is in their food.

“It’s an opportunity to not focus on being healthy for an evening. It’s a special night. So as much as we can have parts of the dish that are healthy, it’s an opportunity for folks to be forgetting about their diet.”

Supporting other local businesses is important to R4, therefore he aims to source his ingredients from local suppliers much as possible. Quality is very important to the restaurant, so selecting high quality suppliers is key to this.

“We’re quite happy to be supporting these local suppliers, because we think the quality is strong, we want to keep the money within Scotland, and we’re proud of the produce we have.”

Although he is open to providing healthier options, he is worried doing so may compromise the flavour of his dishes.

Starters

- Soup of the day (Vg) £8
  Cullen Skink - Smoked haddock, leeks, potatoes & cream (GF) £10
- Shredded five spiced duck, Stornoway black pudding, rosemary red wine jelly £10
- Pan fried scallops on veggie haggis, Arran mustard cream sauce £15

Mains

- Saddle of wild venison, caraway red cabbage, rosemary polenta, berry & Scottish gin jus (GF) £26
- Pan fried fillet of halibut, sauteed red onion potatoes, creamed spinach, scampi bisque (GF) £30
- Fillet of Scottish beef, veg gratin, sauteed wild mushrooms, port jus & crumbled goat’s cheese (GF) £38
- Pan fried collops of monkfish & king prawns, Bombay potatoes, butter masala sauce & coriander sour cream (GF) £30
- Whole grilled sole, tomato & tarragon butter sauce, pommes paille £28
- Roast chicken breast wrapped in bacon, MacSween haggis, sauté potatoes, haggis bon bons, peppercorn sauce £23

Children’s menu

Starters

Freshly prepared soup of the day
Smoked salmon salad
Garlic bread with cheese

Mains

Fish or chicken goujons with chips
Tomato & herb pasta
Mini fillet of beef & chips

Desserts

Fruit salad
Selection of ice-creams
Any small dessert from our A la Carte Menu

Healthy Eating Focussed & EOEW Disengaged - Motivations

R4
Restaurant

Being a premium restaurant, R4's chefs are knowledgeable and have exhaustive culinary training. If any training is to be suggested, it would surround the use of seasonal produce in healthy dishes, in order to maintain their current net profit and reduce wastage.

As a busy establishment, they would need advice and information about adoption of EOEW to be easily accessible, requiring minimal research from their end.

R4's restaurant is used to earning awards and exposure for previous recognition schemes. It leads to increased business; he is really motivated by continuing to get recognition and exposure. If he was able to gain another award or more exposure through this scheme, then he would be more driven to apply it in his restaurant.

R4 is in the segment most likely to adopt this healthy eating framework and sees it as an opportunity to evolve their high-quality restaurant into a healthier environment. With some training and guaranteed exposure, this should be a natural fit.

"The exposure would be good; the government are good at promotion of this sort of thing which would be good. Providing training isn't really that important. But a discount on seasonal fruit and veg would be brilliant."

"Everyone has thought about eating healthier to improve issues in society. Being a part of a movement. Being a part of this movement. We ran a program to allow kids to eat out during the summer holidays during lunch. It gave us great promotion and exposure. increased veg and fibre, policy cohesion and improved children's menu really work for us."

Not Healthy Eating Focussed & EOEW Engaged

R1
Family pub

R1 is 58 and the owner of a hotel with a full-service restaurant. Their offering is mostly traditional and hearty food in order to engage with any age or style of customer.

"We've got quite a broad range of customers in terms of the age group, I'd say we're more of a family-orientated business, than aiming at a narrower sector."

He is really interested in providing healthier options as he understand the importance of doing so, but he will need some guidance and support in order to implement any change.

"I like the idea of providing healthy food. If somebody could absolutely say: listen, here's a menu that's low in sugar content, low in calories but it's so appetising."

MAINS

SLOW COOKED PORK BELLY £10.95
Asian Salad, Mash, Spicy Rib Sauce

STEAK PIE £9.95
Seasonal Veg, Mash Or Fries

BELHAVEN BEST BATTERED HADDOCK £9.50
Fries, Mushy Peas, Tartar Sauce, Lemon

BREADED SCAMPI £9.50
Baby Leaf Salad, Tartar Sauce, Lemon, Fries

MACARONI CHEESE (V) £8.50
Fries Or Garlic Ciabatta Add Bacon £0.75

COD WRAPPED IN PARMA HAM £10.25
Baby Potatoes, Cherry Tomato, Green Beans, Basil Dressing

THAI RED CURRY CHICKEN £9.95 VEG £8.25
Rice, Shredded Veg Salad

PESTO PASTA £8.50
Mixed Olives, Cherry Tomatoes

PENNE ARRABIATA
Onions, Peppers, Basil

STICKY BEEF STIR FRY NOODLES
Shredded Beef, Shredded Veg, Sesame Oil, Sweet Chilli And Te

CHILLI CON CARNE
Rice, Sour Cream, Guacamole, Jalapenos, Tortilla Chips

STEAK SANDWICH
Toasted Ciabatta, Shredded Beef, Onions, Peppercorn Sauce, Fr

Childrens menu all £4.45

Macaroni cheese (v)
Battered haddock
Chips, mash, nothing
Scampi
Salad, veg, beans, nothing
Sausage and mash
Beans, veg, nothing
Breaded chicken goujons
Beans, salad, nothing
Burger
Beans, salad, nothing

Not Healthy Eating Focussed & EOEW Engaged – Motivations

R1
Family
pub

R1 is time poor, juggling the business and trying to keep afloat is taking up most of his time, the thought of adding an additional layer for him to think about is going to deter him from making changes and signing up to the EOEW framework.

R1 feels that he knows what works and what customers are looking for, for him, making significant changes that might impact customer satisfaction feels counter intuitive to running a business. He needs information about the benefits of EOEW, if there is no clear business benefit, he will not adopt the framework.

However, R1 understands the need for change, specially around childhood obesity he can see there is a problem that needs to be fixed. But he is lacking information and education in how to do this. Educating business owners, like R1 (and his staff), in how to offer more healthy options to customers is key, he is unlikely to spend the time researching this on his own, but he is open to learning more.

There are opportunities for the EOEW framework to be delivered to businesses with information on activation as well as education on healthy eating. Businesses such as R1s are lacking in time and the more information and education or training they can be provided with the better.

"At times we seem very much caught up and just trying to stay on top of what we're doing and trying to find time to come up with new ideas is fairly difficult."

"As a business owner you have a degree of responsibility to take care of your customers. I would like to give the choice of a healthy option. I want to look at the bigger picture. Obesity is a big problem. If there was a local and relatively short seminar with a respectable person in the field of nutrition and you can send your chefs for 2 hours with a recipe pack at the end of it."

Healthy Eating Focussed & EOEW Engaged

R5
Italian
Bakery/Deli

R5 is the owner of an Italian bakery and pizzeria, which she runs with her son. She is proud to source fresh, local ingredients, and everything sold is homecooked and in her eyes is healthy.

"I think healthy if it's cooked fresh, with proper ingredients… it makes me feel proud of what I do. Happy. They can trust it."

As everything she sells is made from scratch, she feels it has more health benefits than processed, storebought food. She believes that it is refined ingredients going into other products causing issues with diets.

"You pick up a pizza in a supermarket and it's got like 2000 calories, what are they putting in that pizza? Pizza is just a piece of bread… These manufacturers that are making all that stuff is causing the problem."

She believes that people will choose what they want to eat, not what they are told to. She sees any health-related changes as being a waste of time and is reluctant to invest in these changes.

"If people go out and order all that food, they are going to do that. I don't think by forcing or implementing other things will you change how people think. It's education to families and how to cook."

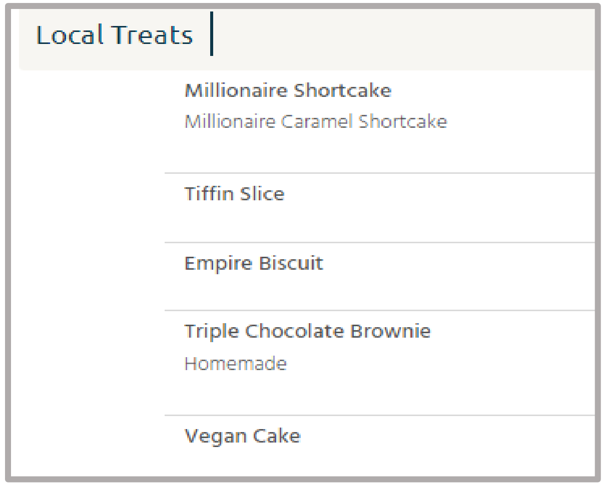

Ciabatta & Focaccia | All Toasted.

New York Pastrami Ciabatta
Pastrami, Jarlsberg Cheese, Dill Pickle & American Mustard.
Regular

Cardenali Ciabatta
Ham, Mushroom, Mozzarella & Mayonnaise.
Regular

Vegan Italiano Focaccia
Artichokes, Sun-blush Tomatoes, Black Olives & Sugo (italian Tomato Sauce).
Regular

Mozzarella Vegetale
Mozzarella, Fresh Basil & Tomato, Pesto (no Nuts), Avocado & Sugo (italian Tomato Sauce).


Local Treats

Millionaire Shortcake
Millionaire Caramel Shortcake

Tiffin Slice

Empire Biscuit

Triple Chocolate Brownie
Homemade

Vegan Cake

Healthy Eating Focussed & EOEW Engaged – Motivations

R5
Italian
Bakery/Deli

As R5 already views her venue as providing healthy food, little change would be needed in terms of what she sells. The main barrier for her would be how to advertise themselves as healthy, as well as the time taken for training and to implement necessary changes.

As a small business with limited staff and low profit margins, she would be looking for options which are time-efficient and low cost. She worries if she adopts the framework, she will require another member of staff to implement it properly, specifically in relation to calorie counts and labelling. With daily specials and frequently changing menus, advice and training would be much appreciated and essential in order to support here.

She is very keen to showcase how healthy her establishment is and looks forward to the positive recognition it could bring. However, if she does not see direct benefits in sales or if wastage is too high, she would have to stop as her profit margins are already tight.

"I would look at what extra time it would take… It needs to be easy… An extra member of staff who did this. If I could personally feel like I could implement it then yes, I would do it. "

"If its being promoted and talked about and advertised. If it was visually available with labelling and packaging…. I would value the advertising it provided. Make it an easy system for labelling. If they would come into the business and show how it could work maybe? Or just have a chat."

Not Healthy Eating Focussed & EOEW Disengaged

R9
Bakery

R9 owns a bakery which specialises solely in decadent cookies and house brand coffees; which she has run with her boyfriend since 2021.

She is personally very aware of healthy eating and the benefits of calorie-controlled diets. However, the cookies she provides are seen as a one-off treat and an indulgence by her customers.

"I am a healthy person, but we see our product as a treat, as a dessert. Its like a weekend treat. People tell us it's a special treat. An indulgence. Not something to eat everyday. Its never going to be a healthy product. It's aimed as a once in a while treat."

There has been no demand from customers to provide healthy alternatives to their products, she is concerned that if they started to promote healthy options, people would be less likely to treat themselves to their cookies. So, unless it becomes mandatory to change the way they run their business, they will be highly unlikely to make any health-related changes.

"Showing we had an alternative lower fat or lower sugar option could be interesting. Its just not what we do though."

Cookie 1
White & milk chocolate chunk cookie dough with Kinder chocolate. Stuffed with Kinder Bueno & Kinder spread. Topped with a Happy Hippo. Contains nuts
£4.50

Cookie 2
Red velvet dough with Oreo chunks, milk chocolate chunks & white chocolate chunks, stuffed with a Double Creme Oreo & and a cookies and cream filling and topped with Hershey's
£4.50

Cookie 3
Milky Way dough with chocolate chunks, Magic Stars & Milky Way biscuits. Stuffed with half a Milky Way & a whipped milk chocolate ganache. Topped with Magic Stars.
£4.50

Cookie 4
Biscoff dough with white chocolate & Caramilk chunks. Stuffed with a Biscoff Sandwich Biscuit & Biscoff spread and topped with white chocolate, more Biscoff & a Gold Bar
£4.50

Not Healthy Eating Focussed & EOEW Disengaged – Motivations

R9
Bakery

R9 is very set in her ways so is reluctant to make any changes as she knows what she currently sells is what her customer wants. Unless, her customers show an interest in healthy products, or it is made mandatory it will be avoided.

If this happens, she will need education on how to adapt her current menu to contain healthy alternatives that customers will enjoy as much as her current offerings, whilst monitoring wastage. R9 would also benefit from having a point of contact to help implement changes as it would be very different to what she is used to.

She knows the importance of providing health information, but would find it an annoyance, so anything she can receive to alleviate this added stress would be welcomed.

Currently, the public view R9's outlet as unhealthy, so if she is to implement changes it would be good to receive some recognition in order to boost sales among the health conscious.

"The thing they have done with the calories in the bigger outlets is something that's quite good. These things are a real hassle, it's so hard to adapt properly to the 'stick' approach. Our product works for us so unless it became compulsory, we would not have it."

"Unless they said it was something you had to do, I would not even bother. Unless it was mandatory. If it did happen and it was successful, it would be down to the public really, what they would want. "

Not Healthy Eating Focussed & EOEW Disengaged

R13
Takeaway
(Pizza &
Indian)

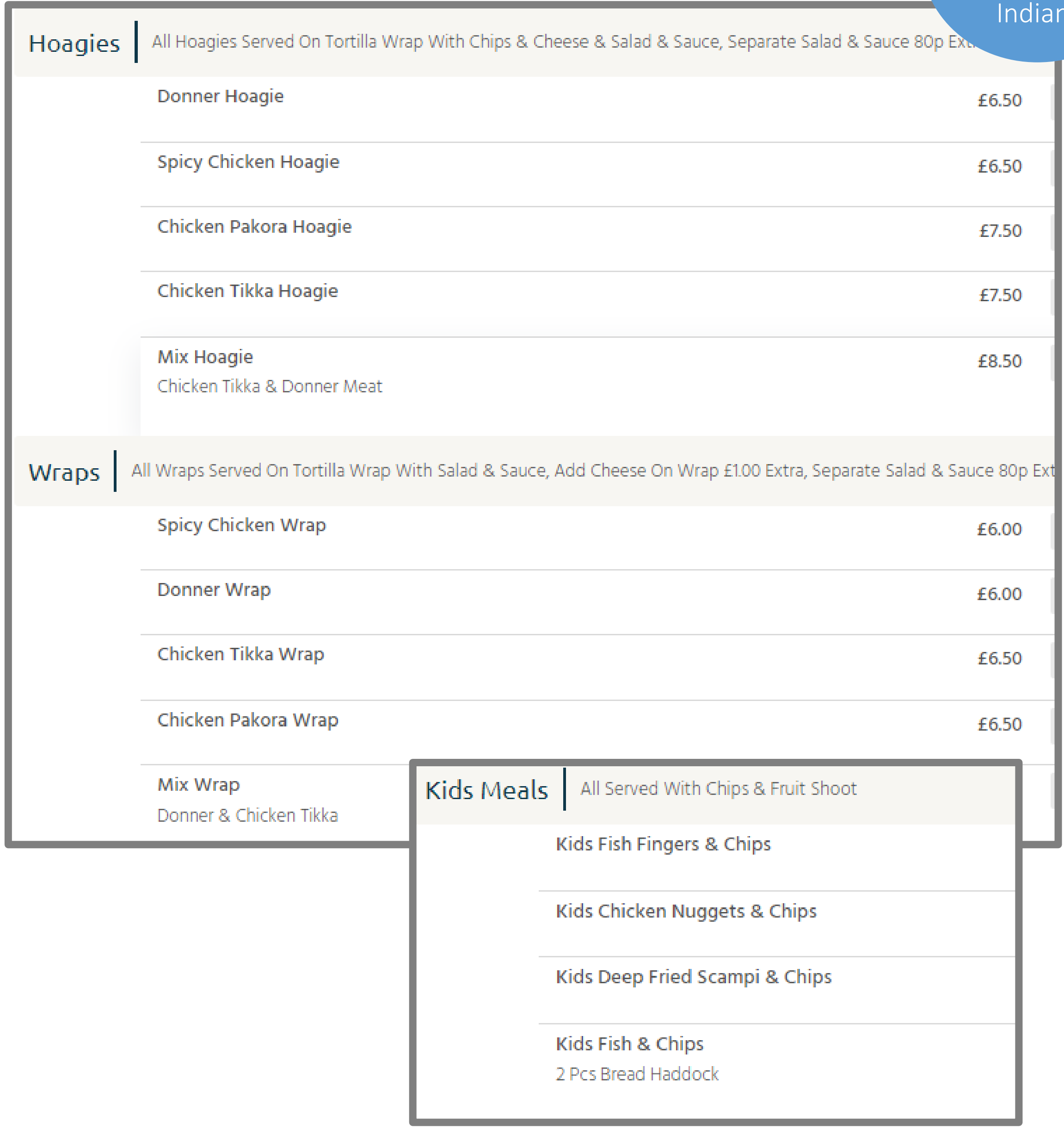
R13 is an owner of multiple fast food takeaway outlets across Scotland. He is very focused on providing what his customers want, as this in turn leads to more success for his business.

"Across all our places, we just don't get asked for healthy food for themselves or the kids. People just don't want healthy food... it's more or less the convenience of fast food. We're not gonna get a customer standing there for 15-to-20-minute waiting for it to be oven made."

He does not feel that there would be a benefit to him to add calories to his menu, he is reluctant to change the portion sizes and content of his dishes. He also feels that due to the size of the menu it would be time consuming to find all calorie counts.

"We have put 215 items on the menu, which is a bit much to then have calorie counts beside it. so, then you're not gonna have a menu, because then you'd need to fold it over double sided."

He admits that the style of his restaurants are a major contributor to poor diet, due to over 60% of his offerings being fried. However, unless introducing any healthier changes will guarantee to bring in more profit for his business then he is not interested.



Not Healthy Eating Focussed & EOEW Disengaged – Motivations

R13
Takeaway
(Pizza &
Indian)

R13 is included within the most reluctant segment for adopting this framework. Cost is of huge importance to him and his business so he needs to be sure that there will be notable benefits before he considers looking into it.

He would be unlikely to adopt unless mandatory, if this happens he will need education on how to adapt his menu to include healthier measures and how to show his customers that his offerings are still desirable.

Money is a huge motivation for R13, but he is worried about the increasing costs and the repercussion this is having on his business. He would need to be reassured that there will either be incentives for adopting the framework, or compensations for food that is wasted. He needs to know what's in it for him. Monetary incentives are more important than those based on awards and recognition, he is already busy so doesn't require this to strengthen his business nor do his customer's care.

Managing R13's worries is a huge driving force behind implementing the framework correctly. He needs to be reassured that his business will survive, and assured than any negative impact on sales will be recuperated. Driving change here will be vital in addressing the targets set out in the Scottish Government's action plan. In its current format the voluntary EOEW framework will not achieve the change required.

"All the costs are going up. It wouldn't work in the chippy; it would work well in a new fast-food place with a kid's menu. Staff are an issue; you are paying people through the roof just to get them in. Gas and electricity going through the roof"

"The kids menu thing could work but we would need some help, we could always do something like that. If we got help or an incentive to do it, then I would but I don't see it happening."

Reward and Recognition Schemes

There is low awareness of reward and recognition schemes generally

Qualitative research

Qualitatively the audience were asked to rate their awareness of some current recognition schemes, generally awareness is low across all businesses spoken to. There was slightly increased recognition when they were shown the logos, but this was limited. When pressed, a few were able to identify industry awards such as Scottish Italian Awards or Best Indian Awards, these were viewed with some cynicism.

Perceived benefits of these schemes:

- Improved standards across the sector
- Customer reassurance
- Accountability
- Pride in their offering
- Increased friendly competition between businesses

Perceived barriers to adoption of schemes:

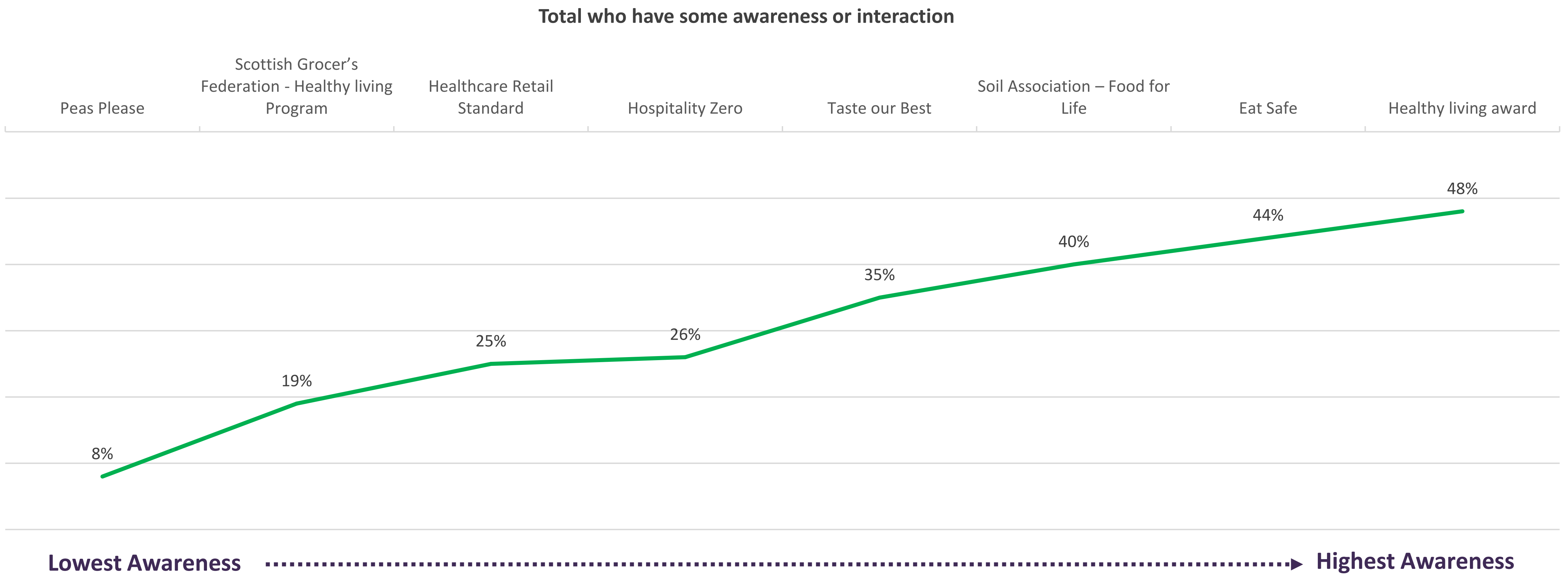
- Time taken to apply
- Cost of application
- Potential changes they would be required to make
- Potential damage a low score could give the brand vs competition (e.g. bronze and not silver or gold)
- Cynicism of the benefits – what's in it for me?

Insight: There is a very limited appetite among this audience for voluntary frameworks, mostly driven by how busy they are on a day to day basis, with this 'sort of thing' being very low on a long list of priorities. Lack of awareness of the schemes themselves and uncertainty around benefits are also driving factors.

Recognition Schemes - Awareness & Interaction

Quantitative research

Very few outlets currently hold any recognition scheme awards.

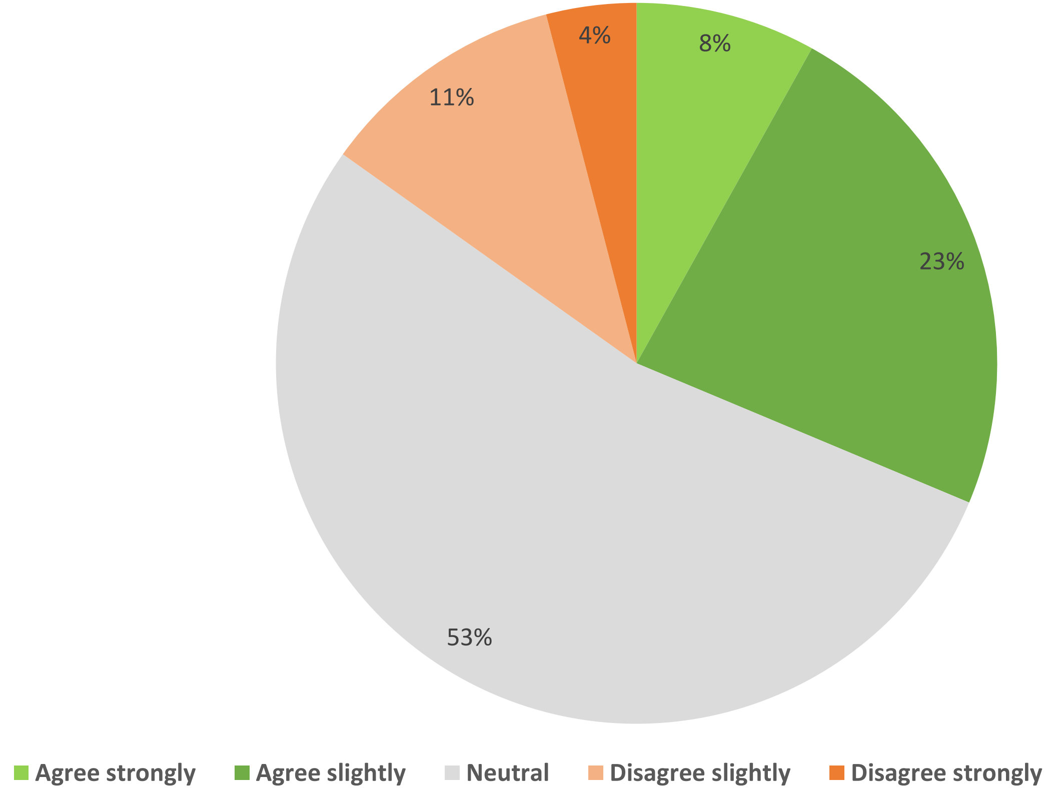


Positively, the scheme with the highest awareness is the Healthy Living Award (which is no longer operational), there is a potential opportunity to learn from the successes of this award when launching the EOEW framework.

Recognition Schemes - A Benefit?

Fewer than 1 in 3 outlets view recognition schemes as a benefit and this is likely to be as a result of low levels of awareness/participation.

Attitude Towards benefits of Current Schemes
How much do you agree or disagree that:
"They offer a clear benefit to the businesses that can sign up to them"



% Agreeing 31%

% Disagreeing 15%

Seeing the benefits is much less likely for quick service outlets and those where deep-fried food accounts for more than 20% of the food sold. Clearly showcasing the visible benefits of the new scheme will be critical.

There are two clear (voluntary) drivers of changes for framework/award adoption, with the other being mandatory regulation

Qualitative research

Voluntary Drivers for change

We are doing this to showcase our food / standards

- The EOEW framework must work to demonstrate the quality of the venues who sign up
- Can we allow the EOEW framework to showcase the healthy food in each venue in a tailored fashion?
    - One size won't fit all venues

"It's like Michelin or rosette, people want them as people recognise them, it's a sign of quality. I think people are trying to clean up the business and industry so more schemes being set up to hold people accountable."
(R20, Café)

Increased customer demand for…

- Vegan options
- Gluten free
- Child friendly meals
- ½ portions for particular groups
- Smaller portions for kids
- Healthier 'junk/comfort food' (although not currently in demand)

"Time and energy are the barrier - reward not worth the effort for us."
(R17, Full-service restaurant)

Mandatory Regulation

There is a precedent…

- Allergy based advice (Natasha's Law)
- Calorie information (bit of confusion around what is mandatory)
- Removal of polystyrene and other single use plastics (additional costs)

"I think education and reassuring customers that we are doing these things."
(R18, Fast food)

Insight: Small businesses are looking for a framework that can be tailored to their needs, and one which is matched by customer demand. They are unlikely to spend time and money on changes where there is no customer demand; unless these are enforced regulations.

Outlet Menus

Healthy catering isn't a priority for establishments, unless it is a priority for customers…

Qualitative research

For the majority of businesses spoken to in the qualitative research, healthy eating is not a priority, this is driven by customer demand. Of the 23 venues spoken to, only 6 agree that healthy eating is currently a priority for their establishment (scoring this a 7/10 or higher).

The establishment scores are only likely to be altered if there is a significant change to customer demand, which most feel is not likely to happen any time soon. Specifically for the disengaged outlets, such as takeaway outlets (e.g., Chinese, Indian and Pizza) and the 'fine dining' establishments. These outlets feel that when people visit them it is with the understanding that what they consume is not healthy but, for most, it is a treat and a rare indulgence.

"Healthy catering is a priority for my establishment."

4.9/10

"Our occasion is an opportunity not to be totally healthy for a night. An opportunity for people to indulge."
(R4, Full-service restaurant)

"It's not a priority for us to offer healthy food because of the audience; they want unhealthy food."
(R8, Cafe)

"The people I am dealing with… It's not about the nutrition. It's about how much is it and can it fill my kid's belly. "
(R6, Cafe)

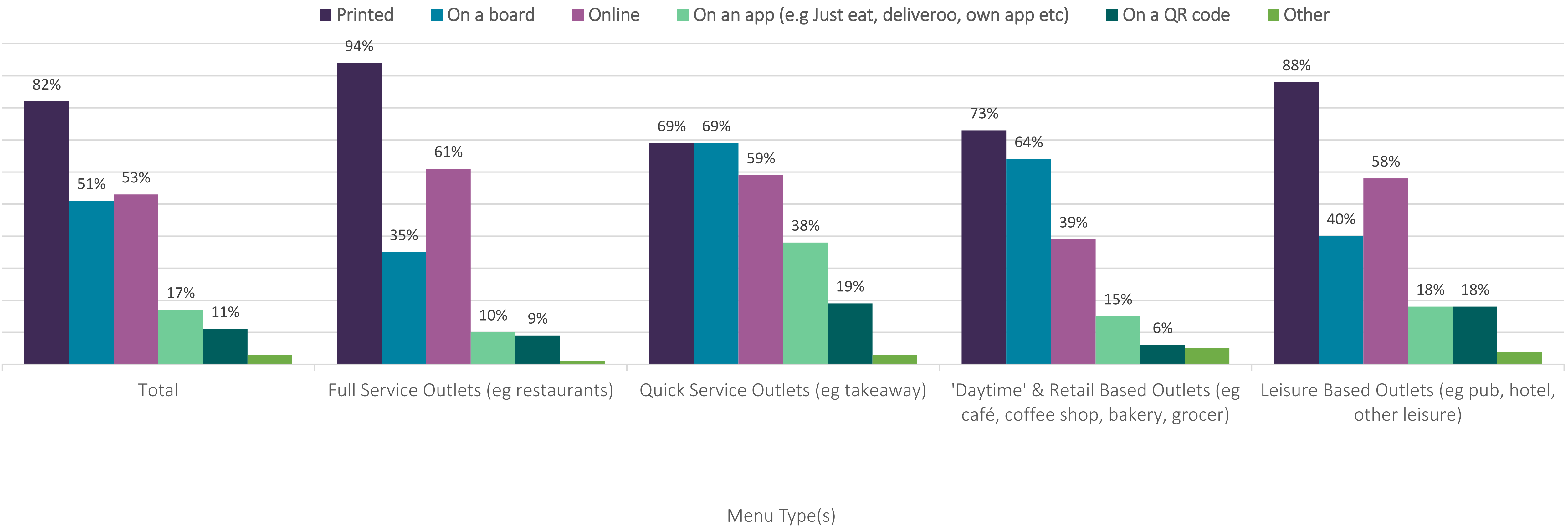
"I am a healthy person, but we see our product as a treat, as a dessert. It's like a weekend treat. People tell us it's a special treat, an indulgence. Not something to eat every day. It's never going to be a healthy product. It's aimed as a once in a while treat."
(R9, Bakery)

Insight: For most, healthy eating is not currently a priority at their establishment. This is something they do not foresee changing any time soon. However, there is agreement that awareness around healthy eating is starting to have greater focus more generally, particularly in more affluent communities.

The Menu – Type of Menu(s)

Quantitative research

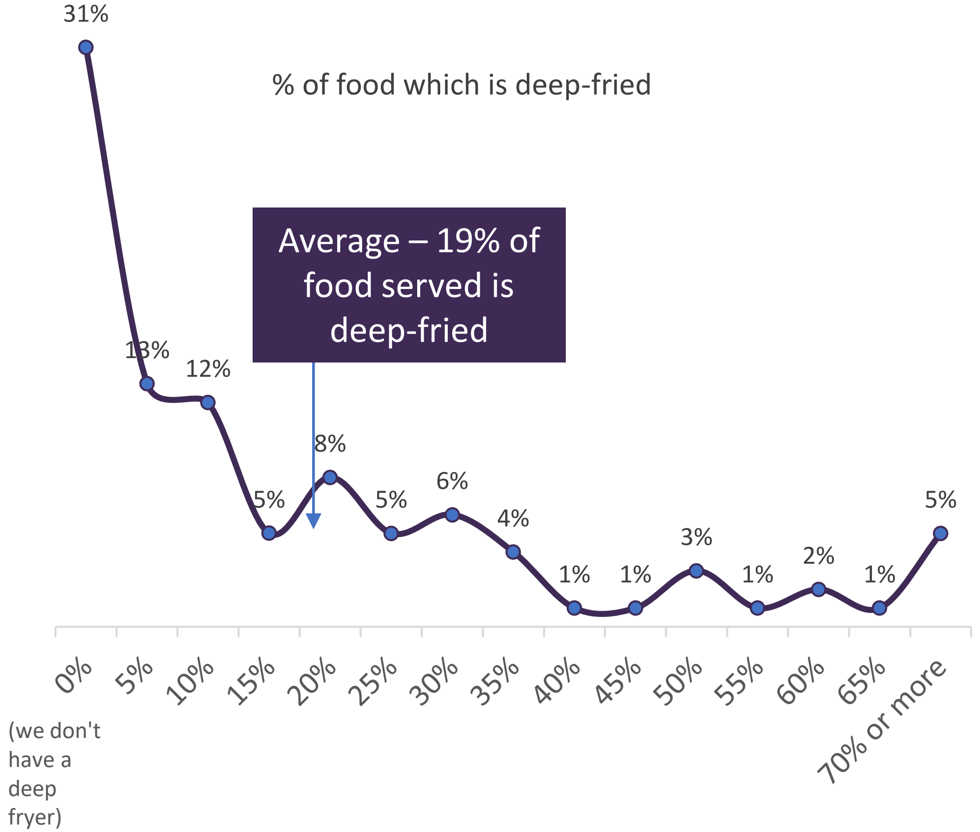
Most outlets have a printed menu, around half have a board and around half an online menu. Just under 1 in 5 outlets use an app and just 1 in 10 a QR code.

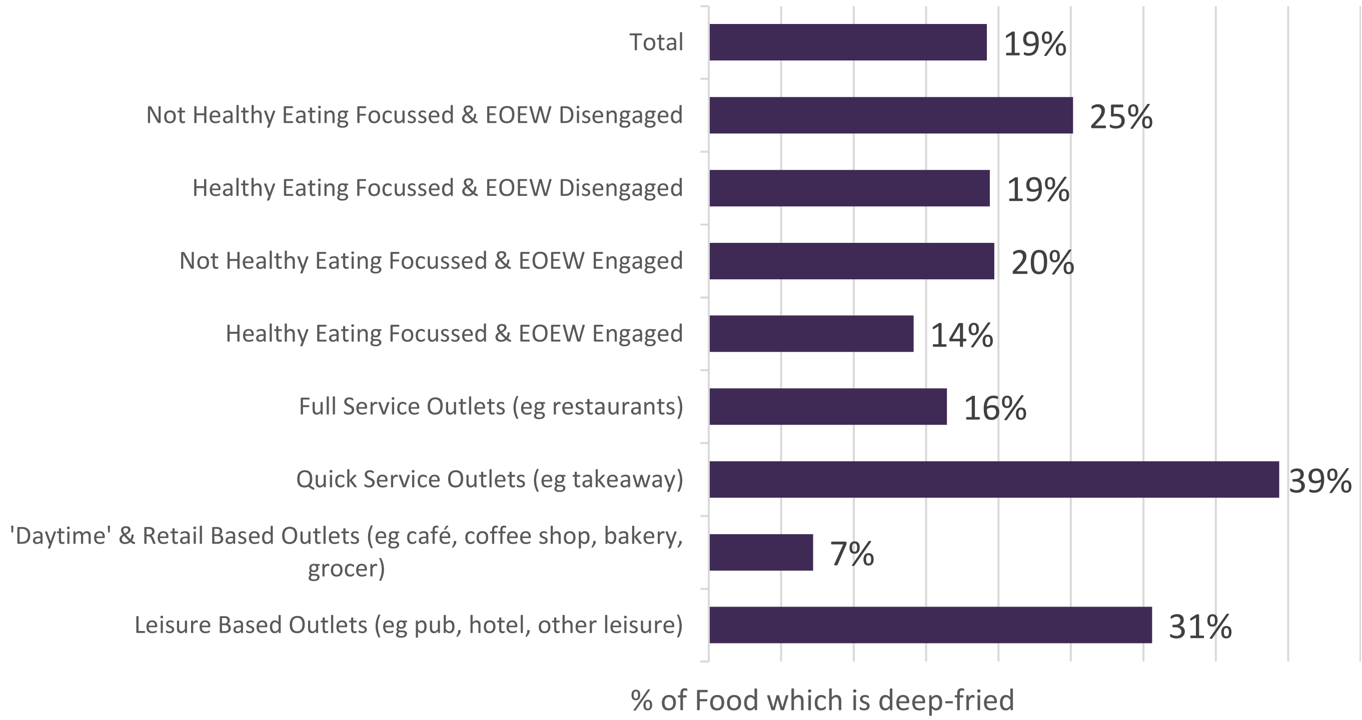


The Menu – Deep-fried Food

Quantitative research

For just over 1 in 10 outlets (12%) deep-fried food accounts for at least half of the food sold but overall, on average across all outlets, 19% of food sold is deep-fried.



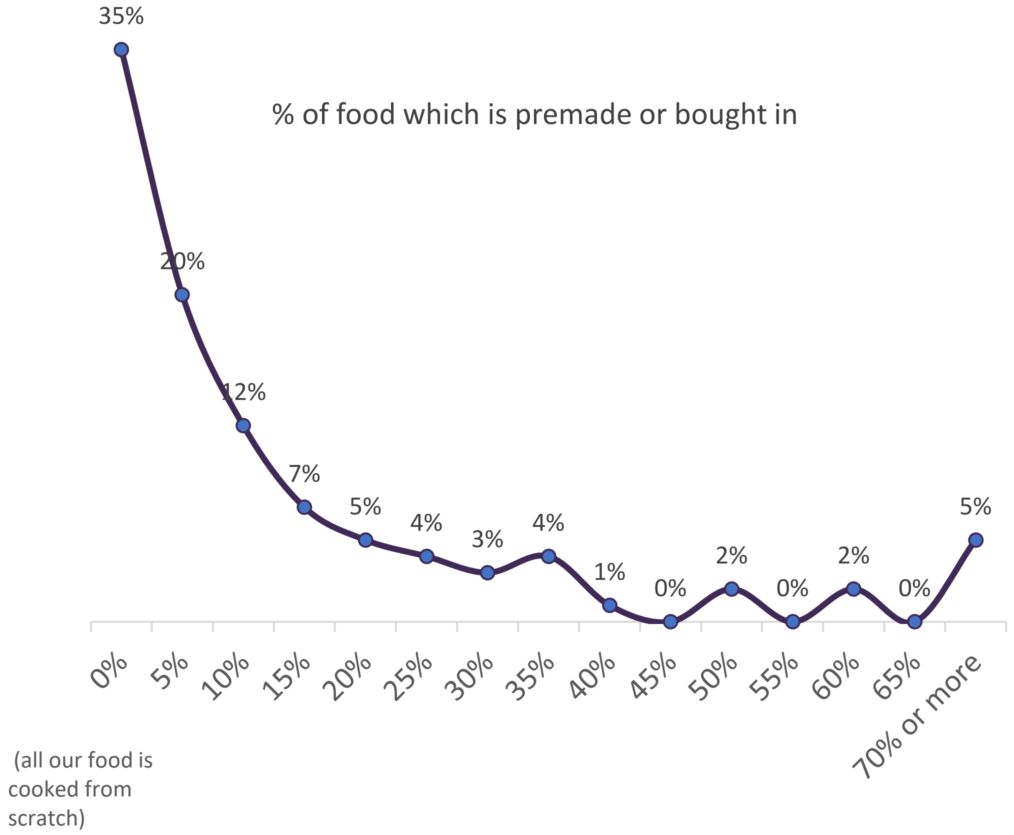


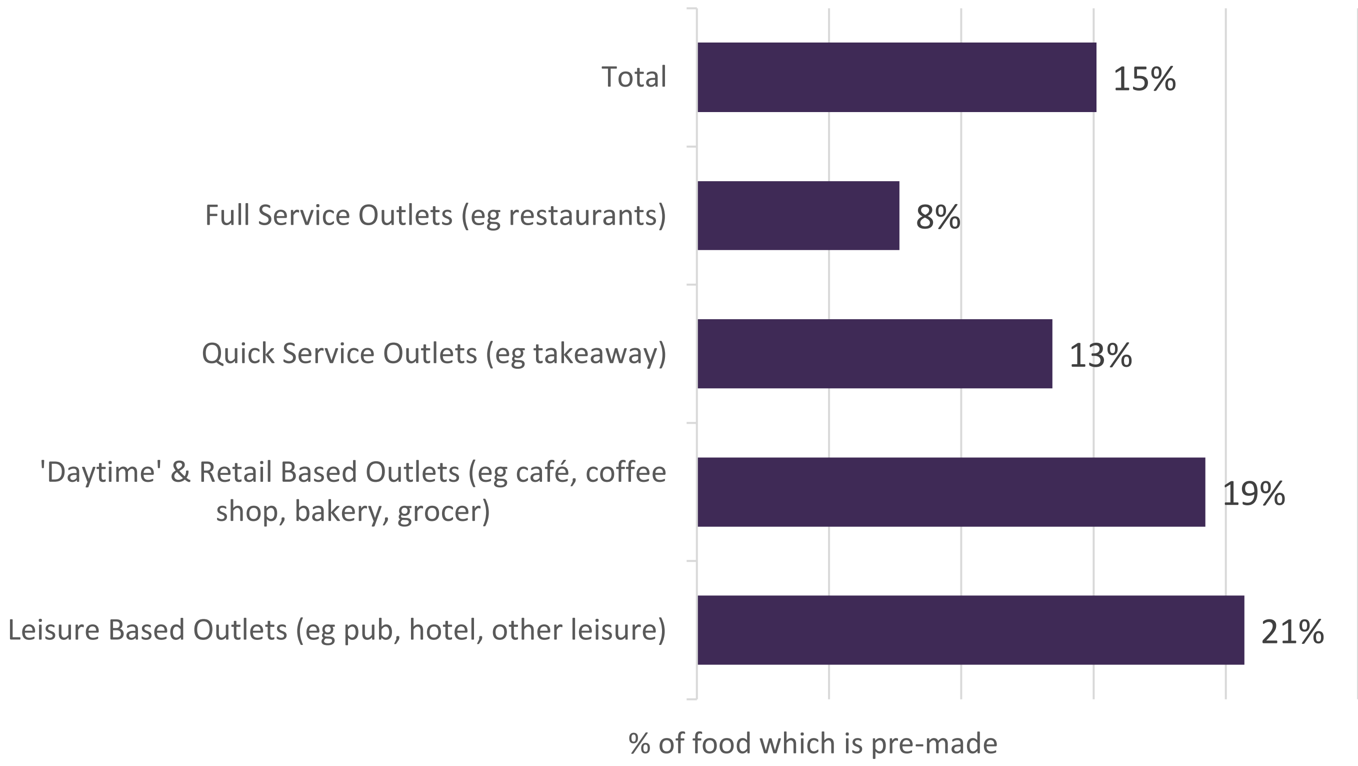
The levels of deep-fried food vary. Daytime & retail based outlets have the lowest levels at just 7% on average but Quick service outlets (i.e. takeaways) have an average of 39%.

The Menu – Pre-Made Food

Quantitative research

35% of the outlets spoken to stated that 0% of their food is premade or bought in, and all food is cooked from scratch, on average, 15% of food served across all outlets is premade or bought in (i.e. not scratch cooked).





Full service restaurant have the lowest levels of premade or bought in food at just 8% of all food sold while Leisure Based Outlets have the highest at 21%.

Current Main Menu Offerings

Qualitative research

The qual audience were asked a series of questions about their current menu offerings:

Calorie information

Only 4/23 of the venues spoken to currently include calorie information

- 2 Bakeries
- 1 Takeaway
- 1 Café – but only on a small section of the menu which is pre-packaged

Most feel that there is not currently the demand for this, and many have concerns about how they would find this information to include it.

Meal deals

5/23 venues currently offer some form of meal deal; this is normally in form of a soup and sandwich or a meal and drink.

One of the Chinese takeaways currently offers a meal and fizzy drink offer, and one of the Indian take aways offers a 'happy hour' style discount between 4-6pm.

Smaller / half portions

Some venues will offer this if it is required (for specific groups of customers), however most feel that due to current tight profit margins they are less inclined to offer menu adaptions (with the exception of making changes for children).

Therefore, most do not advertise this as an option, but will do it upon request.

Fried food

For those who offer fried food, it is usually in the form of chips. Although this makes up a small part of the menu, it is a large percentage of what is ordered.

For most, around 20% of their menu is made up of fried food.

Some of the takeaways are sitting closer to 80% of their dishes being fried or including fried products.

Food labelled as healthy

Only 2/23 venues currently label menu offerings as 'healthy', this is only on their specials, if they are healthier than other options.

Most feel that if the customer demand was there for healthier options then they would add this, but currently there is no demand. They also worry that adding a 'healthy' label it would put people off buying their other products.

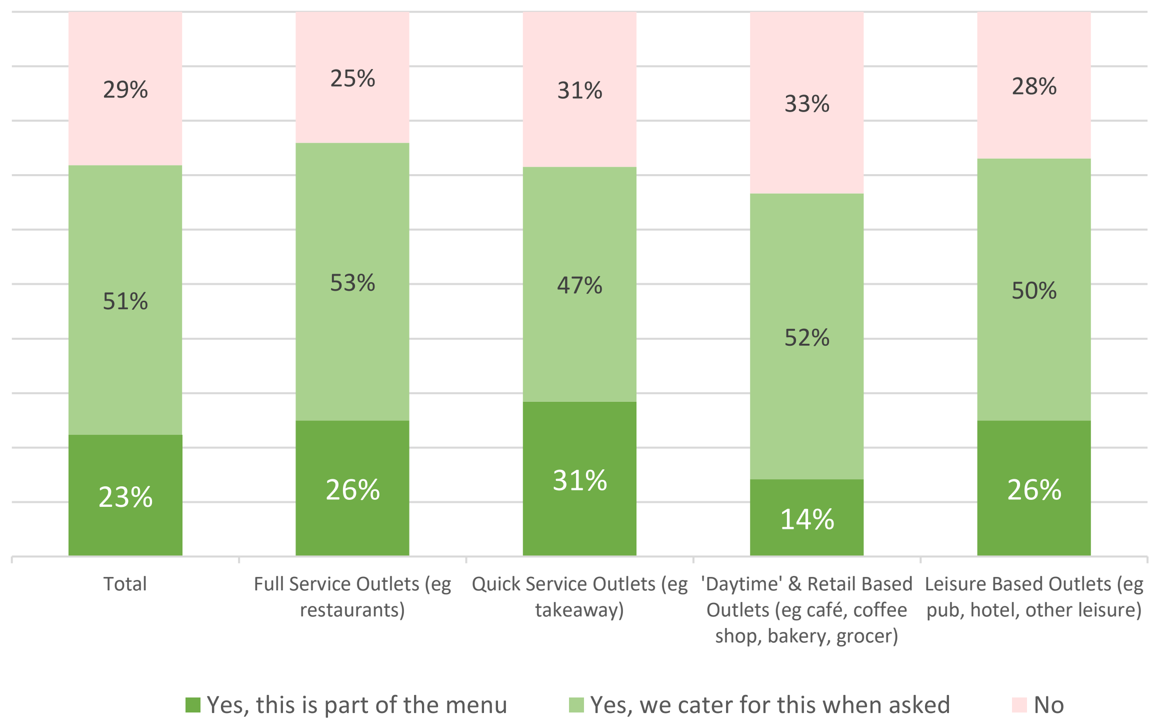
Insight: The majority of outlets do not highlight the healthier options on their menu, nor do they offer deals to increase healthy uptake. Although there is an agreement that if there was increased customer demand they would make these changes, many feel that currently it would not be worth it for them.

The Menu – Healthy Options

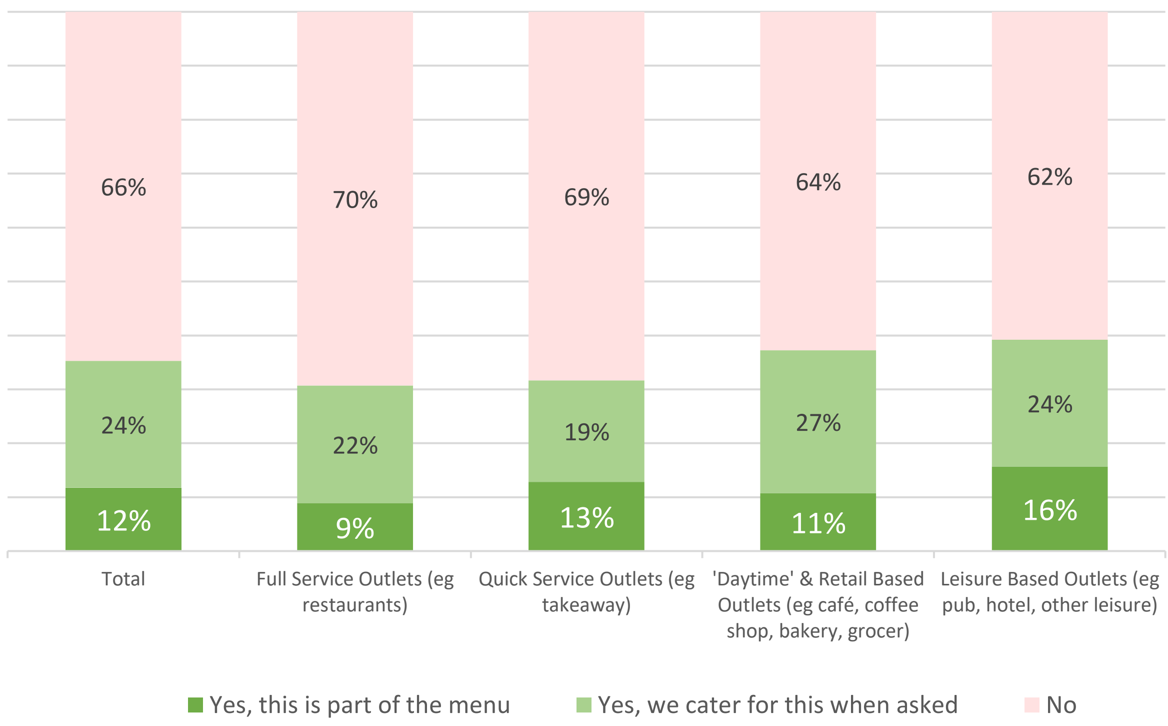
Quantitative research

Just 12% currently have items labelled as healthier as part of their menu. While almost 1 in 4 do offer small or half sized portions as part of the menu, and additional 51% cater for this when asked.

Do you offer smaller or half portions from your menu?



Does your menu offer healthier choices which have been labelled as being healthier e.g. lower calorie, lighter etc...?

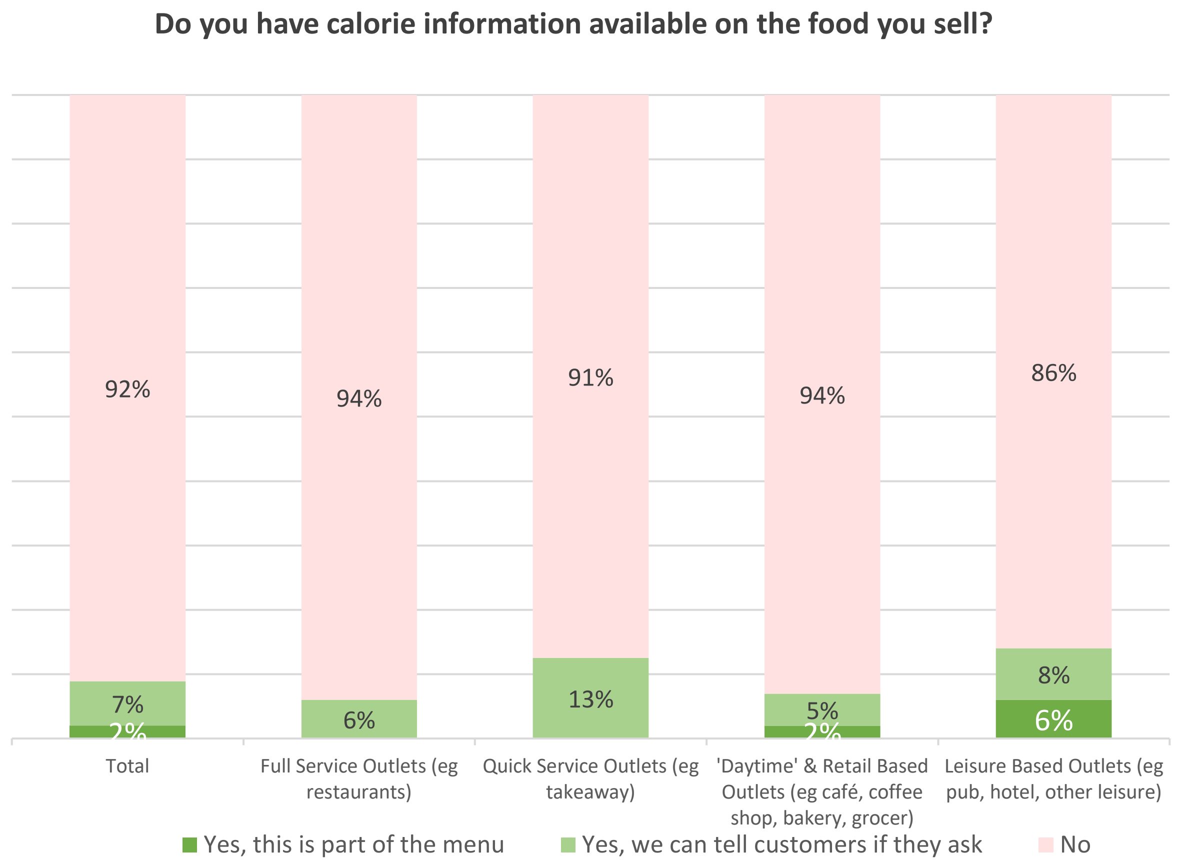


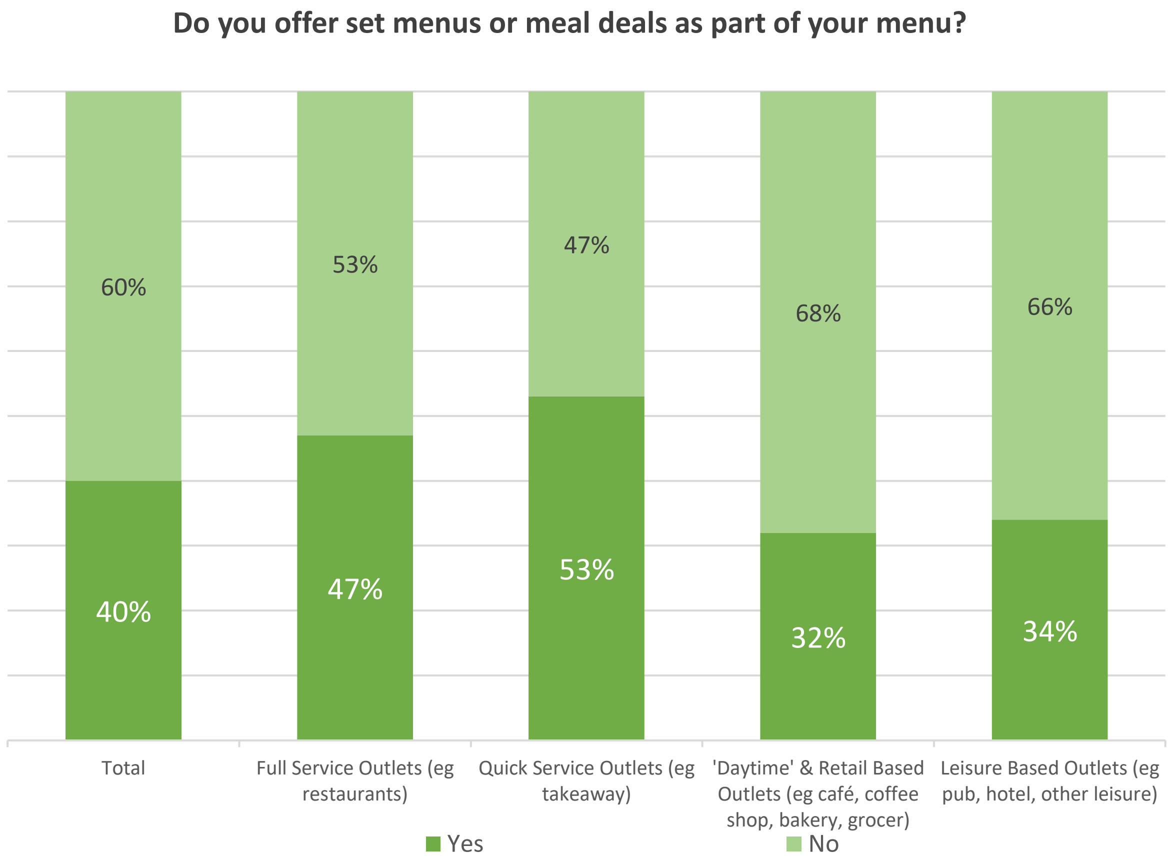
Provision of calorie information could potentially be the biggest challenge since this is rarely done at the moment. Some disagree with the concept of providing calorie guidance and some don't know how they would build this into their menu.

The Menu

Quantitative research

Very few outlets (2%) have calorie information on their menus. 40% of outlets offered a set menus or meal deal.





Fruit and Vegetables

Qualitative research

The outlets spoken to in the qualitative research were then asked to discuss what fruit and vegetables they have available as part of their menu.

Most venues offer fruit or vegetables in some capacity; specifically, the restaurants and some cafes. The offering tended to be fruit salads, side salads and vegetable sides. The main reasons for limiting their offering was due to wastage and increasing costs associated with this food group.

Although the fast food outlets offer salads with kebabs, or vegetables within their mains, these are often either rejected by customers, fried or covered in sauce.

For the bakeries, they did not see the relevance of adding fruit or vegetables to their menus as they believe this would lead to wastage. The only fruit offered is that which is used to flavour their confectionary, for example, a strawberry tart.

"We have veg options on our pizza, we have chargrilled veg as a starter or side option. Fruit in cheesecakes and crumbles. It is not dominant."
(R2, Pizzeria)

"We did offer side salads on the side of a sandwich, and it was just so much food waste so swapped to veg crisps… The salads were too wasteful."
(R22, Café)

"I don't think our current customer profile fits the fruit need, the reason not to do it is it would be incongruous to what we do currently, it doesn't make sense to have the fruit and the doughnuts."
(R23, Bakery)

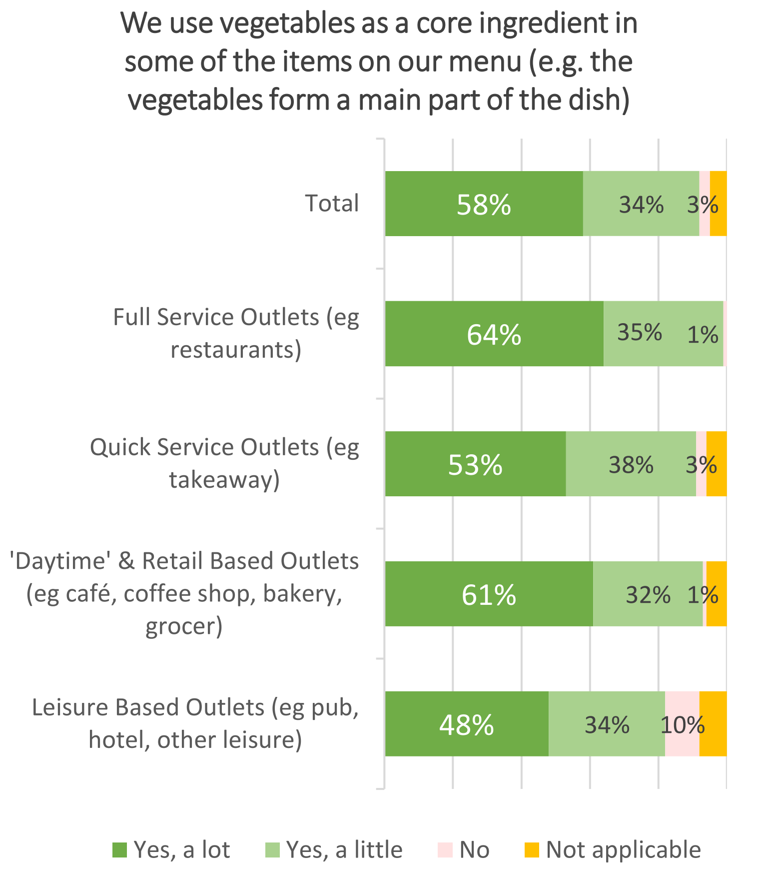
"We have kids fruit salad to finish off and on the main courses there are sides of vegetables."
(R4, Full-service Restaurant)

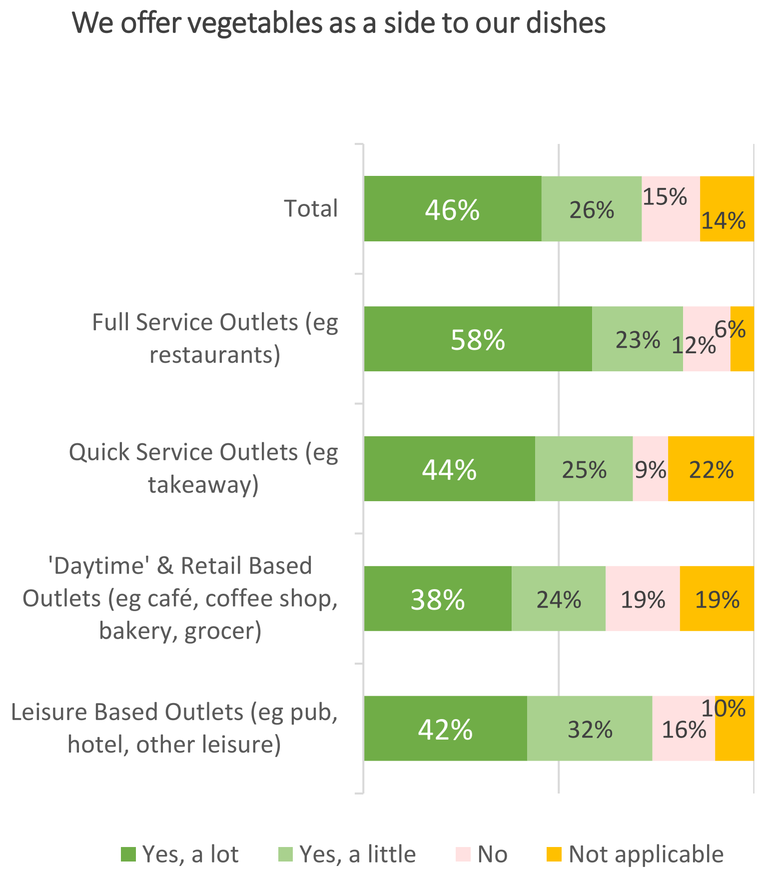
Insight: Although most of the outlets have fruit and vegetables available in their offering, it is not in the forefront of their minds. There is a fear of rising costs and wastage when considering increasing the offering of this food group.

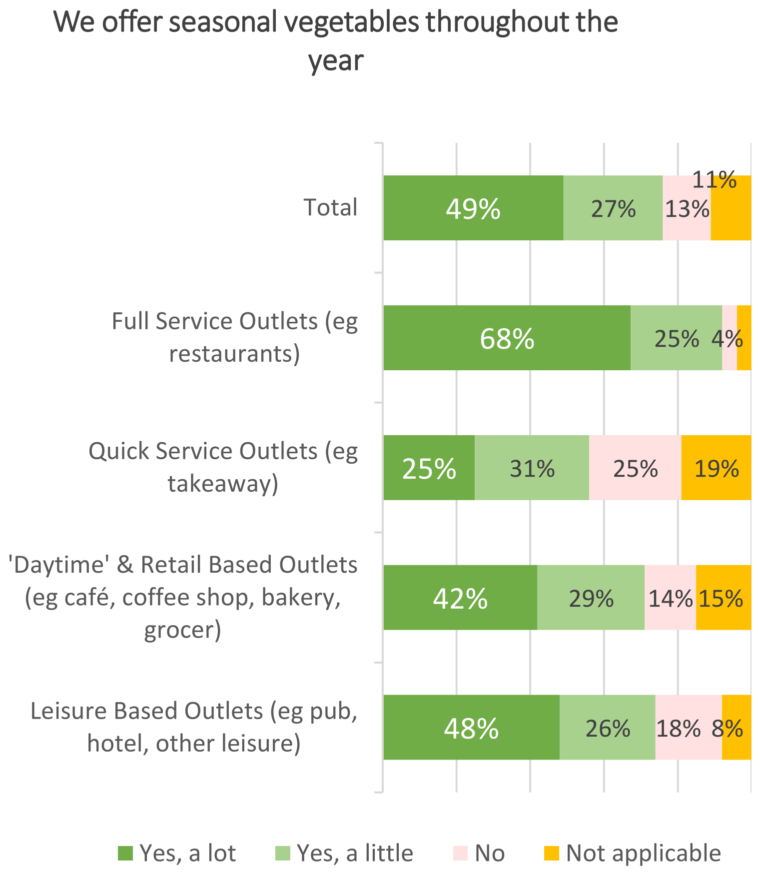
The Menu – Vegetables

Quantitative research

58% of outlets use vegetable a lot as a core ingredient, 46% use veg a lot as a side dish and 49% use season veg often throughout the year.





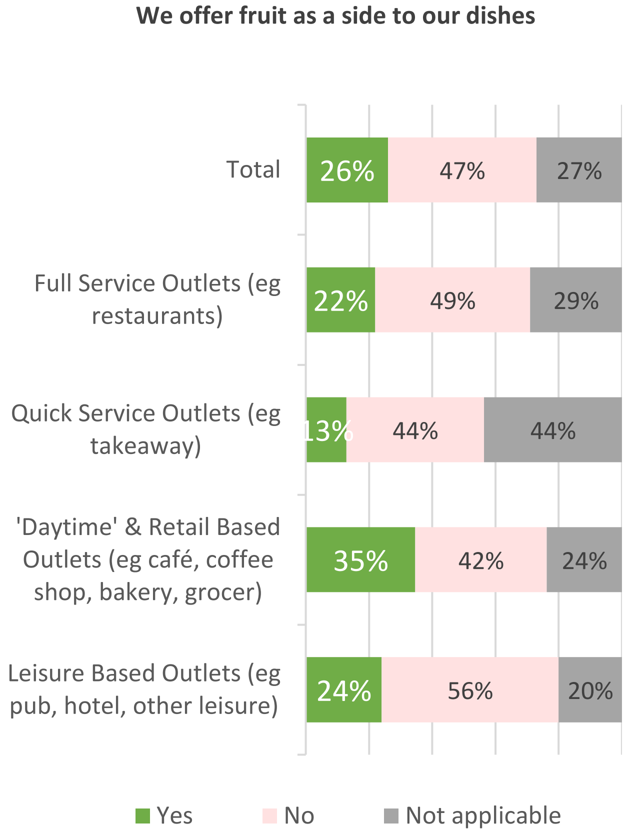


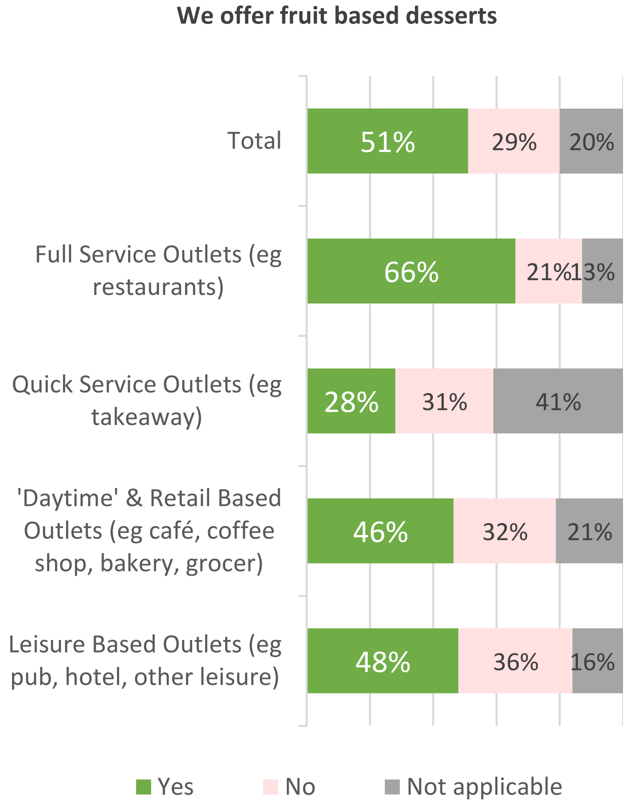
Usage of vegetables as a core dish, a side dish or usage of season veg is among the highest for outlets with a healthy eating focus but who are EOEW disengaged.

The Menu – Fruit

Quantitative research

Just 26% of outlets offer fruit as a side dish but 51% do offer fruit-based desserts.





Usage of fruit-based desserts is more common in Full-service Restaurants but again is higher for those with a healthy eating focus but who are disengaged by the EOEW framework.

Current Children’s Menu Offerings

Qualitative research

The audience were then asked a series of questions about their children's menu offerings. **10/23** of those we spoke to have a specific children's menu, while **6/23** will make substitutions in order to adapt the main menu for children.

Calorie information

Only one venue (a bakery) currently offers calorie information for the children's menu; this is on pre-packaged items.

Most feel that calorie information should not be included in a children's menu as they worry this may lead to unhealthy calorie counting habits.

Meal deals

5 outlets reported having a children’s meal deal. This usually includes a meal, side and drink.

One café used to offer fruit as a side, but due to wastage, now opt for less healthy, but non-perishable sides instead (such as raisins). Another venue no longer provides salad unless asked - also due to wastage concerns.

Age restrictions

For those venues with age restrictions, most would give a children’s menu to those under 12 years old.

Three cafes, one takeaway and one restaurant reported having a children’s menu but they are not strict with ages and will allow anyone to order from it.

Benefits of uptake

The outlets which currently offer a children's menu feel that this provides a business benefit to them as it is attractive to families and therefore leads to more business.

It also provides functional benefits such as reduction of wastage due to portion sizes.

Drinks

Most venues offer a selection of drinks for children including: fruit juice, water, fizzy drinks and in some places, milk. Most outlets do not promote fizzy drinks for children, but will offer if parents allow.

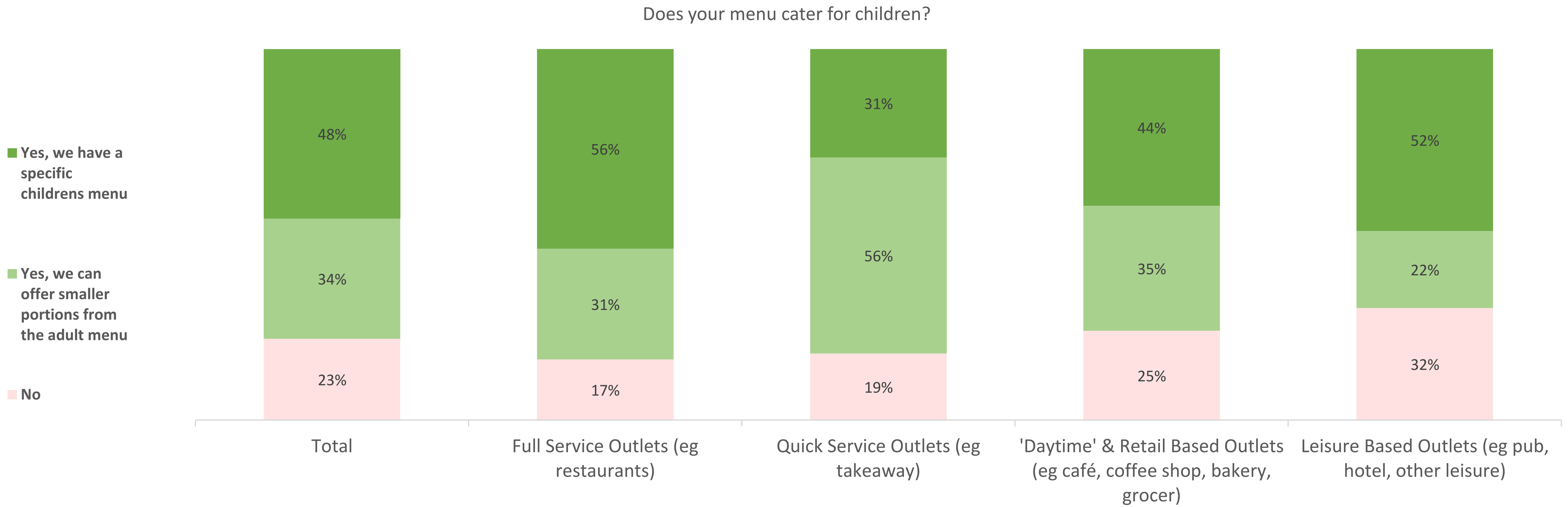
More education about what drinks are healthy for children is needed here.

Insight: Most outlets think that healthy eating starts at home, so don’t feel like it is their responsibility to ensure that children are eating healthily. They are more likely to choose offerings which will sell; they leave it to the parents to decide what the children can and can’t eat.

Children's Menu

Quantitative research

Overall, 48% of outlets have a specific children's menu and an additional 34% can offer smaller portions from the main menu. The remaining 23% do not cater specifically for children.

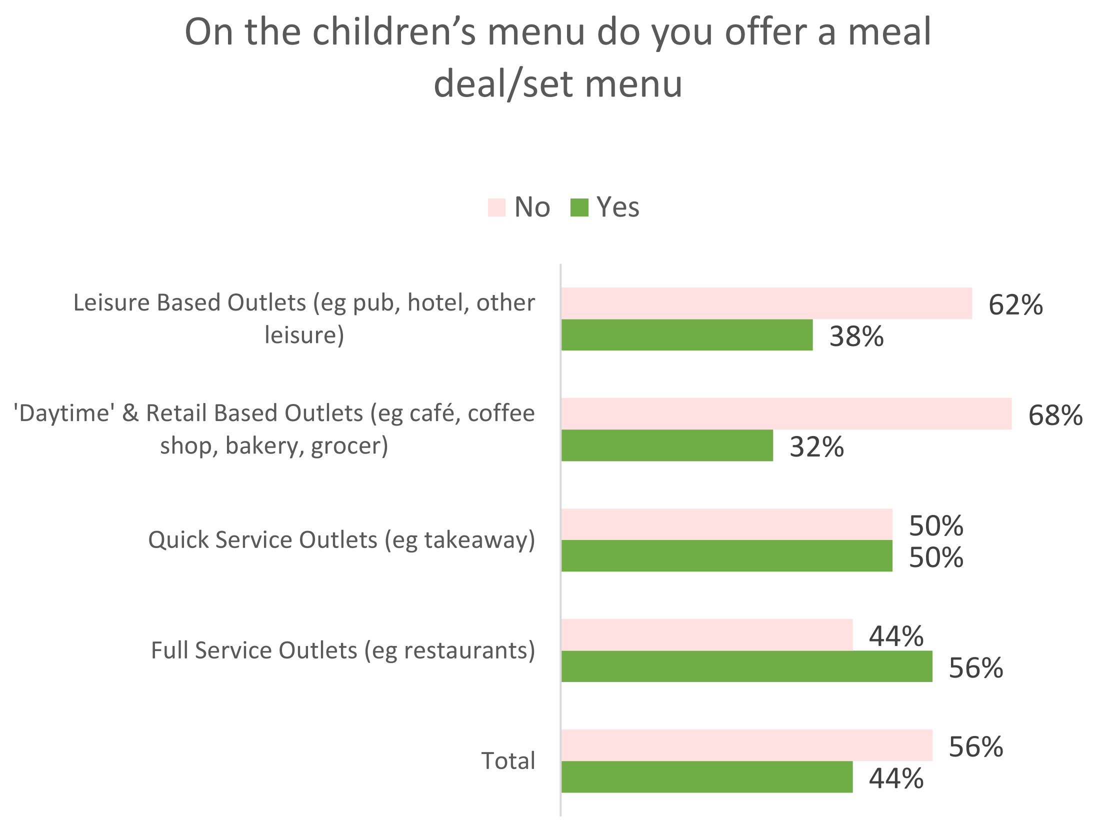


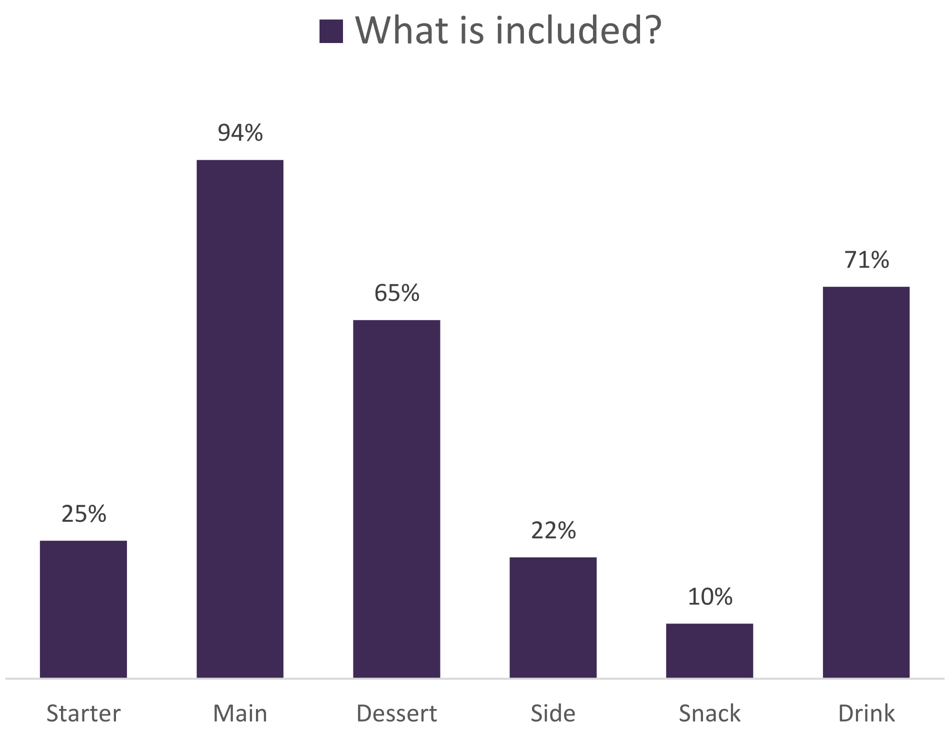
Note: These figures may not add up to a100% as this was a multiple-choice question, with some outlets offering both small portions and a specific children's menu

Those not currently catering for children are more likely to be Leisure Outlets (i.e. pubs etc) and those who don't have a healthy eating focus and who are disengaged by the EOEW framework.

Children’s Menu

For those who do have a children’s menu, 44% offer a meal deal.

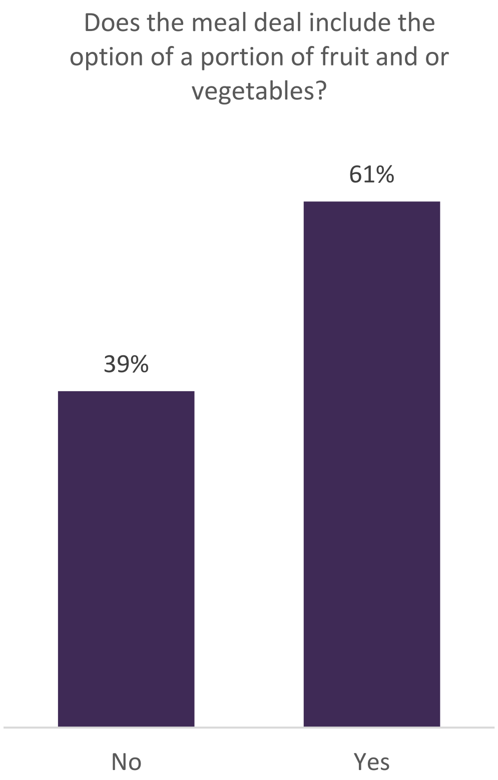


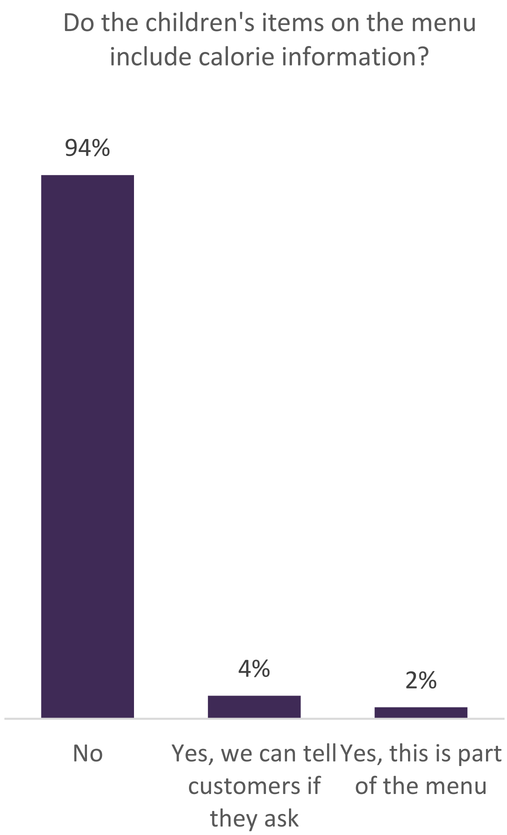


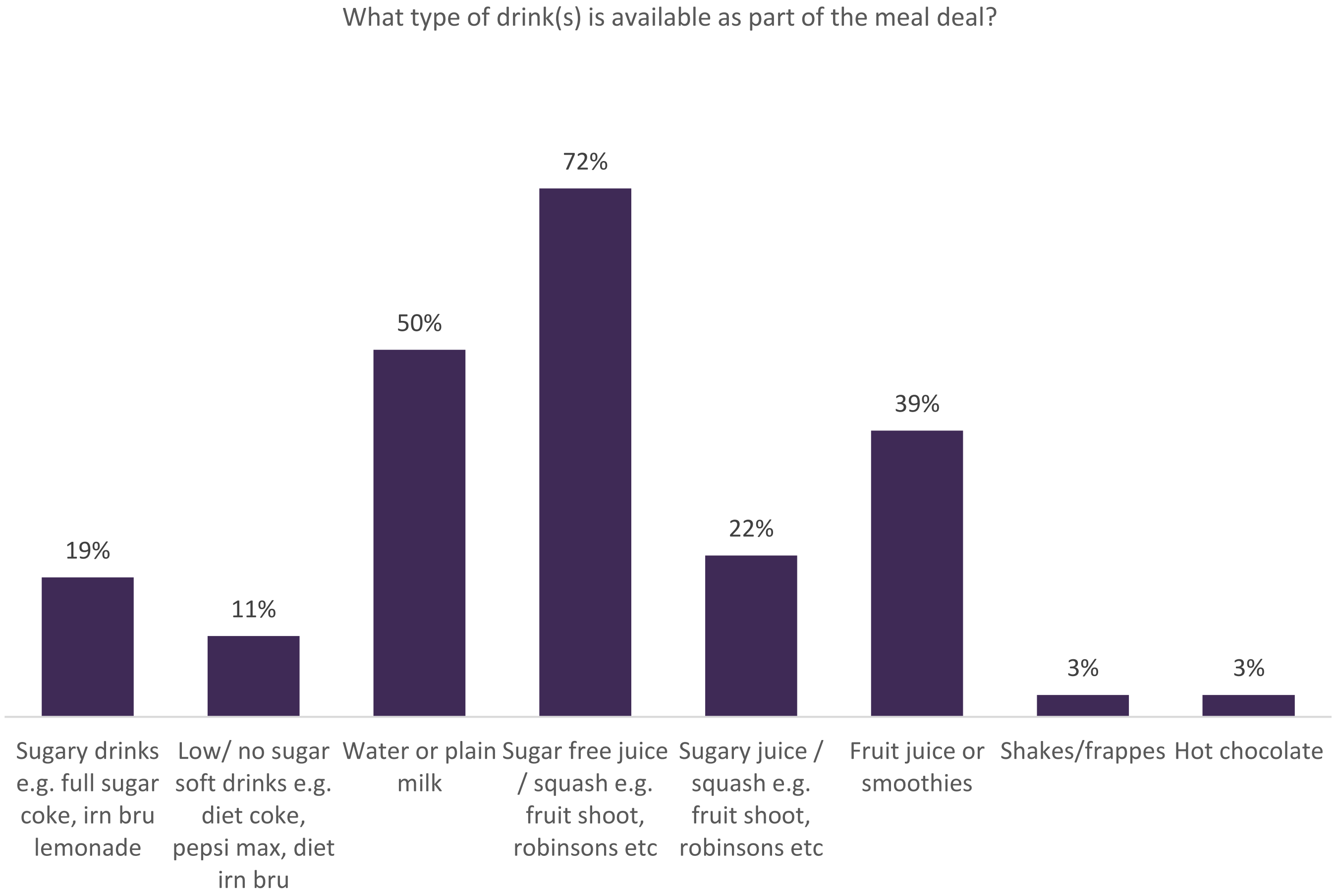
Children’s Menu

Quantitative research

For those who do have a children’s menu and offer a meal deal, 61% of these meal deals include a portion of fruit or veg and 6% included calorie information.







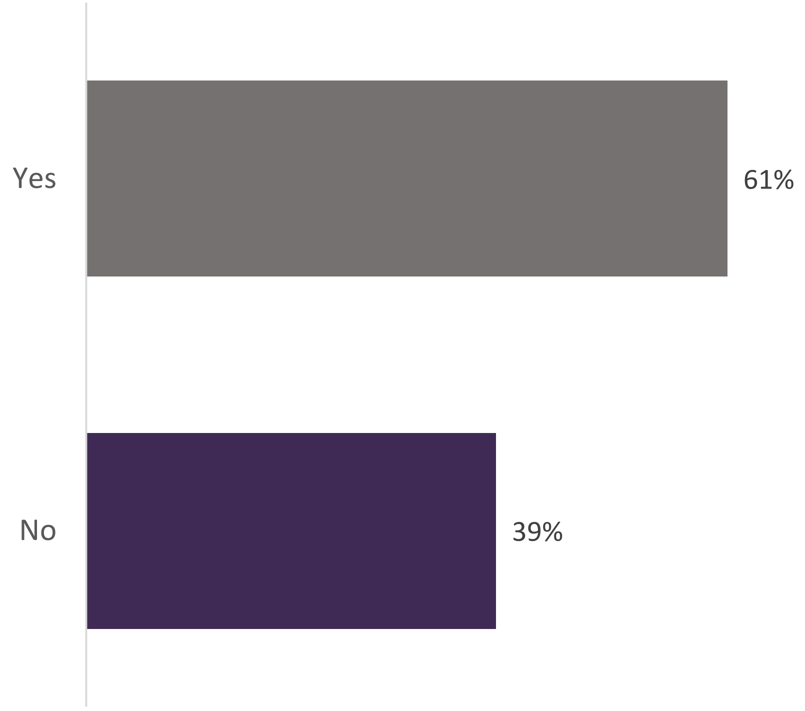
Few have calorie information about children’s menu items. Offering sugar free drinks is much more prevalent as part of a meal deal than offering sugary drinks.

Children’s Menu

Quantitative research

Looking at reasons for either including or not including fruit/veg as part of a children’s meal deal:

Does the meal deal include the option of a portion of fruit and or vegetables?



What’s included?

- A piece of fruit
- Fruit salad
- Salad
- Vegetables (particularly peas or beans)
- Vegetable sticks, tomato, cucumber
- Grapes or berries

Why not...?

- No demand
- Never requested
- Doesn’t get eaten or when previously tried it mostly was thrown in the bin

Perceived lack of demand is the main reason for not offering fruit and veg but past experience of wastage is also a fundamental barrier.

The Eating Out, Eating Well Framework

Overview of the Framework

Qualitatively the audience were introduced to the framework with this description.

This received an average score of **5**/10 for relevance to their business. Almost all agree that there is a problem that needs to be addressed regarding childhood obesity (and more generally); however, they question how much this is relevant to their businesses and how much of this responsibility should fall on them.

What can make it feel like something they want to be a part of?

- Defining the scale of the issue that unhealthy eating is causing can grab attention and highlight the problem.
- Making change feel relevant is key to encouraging uptake of the framework, most are questioning why this falls on them.

Framework Description:

"The voluntary Eating Out, Eating Well Framework, and Code of Practice for children's menus, will support caterers who are looking to provide healthier food for their customers. They will support the achievement of Scottish Dietary Goals and the ambition to half childhood obesity by 2030."

"As a business owner you have a degree of responsibility to take care of your customers. If there was a local and relatively short seminar with a respectable person in the field of nutrition and you can send your chefs for 2 hours with a recipe pack at the end of it."
(R1, Full-service Restaurant)

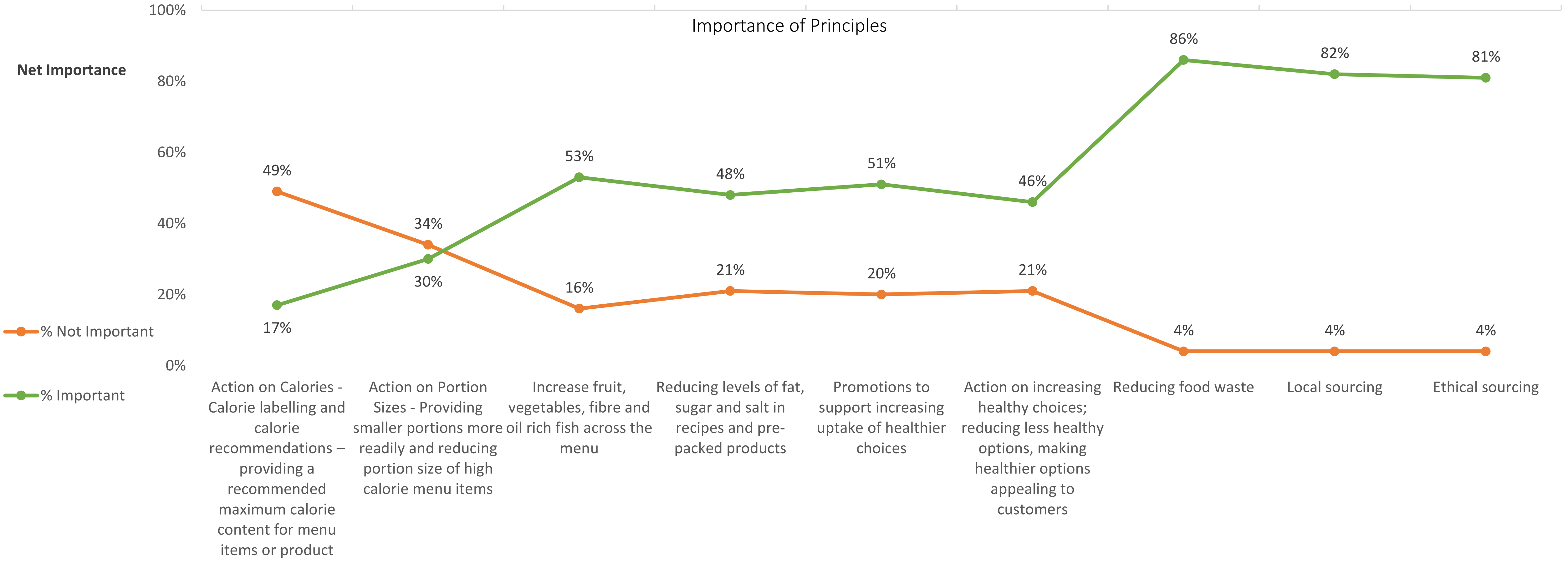
"The only way we would be motivated to do is if the public shifted their opinion on it. If the public were getting behind it and we could create a product."
(R9, Bakery)

Insight: For many of the businesses spoken to, the framework does not currently feel relevant to them, and they are unsure what their role is in this.

EOEW Framework - Importance of Principles

Quantitative research

Reducing food waste, local sourcing and ethical sourcing are deemed by far the most important principle of the EOEW framework.

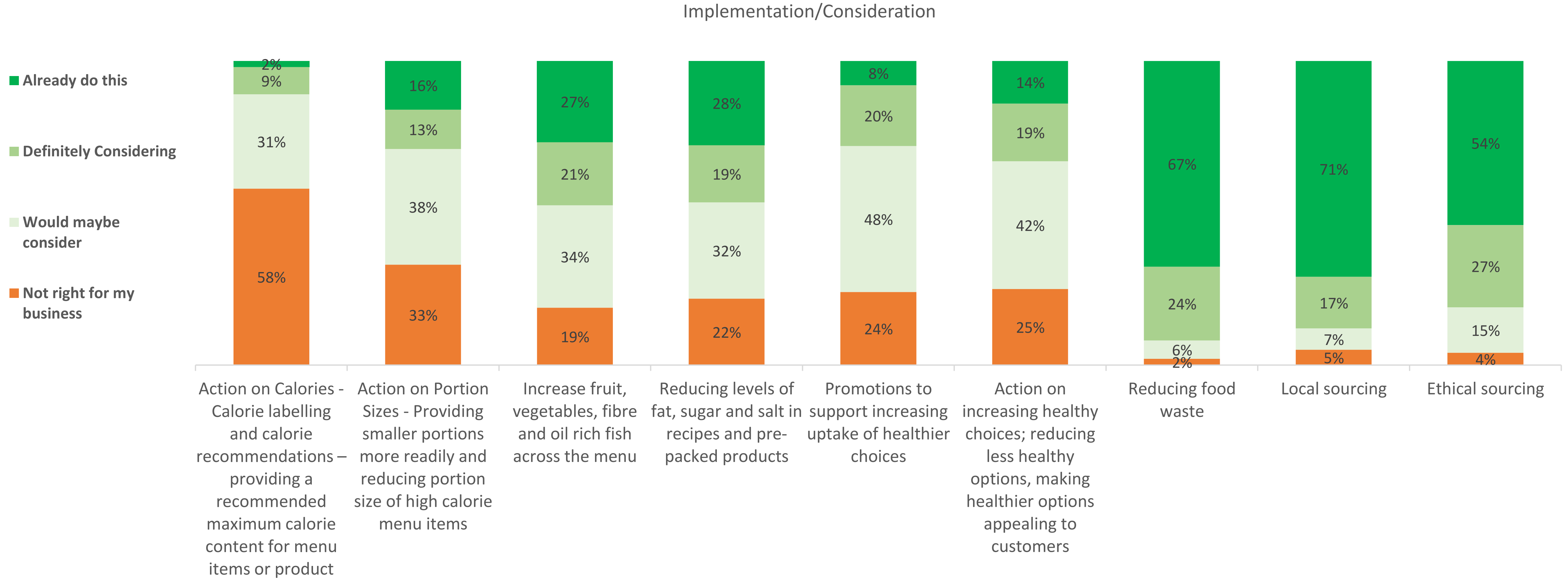


Action on calories and action on portion sizes are viewed as least important (and more outlets think these are unimportant than think important).

EOEW Framework - Implementation/Consideration

Quantitative research

Reducing food waste and local and ethical sourcing, in addition to being important for the vast majority, are also much more likely to be currently done by outlets.

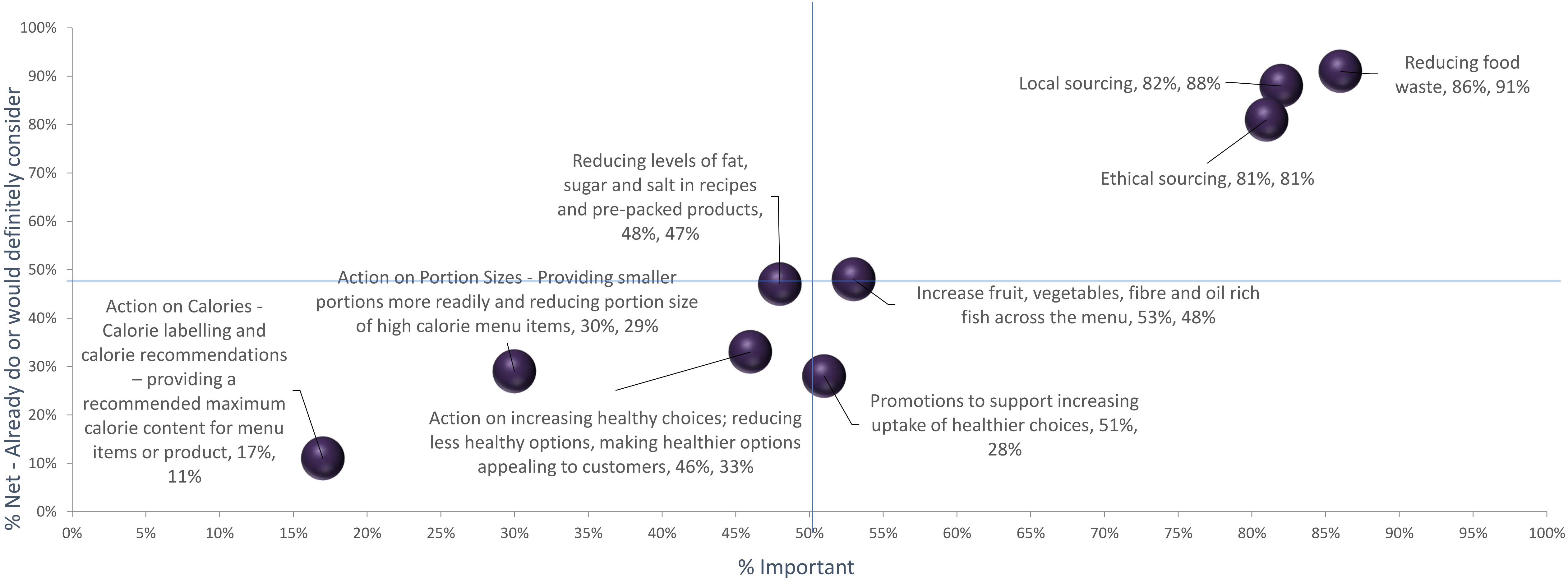


Action on calories is likely to be the most challenging aspect of the framework to engage outlets on.

EOEW Framework - Importance vs Consideration

Quantitative research

Summing up importance coupled with consideration of the different framework aspects, the businesses are most interested in reducing food waste and local and ethical sourcing.



Increasing fruit, veg, fibre and fish and promotions to support increasing uptake of healthier choice are seen as important but are currently undertaken or considered by fewer than half of all outlets.

Action on Calories

Relevance score
5/10

This principle provided a split opinion among the food outlets. Some, particularly those who deemed their business to be 'treat' orientated or those providing fast-food, worry it could be damaging to business, as those using these establishments do not want to know their calories consumed; it could be off-putting.

The main barrier stopping the rest of the audience, particularly those who make all their own products, is the lack of time and knowledge. They would find it hard to work out precisely how many calories go into their food, and would find it time consuming if they have specials or a frequently changing menu.

Action on Portion Sizes

Relevance score
5.5/10

Generally, the audience felt that, although they understand the potential benefit of this principle, the impact on them as a business is unappealing. Many feel that the cost of providing a half portion does not match the cost of the product (as customers often expect it to be 50% cheaper).

Some also worry that, if given the option, people may opt for the smaller portion size over the larger one, leading to less profit for the business. On the other hand, if portions are reduced without consent from customers, particularly regular ones, there may be an uproar. Overall, this principle would be straightforward to adopt, however there is still some uncertainty around the business sense in doing so.

Principle 1 & 2
Verbatims

Qualitative research

Action on Calories

"Technically I don't know how I would do this; It would take time and money and our menus change every day. So, it feels like a big burden. I also don't really agree with calorie counting."
(R3, Café)

"Being a parent, seeing this is good. But to implement this in my premises is difficult, the clientele do not want this… People keep coming back, even after a heart attack!"
(R10, Take-away)

"All very well if you're buying stuff in but when making stuff fresh it's hard to find out the calorie content - who is going to fund this?"
(R17, Full-service restaurant)

"It's difficult because I think you could put people off as we only have higher calorie content, it would take a lot of work to get to that stage, it wouldn't look good unless we change the menu!"
(R7, Cafe)

Action on Portion Sizes

"I have no problem making things smaller for people. It's an individual customer choice at the end of the day."
(R6, Café)

"If we give less portions folk go nuts"
(R13, Take-away)

"We don't want to reduce our sizes; we make very traditional things & we have no reason to adapt these."
(R23, Bakery)

"I think we should have small or large sizes, but we just do the one size. I know it's important but there's a financial impact on us for smaller portions. People might not need a large but if it's in front of them they would eat it, the profit would be impacted if we did smaller sizes."
(R18, Take-away)

Principle 3 & 4

Increase fruit, vegetables and fibre across the menu & reducing levels of fat, sugar and salt in recipes and pre-packed products.

Qualitative research

Increase fruit, vegetables and fibre across the menu

Relevance score

6.5/10

Generally, the audience understood the benefits of implementing this principle. Full-service restaurants found this principle to be of high relevance as they would have more control of their menus and have multiple opportunities to increase the fruit, vegetable or fibre content. Those with more rigid and less diverse menus, such as bakeries, felt they would struggle with this.

A barrier for the audience would be the cost associated with this food group. Some outlets have reduced fruit and vegetables due to inflation, and others would worry it would be wasted if they were to introduce it to their menu, as such some have removed side salads due to high wastage. The audience would like to see an incentive for providing fruit and vegetables, such as a reduction of product price, or compensation if food is wasted, in order to consider introducing the items to their menus.

Reducing levels of fat, sugar and salt in recipes and pre-packed products

Relevance score

6.7/10

This principle would particularly be achievable for those whose offering is homemade. However, some are worried that reducing taste-enhancing products will negatively alter the flavour of their products.

There is a cost issue for those who buy pre-made products, and they worry that changing suppliers or products to healthier ones may lead to increased costs. On the other hand, some would see this principle being beneficial to them due to the rising prices of certain cooking products; this would help them to reduce costs.

Less guidance would be required to implement this principle. However, a barrier for the audience would be the time taken to test new recipes in order to see what would work for them.

Principle 3 & 4
Verbatims

Qualitative research

Increase fruit, vegetables and fibre across the menu

"We could do this fairly easily; we have control over what goes into our menu. Could offer healthier veg options. There is a big push for vegan."
(R2, Restaurant)

"All our food is prepared with food like this, but we are reducing fruit and veg as the price is so high. They are being priced out."
(R10, Take-away)

"I don't see how I can do that; the menu hasn't changed for 25 years. I have lots of items and I sell bananas."
(R6, Take-away)

"I think it's a good idea, but I don't know where we would plug into it, our customers don't have the demand for healthy things, it's white van men etc."
(R23, Bakery)

Reducing levels of fat, sugar and salt in recipes and pre-packed products

"I know we need to do this, but it would impact the taste of the food if we had to cut this down. We need to look for alternatives. I would love to reduce stuff but it's hard to do, it would totally change the taste. The [amount of] sugar in the sauces is unreal, if we change it, we will lose customers."
(R18, Takeaway)

"This is relevant but unlikely to happen soon. I think there needs to be something big driving this, as our customers like the taste and we don't want to compromise on what we have. A low salt version might not taste as good, we would need to test this a lot."
(R20, Café)

"It's a bit more difficult to do this, we rely on suppliers to provide us with good numbers, but we would need to look at the menu to see what we could do to bring this down and reproduce it better."
(R7, Cafe)

"The price has soared so much, so this is quite motivating for us as it would save us money."
(R10, Takeaway)

Principle 5 & 6

Promotions to support increasing uptake of healthier choices & action on increasing healthy choices

Qualitative research

Promotions to support increasing uptake of healthier choices

Relevance score

5.4/10

Overall, they feel that this principle would be easy to achieve but are reluctant due to the potential costs involved. Some highlighted that whether a customer selects a healthier option or not is not within their control and they are unwilling to promote something if there is no guaranteed profit for them.

Bakeries and takeaways deem this principle to be less relevant to them as they claim that healthy options are not what their customers are seeking when going to them. There is also a worry that having healthy promotions will lead to an increase in wastage if they are not able to sell these items.

Some education would also be needed across all outlets in order to help outlets define and identify healthy options.

Action on increasing healthy choices

Relevance score

4.7/10

This was the least relevant principle to the audience. A common theme across most businesses was that most of them would need to see a change in demand before making any changes to their offerings. However, some businesses are already adopting characteristics of this principle, by offering salads or promoting healthy specials, and reported this was leading to positive outcomes.

Some outlets did not see the relevance of this principle to them, specifically those who view themselves as a one-off treat or indulgence; fast-food and bakeries. Their customers do not come to them to be healthy. These businesses also worry that switching to healthier items on their menu would put customers off as they are simply not interested.

Principle 5 & 6
Verbatims

Qualitative research

Promotions to support increasing uptake of healthier choices

"It's a bit like you are preaching to people. I think because we think our menu is already healthy, we would not be that keen to promote a healthier choice on the menu as it would put the rest of the menu to shame really!"
(R3, Café)

"I am okay with that but who's paying for it? We can't promote unless we are making profit."
(R17, Full-service restaurant)

"If we start to promote healthier choices people wouldn't eat a cookie!"
(R9, Bakery)

"I think this would work if there are promotions on, I don't see an issue with this, we use social media and free promotion but issue is the products wasting if we don't sell it."
(R7, Cafe)

Action on increasing healthy choices

"Reducing less healthy options would be shooting ourselves in the foot! Making healthy options would be things we buy in, not we make ourselves."
(R23, Bakery)

"I don't know how we can make the healthier options more appealing; people are attracted to the salt and chilli boxes etc. the unhealthy things are appealing to people the unhealthy things draw my customers in. You can't get healthy food at a Chinese takeaway."
(R18, Takeaway)

"I think when people come to us, they are coming for an indulgent experience, and I don't think we would want to remove options for people."
(R22, Café)

"We could look at having an option for this, it's hard as when you start messing with the menu then people might get frustrated."
(R12, Full-service restaurant)

Principle 7

Policy Cohesion (Reduced food waste, Local and Ethical sourcing)

Relevance score

8.8/10

Qualitative research

Reduced Food Waste

All outlet types agreed that reducing food waste was incredibly relevant and important to them. This subtopic was the main contributor for the overall 8.8/10 relevance score. Although not all outlets reported having a problem with food waste, they all understood the correlation between decreasing food waste and increasing gross profit, and would welcome having something in place to help with this.

The only issue that arose was surrounding the worry of increased food wastage if outlets are to adopt some of the other principles within this framework, such as increasing fruit and vegetable intake and increasing healthy options, and they're not well received by their customers. Side salads was an example used here, many have now stopped adding this to plates to reduce food waste.

Local & Ethical Sourcing

The businesses showed a preference for local and ethical sourcing. The high-end outlets are proud to already be exercising this. However, cost is the main barrier with adopting this principle. Although most would strive to achieve it. For outlets offering foreign cuisine, such as Indian and Chinese take-aways, they would find it hard to maintain authenticity in their cooking, so opt to purchase produce from global suppliers.

There was some confusion as to what ethical sourcing is, education is needed to help businesses to implement a more ethical approach. Offering incentives or recognition to businesses may be useful for helping them to adopt more local and ethical sourcing practices.

Principle 7
Verbatims

Qualitative research

Reduced Food Waste

"I am not a fan of food waste so it's a big thing for me people massively over order I see huge orders go out and I don't know how they can be eating all of that food."
(R21, Takeaway)

"Hugely relevant, I look at the food waste in the business and the food that comes back on a plate. I want to do something about this."
(R1, Full-service restaurant)

"This is what we are about, food waste is awful so anything we can do to avoid that we will always do it. It is essential."
(R4, Full-service restaurant)

"This is really relevant to us it is something we do anyway but again I probably think we could review this. So help here appreciated."
(R3, Café)

Local & Ethical Sourcing

"Local sourcing is hard for us, as we go to the Chinese supermarkets, ethical sourcing I know we should do but its more expensive to do this I would like to have the bamboo or more ethical boxes for take away food, but it's the cost of this."
R18, Takeaway

"Time and price would come into it though. We do work with local sourcing and price and convenience comes into it. Getting eggs locally would be good but we go through 600 eggs a week so…"
R9, Bakery

"The only thing standing in the way of this is the money it would cost, how much will someone pay to be more ethical 10 miles versus 400, but when it's cheaper to get from further we will."
R15, Cafe

"In a practical and cynical world it's hard to be ethical and local, when it's cheaper to get imports. Not all ethical is actually ethical"
R17, Full-service restaurant

The Code of Practice for Children's Menus

Code of Practice for Children's Menus

Overall, the outlets agreed on the importance of the COP for children's menus.

They understand the significance of investing in children's health in order to prepare them for the future. Additionally, as some of them were parents themselves, it is of personal relevance to them.

Some businesses feel that implementation would be straightforward; specifically, restaurants and cafes who claim that they would not need to adopt many significant changes to fit these principles. They all agree the potential recognition this would have for their business would be positive.

However, some do not feel it is their responsibility to make changes. They feel the responsibility lies with the parents and schools to teach children to make healthier choices. Unless made mandatory, most would need more education highlighting the importance of this or by offering incentives/recognition for adopting this COP.

1. Businesses should reduce levels of fat, sugar and salt across the menu

2. Each course should contain at least one portion of fruit or vegetables.

3. Fried foods should not be the only option

4. A fruit based dessert should always be available.

5. Sugary drinks should not be offered as part of a children's menu.

6. Businesses should actively promote healthier options including within meal deals

7. Small or half portions should be available from the adult menu *where practical*

"100% behind it, it is so important to be looking at these things from an early age. The promotion of having a sugary drink is awful. There are small tweaks everyone could do without much work as a business." R4, Restaurant

"No chance would we do this. We do try to reduce stuff to reduce sugar, if it's fast food, it's fried food! We don't have any fruit to offer. We could remove sugary drinks and offer water. We just don't have healthier options." R13, Take-away

"I totally agree with this. Nothing is really stopping us from doing this, it would work perfectly." R12, Cafe

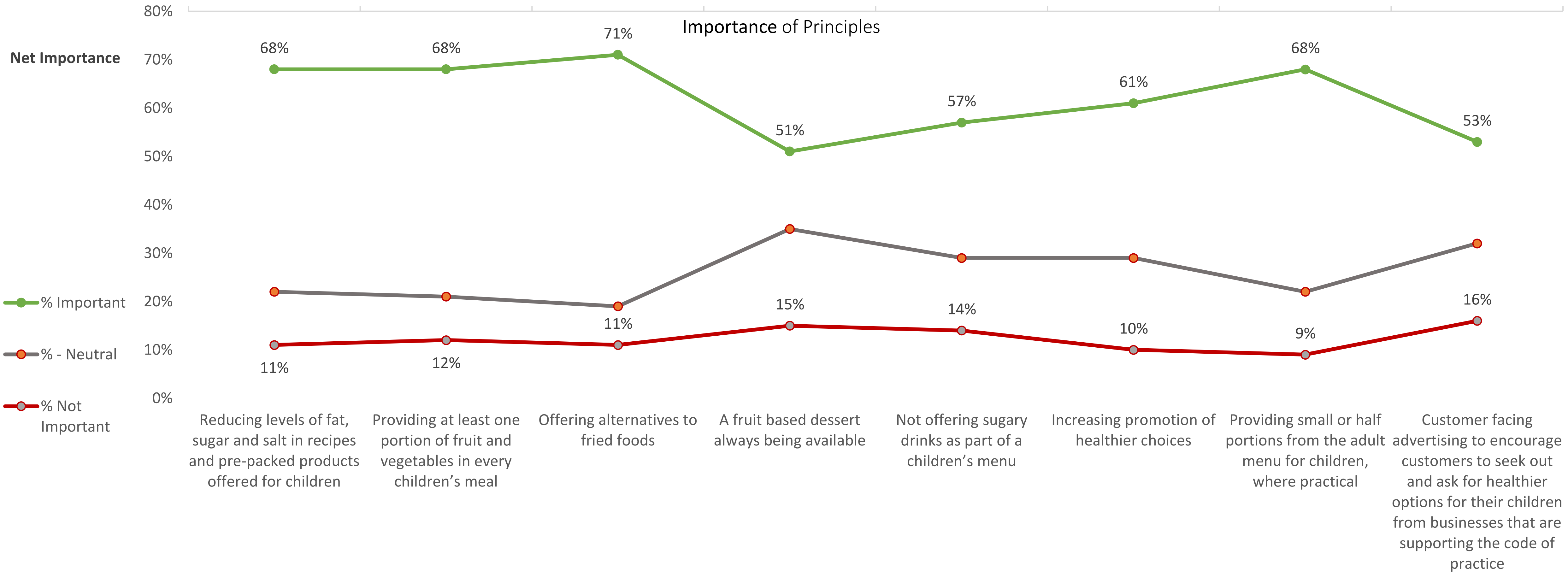
"We can do what we like with salt but if there is salt on the table, they will use that. I think you can put veg on plates, but there will be people who won't expect their kids to eat veg and that results in more food waste." R17, Full-service restaurant

Insight: There is apprehension around making changes in this area and debate over where the responsibility lies. Outlets feel that there needs to be something 'in it for them' otherwise many will be unwilling to make changes.

COP for Children's Menu - Importance of Principles

Quantitative research

Offering alternatives to fried food marginally leads as the most important aspect of the children's menu COP but very closely followed by providing small or half portions, providing at least one portion of fruit or veg and reducing levels of fat, sugar and salt.



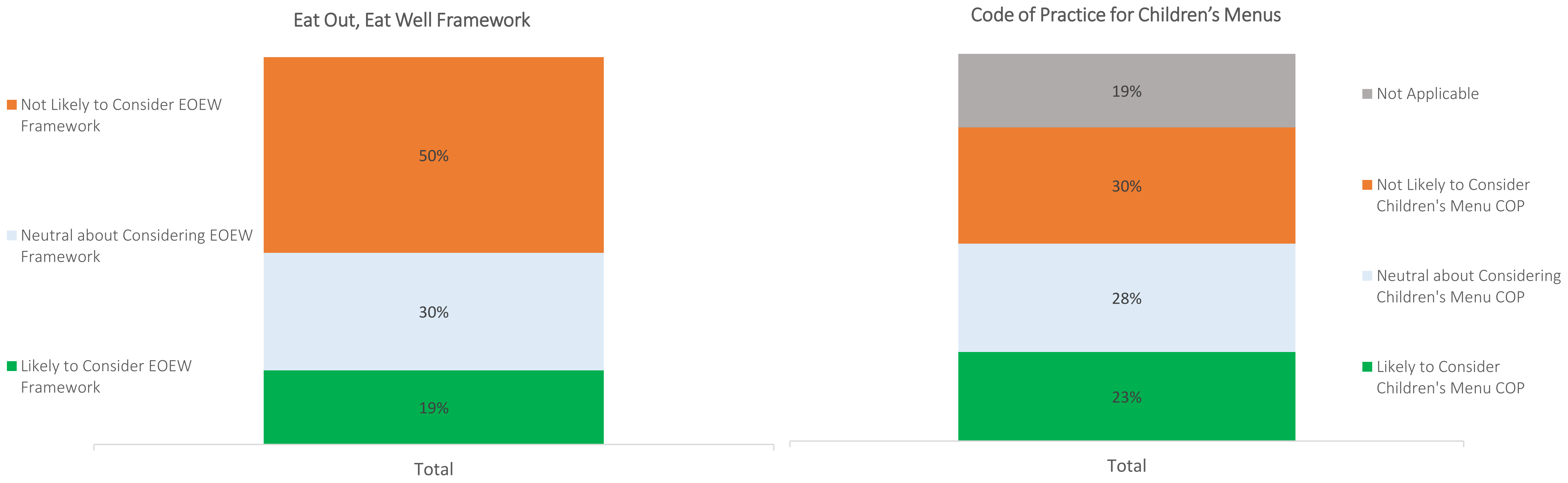
Very few outlets see any of these aspects as unimportant so outlets are generally aware of the importance of diet on children's health.

EOEW Framework & COP for Children's Menus

Quantitative research

Overall, 19% of independent OOH Food Outlets in Scotland stated that they are likely to participate in the EOEW framework and 23% overall state they are likely to take part in the COP for children's menus. What people say they are going to do, is not necessarily what they will do, which is why we followed this up with a Juster Score to confirm the audiences likely uptake. This can be seen on the next slide.

How likely or unlikely would you be to consider adopting….



Discounting those businesses for whom the COP for children's menus is not applicable, then take up of the COP for children's menus (28% of those for whom it is applicable) is likely to be greater than adoption of the framework itself.

Likely Adoption of the EOEW Framework and the COP for Children's Menus

Quantitative research

Overall, this research indicates that 30% of independent OOH food operators in Scotland will adopt the EOEW Framework and 38% will adopt the COP for children's menus. For the Framework itself, there is little difference by outlet type. The COP for children's menus is more likely to be adopted by Full-Service (i.e. sit in) restaurants.

LIKELIHOOD OF ADOPTION	% OF SAMPLE	Eat Out, Eat Well Framework				Code of Practice for children's menus *			
		Juster Likelihood Score	Certainty Score	Derived Intent Probability	Predicted Intent	Juster Likelihood Score	Certainty Score	Derived Intent Probability	Predicted Intent
Total	100%	0.4	0.7	0.3	30%	0.5	0.7	0.4	38%
Daytime' & Retail Based Outlets (e.g. café, coffee shop, bakery, grocer)	35%	0.4	0.7	0.3	30%	0.4	0.7	0.3	35%
Full Service Outlets (e.g. restaurants)	32%	0.4	0.7	0.3	30%	0.5	0.8	0.4	44%
Leisure Based Outlets (e.g. pub, hotel, other leisure)	21%	0.4	0.7	0.3	28%	0.4	0.7	0.3	33%
Quick Service Outlets (e.g. takeaway)	13%	0.4	0.7	0.3	31%	0.5	0.7	0.4	38%

*Excludes outlets for whom this is claimed to be not applicable

Adoption of both schemes is likely to be driven by those business who are engaged with the EOEW Framework and particularly by those who already have a healthy eating focus.

Attitudinal Barriers to and Drivers of Likely Adoption of the EOEW Framework

Quantitative research

Key barriers to adopting the framework stem from 3 things - belief that the outlet is limited in how much they can impact how healthy their food is, believing customers are looking for value and big portions and being too busy to find the time to do it.

% Scoring 7-10 (Agree) Indices vs Total Sample	Total	Not Likely to Consider EOEW Framework	Neutral about Considering EOEW Framework	Likely to Consider EOEW Framework
Healthy eating is a priority for my establishment	**51%**	69	120	153
My typical customer is very health conscious	**27%**	67	107	159
Healthy eating options play a central role in our menu offering	**39%**	69	123	149
We are limited in how much impact we can have on how healthy our food is	**25%**	116	88	104
We could offer a healthier menu if we had more support	**25%**	72	108	148
Our offer works well and I worry that adding healthier options could impact sales	**30%**	103	103	87
Making it easier for customers to make healthy choices is something we would prioritise	**37%**	68	116	146
Our customers are often looking for healthier food when they use us	**27%**	70	119	170
Our customers are looking for good value and big portions when they use us	**58%**	110	91	90
Our customers are looking for an indulgent high quality experience with us	**68%**	101	99	103
I have a good understanding of healthy and nutritious food	**81%**	98	98	116
We focus on producing balanced and nutritious meals / food	**53%**	81	106	140

% Scoring 7-10 (Agree) Indices vs Total Sample	Total	Not Likely to Consider EOEW Framework	Neutral about Considering EOEW Framework	Likely to Consider EOEW Framework
I am genuinely interested in finding out more about this framework	**52%**	58	127	165
I would only consider this framework if there was a clear business benefit	**55%**	100	115	73
Realistically we are far too busy to find the time for a framework like this	**31%**	142	65	52
Our business would benefit from the type of support this framework could offer	**26%**	58	108	196
For this framework to be successful customers need to be made aware of it through advertising	**62%**	82	106	127
The recognition of being on a framework like this could benefit our business	**39%**	46	144	177

Key to indexing

Where specific audiences agree more or less with these statements vs the total sample. If the index produced is over 100 e.g. 133, we can say that they are 33% more likely to agree with a statement than the average

Green - A particular group are more likely to agree with a statement vs. the overall average.

Red – A group is less likely to agree with a statements vs. the overall average.

No colour - indicate alignment with the average.

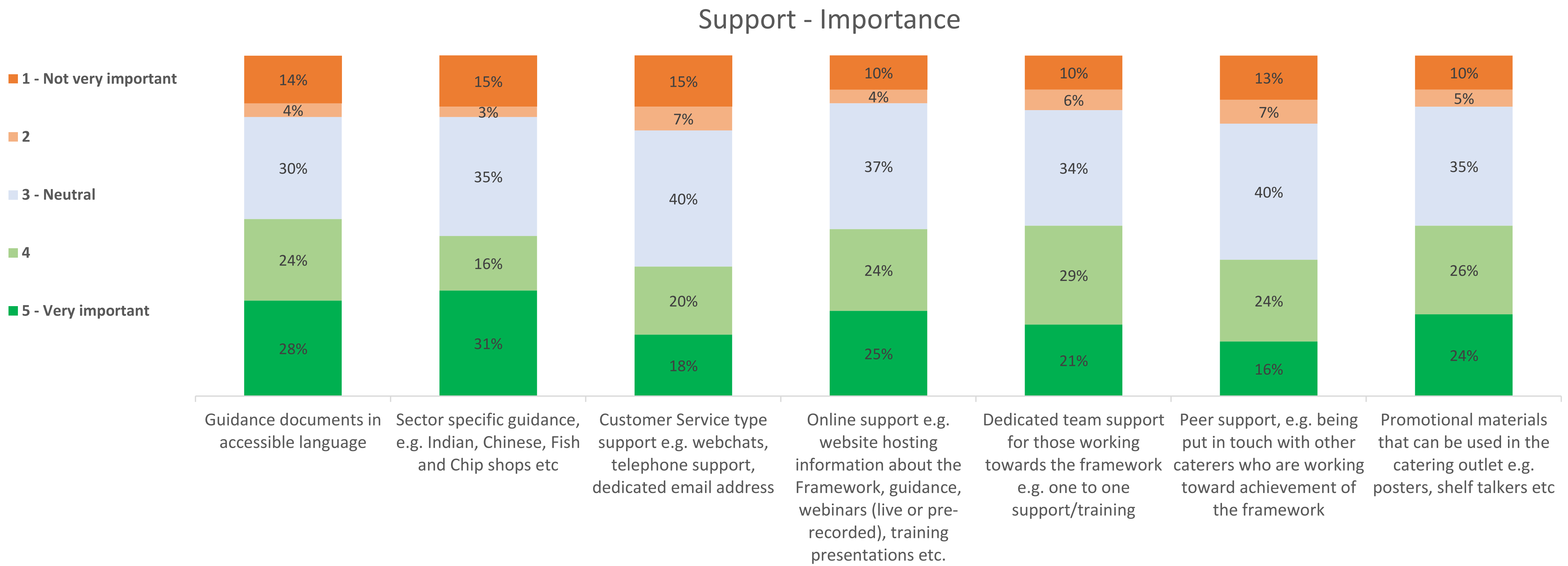
While both those neutral and likely to consider the framework share the characteristics of prioritising healthier food and recognising the benefits it could bring, those likely to consider are much more likely to be driven by the implied support the framework could offer.

Support

Support - Importance

Quantitative research

Guidance documents in accessible language, one to one support and training, promotional materials and online support and training are all seen as being important support mechanisms.



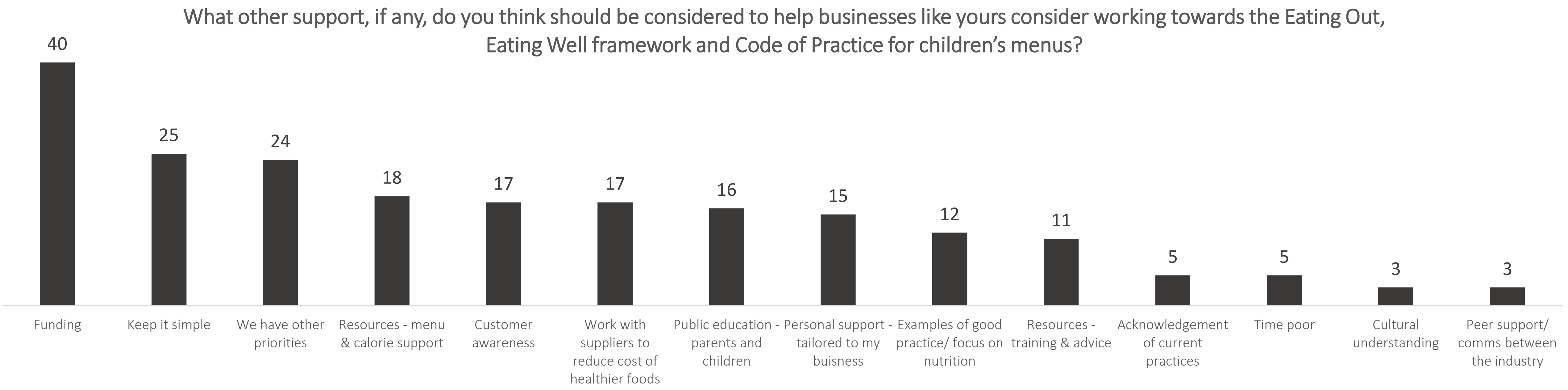
Insight to Action: Creating support which feels tailored to specific industries and that uses case studies to show best practice will go a long way to making the framework seem ‘doable’ and accessible. If it is possible to show how the framework can improve business outcomes with simple to implement examples, it could create a very compelling proposition for the decision maker.

Support is required in order for the framework to feel accessible…

In both the qualitative and quantitative research the outlets spoken to are looking for support in order to implement the framework. Quantitatively, 40 felt that the main support they would require is around funding, this is either direct finding or support through local suppliers to reduce the costs of healthy food items (mentioned specifically by 17).

Qualitatively almost all of the outlets (and 25 quantitatively) feel that all support provided needs to be simple, they do not want to be confused by jargon or have to sift through paperwork to find the information relevant to them. One of the biggest areas of concern for outlets is calorie calculation, many feel they will need support to manage this process.

24 of the outlets still feel that they have other priorities that are bigger than this which will impact their uptake.



Insight: Outlets are looking for support to access the framework, currently many feel that they lack the time and resources to adapt.

However, support needs to be tailored in order for the framework to feel relevant…

Qualitative research

Many feel that the framework is ill-fitting to their specific business needs. It must be flexible and suitable for all business types.

Some of the restauranteurs feel that they ‘are not the problem’ and that the issues surrounding obesity are due to fast food takeaways, therefore they feel that the support will not be tailored to their needs. They are looking for guidance on how to offer healthy menu adaptions and how to work with local suppliers within their budgets.

On the other hand, the takeaways are more apprehensive of the framework as they are the most concerned about changing their menu and potentially becoming off-putting for customers. The framework needs to work for them to encourage uptake. They are unlikely to make any changes if there is ‘nothing in it’ for them.

“I don’t think that restaurants like mine are the issue, when people come to us, they are looking for something special and something different. You don’t want to know how many calories or butter is in our food!”
(R4, Full-service Restaurant)

“If we were do change our menu and do healthy food people would go somewhere else, they don’t come to us for steamed broccoli they come to us for an indulgent treat. Our menu is not healthy living, it's a lot of fried stuff. I think people want comfort food, fast food!”
(R21, Takeaway)

“If people are going to buy chips, we will sell them”
(R18 Takeaway)

Insight: There is a lot of apprehension across the outlets when considering the framework, change is scary to almost all of them, especially when they feel that the customer demand is not there.

Final Comments

The audience were asked if they had any final comments to feedback on based on what had been discussed in the survey and the interviews.

"A financial incentive for businesses is essential for this to have an impact particularly in the current cost crisis." (Quant)

"There is an apathy in many of our customers to healthier eating, we have been serving salads with most meals since 2014 and are still shocked how much is returned. The better the demographic of our customers, there is more chance they will eat better" (Quant)

"Cantonese food in the traditional sense is healthy we have over the years adapted to a British palate; we need to change that palate in order for healthy choices to be made." (Quant)

"Cost to implement is a huge factor that's not been mentioned- hospitality is still struggling massively with staff shortages, increased costs and decreased footfall." (Quant)

"I feel our menu is already healthy, we make 90% of the food in house, we use lots of salad, veg & fruit and majority of our fresh home baking contains fruit. We are a tourist destination & therefore families like to treat the kids if on holiday, our hot chocolate is Organic. I am not sure we need to change much; the calorie counting is interesting but, in all honesty, we would have a clue how to implement that." (Quant)

"If I have the burden of calorie counting in future legislation, I will close my business and simply move on. Hospitality staff are over worked, underpaid and not in a place to dictate nutritional information to customers who simply aren't all that interested. The fact that this is deemed a pressing issue given the financial climate and that the hospitality trade in Scotland is on the brink of collapse" (Quant)

"My only concern is providing nutritional information, the cost of support for this is far to high for a small independent business to incur in such difficult times for hospitality." (Quant)

"Do not ruin tiny hospitality businesses by forcing them to implement your vision of healthy eating/calorie counting etc. You really should distinguish between e.g., fish and chip shops/cafes/multi-outlet businesses. We do not have the time to read through multitudes of frameworks, implement stuff that does not work. If the end game is to kill off all independently owned small hard-working businesses, then sure, the government is on the right track." (Quant)

"Better food education in schools would make a big difference as we respond to customer needs" (Quant)

Care needs to be taken with the implementation of the EOEW Framework and the COP for children's menus, there is a significant amount of anxiety around what this will mean for businesses, all communication needs to clearly show the need for and benefits of adoption.

Summary

Summary: Audience Mindsets

- There is an understanding that the framework is required, specifically surrounding children's menus. However, most feel that the responsibility for this lies with education and parents, and not with food outlets.

- Many customers are seen to be 'sitting in' less frequently and 'ordering out' more than they have in previous years. Therefore, when customers are dining out/visiting out of home establishments they are looking for a treat and often an indulgence. And when they are ordering out, they are looking for increased value (typically achieved through higher volume or meal deals). Therefore, quick service 'take-away' outlets are less willing to adapt their menus to be 'healthier' in case this is impacts business by deterring customers.

- Healthy catering isn't a priority for establishments when it is not a priority for customers, until there is a shift in consumer mindset there is unlikely to be a shift in outlet attitude, unless this is made to be mandatory through regulation. Currently there is limited appetite among this audience for voluntary frameworks, mostly driven by how busy they are on a day-to-day basis with this 'sort of thing' being very low on a long list of priorities.

- Independent outlets open to the framework are looking for it to be tailored to their needs/sector and easy to implement.

Summary: The Framework

- The quick service market was underrepresented in the sample as they are hard to reach and make up a much higher % of outlets than that achieved in this survey. They have a predicted uptake of just 13% for the framework suggesting this audience are unlikely to engage unless it is mandatory or business dictate that adapting their menu in line with the framework will create a more profitable business.

- For outlets open to adopting the framework they need to understand a clear why and the framework must work in a way that can be adapted depending on the business and their needs.

- For many of the businesses the framework does not currently feel relevant to them, and they are unsure what their role is in this. Businesses need to understand why it is required and what they can do to make a difference, education both for in and out of home eating is key to improving overall understanding.

- Outlets are looking for support to access the framework, currently many feel that they lack the time and resources. However, support must be tailored and easy to access, information on calorie labelling and financial support are key to the adoption of the framework from the outlets spoken to.

Thank you

Food Standards Scotland

Public Health Scotland

TMcK
Taylor McKenzie
Research & Marketing Ltd.