Scottish Government
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Research to understand price and placement marketing strategies used within premises and online by out of home businesses in Scotland

HEALTH AND SOCIAL CARE

social research

Research to understand price and placement marketing strategies used within premises and online by out of home businesses in Scotland

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Executive summary

A key outcome of Scotland's National Performance Framework is that we are healthy and active. An important part of achieving this includes consuming healthy foods as well as restricting the consumption of foods that are high in fat, sugar, and salt (HFSS). The Scottish Government has recently consulted on its proposals to restrict the promotions of foods high in fat, sugar, or salt.

Research was required to fill a gap in recent evidence on promotions of HFSS food and drink and to feed into the evidence base for changes proposed post-consultation. The Scottish Government commissioned Ipsos Scotland to undertake a mystery shopping exercise looking specially at the out-of-home (OOH) market. OOH refers to food and drink purchased and consumed outside the home, as well as take-away and home delivered food. It has a significant role to play in relation to excess calorie consumption. Much of this food is purchased in quick service burger, chicken and pizza restaurants (QSR), coffee shops, bakeries and 'on the go' sections of supermarkets and convenience stores. The research therefore focused on these outlet categories.

The research involved 316 'mystery shopper' visits to 158 OOH premises and 20 online visits to a purposively selected sample of outlets (designed to provide a spread in terms of urban and rural locations, Scottish Index of Multiple Deprivation (SIMD) levels, and areas of Scotland). The visits, conducted by a team of specialist mystery shoppers, provided information on:

- Price promotions
- Meal deals
- Upsizing and upselling
- Product placement
- Advertising of specific products
- Availability of calorie and nutrition information within premises.

Key findings

There are a number of practices in place which make the environment challenging for consumers to make healthier choices including the high prevalence of promotions, particularly on 'less healthy' foods. However, the findings of the research are in some ways encouraging, with at least one 'healthier' option available in the majority of meal deal offers and few differences linked to the SIMD or urban versus rural profile of the outlets.

Most commonly observed marketing strategies and promotions

1. The most common marketing strategies recorded were the prominent placement of items near the till (69% of in-premise visits), meal deals (52% in-

premise and 35% online visits) and price promotions (44% in-premise and 25% online visits).

2. Specific types of price promotions that were common were: multi-buy (41% of all price promotions observed in-premise) and reduced price promotions (24% of all price promotions observed in-premise) and discounts for minimum spend (55% of all price promotions observed online).

3. Price promotions were much less common in coffee shops than in other outlet categories (12% of in-premise visits and none online). Meal deals were available in almost all supermarkets (92% of in-premise visits) and were available at 50% or more of outlets in other categories, with the exception of coffee shops (9% of in-premise visits and none online).

4. Overall, there was no clear pattern in terms of observed price promotions or meal deals being linked to the urban/rural or SIMD profile of the outlets.

Strategies encouraging people to eat more (and more than they may have intended)

5. In around one in four (28%) in-premise visits where there was the potential for it to happen, shoppers were encouraged verbally to 'upsize' their order by buying a larger size. This encouragement to upsize orders happened more frequently when shoppers were purchasing less healthy products than when they were purchasing healthier products (37% versus 20%). This was particularly the case in bakeries and coffee shops, where shoppers were much more likely to be encouraged to upsize when buying a less healthy product (38% in bakeries and 45% in coffee shops) compared to when they were buying a healthier product (0% in bakeries and 21% in coffee shops). In QSRs, however, the difference in encouragement to upsize when purchasing a less healthy product compared to a healthier product was much less pronounced (29% compared to 23%).

6. Upsizing via online prompts was much less common and only occurred in one of the 20 online visits.

7. 'Upselling' (verbal or online prompt encouraging consumers to purchase additional items e.g., a cake with a coffee) was more common than upsizing (42% of in-premise visits and 35% of online visits). This is in addition to the other types of promotions encouraging the purchase of additional items that were prominent across outlets such as: multi-buy promotions, meal deals and discounts for minimum spends.

Encouraging consumers to purchase less healthy foods rather than healthier foods

8. Most of the common marketing strategies (product placement, price promotions and general promotions) were on less healthy products.

9. Items most commonly found on price promotion in-premise included: confectionery (14% of price promotions observed), crisps or savoury snacks

(12% of price promotions observed) and cakes (10% of price promotions observed). Online, the product most commonly found to be on price promotion was pizza (30% of price promotions observed) followed by savoury pastries (20% of price promotions observed).

10. Positively, healthier items (particularly water) were largely available within meal deals. However, when set against less healthy options, such as crisps or confectionery, consumers may find it hard to choose the healthier option. Furthermore, healthier items as part of meal deals were available in a greater proportion of outlets in less deprived areas than in more deprived areas (34% versus 14%).

11. The placement of items near the till point was common, with 69% of outlets using this type of strategy. Cakes (34% of outlets), confectionery (30% of outlets) and sweet biscuits (29% of outlets) were the items most commonly displayed in this way.

Consumers not always being able to make an informed choice

12. For consumers wishing to make informed choices, having calorie/nutrition information readily available within premises is key. It was present at just over half of outlets, meaning there are high numbers of cases in which consumers are not able to make informed choices. This is particularly true of independent outlets in this study who did not have it available at all.

Glossary

Aggregator app	A third party that facilitates the order of food from a restaurant to a consumer, e.g. Just Eat, Deliveroo.
Discount for minimum spend	Promotion offering an amount or percentage discount for spending a set amount.
Healthier products	Food and drink products that are not high in either fat, salt or sugar.
HFSS	Food and drinks that are high in fat, sugar, and/or salt. In the UK, these are defined by the UK Nutrient Profiling Model. The nutrient profiling model uses a scoring system which balances the contribution made by beneficial nutrients that are particularly important in diets with components in the food that the population should eat less of. The overall score indicates whether that food (or drink) is high in fat, sugar or salt (HFSS) or not. Foods which score 4 or higher, and drinks which score 1 or higher under this model are classed as HFSS.
Larger size promotion	Promotion offering a larger size product for the same price or slightly more.
Less healthy products	Food and drink products that are high in fat, salt or sugar.
Meal deal	Promotion where consumers are offered additional products for 'free' or a discount to create a meal (e.g. sandwich, drink and a snack or a main and side dish for set price).
Multi-buy	Promotion where purchase of multiple items is cheaper than purchase of each individual item alone. This includes e.g. buy one get one free, 3 for £2, 3 for 2 offers, extra free, and meal deals.
OOH	Out of home food and drink outlet.
Prominent low-price promotion	Clearly visible sign or display showing a promotion (e.g. ‘£1’ or ‘only 50p’ in big signage).
Push notifications	Mobile phone notifications that are generated by an app.
QSR	Quick service restaurant or takeaway restaurant.
Reduced price	A promotion offering money off (e.g. ‘25p off’, ‘half-price’, ‘50% off’, ‘normally £2.50 but now £1’).
SIMD	Scottish Index of Multiple Deprivation.

Unclassified products	Food and drink products cannot be easily categorised as healthier or less healthy (e.g. pasta, sandwiches, yoghurt).
Upselling	Encouragement to purchase additional items either verbally by a member of staff or via an online prompt.
Upsizing	Encouragement to buy a larger size, either verbally by a member of staff or via an online prompt.

1. Introduction

The Scottish Government commissioned Ipsos Scotland to undertake research to understand the current landscape of price and placement marketing strategies used within premises and online by out of home (OOH) businesses in Scotland. 'Out of home' refers to any food or drink bought and eaten away from home, including 'on the go', and any takeaway or home delivered food (it does not include retail grocery shopping). This report details the findings from research undertaken in OOH business across Scotland (ordering in-premise and online) in July-August 2022.

Background

A key outcome of Scotland's National Performance Framework is that we are healthy and active. An important part of achieving this includes consuming healthy foods as well as restricting the consumption of foods that are high in fat, sugar, and salt (HFSS). Research has highlighted that focusing on food promotions and marketing strategies can be more effective at restricting the consumption of HFSS foods than focusing on campaigns such as "eat less, move more" (see Sugar Reduction: The evidence for action. Annexe 4, Public Health England, 2016).

Prior to this study, there was little recent data on promotions in OOH outlets in Scotland. The most recent studies were a 2017 Food Standards Scotland commissioned study looking at price and placement promotions and an NHS Scotland commissioned piece of research looking at non-price related promotions in 2018 (unpublished). The Covid-19 pandemic has impacted on food and drink business and consumer behaviours, as well as increasing existing health inequalities. The pandemic led to a marked decrease in purchases across the wider OOH market. However, the takeaway market saw growth of 31% from 2019-2020 and higher rates of online purchases using apps. It also led to changes in marketing strategies and promotions used by OOH outlets in-premise and online. The number of promotions being offered by OOH outlets reduced during 2020, but has since returned to a level similar to that of 2019 (see The impact of Covid-19 on the out of home sector in Scotland, Food Standards Scotland, 2021).

In its 2022/23 Programme for Government, the Scottish Government announced that it will introduce a "Public Health (Restriction of Promotions) Bill" that will include "provisions for restricting food and drink promotions to protect public health, to make it easier for people to spend less and make healthier food choices." This is in keeping with the 2018 Diet and Healthy Weight Delivery Plan. The Scottish Government has recently consulted on its proposals to restrict the promotions of foods high in fat sugar or salt. The findings in this report will form part of the evidence base to inform the development of the policy.

Research objectives

The overall aim of this research was to understand the landscape of price and placement marketing strategies used within premises and online by out of home (OOH) businesses in Scotland, with particular focus on promotions used on food and drink high in fat, sugar, or salt. The specific research objectives were to:

- **Map the different types and prevalence of marketing strategies and promotions used to influence consumer purchasing used in-premise and online by OOH businesses in Scotland**, as well as how these strategies are used across different types of outlets across the OOH sector;

- **Compare the types/categories of food and drink being promoted in-premise and online by OOH businesses**;

- **Explore any differences in promotions and marketing strategies used for HFSS and non-HFSS food and drinks**;

- **Understand the interaction of OOH promotions with key inequalities,** e.g. to explore any differences in how marketing strategies of HFSS food and drink are used in different geographies of Scotland, urban/rural areas, and areas by Scottish Index of Multiple Deprivation (SIMD) quintiles (and to consider other relevant key inequalities);

- **Create a methodology that has the ability to be repeated over time to monitor change**.

The study covered a wide range of promotions and marketing strategies including: price promotions (e.g. multi-buys, meal deals, add-ons, upsizing of portions); and placement promotions, i.e. placement of items at prominent locations such as checkouts. It also covered what nutritional information was displayed in-premise or online.

2. Method

Overview

This research involved 316 ‘mystery shopper’ visits to 158 OOH premises and 20 online visits to a range of outlets.

Sampling of outlets

Overview

The study used a purposive sampling approach for both in-premise and online visits. The aim of this sampling approach was to achieve a spread of types and locations on the Scottish mainland of OOH outlets rather than a representative sample.

This was achieved by sorting a purchased sample of 1,000 OOH outlets in Scotland by brand (or a separate category for independent businesses) and then selecting individual outlets within each brand, plus independents, to achieve a spread across four deprivation and urban/rural categories. The sample included more from urban centres because many brands have far fewer locations in rural and semi-rural locations.

In-premise

A sample of names and locations of 1,000 OOH outlets falling into the categories of interest for the study was purchased from the specialist data company, Local Data Company. Outlets were then selected for inclusion based on the sample plan agreed with Scottish Government. The categories of outlets and specific brands included in the research were based on the most used types of OOH outlets in Scotland. In 2019, the six most visited categories of OOH outlets in Scotland were convenience stores (17.1% of visits), bakery and sandwich shops (16.1% of visits), quick service restaurants (QSR) (12.6% of visits), supermarkets (12.2% of visits), workplace and education canteens (10.3% of visits), and cafes (9.2% of visits) (The Out of Home Environment in Scotland, Food Standards Scotland, 2019). It was agreed workplace and education canteens would not be included given they are only accessible for those who work or study in the premises. Cafes were therefore included instead, which made up 9.2% of OOH visits in 2019, compared with 10.3% for canteens.

Around three fifths (57%) of visits to OOH businesses across Great Britain in 2020 were made to chains and around two fifths (43%) to independents. Independent businesses were therefore included in the study (they were not in the 2017 FSS study). Table 2.1 shows the five outlet categories included in the in-premise part of the study. Three market leading brands were chosen within each of these categories. Independent businesses were included for all categories except supermarkets. The QSR outlets selected included a mix of the most popular types of takeaway food including burgers, fried chicken and pizza. The supermarket OOH businesses comprised the smaller high street branches of the largest supermarket brands, and a small number of their outlets in petrol stations. We aimed to achieve around the same number of visits for each brand across each category. However, in some rural locations some brands were not available – in this scenario, outlets with similar characteristics were used instead.

Table 2.1 also shows the number of outlets visited as well as the purchases shoppers were asked to make. Food and drink purchases were agreed with the Scottish Government and Food Standards Scotland. This was informed by existing data on the most frequently consumed foods outside the home in Scotland, in addition to being relevant to the particular business offering of that brand. They were also selected to allow for an opportunity for promotions and upsizing to be offered by staff.

Every outlet in the in-premise research was visited twice within the space of a week. In Visit 1 shoppers were asked to purchase typically HFSS products and in Visit 2 they were asked to buy healthier options. See below under Data Analysis for description of food classification. In both scenarios, shoppers were asked to buy specific items or equivalents.

Table 2.1: In premise visits and purchases

	Number of outlets	Visit 1 purchase	Visit 2 purchase
1. Convenience stores			
Spar	10		
Boots	8	Sausage roll or equivalent (e.g. processed meat sandwich)	Chicken/vegetarian salad sandwich or equivalent or salad
Co-operative food	9		
Independents	7		
2. Bakery / Sandwich shop			
Greggs	9		
Subway	8	Sausage roll, meat and cheese sub / panini or equivalent	Chicken/vegetarian salad sandwich or equivalent or salad
Pret a Manger	8		
Independents	8		
3. Supermarket OOH			
Tesco Express	8		
Sainsbury's Local	8	Triple sandwich with processed meat or equivalent	Chicken/vegetarian salad sandwich or equivalent or salad
M&S Simply Food (including petrol stations)	8		
4. Quick Service Restaurant			
McDonalds	8	Burger + side (e.g. fries, onion rings) or	Grilled chicken / vegetarian wraps or salad + side
KFC	9		

Pizza Hut	9	cheese crust meat pizza or equivalent	(salad or similar) or thin crust pizza with a vegetable topping or equivalent
Independents	8		
5. Café or coffee shop			
Starbucks	8	Latte (ask for latte, then if size required ask for small latte)	Tea or water
Costs	9		
Caffe Nero	8		
Independents	8		
Total outlets	**158**		

The in-premise sample was also designed to include a spread of levels of deprivation (using SIMD 2020 deciles) and levels of rurality using the Scottish Government Urban Rural Classification 2020 six-fold scale of: large urban areas, other urban areas, accessible small towns (bands 1-3); and remote small town, accessible rural, and remote rural (bands 4-6).

Businesses were categorised in four ways: rural and deprived; rural and non-deprived; urban and deprived; and urban and non-deprived. These relatively broad categories of deprivation and rurality were necessary due to the very small numbers in some of the categories. Table 2.2 shows how these categories were defined, and the number of premises visited in each of these. While the research aimed to achieve a roughly representative spread of levels of rurality, larger brands having fewer premises in rural areas meant the final sample included a higher proportion of businesses in urban locations. Where we were unable to find an outlet in a rural area, we identified and used the nearest match in our sample. There was an even split of deprived and non-deprived locations (exactly 50/50 with 79 premises in each).

Table 2.2: In premise visits by deprivation and rurality

	Criteria – level of deprivation and rurality	**Number of premises visited**
Rural deprived	SIMD decile: 1-5 Urban/Rural six-fold: 4-6	23
Rural non-deprived	SIMD decile: 6-10 Urban/Rural six-fold: 4-6	31
Urban deprived	SIMD decile: 1-5 Urban/Rural six-fold:1-3	56
Urban non-deprived	SIMD decile: 6-10 Urban/Rural six-fold: 1-3	48
Total outlets		**158**

Total visits (two in each)	**316**

Online

The online sample was also taken from the purchased sample list. The 20 online visits included large brands and independents in the three categories where it is possible to make OOH purchases online: bakery / sandwich shops; QSR; and cafes and coffee shops. For the online research, only one visit was made, as the experience was considered to be very similar whether a person orders HFSS products or not. We are aware that online shopping experiences can be more personalised than in-premise experiences due to the use of algorithms, but in this instance, it was felt there would be no opportunity for OOH websites or apps to 'learn' the preferences of shoppers.

The visits were made on either the businesses' own apps (e.g. the Starbucks app) or on an aggregator app (e.g. Just Eat, Deliveroo, Uber Eats). Overall, 14 visits were made on the aggregator apps and six were made directly on the outlets' apps. Just two out of the seven visits to independent businesses were made on outlets' apps (as the majority do not have their own app or website to order from). Table 2.3 provides details of the number of visits made in each category and the purchases made.

Table 2.3: Online visits and purchases

	Number of outlets	App used	Purchase (one only)
2. Bakery / Sandwich shop			
Greggs	2	1 Restaurant 1 Aggregator	Sausage roll, meat and cheese sub / panini or equivalent
Subway	1	Aggregator	
Pret a Manger	1	Aggregator	
Independents	2	Aggregator	
4. Quick Service Restaurant			
McDonalds	2	Aggregator	Burger + side (e.g. fries, onion rings) or stuffed crust meat pizza or equivalent
KFC	2	Aggregator	
Dominos	1	Restaurant	
Independents	3	2 Restaurant 1 Aggregator	
5. Café or coffee shop			
Starbucks	2	Aggregator	Small latte
Costa	1	Restaurant	
Caffe Nero	1	Restaurant	

Independents	2	Aggregator
Total outlets	**20**	

Table 2.4 shows the levels of deprivation and rurality according to the locations of the online sample. It was not possible to visit many online OOH outlets in rural locations because they do not tend to have an app or website for online ordering and delivery services, such as Deliveroo, do not service rural locations. Only one online visit was for an outlet in a rural location. The sample contained a fairly even split of businesses in deprived and non-deprived locations (11 in deprived areas and 9 in non-deprived areas).

Table 2.4: Online visits by deprivation and rurality

	Criteria – level of deprivation and rurality	**Number of online visits**
Rural deprived	SIMD decile: 1-5 Urban/Rural six-fold: 4-6	0
Rural non-deprived	SIMD decile: 6-10 Urban/Rural six-fold: 4-6	1
Urban deprived	SIMD decile: 1-5 Urban/Rural six-fold:1-3	11
Urban non-deprived	SIMD decile: 6-10 Urban/Rural six-fold: 1-3	8
Total visits		**20**

Questionnaire design and fieldwork

Two questionnaires were developed by the research team – one for in-premise visits and one for online (these can be found in Appendix A). The in-premise questionnaire had two parts, for the two separate visits. This approach was taken to ensure a manageable amount of data was collected during each visit; and also to explore any differences in promotions and marketing strategies when shoppers purchased HFSS and non-HFSS food and drinks. Visit 1 covered price promotions, including meal deals, and staff interactions. Visit 2 covered staff interactions, nutritional information and any further promotions the shopper noted. Both in-premise visits were undertaken by the same mystery shopper.

The online questionnaire was designed to be as similar as possible as the in-premise one, to allow comparisons to be made. The staff interaction section was replaced by an ‘ordering’ section which asked about whether the app prompted them with any price promotions or deals.

All fieldwork was undertaken by a team of specialist mystery shoppers, using the Ipsos mobile phone app ‘Ipsos Shopmetrics’ to complete the questionnaire. The use of a mobile app to collect the data allowed shoppers to fill out the survey while in-premise, or soon after leaving the outlet, or while completing the online order - and therefore potentially record more accurate data than they would have done if they had completed the survey later that day.

The shoppers were fully briefed on the aims of the research and were provided with instructions on how to conduct the survey (Appendix B). Careful consideration was given to the in-premise instructions, in order to allow opportunity for upsizing and upselling and also to ensure comparability between visits. Shoppers were instructed which products to purchase (as detailed in the sample table above) and (where relevant) exactly how to ask for it within each outlet they visited. This included asking those visiting coffee shops and cafes to specifically ask for a ‘latte’, being careful not to mention the size initially, to then see whether they were encouraged to buy a larger size by staff. The online visit instructions were similar and also specified which app to use.

The main fieldwork was undertaken between 4 July and 21 August 2022. A total of 316 in-premise visits were made (two visits in 158 outlets), and 20 visits were made online – making a total of 336 mystery shopping visits to outlets across mainland Scotland.

Data analysis

The raw data from the survey was analysed using SPSS Statistics. The analysis of the survey comprised question by question analysis examining both the frequency of response to each survey question, as well as the extent to which responses varied by outlet category. It also involved looking for any differences or patterns according to deprivation and rurality. Throughout the report, we have only commented on any differences by SIMD/urban/rural category where a clear difference exists.

Food and drink categories were grouped into three types to provide a further level of analysis (including examining what types of products were promoted in Visit 1 compared with Visit 2). These were:

- **Less healthy products** including savoury pastries (sausage rolls, steak/chicken/cheese bakes), burgers, chips, fries, potato wedges, fried chicken, chicken wings, chicken nuggets, pizza with stuffed crust and/or meat, savoury sides (e.g. hash browns and onion rings), crisps, savoury snacks, cakes, biscuits, desserts, sweet pastries, chocolate, confectionery, cereal bars, shakes/frappes, soft drinks with added sugar, coffees (latte, cappuccino, coffees with syrups) hot chocolate.
- **Healthier products** including salads, pasta salads, vegetable sides, soup, fresh and dried fruit, nuts, water, low/no sugar soft drinks, pure fruit juice and smoothies, plain milk, and tea.
- **Unclassified products** including sandwiches, pasta, yoghurts.

This categorisation is necessarily a generalisation and pragmatic decisions were taken on the classifications of products. It is worth noting that within some of the healthier codes, that there may be items which are less healthy (such as smoothies with a high amount of sugar) and vice versa – and it was not possible to conduct a full assessment of each product in store to refine the classification, for example, for sandwiches.

Limitations of the research

There were some limitations which should be considered when interpreting the findings of this study:

- The number of outlets visited for each brand was small (seven to 10 outlets) and the outlets were not randomly selected from all outlets of that brand in Scotland (as discussed above, they were purposively sampled to provide a range across different area types). The results are therefore not statistically robust estimates of the prevalence of promotions across all outlets or across all outlets within each brand. We cannot say, for example, that 'the majority of price promotions in bakery outlets in Scotland are X' or '15% of QSR outlets use X marketing strategy'.
- Due to the small numbers of each brand, the urban/rural and deprivation categories used were necessarily very broad. A larger sample, with the scope to analyse area differences in more detail, may have revealed more differences. In addition, the deprivation classification of an outlet location may not reflect the customer profile.
- Because of the small sample size, the online data should be viewed as indicative of the types of promotions now being used by large brands and independent OOH outlets. That said, while only 20 visits were made online, the data reflects the online experience of consumers using the same apps across Scotland. For example, the user journey and promotions offered on the Costa app in Aberdeen, will be the same for someone using it elsewhere in Scotland.
- The research focused on the marketing strategies that were evident. It did not explore the consumer response to those promotions.
- The mystery shoppers were provided with detailed instructions on how to undertake the survey and, as far as possible, the questionnaire was designed to minimise variation in the way that promotions were recorded. Inevitably, however, there was potential for variation in some instances in the way the same or very similar promotions were recorded by different mystery shoppers. This issue has been mitigated as far as possible during data validation and cleaning.
- The online research undertaken recorded promotions that appeared to shoppers while they were making a purchase, it did not capture any promotions received as push notifications, texts or emails from OOH businesses.

3. Overview of promotions used

Table 3.1 provides a broad overview of the marketing strategies and promotions identified during the visits. Subsequent chapters provide more detail on which types of outlets were using which strategies and what types of product were being promoted.

The most common marketing strategies recorded were the prominent placement of items near the till (69% in-premise visits), meal deals (54% in-premise and 35% online visits) and price promotions (44% in-premise and 25% online visits).

Table 3.1: Types of promotions used

	% of visits where strategy identified (in-premise)	% of visits where strategy identified (online)
Base: all eligible visits	**1-3: base 158 visits 4: base 316 visits 5: base 150 visits**	**20**
1. Prominent placement of items near till	69	n/a
2. Meal deals	54	35
3. Price promotions (not including meal deals)	44	25
4. 'Upselling' (encouragement to purchase additional items either verbally by a member of staff or via an online prompt)	42	35
5. 'Upsizing' (encouragement to buy a larger size, either verbally by a member of staff or via an online prompt)	28	5

4. Price promotions

Shoppers were asked to record all examples of price promotion offers which were available within each outlet, either in-premise or online. This included:

- Multi-buys: for example, 3 for 2, buy one get one free, 4 for £1.50 type offers
- Reduced price, such as offers promoted as ‘25p off’, ‘half-price’, ‘50% off’, ‘normally £2.50 but now £1’
- A discount offered for a minimum spend
- Prominent low-price promotion (e.g. ‘£1’ or ‘only 50p’ in big signage)
- A larger sized product offered for the same amount or a small amount more

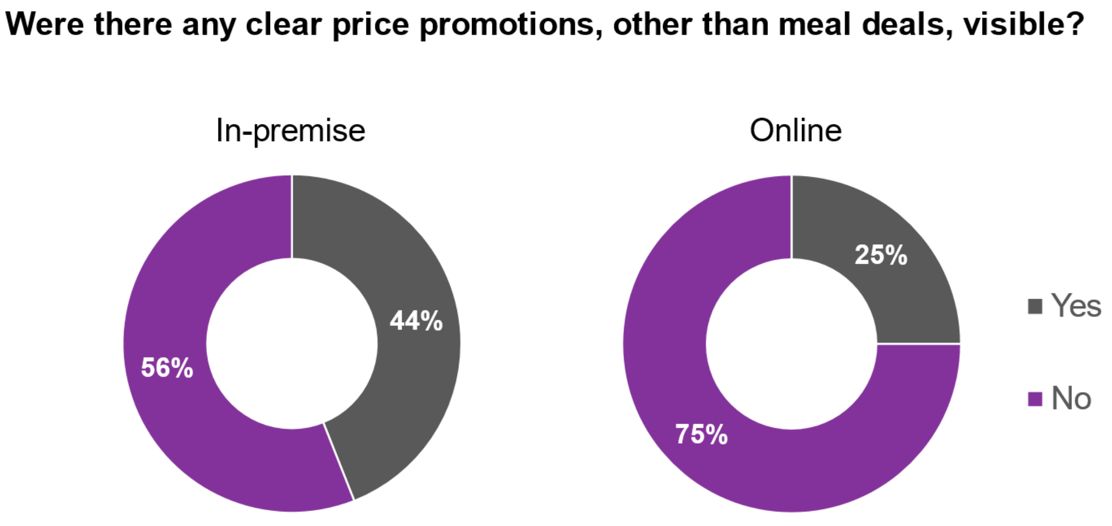
The mystery shoppers were given clear instructions on which type of promotions fell within each category (Appendix B). Meal deals are treated as a separate promotion and are reported on in Chapter 5.

This chapter presents the price promotion offers that were found at outlets, either in-premise or online. It details the types of promotions, the types of products on promotion and the way in which they were advertised.

Prevalence of price promotions

As Figure 4.1 shows, just under half (44%) of the outlets visited in person had a clear price promotion visible inside or outside the premises. Price promotions were less commonly observed online, being visible on an outlet’s app or website in a quarter (25%) of cases.

Figure 4.1: Price promotions, in-premise and online



Base: all in-premise outlets (158), all online outlets (20)

In-premise, price promotions were much less common in coffee and cake businesses (12%) than in other types of outlets. This included Caffe Nero not offering price promotions at any of the outlets visited.

Online, price promotions were only observed at bakery (n = 3: Greggs, Subway and Independent) and QSR outlets (n = 2: KFC and Dominos).

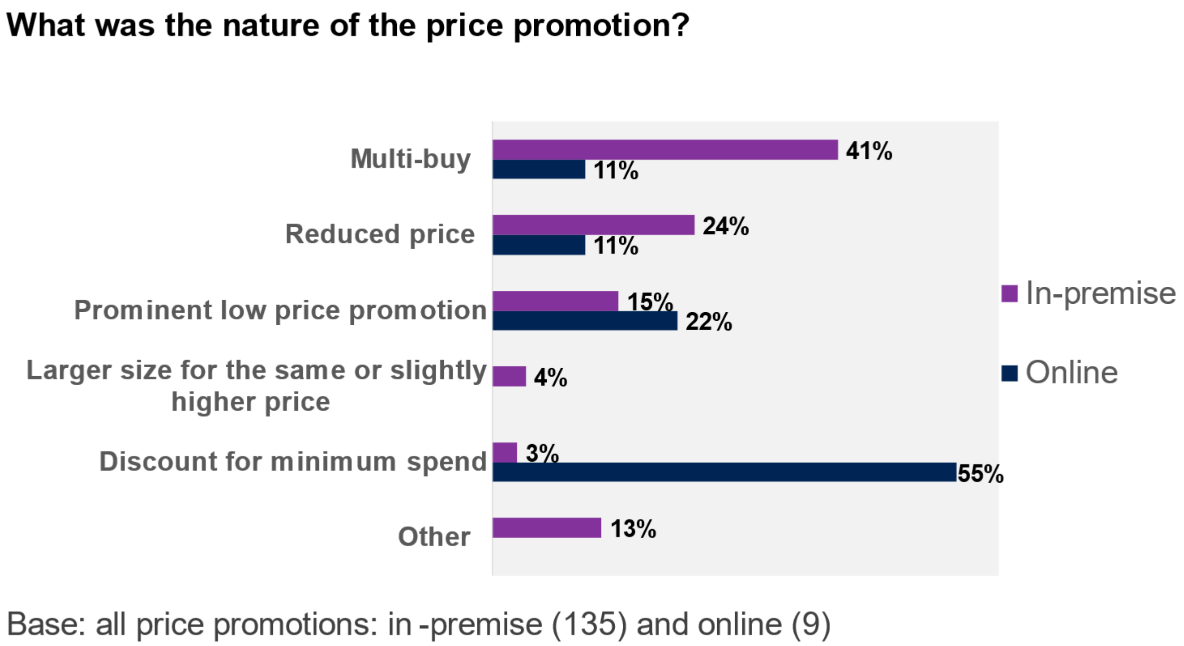
Types of price promotions

Figure 4.2 shows that multi-buys and reduced prices were the most commonly observed forms of price promotion used by the out-of-home businesses sampled, with more than two in five (41%) of all in-premise price promotions being multi-buy offers and around a quarter (24%) being reduced price offers. Online, the most common price promotion was a discount for a minimum spend (55%, n=5), followed by a prominent low price promotion (22%, n = 2).

In-premise, 'other' types of promotion accounted for 13% of all price promotions visible in-premise. These included:

- Limited edition/seasonal and daily special promotions, with a specific item advertised at a lower price for that day only
- Lunchtime deals
- Discounted prices for loyalty card holders

Figure 4.2: Types of price promotions, in-premise and online



The type of in-premise promotions varied by outlet category (Table 4.1). For instance, supermarkets had a higher proportion of multi-buy offers visible (53%) compared to all outlets (41%). Multi-buy promotions were visible in 61% of bakeries, compared to 41% of all outlets, and reduced price deals were least common in bakeries (9% compared to 24% overall). While larger sizes for the same price or a small amount more were not a common promotion overall (4%), there were relatively more of these offers in QSRs (19%).

Table 4.1: Types of price promotions by outlet category

	Bakery (%)	Coffee shops/ cakes (%)	Convenience (%)	QSR (%)	Supermarket (%)	Overall (%)
Base: price promotions in-premise	**23**	**4**	**50**	**26**	**32**	**135**
Discount for minimum spend	0	0	8	0	0	3
Larger sizes for same price or small amount more	4	0	0	19	0	4
Multi-buy	61	0	40	15	53	41
Prominent low price promotion	9	25	24	15	3	15
Reduced price	9	50	24	23	34	24
Other	18	25	4	27	9	13

Products on price promotion

A range of products were found to be on price promotion at outlets visited in-person, the most common of which were those which would be classed as less healthy snacks. This includes confectionery (14%), crisps or savoury snacks (12%) and cakes (10%) (Table 4.2).

Online, the product most commonly found to be on price promotion was pizza (30%) followed by savoury pastries (20%).

Table 4.2: Proportion of price promotions on each type of product

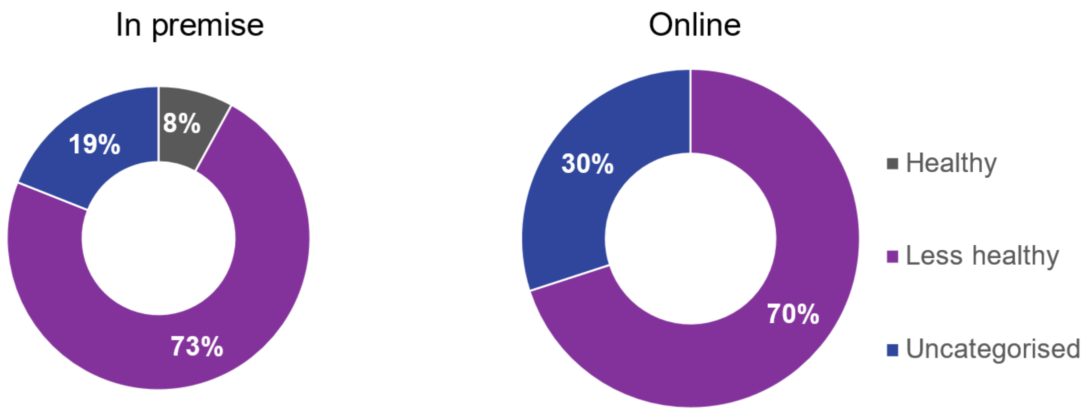
Product	% in-premise	% online
Base: all price promotions	**135**	**10**
Confectionery	14	-
Crisps and savoury snacks (e.g. pretzels, popcorn)	12	-
Cakes (e.g. donuts, flapjacks, pancakes, waffles)	10	-
Sandwiches (including filled rolls, wraps, paninis, subs and toasties but not burgers)	8	10 (n=1)
Pizza (slide, half or whole)	7	30 (n=3)
Fried chicken, chicken wings, nuggets or strips	5	10 (n=1)
Soft drinks with added sugar	5	-
Sweet biscuits	5	-
Other cold drinks (e.g. energy drinks)	4	10 (n=1)
Savoury pastries (e.g. sausage rolls, steak or chicken or cheese bakes)	4	20 (n=2)
Burgers	3	-
Coffee	2	-
Low or no sugar soft drinks	2	-
Cereal bars (e.g. protein or nature bars)	2	-
Savoury sides (e.g. hash browns or onion rings)	2	-
Sweet pastries (e.g. Danish pastry, croissants, pain au chocolat, tarts or flans)	2	10 (n=1)
Water (e.g. still, sparkling or hint of fruit)	2	-
Yoghurts or other dairy desserts	2	-
All menu items (i.e. a % off the price for a minimum spend)	1	-
Chips, fries or potato wedges (full or side portion)	1	-
Fruits or nuts (including dried fruit and dried fruit bars)	1	-
Kebabs	1	-
Pure fruit juice or smoothies	1	-
Salad	1	-
Shakes or frappes	1	-
Other	*5*	-

Promotions on healthier versus less healthy items

Where possible, products were categorised as either 'healthier' or 'less healthy' items (uncategorised items were those where it was not possible to determine whether it constitutes a healthier or less healthy option due to the general nature of their description (for instance sandwiches or other cold drinks) (see Chapter 2 methods). Figure 4.3 shows that, of the in-premise products on price promotion, the majority (73%) were less healthy, while only 8% were healthier and 19% uncategorised. Online, there were no healthier products found to be on price promotion; just under two-thirds (70%, n=7) were less healthy and 30% (n=3) were uncategorised.

Figure 4.3: Price promotions by healthier versus less healthy foods

Were there any clear price promotions, other than meal deals, visible?



Base: All price promotions in-premise (135) and online (10)

As might be expected, the types of products on price promotion varied according to outlet type. In bakeries, for instance, there were more price promotions on cakes (17%) than in other outlet categories. Among QSRs, price promotions were more commonly found on items such as pizza (27%) and fried chicken (23%). Among supermarkets, crisps and savoury snacks (25%) and confectionery (22%) were most common, while in convenience outlets the most common products on price promotion were confectionery items (29%).

As with in-premise price promotions, there was some variation by outlet type online. While pizza was the most common product type in QSRs with a price promotion (60%), among online bakeries it was savoury pastries (40%).

5. Meal deals

Meal deals are typically considered to be the offering of a main (e.g. sandwich, burger, salad etc.), drink and snack. However, there are also variations used by different types of business, such as those offering a drink and a snack (e.g. a coffee and a cake) and those aimed at more than one person e.g. two mains for a discounted price.

This chapter reports on the presence of meal deals at the outlets visited. It also considers the availability of healthier options as part of a meal deal, such as water or healthier side orders.

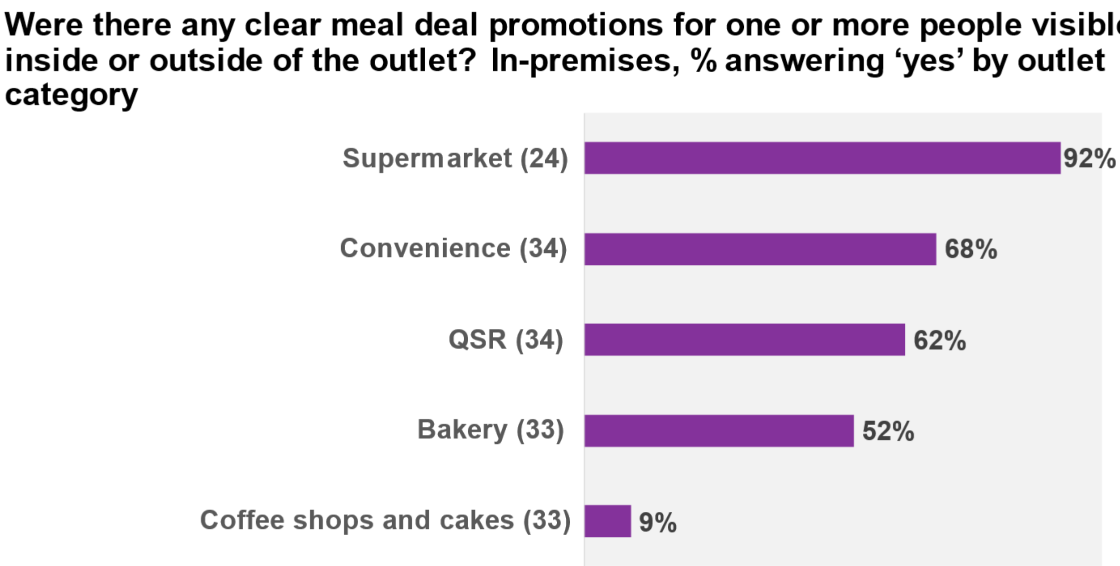
Prevalence of meal deal promotions

Overall, meal deal promotions for one or more people were visible inside or outside just over half (54%) of the outlets visited. Of the online mystery shops, clear meal promotions were visible in around a third (35%) of the apps or websites visited.

As shown in Figure 5.1, among the in-premise visits, there was some variation by outlet type. Promotions were observed at most supermarkets (92%) and in the majority of convenience outlets (67%) and QSRs (62%), and around half of Bakery outlets (52%). Meal promotions were least prevalent at coffee shops (9%). Of the coffee shop brands, there were no clear meal deal promotions at Caffe Nero or Starbucks Coffee. Pret A Manger, categorised as a bakery, also had no clear meal deal promotions.

Independent outlets were less likely than average to have meal deal promotions (32%).

Figure 5.1: Proportion of in-premise outlets offering meal deals by category, bases in brackets alongside category name



Base: all in-premise visits by outlet category (bases in chart)

Among online visits, promotions were observed at half of bakeries (50%) and half of QSRs (50%). No meal deal promotions were available at coffee shops.

Advertising meal deal promotions

Figure 5.2 shows the relative popularity of the different ways in which meal deals were advertised. The most popular being by signage inside the outlet on fridges, shelves or by the products (55% of meal deal promotions in-premise). Other commonly sighted advertisements included signage near the till area (26%) and signage on the walls inside the outlet (25%). Advertising of meal deals was most commonly observed inside the outlet rather than outside or in the window.

Digital display adverts were more common in QSRs, where almost a third (32%) advertised them in this way, compared to 12% overall.

Figure 5.2: Advertising of meal deal promotions in-premise

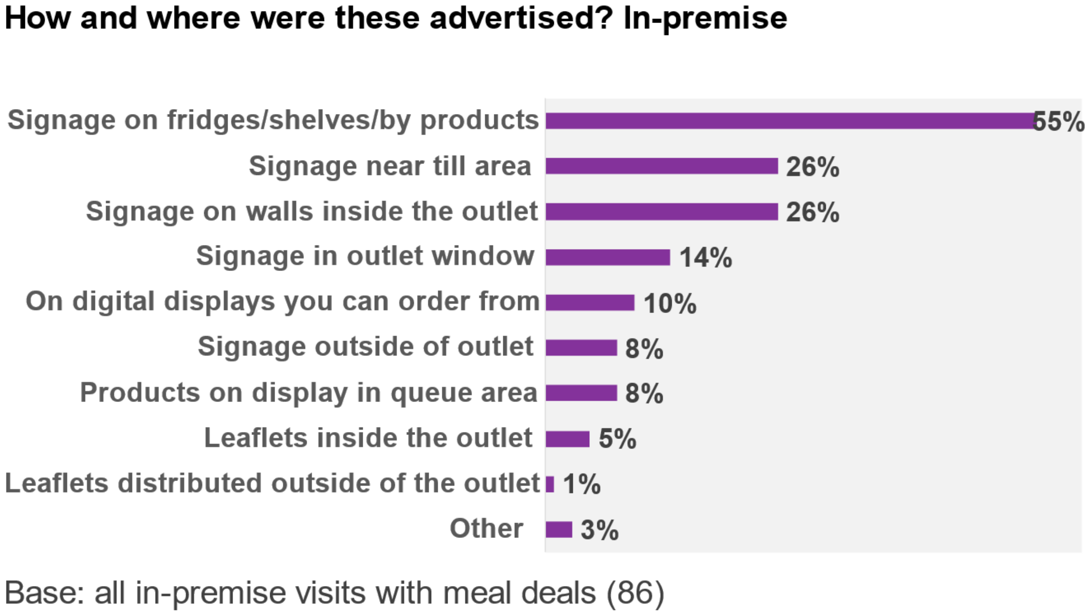
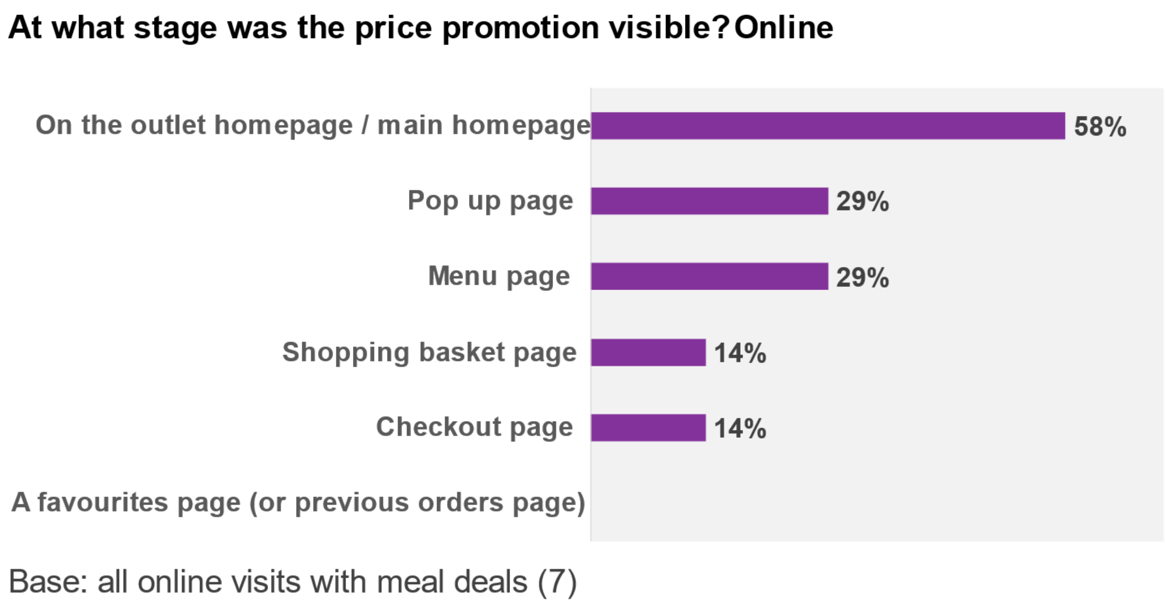


Figure 5.3 shows the way meal deals were advertised online. In 57% of cases, they were advertised on the outlet's homepage. In fewer cases, they were advertised as a pop-up or on the menu page (both 29%) or on the shopping basket or checkout page (both 14%).

Figure 5.3: Advertising of meal deal promotions online



Types of meal deals

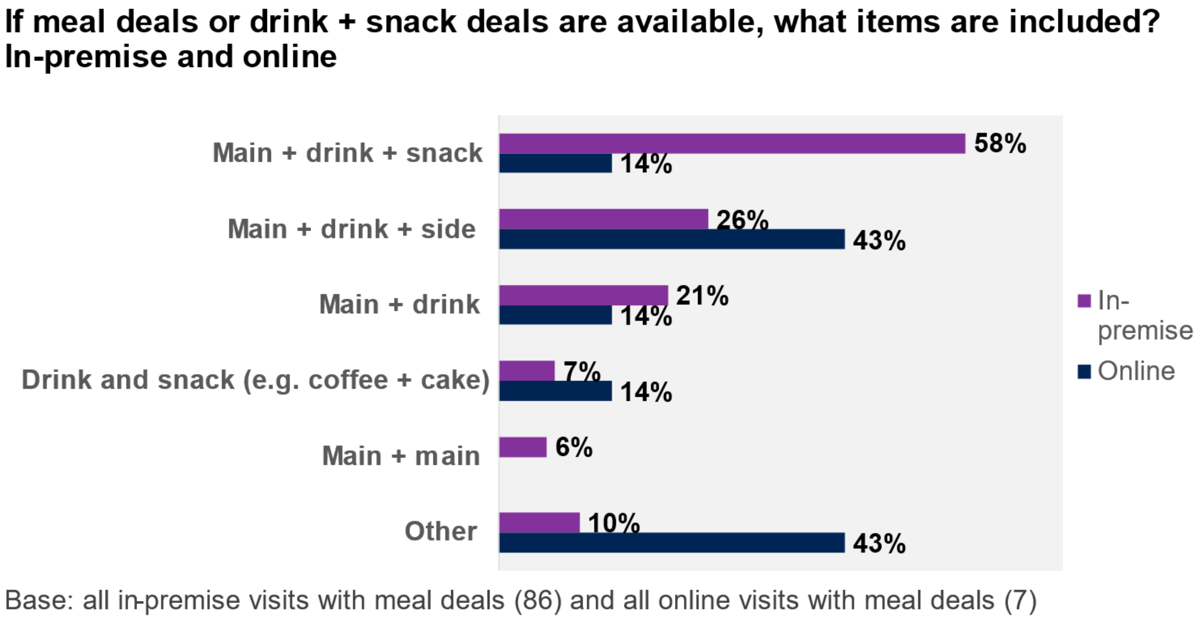
Figure 5.4 shows the relative popularity of different types of meal deals. The standard meal deal offer of a main, drink and snack was the most common deal, found at 58% of the outlets with meal deals visited in person, followed by a main, drink and side (26%) and a main and drink (21%).

Some ‘other’ types of meal deals included multiple main or side dish combinations (such as one main and two sides, or two mains and two snacks).

The type of meal deal on offer varied according to the type of outlet. For instance, among the in-premise visits, the main, drink and snack deal was more commonly found in supermarkets (86% of supermarkets with meal deals had these types of deals) and convenience outlets (78%) while the main, drink and side deal was more common in QSRs (81%).

The main, drink and side deal was the most common combination found online (43%). A number of ‘other’ meal deals were observed online, and these included meals including multiple sides or family meal bundles.

Figure 5.4: Items included in the meal deal in-premise and online

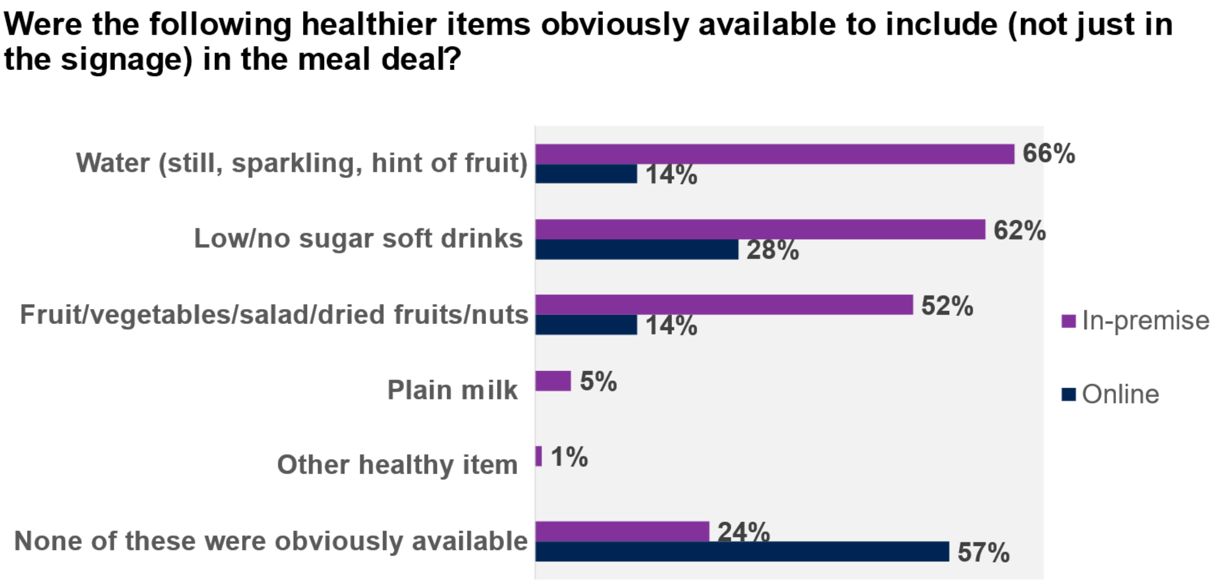


Healthier options

Healthier items were obviously available to include in meals deals in around three-quarters (76%) of outlets visited in-person. Figure 5.5 shows that water was the most common healthier alternative, available at 66% of in-premise visits while 62% offered low or no sugar drinks and 52% offered a healthier accompaniment such as fruit or salad. Plain milk was offered at 5% and 1% offered some other healthy item. In almost a quarter (24%) of outlets, no healthier items were obviously available.

In more than half (57%) of online visits, healthier items were not obviously available to include in a meal deal. In small numbers of online outlets (28%) the following healthier items were available: low/no sugar soft drinks (28%); water (14%) or fruit/vegetables/salad/dried fruit/nuts (14%). No online outlet was observed to offer plain milk or another healthy item.

Figure 5.5: Availability of healthier items in meal deals in-premise and online



Base: all in-premise visits with meal deals (86) and all online visits with meal deals (7)

At in-person visits, the presence of obvious healthier items in meal deals was less common in coffee shops (33%) and QSRs (43%), while in supermarkets (100%) and convenience outlets (96%) there was always/almost always at least one type of healthier item obviously available as part of meal deals. Two thirds (65%) of bakeries had healthier options available in meal deals.

In terms of specific brands, the presence of obvious healthier items were less commonly available as part of meal deals at independent outlets (20% of outlets), KFC (33%) and Pizza Hut delivery (50%).

Clearly available healthier options as part of meal deals were also more commonly observed in outlets (in-person) in less deprived areas (34%) than in more deprived areas (14%).

6. Other promotions

Upsizing and upselling

The research assessed the level at which shoppers were encouraged to buy more than they intended, either through staff in out-of-home businesses or online prompts asking if they wanted to upsize the product or through upselling (suggesting additional products such as drinks, sides or snacks). As mentioned in Chapter 2, mystery shoppers were instructed which product to purchase at each visit, and also exactly how to ask for these products. These specific instructions were to allow some opportunity for upsizing and upselling. For example, for different visits, shoppers were instructed to ask for ‘a latte’ (rather than ‘a large hot chocolate’) and to select a sandwich that was part of the meal deal (but not pick up other items from the meal deal).

Upsizing

Not all products purchased allowed an opportunity for upsizing (e.g., most sandwiches). Business categories where upsizing was possible were coffee shops, QSR and some bakeries (specifically Subway where there is the option of the Footlong sandwich). There was the potential for upsizing to occur at 150 visits (75 Visit 1 and 75 Visit 2).

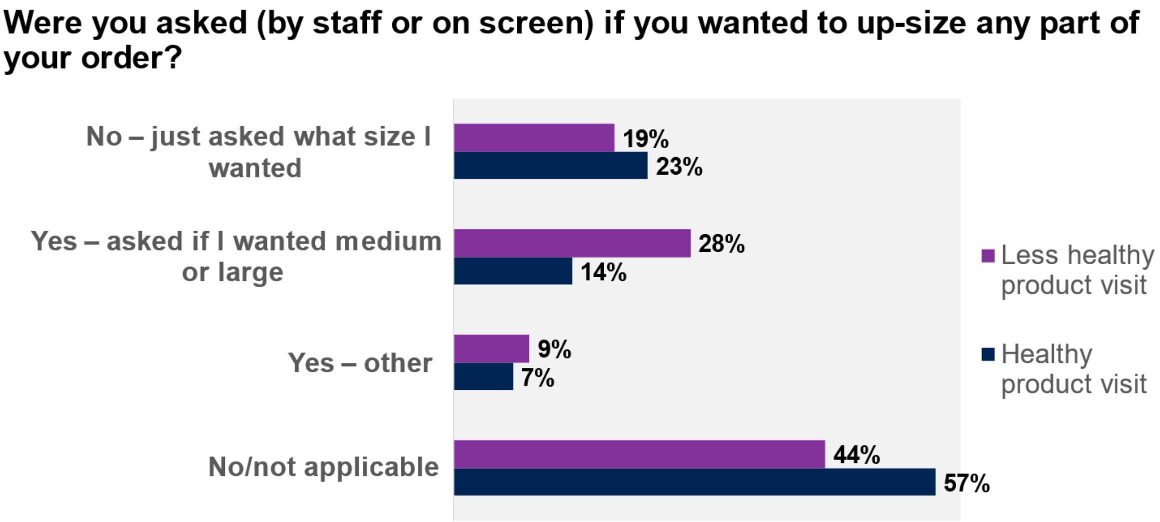
In order to compare any differences in upsizing by the type of product purchased, shoppers purchased a less healthy product in Visit 1 while in Visit 2 they purchased a healthier product (Appendix B).

At the 75 outlets where there was the potential for upsizing to occur, it happened at almost twice as many outlets during the less healthy product visit (37%) than the healthier product visit (20%) (Figure 6.1). In 28% (less healthy product visit) and 14% (healthier product visit) of cases, the upsizing took the form of staff asking if shoppers would like medium or large and in 9% (less healthy product visit) and 7% (healthier product visit) of cases shoppers reported that upsizing had occurred in another way. Comments made by shoppers indicated that, in some of these cases where upsizing had occurred in a different way, the default size of item provided was medium or large and shoppers had to specifically ask for a small. In others, shoppers reported that there was only one size available of, for example, hot drinks or that stuffed crust pizzas were only available in large.

In 8% (less healthy product visit) and 21% (healthier product visit) of cases, the member of staff indicated a cost advantage to upsizing.

In 19% (less healthy product visit) and 23% (healthier product visit) of cases shoppers were asked what size they would like but there was no attempt to encourage the purchase of a larger size.

Figure 6.1. Upsizing of orders – healthier versus less healthy purchases



Base: all in premise visits with potential for upsizing (150) (75 less healthy product visit and 75 healthy product visit)

As Table 6.1 shows, shoppers visiting bakeries and coffee shops were more likely to be asked to upsize their order when purchasing a less healthy product than a healthier product (38% versus 0% in bakeries and 45% versus 21% in coffee shops). There was less variation at QSRs (29% versus 23%).

Table 6.1: Upsizing of orders – healthier versus less healthy purchases by category

Product	Bakery (Subway) %	Coffee %	QSR %	Total %
Base: all outlets where upsizing is possible (150) (75 Visit 1 and 75 Visit 2)	**16**	**66**	**68**	**148**
Mystery shopper asked if they would like to upsize their order – Visit 1 (less healthy)	38	45	29	37
Mystery shopper asked if they would like to upsize their order – Visit 2 (healthier)	-	21	23	20

Upsizing was not common in online visits, occurring in only one of the 20 visits. In this instance, the shopper was asked if they would like a larger size of an item.

Upselling

Verbal upselling during visits was more common, and varied less by whether the item purchased was healthier or less healthy. It occurred in 44% of cases where the product was less healthy (Visit 1) and 41% of cases where the product was healthier (Visit 2) (Table 6.2). However, this was based on a very broad definition of upselling which included the 8% (Visit 1 and Visit 2) of visits where the shopper was asked if they wanted anything else (in general). Upselling online occurred in 35% of visits.

Table 6.2: Verbal upselling by category

Product	Less healthy product visit %	Healthier product visit %	Online %
Base: all visits	**158**	**158**	**20**
No	56	59	65
Yes – asked if I "wanted anything else" generally	18	18	-
Yes – told / shown part of a meal deal and I could get crisps/ cake etc. with the items (fruit not mentioned)	11	6	5
Yes – told / shown part of a meal deal and I could get other items (fruit mentioned)	4	4	-
Yes – told / shown part of a meal deal and I could get a drink (water /low/ no sugar soft drinks not mentioned)	1	2	5
Yes – told / shown part of a meal deal and I could get a drink (water/low/no sugar soft drinks mentioned)	3	3	5
Yes – asked / prompted "would you like a drink with that"	2	1	-
Yes – asked / prompted "would you like fries with that"	1	1	-
Yes – asked / prompted to see if I wanted cream/ syrup with my drink	1	1	-
Yes – asked / prompted to see if I wanted cake (or similar)	1	1	5
Yes – asked if wanted specific product placed on the till point or checkout screen (e.g. large chocolate bar)	1	-	5
Yes – Other (record)	1	4	10

Most of the remaining cases of upselling related to meal deals (Table 6.2). As mentioned in Chapter 5, the offering of meal deals within out-of-home businesses was common. Such meal deals are a form of non-verbal upselling – using a price promotion to encourage consumers to purchase items (for example a drink and/or snack) that they may not have originally intended to purchase. Where consumers select items that form part of a meal deal (but have not selected the other items), there is the potential for staff to upsell by pointing out the meal deal offer.

As discussed in Chapter 5, meal deals were most common in supermarkets, convenience stores and QSRs. Among the QSR outlets, verbal promotion of meal deals – asking the shopper if they wanted a meal when they had asked for a burger and fries (at less healthy product visit) or a grilled chicken wrap/salad and fries (at healthier product visit) – varied by brand. At KFC and McDonalds, shoppers were asked if they would like a meal at just over half of the visits (nine of both the 17 visits to KFC and 16 visits to McDonald). Conversely, this only happened at two of the 16 visits to Pizza Hut. Across the brands, there was no variation by whether the product purchased was healthier or less healthy. There were seven instances of water or low/no sugar soft drinks being available as one of the drink options for the meal deal, five of which were at KFC outlets.

Variation across brands also existed within the convenience sector, where shoppers were asked to purchase a sausage roll or equivalent (less healthy product visit) or a chicken/vegetarian salad or sandwich (healthier product visit). Shoppers at Boots outlets were more likely to be told their item was part of a meal deal (seven of 16 visits) than shoppers at Co-op (one of 18 visits) and Spar (one of 20 visits).

There was greater consistency across supermarket brands, with shoppers being told items were part of meal deals in around half of visits and little variation between the less healthy product visit (triple sandwich with processed meat) and healthier product visit (chicken/vegetarian sandwich). The slight exception was M&S Simply Food where shoppers were told about meal deals in four of eight less healthy product visit shops and one of eight healthier product visit shops. Fruit was mentioned at five of the instances of upselling to a meal deal at Tesco Express, compared to one instance at M&S Simply food and none at Sainsbury's.

In 11% of in-premise and 5% of online cases, shoppers visiting outlets were told there was a cost advantage to the upselling.

Product placement

The placement of items near the till point (which may encourage additional consumption) was common, with 69% of outlets using this type of strategy.

Snacks that would be generally classed as less healthy were the most common type of product placed at the till point. This included cakes (including donuts, flapjacks, pancakes, and waffles) (34% of outlets), confectionery (30%), sweet biscuits (29%), crisps and savoury snacks (23%) sweet pastries (22%) (Table 6.3).

Healthier options available at the till point included: fruit or nuts (15%), water (9%), low/no sugar soft drinks (9%) and tea (8%).

Table 6.3: Products most commonly available at the till point

	%
Base: All Visit 2 outlets (158)	
Cakes	34
Confectionery	30
Sweet biscuits	29
Crisps and savoury snacks (include pretzels, all popcorn)	23
Sweet pastries e.g., Danish pastries, croissants, pain au chocolat, tarts, flans.	22
Cereal bars (include protein bars and nature bars etc.)	18
Fruit or nuts (include dried fruit and dried fruit bars)	15
Savoury pastries (include sausage rolls, steak or chicken or cheese bakes, pies)	15
Soft drinks with added sugar	11
Coffee (All coffee - Americanos, lattes, cappuccinos)	11
Water (plain – still, sparkling or hint of fruit)	9
Low/no sugar soft drinks	9
Tea (all teas and herbal teas)	8
Sandwiches/filled rolls/wraps etc. (include paninis, subs and toasties but not burgers)	7
No products	30

Other (non-price) promotion of products

Other types of promotions were recorded at around a quarter (26%) of the in-premise visits. Most commonly, these other strategies were the use of prominent posters (53% of other promotions recorded) and screen displays (14%) to advertise or promote specific products. A further 9% of these promotions were branded items such as coffee cups, 7% were item displays and 7% were adverts on digital screens you can order from.

Finally, 11% were recorded as "other" types of advertising – which included the advertisement of specific products using sandwich boards outside of outlets, shelf labelling and floor stickers.

Shakes/frappes were the most frequently advertised product (17%) using non-price promotions (Table 6.4). These were followed by sandwiches (8%) and coffee, either traditional coffee (8%) or specialist coffee (8%). A further 6% were on pizza and the same proportion on soft drinks with added sugar.

Table 6.4: Products in other promotions

	%
Base: All products advertised in other promotions (52)	
Shakes/frappes	17
Sandwiches/filled rolls/wraps etc. (include paninis, subs and toasties but not burgers)	8
Coffee (all coffee - Americanos, lattes, cappuccinos)	8
Specialist coffees (with added syrups/cream)	8
Pizza (slices, half and whole pizzas)	6
Soft drinks with added sugar	6
Confectionery	4
Low/no sugar soft drinks	4
Other cold drink	4
Salad (meal)	4
Sweet pastries e.g., Danish pastries, croissants, pain au chocolat, tarts, flans	4
Burgers (include beef, chicken, vegetarian, filet-o-fish)	2
Fruit or nuts (include dried fruit and dried fruit bars)	2
Hot chocolate	2
Ice cream	2
Salad or vegetable sides	2
Sweet biscuits	2
Tea (all teas and herbal teas)	2
Water (plain – still, sparkling or hint of fruit)	2
Other	8

7. Availability of nutritional information

Providing nutritional information within premises and online allows consumers to make more informed decisions when purchasing food and drink items from out-of-home businesses.

The research assessed the availability of calorie content and further nutritional information (for example, fat content) within the businesses beyond that available on pre-packaged products – for example: on menus, posters, signage on shelving and signage behind the counter at in-premise visits and on menu pages for online shops. As established during the 2017 research, the out-of-home products purchased within supermarkets and convenience store outlets tended to be pre-packaged, with nutritional information on the packaging, these outlets were excluded from the analysis of this question.

In-premise visits

At in-premise visits, calorie content information, beyond that on packaging, was available in 54% of the outlets (excluding supermarkets and convenience outlets). The key factor affecting whether or not calorie information was available was whether the outlet was a chain or an independent business with calorie information available at 71% of chain outlets and no independent outlets. Specific brands where the availability of calorie information was highest were: Subway and Pizza Hut (100% of outlets); McDonalds and Pret a Manger (86%); and Caffé Nero and Starbucks (75%).

The mystery shoppers judged that the calorie information was ‘readable/large enough to easily read’ at 78% of outlets with such information displayed.

The availability of further nutritional information (e.g. fat content) was less common - available in almost a third of outlets (30%). Pret a Manger was most likely to provide this information (observed at five of eight outlets).

Online visits

Calorie content was available at a similar proportion of outlets online (50%). Once more, it was more commonly available at chain businesses (77%) and was not available at any independent outlets. The only chain outlets where it was not obviously available were Starbucks (not available at either of the two visits) and McDonalds (available at one of the two visits).

The availability of further nutritional information was available at 45% of all online outlets. Indeed, of the 10 outlets providing calorie information, nine also provided further nutritional information.

8. Conclusions

There are numerous ways in which the in-premise environment makes it challenging for consumers to make healthier choices and not purchase more than they had intended. The prominent placement of products close to the tills, price promotions and meal deals were common and, overall, less healthy products were far more likely to be promoted than healthier ones. However, there are some encouraging findings with at least one healthier option being available in the majority of meal deal offers.

It is also a positive finding that shoppers are not, on the whole, having a different experience based on the deprivation profile of the area, the exception to this being the higher proportion of meal deals offering healthier items in less deprived areas.

Overall, price promotions and meal deals were less common online than in the in-premise environment. However, discounts for minimum spends were the most frequently reported type of price promotion online, potentially encouraging consumers to purchase more than they had intended. Given the online sample was small, and the research did not take into account digital marketing strategies, such as emails/texts encouraging customers to order and discount codes, further research is required to obtain a fuller picture of the online OOH environment.

Across both in-premise and online outlets, there were also notable differences by business category. For example, coffee shops were much less likely than other types of outlet to have promotions but more likely than others to encourage upsizing, and meal deals were particularly common in supermarkets and convenience stores.

The three main ways which the environment can influence consumers' food choices are summarised below, in turn.

Encouraging people to eat more (and more than they may have intended)

Upselling, upsizing, multi-buy promotions and meal deals were prominent throughout the in-premise outlets visited while discounts for minimum spends were common online. This is likely to encourage customers to purchase more than they might otherwise have and, as noted below, less healthy foods were often available as part of these promotions.

Encouraging consumers to purchase less healthy foods rather than healthier foods

The majority of the common marketing strategies (product placement, price promotions and upsizing) were on less healthy products. While, more positively, healthier items were available within meal deals, these were primarily drinks (water and low/no sugar soft drinks) rather than food items. The research, of course, does not give us any indication of how frequently consumers choose the healthier options as part of meal deals. As noted above, less healthy meal deal options were less available in more disadvantaged areas.

Consumers not always being able to make an informed choice

For consumers wishing to make informed choices, having calorie/nutrition information readily available within premises is key. It was present at just over half of outlets, meaning there are high numbers of cases in which consumers are not able to make informed choices. This is particularly true of independent outlets in this study who did not have it available at all.

Appendix A - Questionnaires

SG In-store marketing questionnaire – in premise
Visit 1

Price promotions

ASK ALL
[was Q1 in 2017]

Q1	Were there any clear price promotions, other than meal deals, visible inside or outside of the outlet? NOTE, WE WILL ASK ABOUT MEAL DEALS LATER	
	Yes	1
	No (Go to Q6)	2

ASK ALL who answer yes (code 1 at Q1 or code 1 at Q5)
[was Q2 in 2017]

Q2	What product was being advertised?	
	Sandwiches/filled rolls/wraps etc. (include paninis, subs and toasties but not burgers)	1
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes, pies)	2
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	3
	Chips, fries or potato wedges (full or side portion)	4
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	5
	Pizza (slices, half and whole pizzas)	6
	Pasta (including noodle dishes)	7
	Kebabs	8
	Savoury sides (include hash browns, onion rings)	9
	Salad (meal)	10
	Salad or vegetable sides	11
	Soup	12
	Crisps and savoury snacks (include pretzels, all popcorn)	13
	Confectionery	14
	Sweet biscuits	15
	Cakes (include donuts, flap jacks, pancakes, waffles)	16
	Sweet pastries e.g., Danish pastries, croissants, pain au chocolat, tarts, flans	17
	Puddings e.g., fruit puddings, sponge puddings, sticky toffee pudding	18
	Ice cream	19

	Cereal bars (include protein bars and nature bars etc.)	20
	Yoghurts/ other dairy desserts	21
	Fruit or nuts (include dried fruit and dried fruit bars)	22
	Cold drinks:	
	Soft drinks with added sugar	23
	Low/ no sugar soft drinks	24
	Water (plain – still, sparkling or hint of fruit)	25
	Pure fruit juice or smoothies	26
	Shakes/frappes	27
	Plain milk	28
	Flavoured milk	29
	Other cold drink (specify)	30
	Hot drinks:	
	Tea (all teas and herbal teas)	31
	Coffee (All coffee - Americanos, lattes, cappuccinos)	32
	Specialist coffees (with added syrups/ cream)	33
	Hot chocolate	34
	All menu items (for example, % off if you spend a minimum of £X)	35
	Other (specify)	36

ASK ALL who answer yes (code 1 at Q1)
[was Q3 in 2017]

Q3	What was the nature of the price promotion?	
	Multi-buy (buy one get one free, 3 for 2 offers)	1
	Reduced price	4
	Discount for minimum spend	5
	Prominent low price promotion (e.g. £1 offers on shelf edge/ fridges)	6
	Larger size for same price/small amount more	7
	Other (specify)	8

ASK Q4 TO ALL WHO ANSWER Q3
[was Q4 in 2017 – new option added]

Q4	How and where was this advertised? TICK ALL THAT APPLY (Multicode)	
	Signage *outside* of outlet	1
	Signage in outlet *window*	2
	Leaflets distributed *outside* of the outlet	3
	Leaflets *inside* the outlet	4
	Signage on walls *inside* the outlet	5
	Signage on fridges/ shelves/ by products	6
	Products on display in queue area	7
	Signage near till area	8
	On digital displays you can order from	9

	Other (specify)	10

ASK ALL who answer yes (code 1 at Q1)
[was Q5 in 2017]

Q5	Were there any other clear price promotions, other than meal deals, visible?	
	Yes (Go to Q2)	
	No (Got to Q6a)	

If yes at Q5, repeat Qs 2-5, until *all price promotions* have been recorded *both inside and outside* of the outlet (code 2 at Q5).

Meal deals

ASK ALL
NEW QUESTION

Q6	Were there any clear meal deal promotions for one or more people visible inside or outside of the outlet?	
	Yes	1
	No (Go to Q10)	2

Q7	How and where were these advertised? (Multicode)	
	Signage *outside* of outlet	1
	Signage in outlet *window*	2
	Leaflets distributed *outside* of the outlet	3
	Leaflets *inside* the outlet	4
	Signage on walls *inside* the outlet	5
	Signage on fridges/ shelves/ by products	6
	Products on display in queue area	7
	Signage near till area	8
	On digital displays you can order from	9
	Other (specify)	10

ASK ALL WHO SELECTED CODE 1 AT Q6.
{was Q6a in 2017 – new options in list]

Q8	If meal deals or drink + snack deals are available, what items are included? (Please select all that are available)	
	Main + drink	1
	Main + drink + snack	2
	Main + drink + side (e.g. burger and drink and fries)	3
	Main + main	4
	Drink and snack (e.g coffee and cake)	5
	Other (please specify) ________________	6

ASK ALL WHO SELECTED CODE 1 AT Q6.

[Q6b in 2017 – new options]

Q9	Were the following healthier items obviously available to include (not just in the signage) in the meal deal? (Please select all that are included)	
	Water (still, sparkling, hint of fruit)	1
	Low / no sugar soft drinks	2
	Plain milk	3
	Fruit / vegetables/ salad / dried fruit/ nuts	4
	Other healthy item (specify)	5
	None of these were obviously available	6

Staff/verbal interaction/ordering

ASK ALL

[Interviewer note: please order from a member of staff where possible, or from a screen if that is not possible]
[New question]

Q10	Did you order from a:	
	Person	1
	In-store digital display	2

[Q19 in 2017 – new options]

Q11	Were you asked (by staff or on screen) if you wanted to up-size any part of your order?	
	No/not applicable	1
	No – just asked what size I wanted	2
	Yes – asked if I wanted medium or large	3
	Yes – other (specify)	4

If Yes (code 3 or 4) at Q11
[Q20 in 2017]

Q12	And did the member of staff / screen display indicate any cost advantage to up-sizing your order?	
	Yes	1
	No	2

[Q21 in 2017]

Q13	Were you offered any additional items or told about part of a meal deal when placing your order? (with staff or on screen display)	
	Yes - told / shown part of a meal deal and I could get crisps/ cake etc. with the items (fruit not mentioned)	1
	Yes - told / shown part of a meal deal and I could get other items (fruit mentioned)	2

	Yes – told / shown part of a meal deal and I could get a drink (water /low/ no sugar soft drinks not mentioned)	3
	Yes – told / shown part of a meal deal and I could get a drink (water/low/no sugar soft drinks mentioned)	4
	Yes- asked / prompted to see if I wanted cake (or similar)	5
	Yes- asked / prompted to see if I wanted cream/ syrup with my drink	6
	Yes- asked / prompted "would you like a drink with that"	7
	Yes- asked / prompted “would you like fries with that"	8
	Yes- asked if wanted specific product placed on the till point or checkout screen (e.g. large chocolate bar) (Please specify)	9
	Yes - asked if I "wanted anything else" generally	10
	Yes- Other (record)	11
	No	12

[Q22 in 2017 – updated wording]

Q14	Did staff (or messages on the screen) indicate any cost advantage to adding the additional item(s)?	
	Yes	1
	No	2

[Q31 in 2017 – updated wording]

Q15	Please provide any additional feedback which you feel may add additional value/insight to your visit report (e.g. any loyalty offers / points, delivery offers or anything else to incentivise you to purchase items or to return)	
	TEXT	1
	NA	2

SG In-store marketing questionnaire
Visit 2

[Interviewer note: please order from a member of staff where possible, or from a screen if that is not possible]

Q16 (same as 7 in visit 1)	Did you order from a:	
	Person	1
	In-store digital display	2

Q17 (same as 8 in visit 1)	Were you asked (by staff or on screen) if you wanted to up-size any part of your order?	
	No/not applicable	1
	No – just asked what size I wanted	2
	Yes – asked if I wanted medium or large	3
	Yes – other (specify)	4

If Yes (code 3 or 4) at Q17

Q18 (same as 9 in visit 1)	And did the member of staff / screen display indicate any cost advantage to up-sizing your order?	
	Yes	1
	No	2

Q19 (same as 10 in visit 1)	Were you offered any additional items or told part of meal deal when placing your order? (with staff or on screen display)	
	Yes - told / shown part of a meal deal and I could get crisps/ cake etc. with the items (fruit not mentioned)	1
	Yes - told / shown part of a meal deal and I could get other items (fruit mentioned)	2
	Yes – told / shown part of a meal deal and I could get a drink (water /low/ no sugar soft drinks not mentioned)	3
	Yes – told / shown part of a meal deal and I could get a drink (water/low/no sugar soft drinks mentioned)	4

	Yes- asked / prompted to see if I wanted cake (or similar)	5
	Yes- asked / prompted to see if I wanted cream/ syrup with my drink	6
	Yes- asked / prompted "would you like a drink with that"	7
	Yes- asked / prompted "would you like fries with that"	8
	Yes- asked if wanted specific product placed on the till point or checkout screens (e.g. large chocolate bar) (Please specify)	9
	Yes - asked if I "wanted anything else" generally	10
	Yes- Other (record)	11
	No	12

Q20 (same as 11 in visit 1)	Did staff (or messages on the screen) indicate any cost advantage to adding the additional item(s)?	
	Yes	1
	No	2

Q21	Were there any products prominently displayed at or near the till point or menu and checkout screens to encourage purchase? (Please select all that apply)	
	Sandwiches/filled rolls/wraps etc. (include paninis, subs and toasties but not burgers)	1
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes, pies)	2
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	3
	Chips, fries or potato wedges (full or side portion)	4
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	5
	Pizza (slices, half and whole pizzas)	6
	Pasta (including noodle dishes)	7
	Kebabs	8
	Savoury sides (include hash browns, onion rings)	9
	Salad (meal)	10
	Salad or vegetable sides	11
	Soup	12
	Crisps and savoury snacks (include pretzels, all popcorn)	13
	Confectionery	14
	Sweet biscuits	15
	Cakes (include donuts, flap jacks, pancakes, waffles)	16

	Sweet pastries e.g., Danish pastries, croissants, pain au chocolat, tarts, flans	17
	Puddings e.g., fruit puddings, sponge puddings, sticky toffee pudding	18
	Ice cream	19
	Cereal bars (include protein bars and nature bars etc.)	20
	Yoghurts/ other dairy desserts	21
	Fruit or nuts (include dried fruit and dried fruit bars)	22
	Cold drinks:	
	Soft drinks with added sugar	23
	Low/ no sugar soft drinks	24
	Water (plain – still, sparkling or hint of fruit)	25
	Pure fruit juice or smoothies	26
	Shakes/frappes	27
	Plain milk	28
	Flavoured milk	29
	Other cold drink (specify)	30
	Hot drinks:	
	Tea (all teas and herbal teas)	31
	Coffee (All coffee - Americanos, lattes, cappuccinos)	32
	Specialist coffees (with added syrups/ cream)	33
	Hot chocolate	34
	Other (specify)	35
	No products	36

Other promotions

Q22	Were there any other ways specific products were advertised, that have not already been mentioned? (Inside or outside of the outlet or on the screen) Please do **not** include price promotions (e.g. multi-buys, meal deals) or checkout placement as these have already been covered in earlier questions E.g. prominent poster advertising a specific product Branding on chiller cabinet/fridge Branded mugs, cups or other accessories (If there are more than three, please record the three most prominent)	
	Open text	1
	No	2

ASK If Yes (code 1) at Q22

Q23	What product was being advertised? (repeat for each of 3 recorded in Q22

	Single code	
	Sandwiches/filled rolls/wraps etc. (include paninis, subs and toasties but not burgers)	1
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes, pies)	2
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	3
	Chips, fries or potato wedges (full or side portion)	4
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	5
	Pizza (slices, half and whole pizzas)	6
	Pasta (including noodle dishes)	7
	Kebabs	8
	Savoury sides (include hash browns, onion rings)	9
	Salad (meal)	10
	Salad or vegetable sides	11
	Soup	12
	Crisps and savoury snacks (include pretzels, all popcorn)	13
	Confectionery	14
	Sweet biscuits	15
	Cakes (include donuts, flap jacks, pancakes, waffles)	16
	Sweet pastries e.g., Danish pastries, croissants, pain au chocolat, tarts, flans	17
	Puddings e.g., fruit puddings, sponge puddings, sticky toffee pudding	18
	Ice cream	19
	Cereal bars (include protein bars and nature bars etc.)	20
	Yoghurts/ other dairy desserts	21
	Fruit or nuts (include dried fruit and dried fruit bars)	22
	Cold drinks:	
	Soft drinks with added sugar	23
	Low/ no sugar soft drinks	24
	Water (plain – still, sparkling or hint of fruit)	25
	Pure fruit juice or smoothies	26
	Shakes/frappes	27
	Plain milk	28
	Flavoured milk	29
	Other cold drink (Specify)	30
	Hot drinks:	
	Tea (all teas and herbal teas)	31
	Coffee (All coffee - Americanos, lattes, cappuccinos)	32
	Specialist coffees (with added syrups/ cream)	33
	Hot chocolate	34
	Other (specify)	35
		36

ASK If Yes (code 1) at Q22 [ASK A MAX OF TWICE TO CAPTURE UP TO 3 ANSWERS TO Q22 AND Q23]

Q24	Were there any other ways specific products were advertised, that have not already been mentioned?	
	Yes (Go back to Q22)	1
	No (Got to Q25)	2

Nutritional content information

[Q28 in 2017]

Q25	Was calorie information obviously available? (Other than on packaging on pre-packed products) (Please select all that apply)	
	Yes- calorie information on labels on shelves	1
	Yes- calorie information on the menu/ behind the till point	2
	Yes – on screen	3
	Yes- other (specify where)	4
	No	4

If yes (codes 1-4 at Q24)
[Q29 in 2017]

Q26	And was this calorie information readable/ large enough to easily read?	
	Yes	1
	No	2

If yes (codes 1-4 at Q24)
[Q30 in 2017]

Q27	Was there any further nutritional information obviously available? (e.g. fat content)	
	Yes- information on labels on shelves	1
	Yes- information on the menu/ behind the till point	2
	Yes – on screen	3
	Yes- other (specify where)	4
	No	5

[Q31 in 2017 – updated wording]

Q28	Please provide any additional feedback which you feel may add additional value/insight to your visit report (e.g. any loyalty offers / points, delivery offers or anything else to incentivise you to purchase items or to return)	
	TEXT	1
	NA	2

SG Online marketing questionnaire (one visit)

Visit details

QA	What type of app or website are you using? [see interviewer instructions]	
	Just Eat	1
	Uber Eats	2
	Deliveroo	3
	Chain outlet app or website (e.g. Greggs, Costa)	4
	Independent outlet app or website (not part of chain)	5

NOTE FOR INTERVIEWER: Please review the questions below before beginning your purchase in the app so that you know the types of things to look out for. Complete your purchase in the app or website, noting when you saw any promotions and what kind of offers they were – then complete the questionnaire.

Price promotions

ASK ALL

Q1O	Were there any clear **price promotions, other than meal deals,** visible in the app / website? NOTE, WE WILL ASK ABOUT MEAL DEALS LATER	
	Yes (Go to Q2)	1
	No (Go to Q6)	2

ASK ALL who answer yes (code 1 at Q1a or code 1 at Q5)

Q2O	What product was being advertised?	
	Sandwiches/filled rolls/wraps etc. (include paninis, subs, and toasties but not burgers)	1
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes, pies)	2
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	3
	Chips, fries or potato wedges (full or side portion)	4
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	5
	Pizza (slices, half and whole pizzas)	6
	Pasta (including noodle dishes)	7
	Kebabs	8
	Savoury sides (include hash browns, onion rings)	9
	Salad (meal)	10
	Salad or vegetable sides	11
	Soup	12

	Crisps and savoury snacks (include pretzels, all popcorn)	13
	Confectionery	14
	Sweet biscuits	15
	Cakes (include donuts, flap jacks, pancakes, waffles)	16
	Sweet pastries e.g., Danish pastries, croissants, pain au chocolat, tarts, flans	17
	Puddings e.g., fruit puddings, sponge puddings, sticky toffee pudding	18
	Ice cream	19
	Cereal bars (include protein bars and nature bars etc.)	20
	Yoghurts/ other dairy desserts	21
	Fruit or nuts (include dried fruit and dried fruit bars)	22
	Cold drinks:	
	Soft drinks with added sugar	23
	Low/ no sugar soft drinks	24
	Water (plain – still, sparkling or hint of fruit)	25
	Pure fruit juice or smoothies	26
	Shakes/frappes	27
	Plain milk	28
	Flavoured milk	29
	Other cold drink (specify)	30
	Hot drinks:	
	Tea (all teas and herbal teas)	31
	Coffee (All coffee - Americanos, lattes, cappuccinos)	32
	Specialist coffees (with added syrups/ cream)	33
	Hot chocolate	34
	All menu items (for example, % off if you spend a minimum of £X)	35
	Other (specify)	36

ASK ALL who answer yes (code 1 at Q1O)

Q3O	What was the nature of the price promotion?	
	Multi-buy (buy one get one free, 3 for 2 offers)	1
	Reduced price	2
	Discount for minimum spend	3
	Prominent low price promotion	4
	Larger size for same price/small amount more	5
	Other (specify)	6

ASK Q4O TO ALL WHO ANSWER Q3 [Q4O = Q4 online version]
ASK ALL who answer yes (code 1 at Q1 or code 1 at Q5)

Q.4O	At what stage was the price promotion visible? TICK ALL THAT APPLY	
	On the outlet homepage / main homepage	1
	Pop up page	2
	A favourites page (or previous orders page)	3
	Shopping basket page	4
	Checkout page	5
	Menu page	6
	Other (please specify _______________)	7

ASK ALL who answer yes (code 1 at Q1a)
[was Q5 in 2017]

Q5O	Were there any other clear price promotions, other than meal deals, visible?	
	Yes (Go to Q2)	1
	No (Got to Q6O)	2

If yes at Q5, repeat Qs 2-5, until ***all price promotions*** have been recorded (code 2 at Q5).

Meal deals

ASK ALL
NEW QUESTION

Q6O	Were there any clear meal deal promotions for one or more people visible during your journey through the app / website?	
	Yes	1
	No (Go to Q11O)	2

ASK ALL WHO SELECTED CODE 1 AT Q6O.

Q.7O	At what stage was the price promotion visible? TICK ALL THAT APPLY	
	On the outlet homepage / main homepage	1
	Pop up page	2
	A favourites page (or previous orders page)	3
	Shopping basket page	4
	Checkout page	5
	Menu page	6
	Other (please specify _______________)	7

ASK ALL WHO SELECTED CODE 1 AT Q6O.

Q8O	If meal deals or drink + snack deals are available, what items are included? (Please select all that are available)	
	Main + drink	1
	Main + drink + snack	2
	Main + drink + side (e.g. burger and drink and fries)	3

	Main + main	4
	Drink and snack (e.g coffee and cake)	5
	Other (please specify) ________________	6

ASK ALL WHO SELECTED CODE 1 AT Q6O.

Q9O	Were the following healthier items obviously available to include in the meal deal? (Please select all that are included)	
	Water (still, sparkling, hint of fruit)	1
	Low / no sugar soft drinks	2
	Plain milk	3
	Fruit / vegetables/ salad / dried fruit/ nuts	4
	Other healthy item (specify)	5
	None of these were obviously available	6

Ordering

[No question 10]

ASK ALL

Q11O	Were you asked if you wanted to up-size any part of your order?	
	No/not applicable	1
	No – I just selected the size I wanted	2
	Yes – I was asked if I wanted a larger size of an item	3
	Yes – other (specify)	4

If Yes (code 3 and 4) at Q11

Q12O	And did the app / website indicate any cost advantage to up-sizing your order?	
	Yes	1
	No	2

Q13O	Were you offered any additional items or told part of meal deal when placing your order?	
	Yes - shown that as part of a meal deal and I could get crisps/ cake etc. with the items (fruit not mentioned)	1
	Yes - shown that as part of a meal deal and I could get other items (fruit mentioned)	2
	Yes – shown that as part of a meal deal and I could get a drink (water /low/ no sugar soft drinks not mentioned)	3
	Yes – shown that as part of a meal deal and I could get a drink (water/low/no sugar soft drinks mentioned)	4

	Yes- prompted to see if I wanted cake (or similar)	5
	Yes- prompted to see if I wanted cream/ syrup with my drink	6
	Yes- prompted "would you like a drink with that"	7
	Yes- prompted "would you like fries with that"	8
	Yes- asked if wanted specific product at the checkout screen (e.g. large chocolate bar) (Please specify)	9
	Yes - asked if I "wanted anything else" generally	10
	Yes- Other (record)	11
	No	12

Q14O	Did the messages on screen indicate any cost advantage to adding the additional item(s)?	
	Yes	1
	No	2

Nutritional content information

Q21O	Was calorie information obviously available (in the app / website)? (Please select all that apply)	
	Yes- calorie information on menu pages	1
	Yes- other (specify where)	2
	No	3

If yes (codes 1-4 at Q18)

Q22O	And was this calorie information readable/ large enough to easily read?	
	Yes	1
	No	2
	Other (please specify / explain)	3

Q23O	Please provide any additional feedback which you feel may add additional value/insight to your app/website report (e.g. any loyalty offers / points, delivery offers or anything else to incentivise you to purchase items or to return)	
	TEXT	1
	NA	2

Appendix B – Interviewer instructions

Scottish Government: In-store marketing Shopper Instructions – in-premise

Background and aims of the research:

This research is being carried out on behalf of the Scottish Government and Food Standards Scotland (FSS). They are looking to establish what kind of promotions, strategies and advertisements are being used to promote both healthier and less healthy foods. The focus here is on “out of home” foods - these are foods that are designed to be purchased and eaten straight away or ‘on the go’, typically for lunch or for a snack, and don’t need any further preparation/heating e.g. sandwiches, burgers, pizzas, crisps, pots of fruit, takeaway coffee, cans of fizzy drink, small bottles of water etc.

Grocery shopping (e.g. for foods that would need heated up or prepared at home) and non-food/drink shopping is not included. The outlets we will be visiting overall are varied to capture the wide market here.

In visits to Tesco Express, Sainsbury’s Local and M & S Simply Food we only want you to go to the ‘out of home’ food section of the store (usually near the entrance) and from there to the manned tills. So, you only need to pay attention to promotions at the entrance, in the ‘out of home’ food area, and in the queue/till area. And you only need to record promotions relating to ‘out of home’ food and drinks – not other groceries or non-food/drink items.

Questions are asked about the following key areas: price promotions, meal deals, upselling of products by staff, other promotions and advertising of products and nutritional content information.

The survey

The survey is split into two visits- so it is possible that you may visit the same outlet twice. Although some of the questions are different for the Visit 1 and Visit 2 surveys, some of them are also the same. You will be advised which item(s) to purchase for each visit.

Notes for specific sections/ questions

***VISIT 1: Section 1- Price promotions (Q1-Q5)**

Q 1- Q5 ask you to record any clear price promotions or advertisements at each outlet- <u>both inside and immediately outside.</u> This sequence of questions will record the type of products being advertised, the nature of the price promotion (e.g multi-buy) and where it was located.

(Please do not include meal deals when answering Q1-5, as these are asked about at Q6).

You will answer these questions about one product at a time, but can repeat Qs 2- 5 until all of the price promotions have been recorded. Once all have been recorded, please select “No” at Q5.

Please note we would like you to record promotions that are obviously visible to you on your visit.

Q2 – include all popcorn (including sweet popcorn) under ‘Crisps and savoury snacks’

Include diet fizzy drinks under ‘Low / no sugar soft drinks’. Only include 100% pure fruit juice and smoothies under ‘Pure fruit juice and smoothies’.

Only record food and drinks products that are designed to be eaten out of home/on the go.

Q3 asks “What was the nature of the price promotion?” and lists options such as multi-buys. Please note that in express supermarkets this is not to include multi-buys of bags of 10 packets of crisps/6-packs of fizzy drinks etc, or 2 litre bottles of fizzy drinks. - which may be located in other areas throughout the supermarket and which are generally aimed at people doing grocery shopping rather than buying ‘out of home’ food.

Multi-buy – use this for 2 for 1, 3 for 2, buy-one get one free offers. Also use for e.g. pack of three (if that’s being promoted as a better deal than buying individually).

Reduced price – this would include offers promoted as ‘25p off’, ‘half-price’, ‘50% off’, ‘normally £2.50 but now £1’ etc.

Discount for minimum spend – this would be a percentage or an amount off your total bill if you spend a certain amount.

Prominent low price promotion – this is where the price isn’t being promoted as having been reduced (which would be covered by ‘reduced price’ above), but the price is low and this is obviously being highlighted e.g. ‘£1’ or ‘only 50p’ in big signage. Don’t include things just because the price is shown in ad – only if it’s prominent and it is clear that they intend a ‘this is cheap!’ message.

Larger size for same price/small amount more – we don’t expect you to work out what’s a better buy – use this code when the fact that you can get a larger size for the same price, or a relatively small amount more, is advertised and promoted e.g. ‘go large for only 40p’, ‘500 ml for the price of 250 ml’ etc. If there are no price promotions in store at all, then answer ‘no’ at Q1 and the questionnaire will move to the next section (Q6). (Please note that this is only likely to be the case in only a small number of outlets).

Q4-‘Signage outside of shop/outlet’ - don’t include adverts on billboards or bus stops etc. that just happen to be near the outside.

***VISIT 1: Section 2- Other price promotions – meal deals (Q6-9):**

Meal deal for one – usually 3 items (sandwich, drink and snack), may be a different number of items in coffee shops.

Meal deal for more than one person – might be 2 mains and 2 desserts, or a deal for a family of four.

In supermarkets- only include these items if they were obviously available in the area around the meal deal locations- not if you would have to go looking for them in the wider supermarket store.

In outlets where you place an order at the counter rather than pick it up yourself, code that products are 'obviously available' if they are obviously advertised on the signage/menu. Do not record them if they are only mentioned in the small print.

Q9 asks: "Were the following healthier items obviously available to pick up in the meal deal"- for this question please only record the items if they were "obviously available". For example, if they were on the signage for the meal deal, but you could not find them in the meal deal area, then please do not record these items.

Low / no sugar soft drinks – this includes fizzy drinks like diet coke, flavoured water, Vit Hit (vitamin infused fruit drinks) etc.

***VISIT 1: Section 3- Staff/verbal interaction/ordering (Q10-15)**

Q10 - If possible, please order from a person. However, if this is not an option, you can still complete your visit by ordering on an in-store digital display. Please do not use self-service checkouts.

Q11-Q14 ask about the process of you being served your items. Here we are looking to see if there is any upselling occurring in outlets, encouraging consumers to buy more than intended, for example upsizing their portion of fries or adding a cake with their drink. Please listen out for these requests when being served.

Q11- We are interested here in whether there is any promotion/encouragement to get a larger size. In order to test this, please remember not to specify the size when you place your order. For example, just say 'a latte please' rather than 'a small latte'. If you order a burger and fries and they suggest a larger size for either or for both, code Yes. Or if they say 'is that small, medium or large' and therefore don't promote/suggest any particular size, code "No- just asked what size I wanted." We don't want you to opt to buy what they are suggesting – stick to the size / order you have been asked to purchase, as this is about recording whether you were encouraged to buy more.

Q13-If you are buying some items which are part of the meal deal, please record if the cashier advises you that you can get other products (e.g. a snack or a drink). Please ask them what snacks/ drinks are included (if they don't advise) and record if they mention fruit water/low/sugar soft drinks.

***VISIT 2: Section 1- Staff/verbal interaction/ordering (Q16-21)**

Q16-21 Same as Visit 1 (but you will be making a different purchase).

Again, if possible, please order from a person. However, if this is not an option, you can still complete your visit by ordering on an in-store digital display. Please do not use self-serve checkouts.

Q21 asks if there are any products prominently displayed at or near the till point to encourage purchase. Please only include items immediately next to the cash desk. For example, in coffee shops , do not include all items in the queueing area- as this is where most of their produce is displayed - just include any items on prominent display on top of the counter or next to the till, and which seem to be being particularly promoted.

***VISIT 2: Section 3: Other promotions (Q22-24)**

Q22 asks - Were there any other ways specific products were advertised, not already mentioned? (Inside or outside of the outlet or on the screen). Please do not include price promotions (e.g. multi-buys, meal deals) or checkout placement as these have already been covered in earlier questions. You can add up to 3 other ways items were advertised in this section.

***VISIT 2: Section 4: Nutritional content information (Q25-27)**

This section asks whether calorie information is visible anywhere, and whether any other nutritional information is mentioned (e.g. fat or salt content)

***BOTH VISIT 1 AND VISIT 2: Final question Q15/Q28**

Q12 asks you to provide any further feedback. This can be anything that you think would be useful in terms of healthier and less healthy products being promoted and advertised inside and outside the outlet. This question is included in the survey for Visit 1 and Visit 2.

***What products to buy**

The products you will be purchasing vary depending on the outlet and whether the survey is for Visit 1 or Visit 2. Please only buy the products specified as we have based the questions around what is (and equally what is not) purchased. It is also important that you buy the right product for Visit 1 and the right product for Visit 2 because knowing whether it is a ‘Visit 1’ or a ‘Visit 2’ is what we’ll base the data on what was purchased.

If there are variations in the size of a product (e.g. small, medium, large Latte/ burger/ fries) please only purchase a <u>small</u> (to control the cost of each visit)- however, when you place your order please do not specify the size straight away- just ask for a latte, burger, portion of fries etc. This is very important because we want to test whether staff try and encourage you to buy a larger size – and if you specify immediately that you want a ‘small’ then they are unlikely to do this. Where we know what the approximate cost is, we have included it below as a guide.

In the unlikely event that the specified product is not available, please purchase the closest product available and record what you had to purchase at the last question in the questionnaire.

Scottish Government: Online marketing shopper Instructions - online

Background and aims of the research:

This research is being carried out on behalf of the Scottish Government and Food Standards Scotland (FSS). They are looking to establish what kind of promotions, strategies and advertisements are being used to promote both healthier and less healthy foods. The focus here is on “out of home” foods - these are foods that are designed to be purchased and eaten straight away or ‘on the go’, typically for lunch or for a snack, and don’t need any further preparation/heating e.g. sandwiches, burgers, pizzas, crisps, pots of fruit, takeaway coffee, cans of fizzy drink, small bottles of water etc.

These online mystery shops are aimed at understanding what promotions are visible when you make a purchase in an app or on a website. Please review the questionnaire before beginning your purchase in the app / website so that you know the types of things to look out for. Complete your purchase in the app or website, noting when you saw any promotions and what kind of offers they were – then complete the questionnaire.

Questions are asked about the following key areas: price promotions, meal deals, upselling of products, other promotions and advertising of products, and nutritional content information.

Where to do your shop

You should have received information on whether to use a specific aggregator app (like Just East) or the outlet’s own app, and what to buy. Given most people order food on their phones, please use the appropriate mobile app if you can. If a mobile app isn’t available (for example, for an independent coffee shop), then using their website is fine.

The survey

There is just one questionnaire and one visit to make to the app / website.

Notes for specific sections/ questions

Section 1- Visit details (QA)

Specify the type of app or website you have been asked to visit.

Section 2- Price promotions (Q1-Q5)

Q 1- Q5 ask you to record any clear price promotions or advertisements you see during your journey through the app / website.

This sequence of questions will record the type of products being advertised, the nature of the price promotion (e.g. multi-buy) and where it was located (which page or if it was a pop-up page).

(Please do not include meal deals when answering Q1-5, as these are asked about at Q6).

You will answer these questions about one product at a time, but can repeat Qs 2- 5 until all of the price promotions have been recorded. Once all have been recorded, please select "No" at Q5.

Please note we would like you to record promotions that are obviously visible to you on your visit – not offers you need to go searching for within the app.

Q2 – include all popcorn (including sweet popcorn) under 'Crisps and savoury snacks'

Include diet fizzy drinks under 'Low / no sugar soft drinks'. Only include 100% pure fruit juice and smoothies under 'Pure fruit juice and smoothies'.

Q3 asks "What was the nature of the price promotion?"

Multi-buy – use this for 2 for 1, 3 for 2, buy-one get one free offers. Also use for e.g. pack of three (if that's being promoted as a better deal than buying individually).

Reduced price – this would include offers promoted as '25p off', 'half-price', '50% off', 'normally £2.50 but now £1' etc.

Discount for minimum spend – this would be a percentage or an amount off your total bill if you spend a certain amount.

Prominent low price promotion – this is where the price isn't being promoted as having been reduced (which would be covered by 'reduced price' above), but the price is low and this is obviously being highlighted e.g. '£1' or 'only 50p' in big text. Only include if it's prominent and it is clear that they intend a 'this is cheap!' message.

Larger size for same price/small amount more – we don't expect you to work out what's a better buy – use this code when the fact that you can get a larger size for the same price, or a relatively small amount more, is advertised and promoted e.g. 'go large for only 40p', '500 ml for the price of 250 ml' etc. If there are no price promotions in the app at all, then answer 'no' at Q1 and the questionnaire will move to the next section (Q6).

Q4- This asks "At what stage was the price promotion visible?"

On the outlet homepage / main homepage – the first page in the app once you are signed in, or in aggregator apps, the first page for the outlet you want to buy from.

Pop up page – this would appear over the page you are on (usually with an x in the corner to close it).

A favourites page (or previous orders page) – this is unlikely to appear in an app, however, if you had ordered there before, there could be a favourites page.

Shopping basket page - this summarises what you ordered so far.

Checkout page - the one that asks you for payment details.

Menu page – main pages with product details and prices.

Section 3- Other price promotions – meal deals (Q6-9):

Q6 – asks "Were there any clear meal deal promotions for one or more people visible during your journey through the app / website?"

Meal deal for one – usually 3 items (sandwich, drink and snack), may be a different number of items in coffee shops.

Meal deal for more than one person – might be 2 mains and 2 desserts, or a deal for a family of four.

Q7 – see notes for Q5 above.

Q9 asks: "Were the following healthier items obviously available to pick up in the meal deal"- for this question please only record the items if they were "obviously available" – i.e.. they were clearly visible as something you could add if you chose to.

Low / no sugar soft drinks – this includes fizzy drinks like diet coke, flavoured water, Vit Hit (vitamin infused fruit drinks) etc.

Section 4- Ordering (Q11-14)

Q11-Q14 ask about the process of ordering your items. Here we are looking to see if there is any upselling, encouraging consumers to buy more than intended, for example upsizing their portion of fries or adding a cake with their drink. Please look out for these kinds of suggestions or prompts.

Q11- We are interested here in whether there is any promotion/encouragement to get a larger size, once you have selected the items you have been asked to buy.

Q13 If you are buying some items which are part of a meal deal, please record if you are prompted to add other products (e.g. a snack or a drink). Please record if they mention fruit water/ low/ no sugar soft drinks.

Section 5- Nutritional content information (Q21-22)

This section asks about calorie information – if this is visible via clicking on a link or button on a menu page, then please do so and answer the questions according to what you see.

Q24 asks you to provide any further feedback. This can be anything that you think would be useful in terms of healthier and less healthy products being promoted and advertised in the app / website.

social research

This document is also available from our website at www.gov.scot.
ISBN: 978-1-80525-419-5

The Scottish Government
St Andrew's House
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Produced for
the Scottish Government
by APS Group Scotland
PPDAS1220442 (01/23)
Published by
the Scottish Government,
January 2023

GSR
GOVERNMENT SOCIAL RESEARCH
Social Science in Government

Social Research series
ISSN 2045-6964
ISBN 978-1-80525-419-5

Web Publication
www.gov.scot/socialresearch

PPDAS1220442 (01/23)