



Project no: FOOD-CT-2006-23043

Project acronym: HECTOR

Project title: Eating Out: Habits, Determinants, and Recommendations for Consumers and the European Catering Sector

Instrument: Coordination Action

Thematic Priority: Food Quality & Safety 3rd thematic call, Topic T5 priority Area 4.3.4 Catering and eating out of home

Deliverable D6.3 Consumers' attitudes and behaviour when eating out

Due date of deliverable: Month 34

Actual Submission date: Draft 3: Month 34

Start date of project: 1 June 2006

Duration: 42 months

Project coordinator name: Antonia Trichopoulou, MD

Project coordinator organisation name: National and Kapodistrian University of Athens

Revision: draft 1

Project co-funded by the European Commission within the Sixth Framework Programme (2002-2006)		
Dissemination Level		
PU	Public	X
PP	Restricted to other programme participants (including the Commission Services).	
RE	Restricted to a group specified by the consortium (including the Commission Services).	
CO	Confidential, only for members of the consortium (including the Commission Services).	

DELIVERABLE REPORT FOR DELIVERABLE 6.3 HECTOR CA

Deliverable name:	Consumers' attitudes and behaviour when eating out
Deliverable no:	D6.3
Work package no:	6
Lead participant no:	13 (FCNAUP)
Responsible work package leader	Maria Daniel Vaz de Almeida
Delivery date:	
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1 Introduction

The aim of this report is to review the existing knowledge on consumers' attitudes, choices and behaviour when eating out. In line with the overall aims of the HECTOR project, this report will enhance knowledge about eating out in Europe. In addition, the report will compare it to research on American eating patterns. It will identify various attitudes and choice factors affecting consumer behaviour when eating out. Furthermore, the report will focus on the health aspects of eating out.

The outline of the report was presented in the 3rd Plenary HECTOR Workshop held in Athens at the beginning of May, 2008. In the general discussion the workshop participants raised a number of points of interest, among which were:

- the capability of food services to provide healthy foods
- the importance of the Gross Domestic Product (GDP) in relation to gaps in food expenditure among different countries. Expenditure on eating out is higher in wealthier countries.
- certain eating out occasions, such as food acquired from vending machines
- life stage
- the reasons why health-conscious people report eating out less frequently
- the socio-economics of the EU
- the family context of eating out
- food allergies (labels are used in the Nordic countries)

Some of these questions cannot be answered by the existing knowledge. We did not find any published research on vending machines or food allergies in relation to eating out particularly. These issues, however, are taken into account in the last chapter of this report where we discuss the gaps in the existing knowledge.

Nowadays, women in particular are interested in health issues and have their say when choosing a restaurant. In addition, the importance of children as customers should not be underestimated, since a relatively large proportion of fast food restaurants cater for children as

well. This kind of development is relatively recent. In Finland, women were identified as a potentially interesting customer segment during the 1980s when some restaurants redesigned both the interior and the menu with special regard to women (Sillanpää, 2002).

In an article summarising the Decision Analyst study, entitled *Nutrition and Eating Out*, it was aptly asked how nutrition – or health for that matter – fits in the picture of eating out as a necessity, a treat, a convenience, or a social event (Decision Analyst, 2007). This question is highly relevant and challenging for the HECTOR project. Therefore, this report, with its focus on consumers' views of eating out, will try to grasp the manifoldness of eating out in the Western world.

The history of eating out in Europe has proved long, vivid and varied (Jacobs and Scholliers, 2003). It ranges from street vendors to factory canteens, from fine dining to soup kitchens, from picnics to fast food restaurants, from snacks to meals, from rational feeding to pleasurable eating. Through the centuries, eating out has served both the body and the soul of the Europeans. However, eating out has not meant the same thing throughout its history or for different social groups. John Burnett (2004) has aptly captured this difference with notions of catering for the masses and catering for the classes. The democratisation of eating out is not only a matter of access but also of identification and distinction (Jacobs and Scholliers, 2003). These are relevant aspects while discussing the healthiness of eating out in post-industrial Europe.

Even though eating out is nothing new, it has increased during the last decades. This relates to many societal changes like urbanisation and industrialisation, the family structure and women's increased educational level and participation in the labour market. These developments have particular implications on where people eat their lunches (Byrne et al., 1998; Mutlu and Gracia, 2006).

The structure of this report is as follows. The second chapter addresses the objectives, methods and data sources used in the review. It presents the results of the literature search and how it was analysed. The third chapter focuses on the economic aspect of eating out and catering industry. It gives an overview of the situation in European countries as well as in some other countries, members of the Organisation for Economic Co-operation and Development (OECD). In the fourth chapter, the focus is on consumers' choice and attitudes, and both theoretical

frameworks and empirical results are presented. The fifth chapter ponders the position of healthiness in the literature. The sixth chapter explores the aspects of sociability related to eating in general, and eating out in particular. Finally, the seventh chapter concludes the findings and discusses the future of eating out in Europe.

2 Objectives, methods, definitions and data sources of research on eating out

2.1 Definition of eating out

Having to work with already collected data, the HECTOR project has jointly accepted the following multi-level operational definition for “eating out”:

1. “meals, beverages, snacks consumed out of home (core definition)

If more detailed data are available, eating out will be defined as:

2. meals eaten outside home prepared by food services (it is understood that food services refer to catering, formal and informal eating out)
3. meals prepared by food services and consumed in home“

Three criteria were discussed when developing the definition of eating out:

- a) **Where** the food was eaten (home, restaurant, canteen/cafeteria, take-away, picnic). It is clear that eating at a restaurant or cafeteria falls into the definition. But what about having a picnic meal on a beach, or a take-away-meal bought from a restaurant and eaten at home?
- b) **Who prepared** the meal (members of the household, hired help, canteen cook, restaurant chef, food industry) or **where** it was prepared. Two points can be taken into account: (1) Whether a money transaction took place between the producer and the consumer, and (2) Whether there was a possibility for choosing the ingredients the meal or snack was composed of.
- c) The nature/category of the food eaten, basically, whether it was a *meal* or a *snack* (meal, salad, sandwich, tea or coffee, ice cream, etc). People may connect eating out

with meals rather than with snacks, so that eating out is considered as something special in people's minds.

The EO-definition, developed within the HECTOR project and recommended to be used in future data collections, followed the '*where it was prepared*' criterion. "All foods that were not prepared at home" were included in the definition. This brought in snacks bought from vending machines as well. Thus, small items such as chocolate bars and soft drinks were included in the category of eating out.

In addition, it is interesting to explore how consumers themselves, as laypersons, see eating out (Warde and Martens, 2000). If we want to influence people's choices, we need to understand their perceptions. The working definition of eating out by Warde and Martens (2000) was based on the dimensions of *place of eating* (food is consumed outside or inside domestic sphere) and *place of preparation* (food is prepared outside or inside domestic sphere). It turned out that the views of Warde and Martens' (2000) interviewees were more complicated. Four other aspects were identified, in addition to the socio-spatial and preparation dimensions of eating out. Those were the payment involved (as the eating out usually takes place in commercial outlets), the sociability of eating, eating out as something special and the association of eating out to meals and not snacks. The latter is related to the notion of eating out as something special. In this line, snacks would not meet this criterion of eating out. The HECTOR definition of eating out includes only the meals prepared outside the domestic sphere.

This report, however, needs to take into account how "eating out" is defined in the reviewed literature as well. The starting point is "meals, beverages, snacks, prepared or consumed outside home", as mentioned above. The challenge is to grasp the manifoldness of eating out in terms of, for instance, informal eating out (IEO) versus other eating out occasions and types (see chapter 4).

2.2 Data sources of the reviewed research on eating out

Three literature searches were conducted in order to scan out the literature: in March 2007, in April 2008 and in January 2009. The search was limited to literature published after 2000 so as to get relevant information. The search was based on keywords, such as ‘eating out’, ‘dining out’, and ‘food services’, cross-tabled with consumer attitudes, behaviour, choice, etc.

Another data source were the statistics on eating out. Statistics on national accounts annually provide data on consumption expenditure on catering services based on the official Classification of Individual Consumption by Purpose (COICOP, maintained by the United Nations Statistics Division and applied by international organisations such as EU and OECD). The COICOP classification provides internationally comparable information about household expenditure on food. It includes categories such as ‘*food and non-alcoholic beverages*’ with several subcategories, such as ‘*alcoholic beverages (and tobacco)*’ and ‘*catering services*’ which may be divided into subcategories such as ‘restaurants’, ‘cafes and the like’ or ‘canteens’. The data on the different countries were drawn from the OECD data bank.

The scope of research on eating out is wide. The objectives, methods and data vary a lot, as certainly does the definition of eating out. On one side, it seems that the concept of ‘eating out’ is a relatively unestablished term. Some studies take into account the entire range of eating outside the home, others refer to places of eating out, e.g. eating-out outlets (Olsen et al., 2000), or use the expression “commercial eating facility” (FAFH food away from home) (Byrne et al., 1998; Mutlu and Gracia, 2006). In the reviewed literature, snacks were not generally included in the definitions of eating out. On the other hand, the classification of restaurants is more established (QSR/quick service restaurant or fast food; casual dining; up-scale/fine dining; as well as the take-away/carryout types of restaurants) (Mertanen, 2007).

Classification of the studies reviewed

Literature searches resulted in more than a hundred articles in English. We classified the studies according to the methods used and theories applied, the focus on the topic and the country the research was related to. To give an overview of the existing research, a short summary is presented here, without however claiming that the review covers at all the research done in this field.

The majority of the reviewed papers came from disciplines like sociology, marketing and nutrition, implementing the theories and paradigms of their respective fields. About one third of the studies applied multidisciplinary approaches, e.g. sociology and nutrition or marketing and economics. Other fields, such as business economics (catering), psychology, and food technology were covered by a small number of articles. The search executed in January 2009 resulted in more articles related to children's eating habits compared to earlier searches. Very few, however, gave information on eating out.

Several market research institutes have lately explored the aspects of eating out in relation to nutrition and healthiness. Unfortunately, in several cases, the full reports compiled by agencies/organisations like Mintel (<http://www.mintel.com/trends-innovation>), Euromonitor International (<http://www.euromonitor.com/>) or Peach Factory: Eating out and the Consumer (<http://www.peach-factory.com/research1.ink>), the cost for acquiring reports is discouraging.

Classification according to methods and design was drawn up as follows:

Theoretical/conceptual studies (e.g. Murcott, 2000; Warde and Martens, 2000; Kivela et al., 1999a, b) give an insight into how eating out is defined, or how the concept of lifestyle and contextual factors help understand food use. Only a few studies of this type were identified, even though most of the studies applied a theoretical frame guiding the quantitative analysis. Theoretical and conceptual developments are presented, in more detail, in chapter 4.

Qualitative studies analyse, for example, the functions of restaurants in daily life (Pettersson & Fjellström 2007) and how these could be taken into account when developing food services (Gustafsson et al. 2006). About one tenth of the articles used qualitative methods. Menu analysis, developing customer segments in marketing, laddering technique (means–ends chain), customer interviews, and analysis of food diaries, among others, were dealt within these articles. Observation was used in a study of families in restaurants.

Quantitative studies are based on either surveys or statistics. A lion share of the relevant literature falls into this category. The aims and focus of surveys vary from defining the customer profiles of one or two restaurants to the producer perspective or consumer satisfaction

on eating out occasions, menu price endings etc. Theoretical perspectives may vary from social science and economics to hospitality management.

Statistical data can be used to give an overview of eating-out behaviour, for example, in relation to household expenditure on catering. Time use surveys provide information about the time spent on eating at home and out of home per average day (European time use data bank HETUS). Data collected through the CREST study shed light on the popularity of types of restaurants and the age, income, and household composition of people visiting them (Data collected through the CREST study; http://www.npd.com/corpServlet?nextpage=foodservice-crest_s.html).

Triangulation, i.e. using more than one method or data source, was not very common but some theoretical-qualitative, qualitative-quantitative and case studies were retrieved.

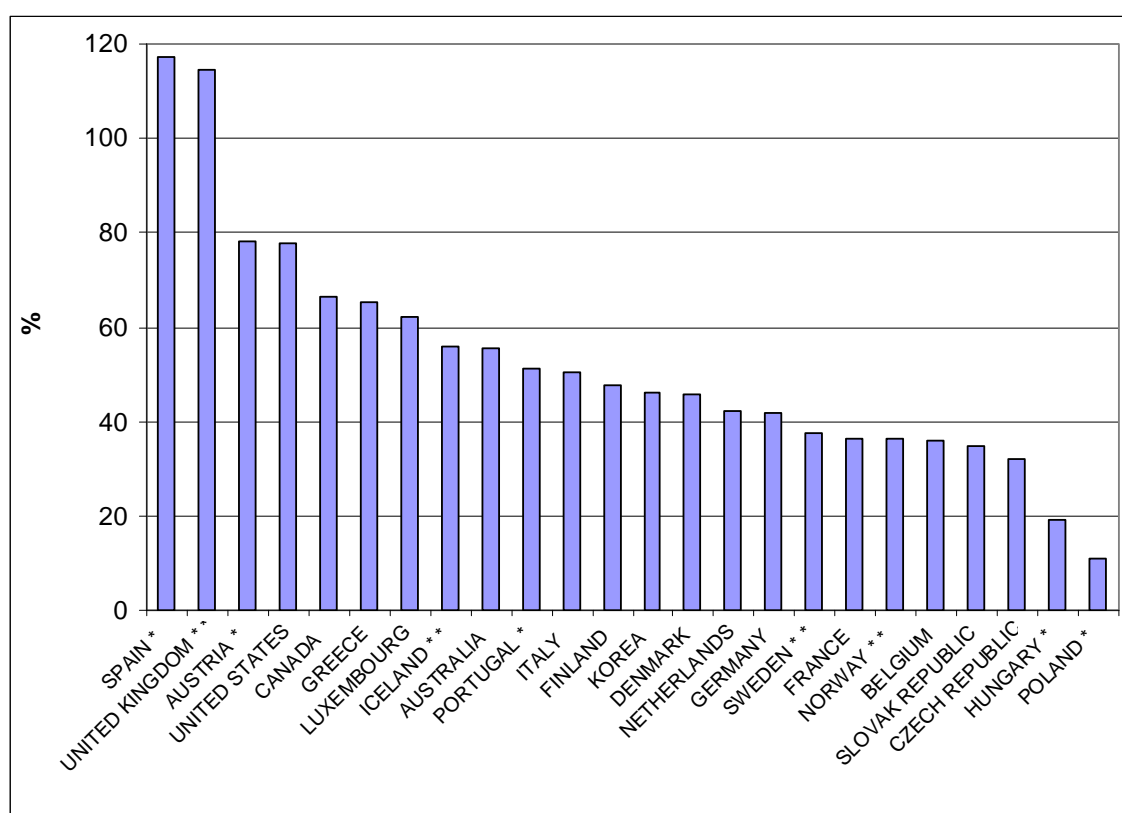
In addition, one fifth of the articles provided literature reviews on topics such as consumer behaviour in catering, the "Slow food" movement , food safety, children as decision makers in food choice, etc.

The target groups of the studies were mainly restaurant customers or consumers in general. Many studies focused on special population groups such as school children, teachers, women of certain age, inexperienced restaurant visitors, smokers, etc. Nearly half of the studies dealt with Europe, about a third with the US, and the rest were Asian or Australian studies.

3 Overview of economic aspects of eating out

In order to get an overview of the significance of eating out in the diet, we looked at the statistical data on consumption expenditure: how much money households spend on eating out versus eating at home. Figure 1 compares the expenditure on the catering sector to the expenditure on food and non-alcoholic beverages bought from the supermarkets. Figures on catering consist of meals and drinks, including alcoholic beverages. When interpreting the graph, it should be noted, however, that: (a) Consumption by tourists is included in the figures on catering; (b) there may be some problems with data harmonisation and (c) variation in the price levels of restaurant meals and foods that limit comparisons. Bearing the above in mind, the proportion varies from 11 percent in Poland to around 50 per cent in many other European countries. In the UK and Spain the share of catering is over 100 per cent.

Figure 1. Proportion (expressed as %) of expenditures for EO (meals and beverages, alcoholic and non-alcoholic) to expenditures in supermarkets (food and non-alcoholic beverages).



Data from 2007, * data from 2006, ** data from 2005

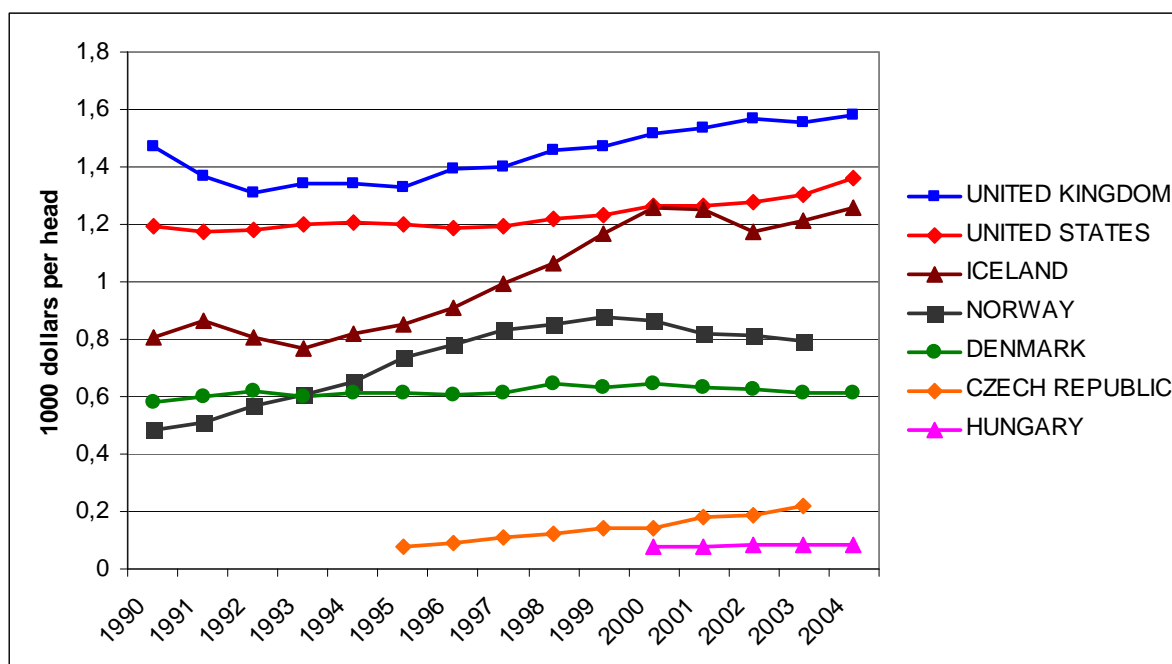
Source: OECD

There seems to be a connection between the wealth of a country, expressed in GDP, and the proportion of expenditure on eating and drinking out of home. Poorer countries use proportionally less money on catering than richer countries. But the economics don't seem to explain all the differences. Although Luxembourg and Norway are the richest countries in Figure 1, Spain and the UK rank at the top. The latter have a strong pub and bar culture and attract a large number of tourists. The position of Belgium appears questionable and could be the result of data harmonisation issues. Price levels of restaurant meals and food in general may have some influence on how expenditure is divided between expenditure on eating at home and catering. For example, the value added tax (VAT) can be much lower for foods bought from the supermarkets than for catering services. School meals and meals served at kindergarten are excluded from the figures if they are provided free of charge by the public sector. The latter and lunches eaten at cafeterias at workplace may reduce the portion of home meals in countries where in the majority of households both spouses work full time, and children's meals are provided by the public sector. In Finland, for example, 85% of pupils eat hot lunch at school, for free, every school day (Tikkanen and Urho, 2009).

The UK may be a special case. Unlike any other European country, the expenditure per capita on catering and hotels was the fifth biggest expenditure group after expenditure on housing, transport and recreation. In other European countries' expenses for food and non-alcoholic beverages were among the three biggest expenditure groups (Varjonen, 2006).

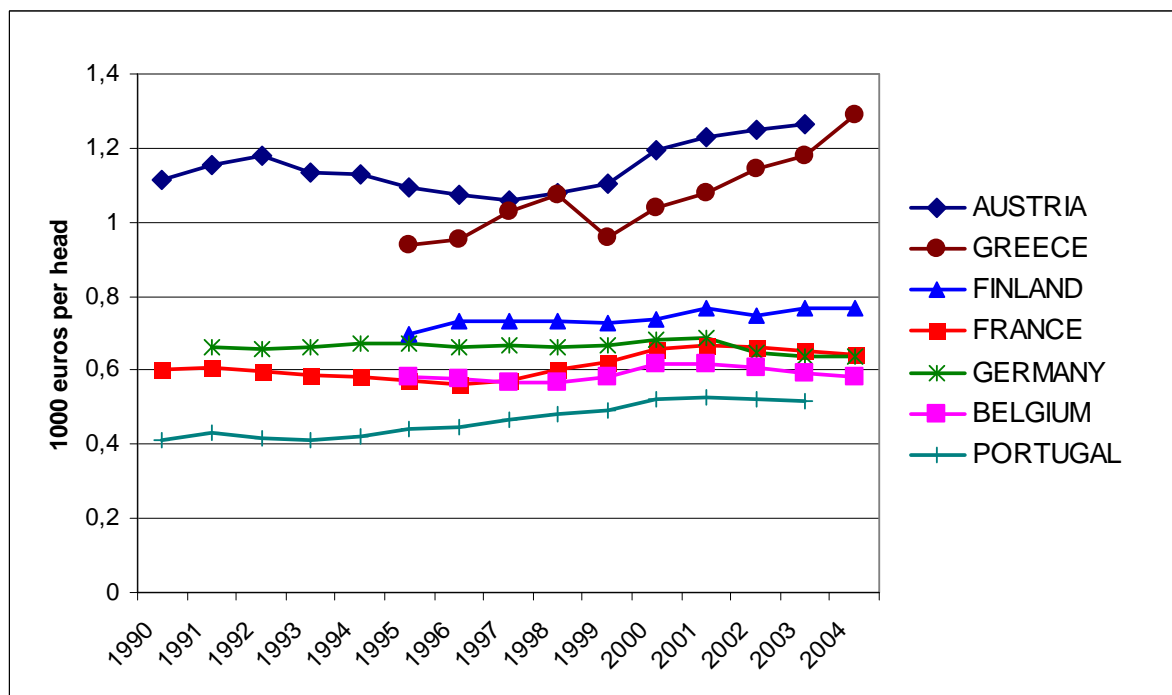
Expenditure on catering in proportion to food purchases has shown minor changes during the last few years. From 2005 to 2007 the share of catering has slightly increased in most countries. The long-term development, however, can be seen in figures 2 and 3. They present volume changes in catering sector (i.e. price changes have been taken into account). The figures show expenditure per head per year in dollars (Figure 2) and in euros (Figure 3). In 2000, the exchange rate between dollar and euro was 1 dollar = 0,805 euros. At this point, again, the change of consumption expenditure on eating out seems to be connected with the economic development. In Germany, for example, the growth of the GDP was only 1 per cent from 2000 to 2003, and the volume of catering slightly decreased. In contrast, in the UK the GDP growth was nearly 7 per cent, and the volume of catering increased steadily (OECD, 2006). Longitudinal data were not available for some countries (e.g. Italy, Spain) as they reported expenditure on Restaurants and hotels as aggregated category.

Figure 2. Expenses for catering services in dollars. Prices adjusted to the levels and exchange rates of 2000.



Source: OECD

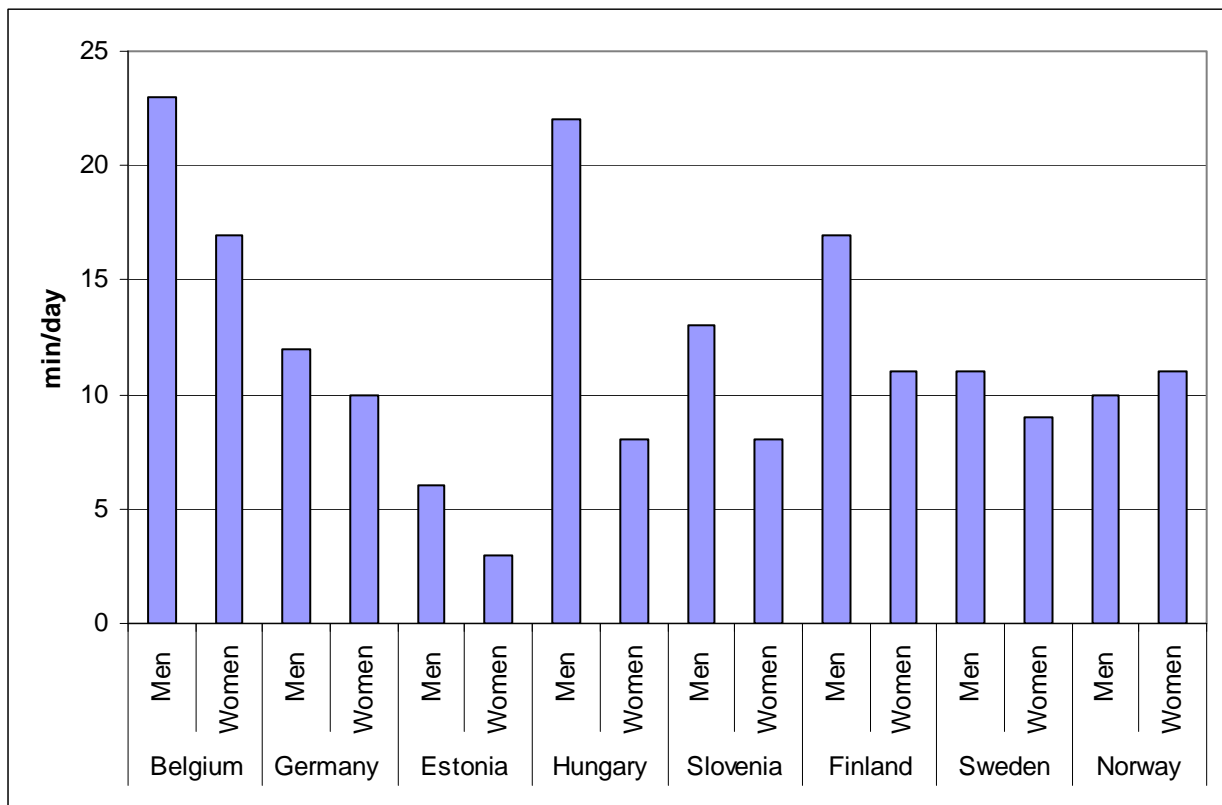
Figure 3. Expenses for catering services in the euro zone countries. Price adjusted to the levels of 2000.



Source: OECD

Time use surveys provide information about the time people spend in restaurants, bars and cafes. Harmonized data for eight countries have been published by the European Commission (2004). The data were collected during 1998-2002. Figure 4 shows differences in time use between men and women as well as between countries. Men in Belgium, Hungary and Finland seem to spend more time in restaurants and bars than men and women in other countries, keeping in mind that data demonstrate average figures on the whole population of the given age.

Figure 4. Time spent in restaurants, bars or pubs by 20-74 year-old men and women in European countries.



Source: European commission 2004

4 Consumers' choices and motives concerning eating out

4.1 Theoretical approaches

Food services serve multiple purposes and functions. Research reviews disclose a wide variety of types and points of view making general conclusions difficult. It does however seem that the consumer's choice of restaurant is the most important aspect and that the choice of meal comes after that.

Choices and motives related to eating out are connected to expectations and former experiences people have on eating out. Subsequently, the research largely focuses on consumer satisfaction, on how well expectations have been met and an overlapping with socio-psychological aspects cannot be avoided.

In consumer research on restaurant visits a coherent theoretical structure has emerged since the 1970s (Johns and Pine, 2002). Nick Johns and Ray Pine state: "The picture can be summarized as follows. Consumers are believed to view a service such as a restaurant meal in terms of a set of attributes: characteristics that make it desirable, ascribing different levels of importance to each attribute." This approach is called *attribute-value theory*. Such attributes may be low price, food quality, convenient location etc. The evaluation of the meal service attributes produces attitudes towards a restaurant. Attitudes may appear in two types: expectation or post-experience evaluation (Johns and Pine, 2002; Iglesias and Guillén, 2004).

Consumer satisfaction is concerned not only with attribute values but also with a broader value system. The overall evaluation of an attitude towards a restaurant leads to the *expectancy disconfirmation theory*. The attitudes towards the restaurant may be based on expectations (friends' recommendations, for example) or post-experience performance evaluation (after visiting a restaurant the attitudes are based on the experience). Kivela et al. (1999a) present a model that combines the two types of attitudes to the model of dining satisfaction and return patronage. The model includes external and internal factors: dining occasion, restaurant attributes, customers' dining expectations, customers' importance perceptions, and customers'

post-experience perceptions. A large amount of the consumer research reflects this broad theoretical structure. Therefore, it is presented here in more detail (Kivela et al., 1999a, 2000).

A model of dining satisfaction and return patronage

External factors form a starting point, “framework”, for the model. They include

- the dining occasion (business, celebration, social occasion, etc.);
- situational constraints (time, money);
- dining out frequency and
- customers’ characteristics (age, gender, income, occupation).



Restaurant attributes include:

food: presentation of food, menu item variety, nutritional value of food, tastiness of food, food quality, freshness of food, temperature of food

service: friendly, polite and helpful staff, attentive staff, staff greets customers, efficient service, staff are willing to serve, staff have food/ beverage knowledge, sympathetic handling of complaints

atmosphere: level of comfort in the restaurant, level of noise in the restaurant, view from the restaurant, cleanliness of the restaurant, dining privacy, restaurant’s temperature, restaurant’s appearance, staff’s appearance

convenience: handling of telephone reservations, parking convenience



Pre-dining perceptions and expectations are developed on the basis of these restaurant attributes. Expectations include also customers’ perceptions on the importance of these attributes.



Dining experience leads to the customers’ evaluation of how well the expectations have been met.



Post-experience perceptions of the restaurant are developed which leads to

DINING (DIS)SATISFACTION

The level of satisfaction is specified depending on whether the expectations have been confirmed or not. Satisfaction depends also on former dining experiences. All these factors influence the decision on whether to revisit the restaurant.

This model was tested with data from two restaurants in Hong Kong (Kivela et al., 2000). Five dimensions of dining satisfaction were found. These were: 1) first and last impressions (dining privacy, restaurant's temperature, appearance, restaurant offers new dining experiences, food of consistent standard, service of consistent standard), 2) service excellence (friendly, polite and helpful, attentive staff, greeting customers, willing to serve), 3) ambience excellence (level of comfort, level of noise, view from the restaurant), 4) food excellence and comfort when eating there (menu variety, nutritious food, tastiness of food, food quality, feels comfortable) and 5) reservations and parking.

Several authors agree that food quality and service quality are key issues in choosing a restaurant. Food quality may even be a more important criterion than service quality. Food quality, however, is very much a subjective perception, what is good quality for one may not be good for another (Mertanen, 2007; Johns and Pine, 2002; Johns and Kivela, 2001). The connection between quality and price and consumer satisfaction was studied by Iglesias and Guillén (2004). They concluded that the perceived quality has a direct and positive impact on the level of satisfaction, while, in contrast, the total perceived price does not influence that satisfaction in the same way.

Another model that tries to combine the multiple factors that influence enjoyment of the meal occasion is the *Five Aspects Meal Model FAMM* (Gustafsson et al., 2006; Edwards and Gustafsson, 2008). In addition to food itself, many situational variables have long been understood to be important factors influencing the preferences of eating out. Based on a number of studies it can be concluded that situation and context or circumstance of consumption have the ability to influence the acceptability of individual foods, beverages and meals, and in some cases, the amount actually consumed. The five components sketched by the authors are: the room, meeting (service quality), product (technical quality), management control system (logistics, meal preparation, waiting times for customers, legal issues, etc.), and the entirety of the meal which can be called atmosphere. The authors emphasise that a wider framework which makes up the customers' experience is inevitable. These factors should not be considered in isolation but more as contributory factors to the meal experience.

One more applied theoretical approach is based on the household production theory which was initiated by Gary Becker in his *time allocation theory* (1965). The basic idea of the approach is that households try to allocate their money and time between unpaid and paid work in a way that best satisfies their needs. In literature, this approach introduces the term *food away from home (FAFH)*, and it uses econometric modelling with the household expenditure data complemented with time use data whenever available. (Byrne et al., 1998; Mihalopoulos and Demoussis, 2001; Mutlu and Gracia, 2006.)

4.2 Choice between eating at home or outside home

The decision of eating out could be seen as a continuum where situations, contexts and preferences vary. Costa et al. (2007) studied different motives behind the choice of how the meal is to be provided. The authors interviewed 50 Dutch people about their preferences for a weekday and a weekend day eating using the laddering technique. The interviewees were first asked to rank order four general meal solutions (home-made meal, ready-made meals, take-away, eating out at a restaurant) according to the likelihood of each of them being chosen for a dinner on an ordinary weekday or weekend day. The interview continued with questioning the importance of such meals, which is essential according to the laddering method. Table 2 shows the rank of preference for each meal solution, (1=most likely, 4= least likely). The results also showed that the replacement of home-made meals by ready meals is dependent on how people trade off convenience with the perceived sensory and health-related benefits. (Costa et al. 2007).

Table 1. Means and standard deviations of the rank order of meal solutions for weekdays and weekends (1=most likely, 4=least likely).

Meal solution	Weekday dinner	Weekend dinner
	Means (and \pm std of rank orders)	
Home-made	1,2 (\pm 0,7)	1,4 (\pm 0,9)
Ready-made	2,5 (\pm 0,9)	2,6 (\pm 1,0)
Take-away	2,8 (\pm 0,9)	2,8 (\pm 0,8)
Eating out at a restaurant	3,5 (\pm 0,7)	3,1 (\pm 1,0)

(n=50)

Source: Costa et al. 2007

Eating out was considered to take too much time and money on weekdays. Eating out is more valued for its recreational aspects such as belonging, family harmony, pleasure and excitement, rather than its convenience or functionality. Therefore it was preferred for special occasions. The results confirm the evidence also reported in other studies that the negative valuation of convenience attributes derives from the conviction that an appropriate amount of effort, attention and time should be put into meal preparation. Additionally, healthiness of food was a valued attribute in home-made cooking.

A Spanish study (Mutlu and Gracia, 2006) reveals that food purchasing behaviour away from home differs by type of meal. Family income plays a major role. Better income increases eating out of home for all meal types. The wife's labour time outside home correlates with an increase in lunches eaten outside home. Larger household size decreases the number of lunches and breakfasts but increases the number of snacks eaten outside the home. Families living in smaller towns spend less money on eating out. A US study using a similar setting shows similar results. Household time is an important factor: labour participation of the mother increases the outsourcing of meal preparation. Higher urbanisation level, income, and education have a positive effect on the likelihood to consume food away from home (Byrne et al., 1998). Similar results, again, were found in a study comparing households' food-away-from-home expenditures in the US and Korea (Ham et al. 2004). Income, the number of wage earners and level of education in the family had a positive effect on eating out expenditure. Presence of infants, on the contrary, decreased eating out expenditure in both countries. Number of school-age children had negative influence in Korea but no significant effect in the US. The lower number of school canteens in Korea compared to the US explained this.

4.3 Choice of restaurant

The variety of restaurants and other places for eating out is huge. Therefore, the reviewed articles sometimes deal with only one or two types of restaurants and sometimes with all kinds of eating out places without any obvious differentiation. A range of the studies focuses on the customers' motives and behaviour when choosing a restaurant. Olsen et al. (2000) provide detailed information about who uses which type of eating-out outlets in the UK. The data included 1000 people from London, Bristol and Preston. People were asked about the frequency of eating out, types of outlet visited during the 12 months preceding the survey and

attitudes to eating out. The data were analysed to compare the characteristics of visitors compared to non-visitors of 20 different types of outlets eating out in such categories as workplace, pizza, fast food, fish and chips, wine bar, motorway services, in-store, steak house, hotel, bar, food area of pub, cafe or tea shop, vegetarian, and 7 ethnic restaurant types.

The results show that household income, which is commonly assumed to be an important positive correlate of eating out, is not important in explaining the use of fast food outlets or wine bars. Personal income did not independently influence the use of pizza restaurants, fast food venues, fish and chips restaurants, in-store restaurants, pubs, or Italian, Indian and Chinese restaurants. Results indicate that different people go to different places.

According to a Finnish study on eating in restaurants (Ravintolaruokailun trenditutkimus, 2006), quality and reasonable price level had the greatest effect on the choice of restaurant or eating place. Friendliness of service and location were also important factors. The restaurant's image was more significant when choosing a restaurant for dinner than for lunch. In a Swedish study (Andersson and Mossberg, 2004), customers' willingness to pay for an eating out experience was explored with respect to six specified aspects: food, service, fine cuisine, restaurant interior, good company and other customers. The results show that the willingness to pay vary between lunch and dinner. The most important aspect when choosing a place to have lunch was food quality. For dinner, quality of service, good company and other guests at the restaurant were more important aspects than for lunch, and people were willing to pay for them, too, because these elements make the event a delightful one.

The carry-out/take away (e.g. drive-through) segment of restaurants is one of the fastest growing segments of restaurants. This growth has come in the form of entirely new customers, rather than as a decrease in the business of the more traditional restaurant types. Bojanic (2007) has studied the profiles of customers. Study was conducted in Massachusetts, USA. Customers tend to be young to middle-aged, married, and have children. They consume food away from home more often than those who do not use take-away (3.36 vs. 2.49 times per week). They also put somewhat less emphasis on the "value for price paid" and "convenience of location" attributes. Convenience of location means places that are easily accessible by car and parking possibilities.

The frequency of eating out has been explored in many surveys. The results vary according to the survey setting, definition of eating out, sample size and population group, region, etc. It is therefore difficult to make general conclusions based on these surveys. Moreover, it is important to notice that survey data collected in eating-out outlets result in higher frequencies than those observed in studies using representative samples of total population (e.g. Mertanen, 2007; Bojanic, 2007; Kivela et al., 1999a). In any case, the studies agree that eating out is steadily increasing.

Statistics provided by McDonald's give more specific information, especially on informal eating out (IEO). Informal type of eating out is described in detail in the following classification of the eating-out outlets (Source: McDonald's: CREST). Fine dining and hotel restaurants are not included in the informal eating out definition.

Classification of eating-out outlets

A harmonised classification of eating-out outlets for Informal Eating Out (IEO), which is used for statistical purposes, includes nine groups:

- **Burger:** Quick Service Restaurants (QSR) specialised in beef, chicken, fish, generally branded and without table service
- **Pizza/Italian:** QSRs specialised in pizza, pasta and other Italian, includes pizza delivering
- **Ethnic:** QSRs specialised in foreign food, excludes Italian. Mainly includes kebabs, Asian, Indian, etc. Take-away, restaurants without table service
- **Sandwiches – Bakeries:** Bakeries, sandwich places, stands selling sweet & savoury snacks (incl. hot dogs, paninis, crêpes, pastries)
- **Coffee:** Coffee bars with counter services as well as cafes with waiter service
- **Self-service – Cafeterias:** Self service restaurants, mainly located in department stores or motorway service stations. Canteen-like places where dishes are displayed. You help yourself with a tray and cutlery and pay at the counter.
- **Traditional/Varied:** Usually inexpensive restaurants and places selling local food. Varies significantly from one country to another. Includes non-specialised outlets.
- **Retail/Convenience:** Take-away offering packaged food on the go (not freshly prepared), usually from the shelf in gas stations, supermarkets and other retail outlets.

- Casual Dining: All casual dining places, sit-down restaurants when eating in the store and served by a waiter. Excludes fine dining and hotel restaurants.

The data provided by McDonald's company have been collected for the Consumer Reports on Eating Share Trends (CREST) study by NPD Group (http://www.npd.com/corpServlet?nextpage=foodservice-crest_s.html). According to the web pages of the NPD Group company, CREST offers insight on consumer purchases of commercially prepared meals and snacks in France, Germany, Japan, Spain, UK, US, and Canada. It tracks purchases in the commercial restaurant industry, as well as ready-to-eat foods/beverages purchased from other retail establishments such as convenience and food stores. The company contacts monthly 6000–7000 people per country (information about the sample size was received from Ms. Sue MacEwan from McDonald's on Feb 3, 2009).

For the HECTOR project McDonald's provided survey data about IEO visits from four countries: UK, Spain, Germany and France (CREST data & Fast Track data 2008: IEO market structure). The number of visits had increased from November 2006 to November 2007 by around 1% in the UK and Germany, nearly 2% in France, and decreased 0.4% in Spain. The increase of one per cent may look like a small change but in absolute numbers the visits increased by 166 million in these three countries. Visits to burger restaurants increased in all four countries, casual dining experienced only minor changes, and visits to other types of IEO outlets developed in diverse ways. An association between economic situation in a country and eating out can be identified from the study of the number of visits in the UK and Germany. From 1998 to 2007 the total number of IEO visits in the UK increased by 38%. During the same period in Germany the number of visits decreased by nearly 3%. There may be many different factors behind these developments, including the economic situation that was different in the two countries during the given decade. The adoption of euro in Germany may also have constrained the development in 2002–2004 (see also chapter 3).

Regional and country differences

The information provided by McDonald's (CREST data & Fast Track data 2008: IEO market structure) allowed us to look at the market shares, by the type of IEO outlets, by country, in 2005 and 2008. Interesting differences show up. Traditional ways of eating out based on the local culture, along with the economy may lie behind them. For instance, in the UK, traditional/varied eating out outlets take the biggest share (22 %) of the IEO market, in

Germany the biggest share goes to casual dining (22 %), and in France sandwich shops and bakeries take 25% of the market share. Yet, in France also traditional/varied and casual dining places are popular (21 % and 17 % of the market share respectively).

In some Southern European countries such as Italy, Spain and Portugal, cafes, bars, and coffee shops are the most popular places for informal eating out. In Spain, local Spanish restaurants, and in Greece bakeries are also very much visited. In Nordic countries, interestingly, service stations have taken the lead position measured by market share. The second most popular IEO outlets are sandwich bars in Denmark, coffee shops in Norway and Finland and supermarkets in Sweden. In new EU member states, it seems that local non-branded IEO outlets are gradually losing their position for the branded and, often, international chains. Work and school canteens are important IEO places in countries such as Finland, Czech Republic, Slovakia and Russia.

While most eating out occasions take place in the restaurants or other eating-out outlets (around 60% of all visits in Germany, France and the UK, in 2007), other alternatives are emerging. Eating when travelling “on the go” has increased. Especially the young people adopted the “on the go” eating style in France. Also in the UK and Germany people younger than 35 years lead the “on the go” eating habit. Yet, there are notable differences between countries. Proportion of the “on the go” visits to all eating out visits was 14% in France, 7% in Germany and 2% in the UK. The “on the go” food is usually eaten during travelling, in the car, or sitting at a park bench. The concept of take-away, on the other hand, is broader. It may consist of a whole meal that is eaten at the table. Take-away food is eaten at home quite often in Germany and the UK where it makes a fourth of all visits but less than one tenth in France. The CREST data will also be exploited in chapter 5.

5 Life stage and eating out

Socio-demographic factors such as age, gender, household size and income are used as explanatory factors for the frequency of eating out and the type of facility used. To be able to get meaningful results from the complex entity of eating out, large samples are needed. Research has, for example, utilised nationally representative samples from national household panels or Household Budget Survey (HBS) data. The shortcoming of the HBS data, however, is that they do not include questions about eating-out habits but only collect information on the expenditures on eating out. Market research institutes collect background data about the life stage of the customers of catering services and the information is occasionally shared through the professional channels (Sloan, 2008; Lankinen, 2008; CREST data 2008).

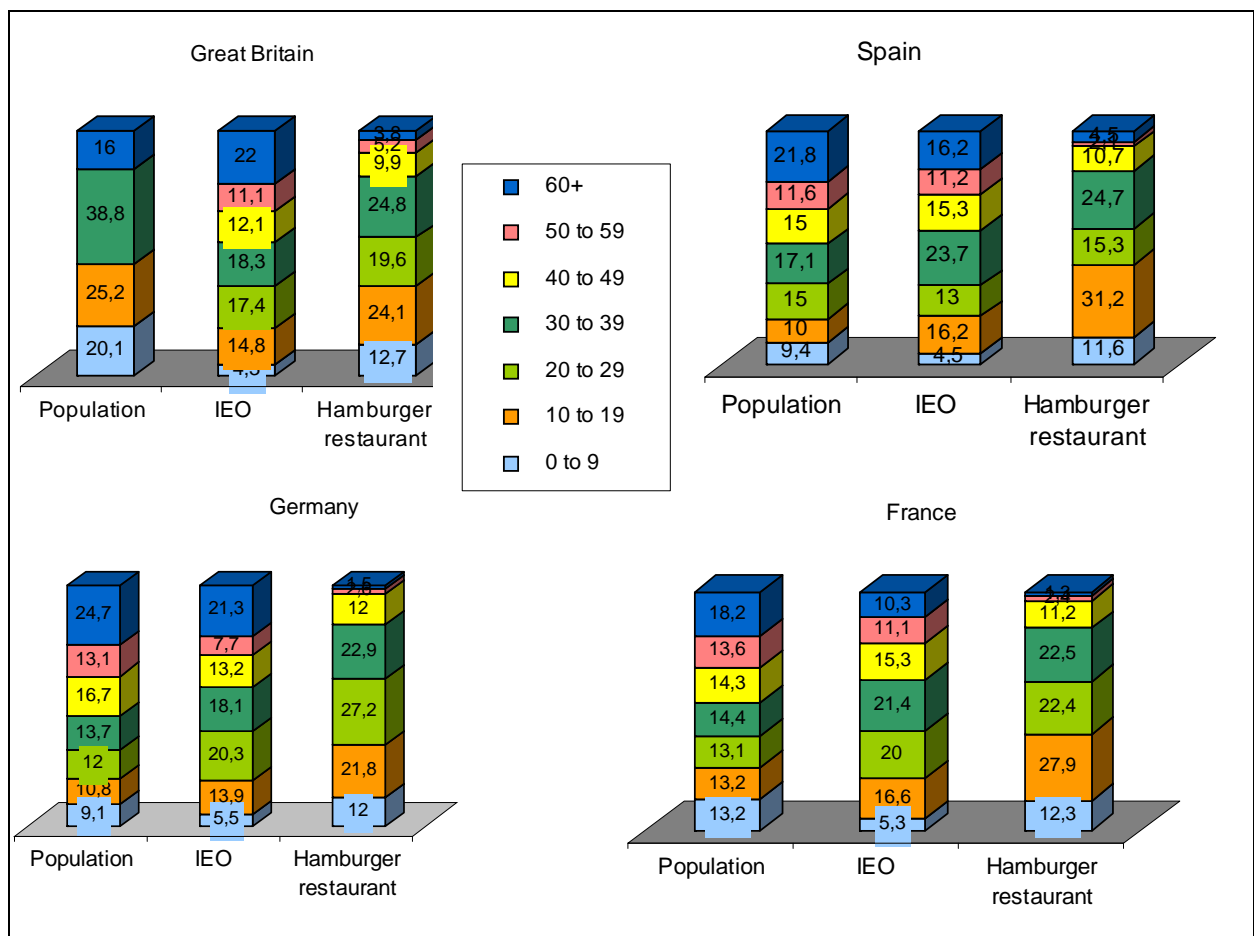
5.1 Age and gender

Age and gender are important factors related to eating out. Historically, restaurants have been a male domain. It seems however that women have been increasing their eating out during the last ten years. Furthermore, Olsen et al. (2000) found that gender does not affect a person's taste preference per se in this context, but it is very relevant when considering the general opportunities to eat out. Women would like to eat out more often, which differs from the opinion of men significantly. Interestingly, recent surveys show that in the UK women do eat out more frequently than men (Peach Factory, 2007).

The CREST data on IEO (CREST data 2007) disclose differences between countries. In general, gender differences are very small, even though men eat out slightly more frequently than women. This is especially the case in France and Spain. In Germany men's restaurant visits are 10% more frequent than those of women. Women may eat more often at retail/grocery stores, but no clear trend regarding the type of outlet was found. The same applies to Norway and Finland: women eat out less frequently than men (Bugge and Lavik, 2007; Lankinen, 2008). According to the CREST data, too, the UK makes an exception: women outdo men by 14% by the number of visits. Women go more often (one third to one fifth more visits) to cafes, retail/grocery outlets and casual dining places, but their visits show a lower share in all types of IEO places except ethnic restaurants, where the ratio is 50:50.

Age has a non-linear effect. In general, older people eat out less frequently than young people, and they go less often to pizzerias and fast food outlets than young people. It cannot be said that this is a matter of generation without data from time series, but it is probable that young people will continue to eat pizzas and fast food when they grow older. Figure 5 shows the age distribution of visits to IEO places. For each country, the column on the left indicates the proportions of the population belonging in each age group. The column in the middle shows the proportions of visits at informal eating out places, by age group, and the column on the right indicates the proportions of visits at hamburger restaurants, by age group. Individuals aged 30-39 years generally reported more visits at informal eating out places as compared to the other population groups. Burger restaurants are popular among the young. The CREST data do not include fine dining or hotel restaurants. The age and gender of the “fine diners” may vary from visitors in IEO places.

Figure 5. Distribution of informal eating out visits by age.



Note, that the age distribution of population in Great Britain apply different age breaks: (from the bottom) 0-15; 16-34; 35-64; 65+.

Figure 5 also indicates that visits at informal eating out places by persons over 60 years of age, make a fairly large proportion in Germany and Great Britain. They do not visit hamburger restaurants in large numbers,, nevertheless they are, the most frequent visitors in self-service cafeterias, casual dining, retail/grocery stores, and also in traditional restaurants (CREST data 2007).

5.2 Household size and income

Labour participation of the person responsible for the household management and high urbanisation level, income and education have had a positive effect on the likelihood to consume food away from home (Byrne et al., 1998; Lankinen, 2006). Income seems to have a stronger influence as to choosing costlier up-scale restaurants. Instead, income did not play a big role in the QSRs. Larger families were more likely to use QSRs. The same applied to the families with mother (or father, if he was taking care of the family meals) working long hours in labour market (Byrne et al., 1998). Byrne and colleagues (1998), suggest that time availability (lack of time) explains the preference for QSRs. Busy families do not consider mid-scale or up-scale restaurants to be time-efficient. Income plays an important role not only in terms of likelihood of but also of expenditure on eating food away from home. Similar results were provided by the Spanish study by Mutlu and Gracia (2006).

Eating out is also about social differentiation. In Norway, middle-class people and people with higher education dine more often at restaurants and consider fast food restaurants to possess “low food-cultural status” (Bugge and Lavik, 2007). Single persons choose restaurants with different motives: they have a higher probability to use QSRs and up-scale restaurants (e.g. for dating purposes), while families with children are more inclined to use mid-scale restaurants.

The CREST data on four countries show interesting differences between the countries related to the visits to IEO places and the income levels of the respondents. The majority of visitors come from middle-income groups in all the studied countries (income level about 2000-3000 euros/month in France and Spain, 1000-3000 euros in Germany), but in the UK the majority of visitors represents lower income levels than in France or Spain. Casual dining is an exception.

People with somewhat higher income visit casual dining places more often than, for example, burger restaurants.

5.3 Families with children

Research on children and adults at restaurants is scarce. One delightful exception is a Swedish study where families were observed with children in restaurant environments (Pettersson and Fjellström, 2007). The objective of the study was to explore what functions restaurants had for the different family members. Family orientation or family friendliness was reflected in interior design and atmosphere as well as in the menu alternatives. Two burger restaurants and two department store restaurants were visited during twelve months to observe their customers. Provision of nursing rooms, plenty of high chairs, microwave ovens to warm baby food, enough room to bring prams next to the tables and serving charts were determining factors of family friendly design and atmosphere. Similarly, menus can be planned to attract both adults and children or a restaurant can have different menus for both.

The observed functions seemed to indicate that while some restaurants were more or less places where adults came to feed their children, having only a cup of coffee themselves, some others were more for having a meal together with children. Restaurants were also used as playing areas where children could stay while other family members were shopping nearby. The researchers observed that this did not seem to disturb anyone. They concluded that “the dining room may be perceived as a public place that enables people go for shopping with young children” (Pettersson and Fjellström, 2007). The overall function seemed to emphasise the pattern of familiarity and friendliness. The authors ponder if a meal at a convenience restaurant actually feels like at home. Then, eating out loses its ‘specialness’ and becomes an ordinary part of daily life.

In the UK a study was performed on school children’s food choices at home, at school and when eating out (Warren et al., 2008). Focus group discussions were used as a method with a total sample of 48 boys and 48 girls aged 7-11. The data indicated that irrespective of age and gender, pupils tended to make unhealthy rather than healthy choices when allowed to choose alone. They associated unhealthy food with items containing fat, sugar and salt, which showed that they had knowledge of what healthy food should be like. A key finding of the study was

that the significance given to control over food choice and access to healthy/unhealthy food options differed between younger and older pupils across the studied eating environments. Control over food choice (which means they could independently decide what to eat) was not as important as security and companionship for the younger participants. Older pupils, instead, valued control over food choice and they also felt they had it at home and when choosing between a school lunch or a packed lunch or eating out (most often at a hamburger restaurant). The authors suggest that interventions should aim to educate and encourage food providers, such as parents, schools and food outlets, to produce a range of healthy options, and encourage informed food choices among children at a younger age.

6 Healthiness in focus

The focus of the HECTOR project is on healthy eating out. According to Eurobarometer 2005 (published in 2006) 83% of the population of 25 European countries believe that what they normally eat is good for their health. There seems to be relatively limited research on the healthiness of eating out in particular from the consumers' point of view. The research has explored whether the increased frequency of eating out causes overweight and obesity to a large extent. Some studies conducted in the US give indirect support to this assumption. Higher fast food outlet density of a region is associated with higher body weight. The result is based on a wide survey of 700 000 respondents carried out in 2002 (Mehta and Chang, 2008). Another important aspect is the variation in the nutritional content of food while eating at home or away from home. A U.S. study on the intake of calcium-rich foods shows that when the frequency of eating outside the home increases among preadolescents, the calcium intake decreases (Cluskey et al., 2008).

It is however evident that at least from the point of view of consumer research the healthiness of eating out has lately been investigated more eagerly. Still, the focus has not been on the actual effects of eating out on consumers' health but on how issues related to health affect their choice of outlets or menus. Many recent studies indicate that interest in health or healthy eating is growing among consumers (Peach Factory, 2007; Navigator, 2007). Especially women are paying more and more attention to health issues (Bugge and Lavik, 2007). Interestingly, healthy children's meals are predicted to be one of the hottest trends in the US in 2009 (Industry Forecast, 2008). There is also some indication that consumers are willing to pay more for healthier menu choices (Hwang and Lorenzen, 2008).

Respectively, it seems that there is more interest in exploring the interrelations between eating out and health. The British Food Standards Agency commissioned a qualitative study on consumers' choices when eating out with a special focus on the role of healthy eating (Navigator, 2007). In addition, many commercial marketing research institutes have addressed these same questions but the results are not easily available as they are directed to market actors. One example of this type of study is a forecast by the National Restaurant Association in the US indicating that American consumers are interested in "healthier restaurants and 'greener' restaurants" when it comes to eating out (Industry Forecast, 2008).

Stewart et al. (2005) have studied consumer preferences in the US for healthy food in connection with other preferences. They collected the data using a mail survey (N=700). The respondents classified the various attributes of food in the following order of importance: taste, nutrition, convenience, ease of digestion and low price. If only nutrition was examined, the results indicated that a consumer is less likely to dine out very frequently if s/he values the nutritional attributes of foods (Decision Analyst, 2007). These health preferences could restrict the choice of restaurant. A consumer selecting an outlet on the basis of healthfulness of food is more likely to frequent a fine-dining establishment. The results somewhat changed when other preferences were taken into account. If easy food preparation is preferred, people are more likely to eat out. Furthermore, a consumer is more likely to buy fast food when looking for convenience restaurants, but less likely to do so if s/he picks a restaurant according to the quality of the dining experience. The authors conclude that preferences for a healthy diet, convenience and an enjoyable dining experience, contribute to consumer behaviour. Stewart et al. (2005) pointed out that consumers could be persuaded to choose the most nutritious option if that alternative is as appealing as convenient and enjoyable.

In the UK, Hartwell and Symonds (2005) point out the importance of caterers in taking responsibility for serving healthy food. They review the recommendations developed by the Committee on Medical Aspects on Food and the Department of Health, on reducing the fat content of foods and increasing informative labelling. Studies indicate that restaurant and pub customers would like to be offered low-fat foods. The authors concluded that the more health-conscious the diners became, the higher the demand for lighter and healthier food was. The problem at the moment is that while consumers believe it is the responsibility of the caterer to provide healthy options, the caterers lack proper nutrition knowledge. There are generally no modules for catering students to educate them regarding the nutrition and dietary implications of the served food. Most of the food service professionals do not feel responsible for the rising level of obesity in the UK. Many of them are, however, taking steps to address the problem (Hartwell and Symonds 2005).

Another aspect in the increasing correlation between eating out and obesity was the so-called super-sizing phenomenon epitomised by Morgan Spurlock's documentary "Super Size Me" (2004), referring to large portion sizes and product bundling. Edwards et al. (2005) analysed the trend from the food services' point of view. On one hand, food services are in business in

order to make profit. On the other hand, they may, by doing this, contribute to the prevalence of obesity. This, again, leads us to deliberate the difficult question of healthy eating out and responsibility: is it to be entrusted to consumers, food services or both?

Adams and Ferrett (1997) conducted a study in the UK where consumers estimated the nutritional status of their lunch sandwiches. The participants (50 females, 50 males) were recruited from a sandwich bar. The participants overestimated the energy and NSP (non-starch polysaccharide) content of their meal. Women generally guessed the fat content, while men tended to estimate it lower than it actually was. In a study from Finland, the majority of the customers believed that the food served at restaurants is prepared according to the current nutrition recommendations. Half of the female customers hoped for better information on the energy content while over half of the male customers did not pay any attention to nutritional aspects of the food served (Mertanen, 2007).

The role of nutrition information when choosing healthier options was explored by Burton and Creyer (2004). Their results indicated that consumers' exposure to knowledge about unfavourable nutrient content affected their attitudes and purchase intentions. Burton and Creyer suggested that many consumers are not aware of the levels of fat in restaurant foods, for example. Therefore, the authors point out that there is a possibility of a positive circle: forcing chain restaurants by legislation to give nutrition information on menus may affect consumers' behaviour with regard to buying foods with high amounts of fat etc. Consequently, this could motivate restaurants to have more healthy options in the menus.

Another U.S. study (Decision Analyst, 2007) divides consumers into heavy restaurant users, i.e. frequent restaurant users, and medium/light restaurant users. Interestingly the heavy restaurant users, who tend to be younger and male, are not as attracted to healthy eating out as slightly older medium/light restaurant users who for example value nutritional labels (cf. Bugge and Lavik, 2007). The Decision Analyst report recommends that restaurants should have different strategies that appeal to the "nutritional guilt" among heavy restaurant users, and the "nutritional savvy" among medium/light users. Furthermore, the report points out that there will always be a segment of consumers that are likely to never use any nutrition information. Again, this points out how complex the world of healthy eating out is. One strategy or approach could not be applicable to all consumers.

It seems that consumers' menu preferences could be best described as contradictory. On the one hand, people want healthy everyday lunches; on the other hand, festive occasions call for enjoyment without calorie counting (Mertanen, 2007). Bugge and Lavik (2007) found four directions in consumers' orientation towards eating out. They are health vs. hedonism, economy vs. extravaganza, democratisation vs. distinction, and convenience vs. enthusiasm.

The major challenge for the HECTOR project is that healthiness is only one aspect or factor when choosing both the restaurant and the menu. The consumer research on eating out executed by Navigator on behalf of the Food Standards Agency in the UK, points out, as do several other studies, the complexity of choice while eating out (Navigator, 2007). It is evident that the dimension of healthiness of eating out cannot be isolated from other aspects of eating out. It is telling that consumers seeking to eat healthier often end up changing outlets rather than looking for other options from the menu. It is interesting how closely intertwined is the perception of healthiness of eating out with the type of restaurant. This, of course, is consistent with other studies focusing on the choice of restaurant.

7 Sociability of eating out

Commensality – the act of eating at the same table – is often seen as essential to people as human beings (Sobal, 2000; Mäkelä, 2009). Societal changes, abundance of available food and industrialisation of food production have changed the structure of our eating. The present individualisation and de-structuration of eating have been seen as a challenge especially to healthy eating habits (Fjellström, 2004). If we are not aware of the rules and norms regarding food and eating and are in a state of ‘gastroanomy’ (Fischler, 1990), there is the risk that we may loosen our sense of what, how and when we should eat. Has the era of ‘vagabond feeding’ (Poulain, 2002) replaced commensalism? What does it mean in relation to healthy eating (out)? When the social dimension of eating is taken into account in studies on healthy food habits, the multidimensionality of our eating again becomes evident.

The social aspect of appetite is intriguing: how do we eat in company? How do we eat alone? The answer varies as commensality may either endorse or hinder healthy eating (Sobal and Nelson, 2003). Existing research suggests that social facilitation, on one hand, increases the food intake in many cases (Hetherington et al., 2006). Therefore, studies on obesity and disordered eating often focus on meal patterns (Bertéus Forslund et al., 2002; Neumark-Sztainer et al., 2004). On the other hand, a Finnish study concludes that among schoolchildren healthy food choices are associated with the tendency to eat together (Haapalahti et al., 2003). Moreover, a Danish study suggests that the social context of eating influences the experience of satiety (Kristensen et al., 2002).

In a Swedish study (Lindén and Nyberg, 2009) the lunchroom of a bus company acts as a multicultural meeting place and as an arena for social communication and attitude formation. The drivers with different ethnic origins exposed their cultural traditions to their colleagues in the form of eating habits. Sometimes the encounters enhanced stereotyped perceptions but every now and then they evoked curiosity to eat something new.

How important is the sociability of eating out and how does it affect the choice of restaurant and food? It seems that eating out – in restaurants at least – is a social activity. Andersson and Mossberg (2004) have showed that in Sweden social needs dominate when it comes to choosing an evening restaurant. In the case of lunch restaurants, the focus is on physiological

needs. In the study by Warde and Martens (2000), 76 % of the respondents in the UK did not like to eat alone. The sociability was felt to contribute to the enjoyment of eating out. Bugge and Lavik (2007) report that only 12 % of Norwegian respondents had eaten their latest meal outside home alone.

It seems that commensality is an essential part of eating out especially when the recreational aspect is emphasised. If eating out is understood as restaurant meals, people seem to prefer to enjoy them in company. It is however not self-evident how good or bad the social aspect of eating is to the healthiness of eating out.

8 Conclusion and discussion

8.1 Future of eating out

Based on existing studies on eating out, the use of food services and eating outside the home have increased. While the volume and trends vary in different countries, the background for this development lies in the societal and cultural changes that have taken place. The growing trend of both spouses working full-time, the quest for convenient eating and cooking as well as meals for children provided by the public sector reduce the number of meals at home. Along with the rise of income and living standards, the share of food in total expenditure has declined and food consumption habits have changed. In wealthier countries people tend to eat out more frequently. The consequences of the present recession still remain to be seen, although it may not have a significant effect on the QSRs as they offer less expensive food. Another trend sparked by the economic downturn already seen in the US is that eating out is partly shifting towards “eating out at home”. It seems, that demand for different types of take-away or home-delivery products and services are increasing (Sloan 2008; Sloan 2009).

Anyhow, there is a lot of variation in Europe. A study in France, UK, USA, Norway and the Netherlands shows considerable national variation in the patterns of food preparation, eating at home and eating out (Warde et al., 2007). Globalization, increasing mobility and migration of people as well as the expansion of international food service companies, however, are likely to reduce the differences, as the example of a Chinese study indicates (Ma et al. 2006).

As the future of eating out is intertwined with other developments within eating patterns, it is necessary to understand eating out in a wider context. Therefore, it is interesting to take a look at the various forecasts on eating and food habits. This is needed because the role of eating out varies in the different scenarios. All the forecasts do however pay attention to the importance of healthy eating.

Australian health experts (n=50) participating in the Delphi survey (Dixon et al., 2006) concluded that the top six social trends fuelling changes in food consumption are “rising use of convenience and pre-prepared food”, “aggressive food marketing” and “growing availability of,

and access to, food”. “We inhabit a food rich environment”, as one of the experts put it. The experts have suggested some hypotheses as to why convenience foods are related to obesity:

- loss of intuitive understanding of what is in the foods we eat (e.g. fat and other nutrients), thereby limiting people’s capacity and confidence in assessing marketing information and making informed, sensible food choices;
- reduced physical activity in food preparation;
- loss of skills in relation to planning food, deciding what to eat, and hence being susceptible to messages about what is easy and tastes good; and
- handing control over companies, which make decisions about ingredients and serving sizes (Dixon et al. 2006).

There is evidence showing that convenience foods are a super-efficient system for delivering calories, and this happens in numerous ways: through calorie density, the super-sizing of portions and the speed with which they are consumed, the frequency of their consumption through grazing or snacking, and hand-size portions that are easy to consume on the move, making round-the-clock consumption entirely feasible.

The experts, however, see functional foods as offering a positive option. Companies that sell convenience foods are now developing products that are healthy and easy to use. Food companies are aware that most premature mortality is associated with diet-related diseases, so finding foods to combat these diseases is high on their agenda. In the past, foods had ingredients taken out of them (for example, fat), and were subsequently promoted as an answer to obesity and cardiovascular disease. Now companies add ingredients to achieve the same result.

In their confusion and cynicism about what constitutes healthy foods, consumers are seeking guidance from traditional authorities, especially governments. Therefore, governments have a crucial role in regulating health claims and the provision of nutrition education (Dixon et al., 2006).

8.2 Lessons to be learned

Our review of the literature disclosed a number of challenges in promoting healthy eating out. The multifunctionality of eating out presents a challenge for the analysis of the entity or the concept of eating out. Healthiness, or nutrition, is only one of the factors affecting food choice. Other factors are the variety and the contextuality of eating out. This makes it difficult to grasp the task of promoting healthy choices. It seems that, on one hand, eating out is related to special occasions and, on the other, it is a part of people's daily routine. Eating out fulfils different needs in different situations. Should these various situations or starting points be treated and analysed differently?

The challenge is how to understand the continuum of eating out, i.e. the whole range from take-away at home, to fine dining. There are abundant and ever present possibilities for eating out. Therefore, it should be discussed within the HECTOR project if the chosen focus on the core definition of eating out is enough. This is a question dealt with in the HECTOR EO data collection questionnaire.

Another challenge originates from results suggesting that in some cases (Finnish, British) consumers largely trust that food services follow nutrition recommendations or that food services take responsibility for the healthiness of the served food. Does this mean that consumers are giving the control over healthy food choice to companies? Consequently, could the food service sector take a role as a forerunner in promoting healthiness and increasing the supply of healthy food? How could we invoke interest in new – healthy – dishes among caterers? This could be part of the corporate social responsibility of the food service enterprises.

The promotion of healthy eating out cannot focus only on the healthiness – or nutritional side – of eating, because consumers want it all: taste, quality of food and service, reasonable price, experience, convenience, nourishment and healthiness. Research indicates that the choice of restaurant type is crucial, everything else is secondary, and the question of price level is usually dealt with already when choosing the restaurant. Therefore, the HECTOR project must deal with the challenge that healthiness is only one factor when choosing both the restaurant and the menu. How could we proceed in identifying the critical points of consumer choices? We need to take into account that the emphasis on healthiness of food and meals, changes our ideas and

concepts of proper meals and eating. The healthiness of eating out does not only boil down to the content of meals or snacks but we also need to understand the broader structure of the present eating habits.

Moreover, consumers' interest in healthy eating varies. Generally, it seems that women and older people are more likely to use nutrition information if provided. Hence the nutrition education related to eating out should be specifically tailored to different consumer groups.

On the other hand, we could presume that healthiness of eating out becomes more interesting when the frequency of eating out increases. If consumers feel that they eat out quite rarely, it may not be their priority to be concerned about the healthiness of the food they consume. Furthermore, even though consumers' interest in healthy eating out is increasing, they still need means to evaluate the food they eat. As several studies have indicated, consumers have found it difficult to make healthy choices (see e.g. Navigator, 2007). Therefore, from the consumers' point of view, healthy eating out is also a question of empowering the consumers. An interesting example is the American Healthy Dining Finder (<http://www.healthydiningfinder.com/site/index.htm>) that aims at helping consumers identify suitable restaurants.

“The *HEALTHY DINING Program* and its signature website HealthyDiningFinder.com constitute a groundbreaking effort to provide consumers with a centralized resource for identifying the healthier choices and corresponding nutrition information from restaurants nationwide. Developed in collaboration with the National Restaurant Association (NRA) and with partial funding from the Centers for Disease Control and Prevention (CDC), HealthyDiningFinder.com provides American diners with information that, in many cases, is not available anywhere else.” (<http://www.healthydiningfinder.com/site/aboutus.htm>, 18 January 2009)

The “Consumer corner” on the USDA website includes a section on “Healthy Restaurant Eating”, along with other advice for “eating for health”. The page includes links to the HealthyDiningFinder and American Heart Association’s “Tips for Eating Out” (http://riley.nal.usda.gov/nal_display/index.php?info_center=4&tax_level=3&tax_subject=358&topic_id=1611&level3_id=5972&level4_id=0&level5_id=0&placement_default=0, 8 March

2009) The American National Restaurant Association also gives tips for eating smart under the title “Want to Watch Calories When Dining Out?”

(<http://www.restaurant.org/dineout/nutrition.cfm> , 8 March 2009).

In January 2009 the Coalition for Responsible Nutrition Information (CRNI), which consists of restaurants, industry organisations and companies, launched the “Get LEAN in 2009” campaign that includes detailed nutrition information on restaurants presented according to a uniform standard (<http://www.restaurant.org/pressroom/pressrelease.cfm?ID=1728> , 8 March 2009). It is thus evident that in the US the issue of healthy eating out is definitely on the agenda. It is interesting to follow its evolution in Europe and see how the HECTOR project may enhance it.

There has, however, been ambivalence in information on the calorie content of meals. It is interesting that there are some examples where only a selection of the dishes is provided with information on the energy and nutrient content. It could be assumed that only the healthiest choices include this information. At a Finnish restaurant chain (Amarillo) for example, energy, protein, fat and carbohydrate content information for their “Fruity chicken” dish, is available in the menu, unlike other dishes even on the same page of their menu (<http://www.amarillo.fi/el-pollo-hki.html> , 8 March 2009). A dish called “Whiskey chicken”, for instance, does not include any information regarding its energy and nutrient content.

This leads again to the intriguing question about information and how to provide it. The Internet is propped with nutrition information. In general, it is easy to find advice on healthy eating out. It is also possible to get precise information on nutritional content of restaurant meals. The question is, however, whether it is enough that this information is available in the web when consumers make their choices in restaurants? Is there a risk of a health wash without a real engagement of changing served food into a healthier direction?

8.3 Gaps in existing research

The report on consumers’ attitudes and behaviour when eating out reveals some gaps in the existing research. To begin with, proper statistics are missing. HBS does not provide information about the actual eating-out behaviour, it only reports the total amount of

expenditure on eating out, and therefore trends cannot be clearly detected. There are some statistics compiled by private companies but researchers do not always have access to them. Furthermore, the definitions and operationalisations of eating out vary a lot and comparison of data from various countries is difficult.

It also turned out that healthiness of eating out from the consumer point of view is either relatively poorly explored, or a rather scattered area of research. Studies focusing on consumers' criteria for choosing a certain outlet often ignore healthiness of supply. The role of 'healthy option' markers or nutritional information attached to the menu needs to be further explored. How are consumers able to evaluate the 'healthiness' of the menu and its options? In addition, it is interesting to investigate the roles of different actors – consumers, food services and authorities – in both promoting and executing healthy choices when eating out. It is not necessarily self-evident how the actors themselves see their responsibilities in the pursuit of healthy eating habits.

Another area with very limited research is how children are socialised into eating out. Issues such as how and when the eating out takes place need to be addressed. How do parents educate children in choosing when to eat out or which restaurant to choose, or in what issues to pay attention to when choosing from the menu? What kind of values do parents transfer and how strongly are parents aware of their educational role? The scarce available research suggests that socialisation starts at a very early age, and therefore healthy eating could be instilled in children when they are still young. Interestingly, on websites focusing on consumer education (<http://www.consumerjungle.org/>) healthy eating out appears quite commonly among the presented life skills.

Moreover, neither the variety of restaurants nor the continuum of eating out from vending machines to fine dining is covered in the existing research. Similarly, the social differentiation and possible inequalities in eating out should be addressed to achieve a more complete picture of eating out patterns. Finally, as several studies emphasise the multifunctionalism or multidimensionality of eating out, future research should address the role and place of healthy eating in this manifoldness/variety. It is important not to consider healthiness as a separate criterion.

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