



**Obesity Action  
Scotland**

Healthy weight for all

## ORDERING FOOD ONLINE (OUT OF HOME)

**Food and drink purchased out of home (OOH) refers to any product purchased away from the home intended for immediate consumption, for example in cafes or restaurants.**

The OOH environment includes online delivery of meals and takeaways, generally facilitated by either restaurant apps or third-party delivery platforms. The COVID-19 pandemic and its associated lockdowns caused a dramatic spike in the uptake of online delivery and evidence suggests this higher usage will remain in the long term. There is currently little evidence outlining the implications of this shift.

We must ensure measures that enable access to healthier options such as portion size improvements, encouragement towards healthier options, and nutrition information apply to online OOH environments.



### FOOD DELIVERY SERVICES

In 2006, the launch of food delivery platforms connecting restaurants to customers, such as Just Eat, marked the start of an evolution in the food delivery market.<sup>1</sup> Following on the success of Just Eat, competing services such as Deliveroo and Uber Eats (*Box 1*) were launched, broadening the number of platforms that deal with processing and delivering orders. The food delivery market in the UK and Scotland has now become one of the most important channels for the OOH sector. Its significance has been underlined by the fact it was the only channel in the sector to generate growth over the pandemic years while all other OOH channels declined.<sup>2</sup>

- » The food service delivery market value was around £10.5bn in 2021 and it is expected to grow to nearly £15bn by 2025.<sup>3</sup>
- » The number of takeaway and delivery trips in Scotland increased by 93% between 2019 and 2021.<sup>2</sup>
- » In Scotland there were 70% more food and drink delivery trips (not including collection) in 2021 compared to 2019, while the value of deliveries alone grew by 155% over the same period to reach £573m.<sup>2</sup>
- » Between 2019 and 2021, the use of third party aggregator delivery apps (e.g. Just Eat) in Scotland increased considerably by 286%, while restaurant app usage grew by over 440%.<sup>2</sup>
- » In 2021, Just Eat, Uber Eats, and Deliveroo made up 98% of the UK online takeaway and delivery market.<sup>4</sup>
- » Ordering food via digital channels (*restaurant apps or aggregator platforms*) was used over six times as much as ordering by phone in 2021.<sup>2</sup>
- » In 2020 the CEO of delivery app Deliveroo stated that the effects of the COVID-19 pandemic had accelerated consumer behaviour trends in the food delivery market by up to 3 years.<sup>5</sup>

## CASE STUDY

### Uber Eats

## Uber Eats

Uber Eats is one of the biggest meal delivery platforms in the UK and Scotland, and in 2021 it reported that its delivery capabilities could reach 90% of the UK population.<sup>6</sup> It claims to have an average delivery time of 30 minutes globally.<sup>7</sup> However, there is evidence showing that nearly three quarters of the food and drink available through the platform would be classified as discretionary, while it actively markets less healthy options as 'most popular' and more often promotes them on its pages using images (compared to all other available food and drink groups).<sup>8</sup>

## Taking responsibility?

In 2023, Uber Eats and the British Nutrition Foundation announced they would be collaborating to improve offerings of healthy food and drink on the app.<sup>7</sup> The initiative aims to increase uptake of healthier options while also encouraging food businesses to make them more available.<sup>7</sup> It comes after a recent survey conducted by Uber Eats found that 70% of small to medium sized restaurants said they were unsure on what would constitute 'healthy' food.<sup>7</sup> The collaboration will include work with restaurants to produce an evidence-based framework which will guide outlets towards developing healthier menus.<sup>7</sup>



## WHAT IS THE PROBLEM?

- » Most of the food and drink available in the OOH sector is excessively high in calories.<sup>9</sup>
- » People in Scotland say they find it more difficult to access healthy options when ordering takeaway food compared to eating OOH in any other context (e.g. sitting in),<sup>10</sup> with 60% saying there are not enough healthy options at takeaway outlets.<sup>11</sup>
- » In 2021, the top food and drink delivery categories in Scotland were coffee, burgers, sugary carbonated drinks, pizza, and Asian food,<sup>2</sup> – many of which are associated with high energy contents and low nutritional value.
- » Research has shown that customers significantly underestimate the calorie content of takeaway meals.<sup>12,13</sup> People might therefore be unknowingly overconsuming calories from food ordered online.
- » People who are most likely to order food online include men, those in younger age groups, as well as people with lower levels of education. Higher engagement with food delivery channels from these groups may contribute to widening health-related inequalities.<sup>14</sup>

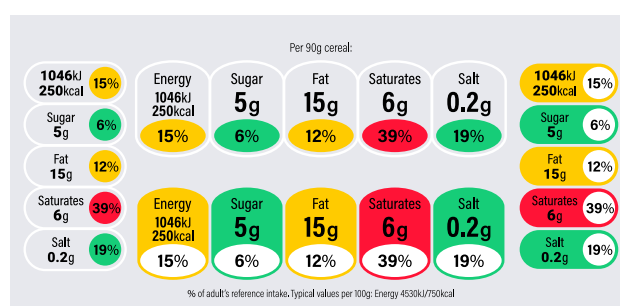


## SCOPE FOR HEALTHIER DELIVERY SERVICES

There is growing research around enhancing the availability of healthier options on food delivery platforms. There are important barriers to consider when trying to achieve this due to social and cultural norms associated with takeaway and delivery meals. In Scotland, top motivations for ordering a delivery in 2021 were enjoyment, practicality, and using it as a treat or reward.<sup>2</sup> Qualitative evidence confirms these motivations along with awareness that delivery meals are typically unhealthy, but they are still often viewed as a positive, convenient treat.<sup>15</sup> In fact, the same evidence revealed that customers recognise there can be healthy options available on delivery platforms but that they won't necessarily seek them out.<sup>15</sup> This has led public health researchers to acknowledge that any intervention to improve the healthiness of delivery platforms would need to be subtle and not intrude too much on customers' existing experiences.<sup>15,16</sup>

Since 2021 the UK research group Nesta has been exploring ways to make small changes to delivery platforms in order to make the experience healthier.<sup>17</sup> Working alongside the Behavioural Insights Team, they developed a simulated meal delivery platform to test various 'nudge' tactics and reveal their effects on total calories ordered by users.<sup>17</sup> The results for studies completed so far are shown below:

- » **Portion sizes** - Making small portion sizes the default option, renaming the default as 'regular', and offering an even smaller portion size were, in combination, shown to reduce the average calories per delivery order by 177kcal.<sup>16</sup>
- » **Positioning of options** - Repositioning restaurants and meal items to show the lowest calorie options at the top of the platform's pages reduced the number of calories ordered by 15% compared to a control layout.<sup>18</sup>
- » **Calorie labelling** - All variations of calorie labels were shown to decrease total calories ordered compared to a control where no labels were present. Making calorie labels large, positioned to the right hand side of meal prices, and having the option to turn off the calorie label resulted in the largest decrease of 8% in calories ordered.<sup>19</sup> It was also found that users viewed the intervention positively as labelling empowered them to stick to their existing healthy eating intentions.<sup>19</sup>



## POLICY DEVELOPMENTS



- » In 2021 **The Scottish Government** published an out of home action plan as part of its ongoing diet and healthy weight strategy.<sup>20</sup> It includes various actions to improve practices in the OOH sector as part of a new framework called Eating Out, Eating Well, with the key metric of success being calorie reduction in the sector.<sup>20</sup> The framework is currently still under development. The government delivered on one of its actions in 2022 when it opened a consultation on mandatory calorie labelling for OOH businesses. In May 2023, the Scottish Government Minister for Public Health and Women's Health announced in a Ministerial Statement that following the feedback received to the consultation, the implementation of mandatory calorie labelling in Scotland would be paused, to allow more evidence to be gathered.<sup>21</sup>
- » **Food Standards Scotland** consulted on measures to improve the out of home environment in Scotland in 2019.<sup>22</sup> Analysis of consultation responses found that the majority of respondents believed that online food delivery services should be included in an out of home strategy, that small or half portions should be universally available, full nutrition information should be provided online, and calorie labelling should be mandatory in order to support transparency and create a level playing field.<sup>23</sup>
- » In 2022 **The UK Government** introduced legislation to make calorie labelling mandatory for OOH businesses in England with 250 or more employees.<sup>24</sup> The policy extends to include the menus of companies shown on meal delivery apps.<sup>24</sup>
- » Public Health England's **Calorie Reduction Programme** was changed in 2020 to exclusively challenge the OOH sector to reduce the calories in their products by 20% by 2024.<sup>25</sup> The sector has been encouraged to focus on calorie reduction through either meal reformulation or reduction of portion sizes.<sup>25</sup> An initial progress report was due to be published in 2022, however this target was missed and it has not yet been released. A further progress report is scheduled for 2024 with the final evaluation of the programme due to be published in 2025.<sup>25</sup>
- » In 2022, Public Health England published an evaluation report on its separate **Sugar Reduction Programme** which showed the OOH sector achieved only a 0.2% reduction in sugar for products sold between 2017 and 2020.<sup>26</sup> Levels of sugar across the period even increased in some product categories including ice creams, lollies, and sorbets (0.5% increase), and puddings and biscuits (0.3% increase).<sup>26</sup>

## KEY RECOMMENDED ACTIONS

- » Improve portion size offerings by ensuring smaller portions are always available to customers.
- » Standardise nutrition labelling on menus to ensure consistency and transparency across out of home outlets.
- » Encourage and incentivise out of home businesses to improve the healthiness of their offerings.
- » Introduce mandatory calorie labelling on online menus and delivery platforms to ensure customers are informed.
- » Expand and test simulated meal delivery research in real world settings.
- » Fund further research to explore the public health implications of ordering food online.





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