BRIEFING

November 2023

THE OUT OF HOME FOOD AND DRINK SECTOR

Eating out of the home has become a regular part of our modern lives. Across Scotland, 96% of us ate out of home in 2021. With a quarter of our calories estimated to come from the sector, it has a crucial role to play in providing healthy, nutritious and palatable food that can help address the burden of diet-related disease in Scotland.

Key Points

- The current out of home food environment in Scotland encourages us to overeat. This is driven by high volumes of calorie-dense options on menus, large portions and marketing strategies focused on less healthy products
- Out of home, children are more likely to consume unhealthy food and drink
- Greater consumption of meals out of home is associated with higher calorie consumption
- The availability of fast-food outlets is higher in more deprived areas, while lower income groups rely more heavily on the sector
- A majority of people in Scotland think that fast food is too easily available

Recommended Actions

- ✔ Regulate to restrict out of home promotions on products high in fat, sugar and salt; and encourage businesses to promote healthy food and drink options instead
- ✔ Regulate or limit access to unhealthy food through improved planning and licensing arrangements for the sector
- ✔ Regulate to control portion sizes, introduce calorie caps, and ensure provision of half size portions
- ✔ A mandatory reformulation programme that reduces calories, sugar and salt while increasing content of fruit, vegetables and wholegrain in recipes and on menus
- ✔ Introduce mandatory nutrition information on menus and online

Obesity Action Scotland
Healthy weight for all

DEFINITIONS

Out of home food and drink: The out of home (OOH) sector covers all the food and drink we eat outside the home, and from takeaways consumed inside and outside of the home.[1] (Food and drink from restaurants, quick service restaurants such as fast food chains or takeaways, pubs, coffee shops, petrol stations, bars, hotels, cinemas, vending machines, public transport, workplaces, colleges/universities, and retail outlets (grocery, deli, convenience stores). Exclusions: hospital patient only meals, schools, prisons, and hospitality e.g. catering services for events such as weddings).

Takeaway: Food which is ordered and made in a restaurant and is then taken away to be eaten at home or elsewhere.[2]

Fast food: Hot food, such as hamburgers and chips, that you obtain from particular types of restaurants, and which is served quickly after you order it.[3]

Aggregator Platforms: A third party that facilitates the order of food from a restaurant to a consumer - e.g. Just Eat, Deliveroo.[1]

EATING OUT OF HOME IN SCOTLAND

In Scotland, it is estimated 25% of our total calories are consumed out of the home, and the sector now accounts for over a quarter of total food and drink spend across the UK.[4] In 2021, 96% of people in Scotland reported visiting an OOH outlet with an average of just under three trips a week per person.[1] Total spend for the sector reached £3.6bn in 2021.[5]

WHO IS EATING OUT OF HOME?

Data published by Food Standards Scotland indicates that 16-34 year olds purchase food to eat out of the home and takeaway more frequently than any other age group.[6] This appears to be a reversal of a trend seen a decade ago, where younger adults' use of the OOH sector in Scotland was declining.[7] Increasing access and availability of online/digital delivery options for OOH outlets may be responsible for this change.

In 2021, people from lower social class backgrounds (categorised by type of occupation) visited the OOH sector more often, on average, than those from higher social classes (182 vs 132 average visits per person).[1] This trend was the same in 2019 and 2020. Despite visiting the OOH sector more often, those from lower social classes were shown to spend less per visit in 2021 compared to customers from higher social classes (£4.78 vs £6.32).[5] This is likely to be a reflection of the different types of OOH outlets visited by each group (*Table A*). Interestingly, rural consumers saw higher average visits per person in 2021 than urban consumers (185 vs 135).[1]

Table A Differences in out of home activity by social class groups.[1]

2021	Total average (all groups)	Higher Social Class Groups	Lower Social Class Groups
Average number of trips	152	132	182
Average spend	£5.58	£6.32	£4.78
Most visited outlets	Supermarket front of store Bakery and sandwich shops Convenience outlets	Supermarket front of store Coffee shop and café Quick service restaurants	Bakery and sandwich shops Convenience outlets Quick service restaurants

HOW OFTEN ARE WE VISITING?

Many people in Scotland are using the OOH sector on a regular basis. In July 2021, a consumer tracker survey involving one thousand participants found that over a third of respondents (36%) had purchased food to eat OOH at least once a week in the previous month.[6] A further 22% had purchased at least one takeaway meal a week over the same period.[6]

New data shows that the OOH sector was heavily impacted by the COVID-19 pandemic which created lasting effects for the industry. For example, in 2019 there were 950 million OOH visits in Scotland, while in 2020 this dropped to 586 million.[1] However, 2021 showed signs that the market is starting to recover as 650 million OOH visits were recorded.[1] This is supported by a projection from the retail insights group, IGD, that states the food-to-go market (a significant channel within the total OOH sector) will be worth £23.4bn by 2027 - an increase of 26% on its value in 2019.[8]

WHERE ARE WE VISITING?

Quick service restaurants (QSRs), which are fast food outlets and takeaways, generate the most business in the OOH sector in Scotland, making up 34% of total sector spend.[5] Independent QSRs are now the most popular type of OOH outlet in Scotland which is a shift from 2019 when branded QSRs were by far the most visited.[1] Within the independent sector, fish and chips shops and Chinese takeaways are the most popular QSRs to visit, accounting for over a third of all independent QSR visits in 2021 (33.6%).[1] When looking at branded QSRs, the biggest outlets in Scotland, based on total number of consumer visits, are McDonald's, KFC, Domino's Pizza, Burger King, and Papa John's Pizza.[1] McDonald's alone received 36.8 million visits in 2021 which, if distributed equally across the population, equates to roughly one visit every eight weeks for each person living in Scotland.*

Overall QSR spend was 26% higher in 2021 compared to 2019, despite the disruption caused by the pandemic over this period.[5] This made it the only channel within the OOH sector to actually grow throughout the pandemic years, largely due to QSR's unique ability to pivot towards delivery services which complied with the pandemic lockdown regulations.[1] Growth across the QSR channel is also reflected in the accelerated uptake of independent and aggregator online delivery platforms seen in recent years ***(Box 1)***. Conversely, all other channels in the OOH sector suffered significantly over this period, with full service restaurants seeing a 40% reduction in consumer spend between 2019 and 2021.[1]

*Calculated by dividing total number of McDonald's visits in 2021 by population of Scotland 2021, as retrieved from National Records of Scotland: 36,800,000 / 5,479,000 = 6.7 visits per person (approximately one visit for every 8 weeks per person in 2021).

Box 1

THE IMPACT OF THE PANDEMIC ON TAKEAWAY AND DELIVERY ORDERING

The COVID-19 pandemic and its associated lockdowns have significantly accelerated the market for OOH takeaways and deliveries in Scotland. Some outlets, such as QSRs, were more easily able to adapt to delivery services in the pandemic period which were the driving force behind their unique growth in the OOH sector.

- The average number of takeaway and delivery trips per year in Scotland increased by 93% between 2019 and 2021, and there were 122 million more takeaway trips in 2021 than in 2019.[1]
- Scotland's delivery market value (not including collection) grew by 150% from 2019 to 2021, largely driven by increased usage of restaurant delivery apps and aggregator platforms.[1]
- Over the pandemic years, the use of restaurant websites and apps more than quadrupled (440%), while aggregator usage nearly tripled (286%).[1]
- McDonald's has seen the largest growth in its website and app usage compared to its competitors, doubling its market share between 2020 and 2021. Fish and chips shops, KFC and Burger King also saw growth over this period.[1]
- In terms of types of takeaway and delivery meals, those with the biggest share of trips in 2021 were; burgers (26%), chicken meals (24%), Chinese food (16%), fish meals (13%), and pizza (12%).[1]
- Small and independent QSRs account for 50% of all OOH delivery spend.[5] However, this is a smaller share than in 2019 as the growth of aggregator platforms has allowed other types of outlets to enter the delivery market (e.g. full service restaurants).[9]

WHEN ARE WE VISITING?

In terms of mealtimes, lunch is the occasion that generates most visits to the OOH sector in Scotland (26% of total visits) followed by dinner (23%) and breakfast (15%).[1] Visits to pick up a snack are the most frequent occasion overall, making up 36% of all visits.[1] Interestingly, lunch occasions have seen a clear decline in recent years, falling by 5% since 2019. This drop off appears to have been picked up by dinner visits which have increased by 6% over the same period.[1] This may have been a result of the shift towards work from home culture throughout the pandemic, which reduced the need for many people to leave their homes and resulted in reduced footfalls in city centres.[10]

WHY DO WE EAT OUT OF HOME?

Enjoying the taste of food and drink available OOH is by far the biggest motivator for people visiting the sector in Scotland, however people now view this as slightly less important than in 2019.[1] Practical aspects such as the ease of using the sector and the quickness it offers became more important in 2021 versus 2019.[1] Buying OOH as a treat or reward was only considered to be a motivator in 14% of visits in 2021, which is largely unchanged from 2019 (13%).[1]

There are clear differences in motivations between people from higher and lower social classes, mainly relating to practicality. On average, people from lower social classes visited the sector 97 times in 2021 to take advantage of its quickness, compared to just 13 visits by those from higher social classes for the same reason.[1] There were also many more visits attributable to ease of access on average by lower social classes (80) versus higher (47).[1]

WHAT DO WE EAT?

Food and drink we consume through the OOH sector tends to be less healthy than food from shops and meals that go on to be prepared in the home. In 2021, quick meals, hot and cold drinks, and sweet snacks saw the highest number of OOH trips in Scotland by general food category, however all of these generated lower figures than in 2019.[1] ***Figures 1*** and ***2*** detail the most commonly bought OOH items in Scotland in 2021, most of which are considered to be discretionary products.

Figure 1
Most popular out of home food items in Scotland (2021)

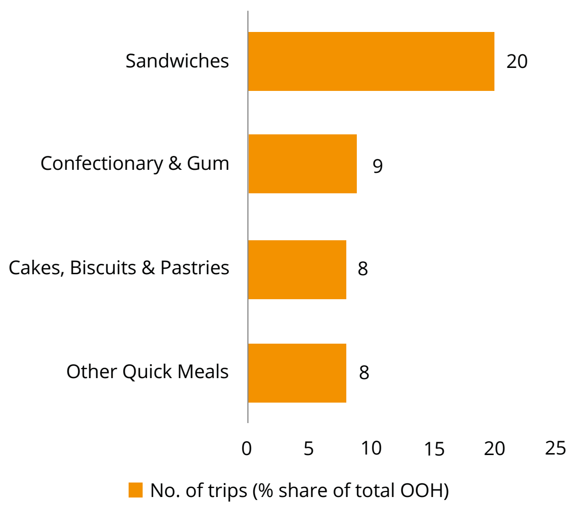
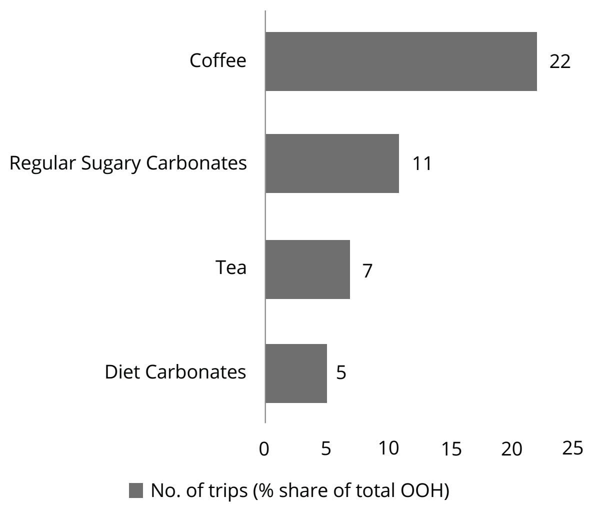


Figure 2
Most popular out of home drink items in Scotland (2021)



When looking at OOH data for children in Scotland, the skew towards consumption of discretionary food and drink is especially clear. In 2019, over two-thirds (67%) of OOH trips involving a child under the age of nine contained a discretionary item.[11] Furthermore, the most frequently bought OOH main meals for children in 2019 were chicken, burger, pizza, sausage, and fish-based meals.[11] Consumption patterns like these align with the broader trend of diets in Scotland not currently being of a high enough standard to support a healthy population ***(Box 2)***.

Box 2

THE PROBLEM WITH THE SCOTTISH DIET

The food and drink from the average diet in Scotland results in us missing our national dietary goals.[12] That is, our diet is tilted too much towards eating less healthy nutrients like free sugars and fat usually found in discretionary foods, while not eating enough healthier nutrients found in foods such as vegetables and wholegrains. In fact, 20% of all calories we consume come from discretionary products such as confectionary, savoury snacks and sugary drinks, which also contribute to half our total sugar intake.[11] Food Standards Scotland estimates that in order to start moving towards our national dietary goals we need to reduce consumption of discretionary products by 50%.[11]

The Scottish Health Survey provides data on population diet and the proportion of people eating certain types of food. In 2021, just 22% of the adult population recorded eating five or more portions of fruit and vegetables each day.[13] This figure has remained roughly unchanged since 2003 underlining a serious lack of progress over two decades. Young people (aged 16-24) appear especially less likely to reach the target, eating 2.8 portions per day in 2021 which was the lowest of all adult age groups.[13] The latest data also shows very few people are meeting recommended targets for fat, fibre, and free sugar intake.[13]

The diets of young people also show room for improvement. The 2022 Health Behaviour in School-aged Children Survey which includes pupils aged 11, 13 and 15 found that, on average, less than half of respondents in Scotland ate fruit (44%) and vegetables (40%) daily.[14] Furthermore, over a third (34%) reported eating sweets or chocolate every day, while 21% consumed a sugary drink.[14] The report also confirmed that young people from less affluent backgrounds were more likely to eat a less nutritious diet than their more affluent peers.[14]

THE IMPACT OF EATING OUT OF HOME

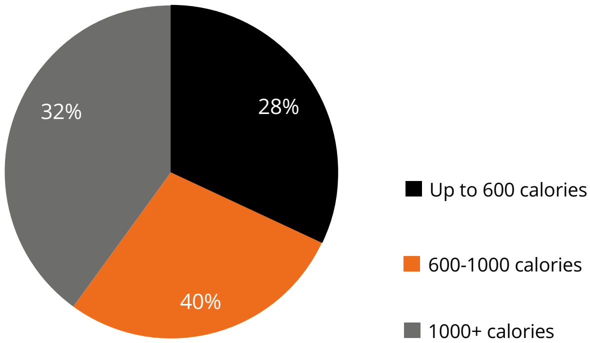
The modern OOH environment exemplifies the structural issues with our national diet. As outlined in *Figure 1* and *2* (page 5), the most popular food and drinks consumed in the sector are often energy dense and of low nutritional value. Evidence shows that OOH options tend to contain higher quantities of salt, sugar, and fat than similar food and drink available in retail outlets such as supermarkets.[15,16]

Data on calorie compositions of OOH food and drink items support the notion that the sector, in its current form, is a barrier to healthy population weight. A 2018 review of 40,000 menu items of large restaurant chains in the UK and USA revealed that 95% of food and drink options were high in either fat, salt, or sugar.[17] A separate review of restaurant chains in the UK and Ireland found children's meals often exceed recommended calorie guidelines for meals of younger age groups.[18]

Scotland has an OOH sector that serves meals with concerningly high energy densities (*Figure 3*). A survey of 81 branded OOH outlets found that nearly a third of main meals (32%) contain more than one thousand calories, while a pizza as a single meal within the sample was recorded as having over three thousand calories.[19] Obesity Action Scotland provided original evidence on this when surveying portions of chips served in 30 OOH outlets in Glasgow. The study found that the average bag of chips from the sample contained just under one thousand calories - half of the recommended daily calorie intake for a woman.[20]

Figure 3

Proportion of out of home main meals by calorie content in Scotland (%)[19]

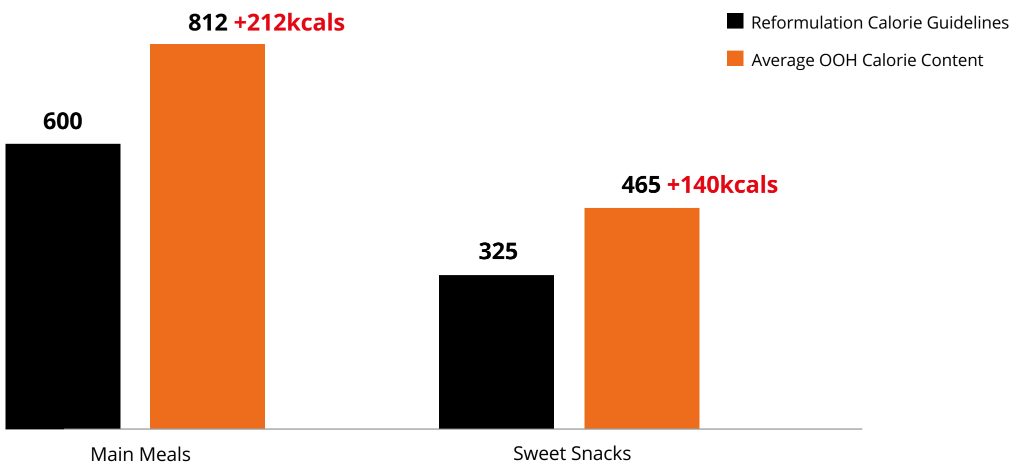


Snacks outside of meals

Other evidence confirms that main meals are not the only concern when it comes to OOH energy contents. Snacks, drinks and smaller meals which do not count as main meals are the most commonly bought OOH items in Scotland,[1] and on-the-go snacking has shown strong rebound growth since the pandemic.[21] Analysis published in 2023 showed the extent of calorie contents found in sweet snacks sold OOH in Scotland (*Figure 4*). Through a survey of foods including cakes, biscuits, and sweet pastries (often found in coffee shops), it revealed the food category averages 465 calories per serving - nearly a quarter of a woman's daily recommended intake.[22] Importantly, given the nature of the products surveyed, the source of the calories in these sweet snacks will often be from ingredients that are damaging to health, such as free sugars.[23] Snacks of this kind are also often bought alongside a drink, including high-calorie, flavoured coffee products, which may further contribute to excessive energy consumption during this type of OOH visit.[22]

Figure 4

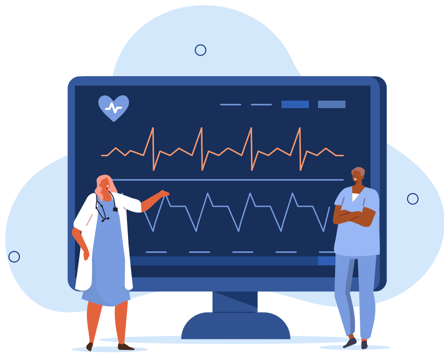
Reformulation targets vs average calorie contents of Out of Home food catergories in Scotland* (%)[19, 22]



**Guidelines taken from Public Health England's Sugar Reduction Programme. 'Main Meals' indicates either lunch or dinner occasions.[24]*

HEALTH OUTCOMES

There is evidence to indicate that high calorie options are influencing people's overall energy consumption and weight outcomes. A 2021 study which used data from the National UK Diet and Nutrition Survey showed that eating OOH causes teenagers to consume higher levels of ultra- processed foods.[25] An earlier study which used data from the same source showed adults who ate meals OOH at least weekly consumed 75-104 more calories per day than those who ate these meals rarely.[26] Similarly, those who consumed takeaway meals at home at least weekly consumed 63 to 87 kcal more per day.[26] The study also showed similar effects on children's calorie intake with the impact being greater in those from less affluent backgrounds.[26] Elsewhere, a 2022 systematic review of international studies found that higher frequency of visiting the OOH sector is associated with higher BMI and overweight in individuals.[27]



LOCATION AND PLANNING

The structure of local environments, including the types of OOH outlets available, has a significant impact on people's ability to access healthy food options. Unfortunately, for many people in Scotland and the UK, their local food environment is comprised of more unhealthy outlets, such as hot food takeaways, than outlets offering healthy and affordable options. Such areas with limited access to nutritious food are known as food deserts, and nearly a fifth (16%) of UK households live in them.[28]

Food deserts are closely linked to local levels of deprivation. A recent Scottish study showed that outlets in Glasgow selling potentially health-damaging products and services, such as fast food, were usually clustered in the same geographical areas.[29] Importantly, it showed that the greater the level of local deprivation, the more clusters of fast food outlets the area had.[29] A similar relationship between fast food outlet density and deprivation has also been confirmed in England.[30] Furthermore, a review of the impact of planning policy by the Scottish Government concluded that there is an association between exposure to unhealthy food outlets and weight gain.[31]

Currently, in Scotland, there are no examples of planning policies being used to help improve local food environments. Planning authorities in England, however, have previously demonstrated their ability to refuse planning applications from unhealthy food outlets in order to protect public health.[32] In 2015, Gateshead council published guidance on hot food takeaway applications in its local community.[32] The guidance extends planning application considerations to include local obesity rates, the proximity to children and young people, and potential clustering of outlets.[32] It also states that a health impact assessment would be required from applicants.[32] An impact evaluation study in 2022 showed that Gateshead's planning policy successfully reduced the density of fast-food outlets by 13 per 100,000 people between 2015 and 2019, and caused a relative prevalence reduction of 14% compared to other types of food outlets.[33] Elsewhere in England, Sunderland City Council recently adopted a similar planning strategy to Gateshead, indicating growing engagement on health and planning from local authorities.[34]

The fourth National Planning Framework (NPF4) represents the latest development in planning policy in Scotland and the potential for population health to be more strongly considered in the design of our cities, towns, and communities. Although stopping short of fully incorporating health as a material planning consideration, NPF4 offers opportunities to make health a more central focus of the planning system and planning decisions, particularly in local areas. NPF4 sets out a presumption against drive-through takeaways, and details that Local Development Plans should identify areas where proposals for healthy food and drink outlets can be supported, and that small- scale neighbourhood retail development will be supported where it can be demonstrated to contribute to the health and wellbeing of the local community. It also states that 'Development proposals which are likely to have a significant adverse effect on health will not be supported' and that a health impact assessment may be required for such proposals.[35] Such commitments should contribute to create healthier food environments, and can empower local planning teams and officers to take decisions, with a central focus on health, that they may have previously felt unable to take before.

INFORMATION WHEN EATING OUT

There is a need to improve availability, consistency and quality of nutritional information for consumers when eating out. In order for people to make informed decisions around the food and drink options available to them in the OOH sector, full transparency around what they consume is vital. A 2021 survey found that only 64% of larger OOH brands in Scotland provide nutritional information on their menu items online.[19] It also found the format of presenting nutritional information was inconsistent across outlets.[19] This level of transparency is often more difficult to achieve for smaller and independent outlets.[36] In April 2022, it became mandatory for large OOH businesses in England (those with 250 or more employees) to provide calorie information on their in- premise and online menus.

In Scotland, OOH outlets are currently not required to provide any nutritional information.[37] However, there is a growing body of evidence to show the effects that calorie labelling in particular can have on people's overall energy intake. A rapid evidence review by Food Standards Scotland in 2022 concluded that a mandatory calorie labelling policy in the OOH sector would successfully reduce calorie consumption of individuals.[37] One of the strongest studies in the review demonstrated that around [47] calories could be cut from people's OOH visits,[38] while another study suggested the reduction could be as large as 155 calories.[39] Recent data analysis shows that reducing people's calorie intake by around 216kcals per day could halve the prevalence of obesity in the UK by 2030,[40] and the reductions demonstrated by calorie labelling could contribute to achieving that target. Alongside empowering customers, it has also been shown that mandatory calorie labelling can act as an incentive for food and drink outlets to reformulate their offerings, broadening its impact on population health.[37,15]

To help small and medium size OOH establishments, Food Standards Scotland provides MenuCal - a free software to calculate calories and flag allergens in recipes.[41] A pilot of MenuCal was run on a small sample of businesses and showed that the service supported them to calculate calories and identify allergens, while it also resulted in some businesses reducing the calorie content of their menu items.[41]

As part of the Scottish Government's out of home action plan, published in 2021, it committed to a consultation on mandatory calorie labelling in the OOH sector in Scotland.[42] Obesity Action Scotland responded to the consultation at the time, however, in May 2023, the Scottish Government announced it would be allowing more time to consider the policy's impact on people with eating disorders before committing to any further action.[43]

PORTION SIZES OUT OF HOME

The portions of food and drink served in the OOH sector is an important area due to their substantial size and variation compared to portions served in standard retail outlets.[44] These larger portions result in OOH options often being more energy dense than food prepared at home.[45] Recent data provided by Which? demonstrates this issue using real world examples:

- In fast food outlets, a large serving of a fizzy sugary drink can be over 1,100ml, while small servings come in at around 470ml. Both of these portion sizes are far bigger than the standard retail serving of 250ml.[46]
- The same was found for cakes and pastries commonly sold in high-street coffee shops. A blueberry muffin sold in these outlets can reach as much as 110g, compared to 75g in retail equivalents, which is over a quarter smaller.[46]

In terms of associated health outcomes, nutrition researchers have emphasised the correlation between increasing portion sizes and higher rates of obesity in recent decades.[47] There is strong evidence to show people consistently consume greater quantities of food and drink when large portions are made available compared to when smaller portions are served.[48] This phenomenon has been dubbed the 'portion size effect' which is considered to be driven by various individual and environmental factors.[49] A popular explanation is that people often believe any portion that is offered to them is of a normal and appropriate size.[50] Furthermore, an important feature of large portion sizes is their relative value for money compared to other sizes.[51,52] Out of home outlets will often set their prices for large portions only slightly higher than those for regular portions which incentivises people to buy the bigger offering.[51] As evidence indicates that larger portion sizes are associated with increased food and drink intake, there is a need to redefine what is perceived as 'normal' and to protect people from offerings that result in over-eating.[53]

MARKETING STRATEGIES USED OUT OF HOME

Businesses in the OOH sector use a variety of marketing techniques to increase purchases of their food and drink offerings. In 2023, the Scottish Government published research on this topic which explored the most common types of marketing used OOH in Scotland and what products they are typically applied to.[54] The study's data was generated by over 300 mystery shoppers who visited 158 OOH outlets across Scotland both in-premise and online, and recorded the marketing techniques they came across.[54] Outlets surveyed included Greggs, Subway, McDonald's, and Starbucks.[54]

Positioning items at the till area was the most common type of marketing promotion, being evident in 69% of all in-premise visits.[54] Offering meal deals (54% of visits) and using price promotions (44% of visits) were other popular approaches recorded in-premise. These were also prominent online which covered visits using OOH restaurant apps and aggregator platforms.[54]

Price promotions (e.g., multi-buy, price reduction) were more frequently applied to less healthy products, both in-premise and online, as shown in *Figure 5*. Only 8% of in-premise offerings on price promotion were categorised as healthier, while 0% were found online (*Figures 6 and 7*).[54]

Figure 5
Proportion of price promotions OOH by less healthy vs healthier products - examples (%)[54]

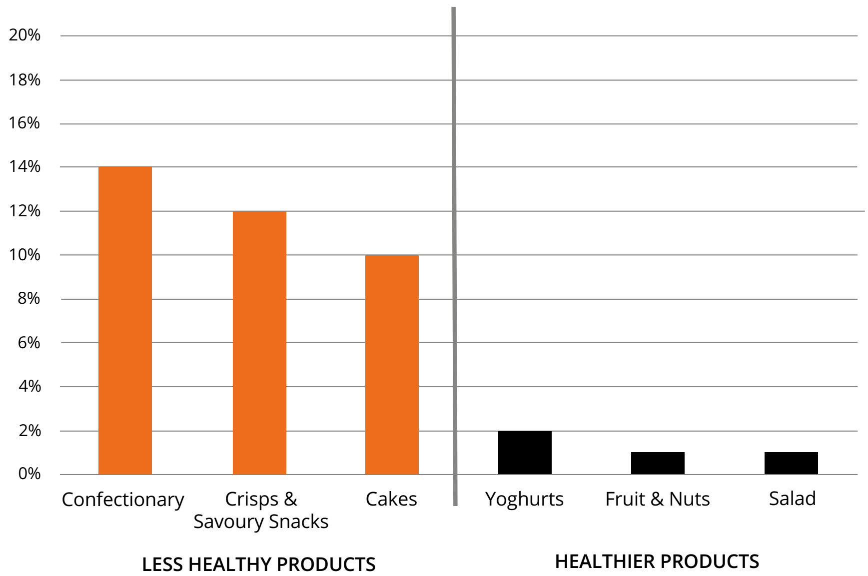
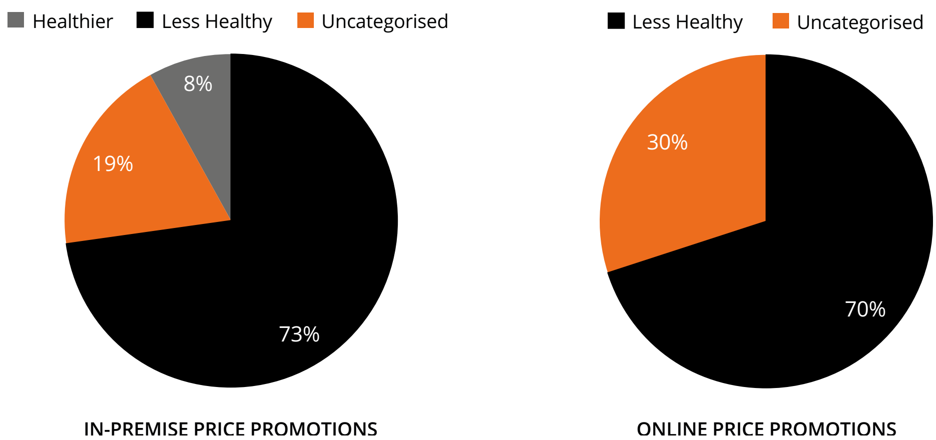


Figure 6 & 7
Proportion of price promotions OOH by healthier vs less healthy food and drink (%)[54]



Upsizing (outlets offering an increased portion size at point of sale) was also found to be a commonly adopted strategy and it was used nearly twice as often to promote less healthy options compared to healthier ones.[54]

WHAT DRIVES OUR CHOICES?

Our food choices are heavily influenced by habits, food cues and opportunities in the surrounding environment and what is available/appealing at the moment of purchase.[55] In fact, most food purchases are made in the moment with little conscious awareness or deliberation.[55]

The current OOH environment subconsciously encourages us to overeat through features explained in this briefing. Making healthy (or less unhealthy) options more common, visible and convenient would increase the chances that they are selected.[55] For example, by[55];

1. moving healthy options closer to customers in shops
2. increasing the relative availability of healthy options
3. making healthy options easier to identify within menu offerings
4. altering plates and packaging to reduce large servings
5. reducing portion sizes

OUT OF HOME POLICY DEVELOPMENTS

Scottish Government

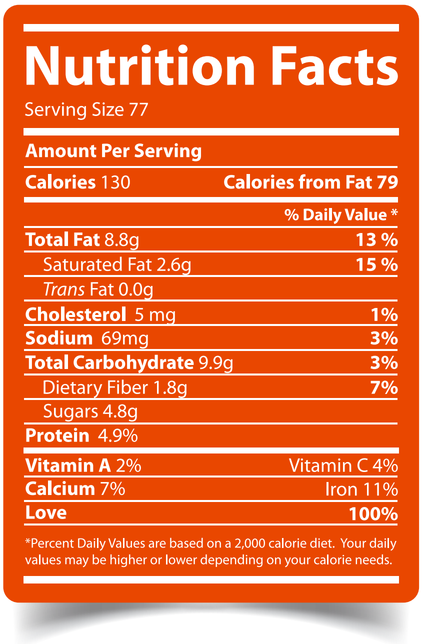
In 2021 the Scottish Government published an Out of Home Action Plan[42] which was a commitment within the 2018 Diet and Healthy Weight Delivery Plan.[56] The voluntary framework outlines ways in which OOH businesses in Scotland can improve their selection of healthy options and offer more information through calorie labelling.[42] Other areas include developing a code of practice for children's menus specifically, ensuring the public sector exemplifies healthy OOH approaches, and using the latest National Planning Framework to help improve the OOH sector.[42] Progress to date has been limited to the developments of National Planning Framework 4 which have the potential to improve food environments, and the consultation that was held on mandatory calorie labelling in 2022. Importantly, the overall action plan was put forward as a voluntary framework meaning businesses can choose whether or not to follow its guidance. This is despite there being ample evidence of voluntary action from the food industry not achieving desired outcomes.[57]

The Scottish Government also supports reformulation in Scotland's food system, including OOH, through funding of the Food and Drink Federation to deliver the Reformul8 programme.[58] It aims to support food and drink businesses to improve the healthiness of their offerings through measures such as reducing portion sizes and replacing ingredients with healthier alternatives.[58]

UK Government

Calorie Labelling (Out of Home Sector) (England) Regulations 2021

As part of the UK Government's latest strategy to reduce national levels of obesity, in 2022 it introduced legislation to make it mandatory for OOH businesses with over 250 employees in England to display calorie labels on menus, including for non-pre-packed food and drink.[59] The policy also requires calorie information to be available on online menus and aggregator platforms.[59]



Public Health England's Sugar Reduction Programme

The UK Government's Sugar Reduction Programme, launched in 2016, was introduced to reduce the volume of sugar in products sold throughout the food industry in England.[60] It was a voluntary programme that businesses could choose to opt into. It challenged the food industry to remove 20% of the sugar content in its offerings by 2020, with the OOH sector included in its remit.[w] In 2022, Public Health England published its final progress report detailing the effectiveness of the programme throughout its four years of operation. It revealed that the programme only achieved a 0.2% reduction in average total sugar per 100g for products sold in the OOH sector between 2017 and 2020.[60] Sugar content was reduced in some OOH food and drink categories, such as cakes and morning goods, however these reductions were considerably below the 20% target.[60] The wider shortcomings of the programme raise yet more questions around the use of voluntary industry approaches aimed at improving the food environment.

Box 3

OTHER OUT OF HOME INITIATIVES

The Healthcare Retail Standard (HRS) has been a mandatory requirement for all stores and trolley services in NHS Scotland since 2017. It was introduced by Scotland's Chief Medical Officer at the time to improve the provision and promotion of healthy food and drink across healthcare services.[61]

Public Health England's Calorie Reduction Programme was launched in 2018 and, like the sugar reduction programme, it challenged the food industry to achieve a 20% reduction in calories by 2024 with a focus on product categories that contribute significantly to children's calorie intakes. The OOH environment is included in its scope, and it supports voluntary engagement from across the sector including restaurants, pubs, cafes, takeaways, delivery services and others.[62]

Peas Please is an initiative run by The Food Foundation that promotes eating more vegetables across the UK. The initiative aims to secure commitments from industry and government to improve the availability, acceptability (including convenience), affordability and quality of vegetables offered in shops, schools, fast food restaurants, and beyond.[63] Its 2022 progress report showed vegetable sales amongst its partners in the OOH sector saw a sizeable increase compared to previous years which were heavily impacted by the pandemic.[64] However, the initiative also recognises that standard reporting of vegetable sales in not mandatory for any sector in the food industry which is a barrier to full transparency and accountability.[64]

Out to Lunch is a campaign run by the Soil Association since 2013 which works with OOH outlets across the UK to help improve their selection of healthy food and drink for families and children.[65] Its analysis for 2022 revealed that issues caused by the pandemic have significantly reduced children's menu offerings at UK visitor attractions.[66] Encouragingly, an attraction in Scotland, Edinburgh's Royal Botanic Garden, was ranked second in a UK-wide league table due to it consistently offering locally- sourced vegetables on adults' and children's menus.[66]

PUBLIC OPINION

Polling in Scotland indicates the public are aware of some of the issues with the OOH sector:

- 53% of adults in Scotland believe food businesses have a responsibility to encourage healthier eating (2023)[67].
- 72% of adults agree children's menus in the OOH sector should be healthier (2023)[67]
- 55% of people say they tend to eat less healthily when eating out (2022)[6]
- 38% of people agree there are not enough healthy options when eating out (2022)[6]

There is also evidence demonstrating public support for interventions that would improve the OOH environment in Scotland:

- The Scottish public's top suggestions for improving uptake of healthy options in the OOH sector (2022)[6]
  - Lowering prices of healthy options
  - Increasing the number of healthy options on menus
  - Stronger promotion of healthy options
- 53% support limiting the number of fast food outlets in a specific area (2022)[68]
- 60% of people support adding calorie information to menus (e.g. for cafes, restaurants and fast food outlets) while 61% support adding calorie information to online platforms (2022)[68]

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