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Marketing strategies used within premises by out of home businesses

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Food Standards Scotland
Inbhe Bìdh Alba

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Summary

Aims and methods

Food Standards Scotland (FSS) commissioned Ipsos MORI Scotland to explore the food and drink marketing strategies used within of out-of-home businesses across Scotland. The purpose of the research was to inform policy development and discussion with out-of-home businesses. The research included an assessment of whether marketing strategies were aimed at encouraging consumers to purchase larger sizes or additional items, and whether promotions were predominantly on less healthy products.

The out-of-home market – referring to food and drink purchased and consumed outside the home, as well as take-away and home delivered food – has a significant role to play in relation to excess calorie consumption. Much of this food is purchased in quick service burger and chicken restaurants, coffee shops, bakeries, 'on the go' sections of retail outlets[1] and retail cafés (e.g. supermarket cafés). The research therefore focused on these outlet categories. It involved 240 mystery shopping visits to a purposively selected sample of outlets (designed to provide a spread in terms of urban and rural locations, deprivation levels, and areas of Scotland). The visits, conducted by a team of specialist mystery shoppers, provided information on:

- Price promotions
- Meal deals
- Celebrity endorsements
- Prizes and gifts
- Free samples
- 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. However, the findings of the research are in some ways encouraging; verbal 'upsizing' was uncommon, offering free samples of products happened very rarely and at least one healthy option was available in the majority of meal deal offers.

Types of promotion

1. The most common strategies were price promotions (particularly multi-buys and the prominent advertising of low prices), the prominent placement of items near the till and meal deals.

[1] Including supermarkets

2. Overall, the promotion of products by celebrities or associations with TV, films and games was rare though it was common in Quick Service Burger/Chicken outlets to offer a set of children's toys with a film tie-in to collect. Free samples were also rare.

3. Overall, there was no clear pattern in terms of price promotions or meal deals being linked to the urban/rural or deprivation profile of the outlets. However, this finding should be treated with caution as the sample size was small and further research is needed in this area.

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

4. There was little evidence of staff actively encouraging customers to choose larger sizes through verbal 'upsizing'.

5. However, 'upselling' (encouraging consumers to purchase additional items) was more common and multi-buy promotions and meal deals were prominent throughout the outlets visited. 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 unhealthy foods rather than healthier foods

6. Most of the common marketing strategies (product placement, price promotions and general promotions) were on less healthy products. Positively, healthier items (particularly water) were largely available within meal deals and especially children's meal deals. However, when set against less healthy options, such as crisps or confectionery, consumers may find it hard to choose the healthy option.

7. The placement of items near the till point was common, with 68% of outlets using this type of strategy. Cakes, biscuits, confectionery or other sweet products were the most commonly promoted and were displayed near the till point at half of the outlets visited (48%).

Consumers not always being able to make an informed choice

8. For consumers wishing to make informed choices, having calorie/nutrition information readily available within premises is key. While some outlet types are doing better than others, (calorie content was available in 75% of the coffee outlets versus 46% of the retail cafes), overall it was unavailable at 40% of the outlets.

1. Introduction

Diet and nutrition in Scotland

Many people in Scotland weigh more than is recommended for maintaining good health – in 2015, 65% of adults were overweight, with 29% obese (with a Body Mass Index of 30 or more).[2] Being obese is associated with an increased risk of numerous common diseases, including type 2 diabetes, stroke, heart disease and cancers. The OECD reports that the UK as a whole has the worst obesity rates in Europe,[3] while comparison of 2015 Scottish Health Survey data for Scotland with similar data for England, Wales and Northern Ireland indicates that obesity rates may be higher here than in the rest of the UK.[4] Further, obesity disproportionately affects those living in the most deprived areas.[5]

Food Standards Scotland – Scotland's public sector body for food - has identified obesity as the 'most pressing diet-related issue in Scotland today' which can 'reasonably be viewed as a crisis'.[6]

A wide range of complex factors have led to this increase in obesity. But, at the most basic level, the problem is driven by excess calorie consumption, which is largely driven by excess consumption of fats and sugars. Surfeit consumption of 'discretionary' foods and drinks (foods and drinks which are high in calories and/or salt, low in nutritional value, and which are not required for health) is one important factor contributing to this excess – recent analysis indicates that discretionary foods contribute 20% of all the calories and fat we consume, and 50% of all the sugars.[7] Another important contributor is excessive portion sizes, whether for drinks and discretionary items or for whole meals.

The out-of-home market

The out-of-home market – referring to food and drink purchased and consumed outside the home, in addition to take-away and home delivered food – has a significant role to play in relation to excess calorie consumption. More than a quarter of total UK spend on food and drink is on food eaten outside of the home, contributing

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[2] *The Scottish Health Survey 2015: summary edition*, Scottish Government, available at http://www.gov.scot/Resource/0050/00505745.pdf

[3] *Obesity and the Economics of Prevention: Fit not Fat - United Kingdom (England) Key Facts*, OECD, available at *http://www.oecd.org/unitedkingdom/obesityandtheeconomicsofpreventionfitnotfat-unitedkingdomenglandkeyfacts.htm*

[4] Cancer research UK, 2016: Overweight and obesity statistics: http://www.cancerresearchuk.org/health-professional/cancer-statistics/risk/overweight-and-obesity#heading-One

[5] Gray, L and Leyland, A (2015) 'Inequalities in Health risks' in Campbell-Jack, D, Hinchliffe, S and Bromley, C (eds.) *Scottish Health Survey 2014: Volume 1: Main Report*, Scottish Government, available at http://www.gov.scot/Publications/2015/09/6648/318828

[6] FSS (2016) *Diet and Nutrition: proposals for setting the direction for the Scottish diet*, available at http://www.foodstandards.gov.scot/publications-and-research/fss-board-meeting-20-january-2016

[7] FSS (2015) *The Scottish Diet: It needs to change*, available at http://www.foodstandards.gov.scot/scottish-diet-it-needs-change

an estimated 11% of total calories[8]. Other sources[9] have estimated the contribution of this sector to be much higher (between 20-25% of calories), which may reflect differences in the definition of out of home food and drink and how takeaways are handled.

Recent research for Food Standards Scotland[10] indicated that there was a 3% increase from 2014 to 2015 in visits to out-of-home outlets in Scotland – a bigger increase than in every other European country followed by NPD Group, who provided the analysis. In 2015, the average person in Scotland visited an out-of-home food outlet 177 times over the course of the year.

The report showed that much of the food and drink offered and purchased out-of-home was skewed towards less healthy food and drink categories including chips, cakes, biscuits, pastries and sugary drinks. The most common reasons people in Scotland gave for purchasing food out-of-home were pragmatic or functional – because they were at work (22%) or to satisfy hunger and thirst (19%). However, people also ate out-of-home for social reasons (socialising with friends, 9%; eating as a family, 7%) or to give themselves a break (14%) or a reward (to treat myself/kids, 16%). These reasons are perhaps also more likely to lead to consumption of items high in fat, salt or sugar. Previous research for Food Standards Scotland on attitudes to diet and health in Scotland[11] showed that around half of adults found it difficult to eat healthily out of home – significantly higher than the proportion who said they found it difficult to eat healthily at home (48% compared with 20%). When asked about the main reason they found this difficult, while 17% said it was because they 'want to eat what I like when I go out', 11% mentioned a lack of healthy choices, 11% that 'less healthy options are more convenient' and 10% that 'healthy food is too expensive'.

Data on marketing and promotions in Scotland

Evidence contained within the FSS report *Monitoring foods and drinks purchased into the home*[12] showed that a large proportion of food and drinks purchased in the retail environment – this refers to 'take home' shopping, and excludes food and drink which is consumed out of home or 'on the go' – were made on price promotion (around 40%). The evidence also showed that the types of foods and drinks most often purchased on promotion were unhealthy food categories (around 50% of purchase) when compared with staple, healthier categories (around 30% of purchase). This aligns with other evidence sources including research which

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8 Defra (2015) *Family Food*, available at https://www.gov.uk/government/collections/family-food-statistics

9 Public Health England (2017) *Sugar reduction: Achieving the 20%*, available at https://www.gov.uk/government/publications/sugar-reduction-achieving-the-20

10 NPD (2015) *An overview of the out of home market in Scotland: NPD CREST data to year ending December 2015,* available at: http://www.foodstandards.gov.scot/assessment-out-home-food-and-drink-landscape-scotland

11 Scott Porter (2015) *Attitudes to diet and health in Scotland*, FSS, available at: http://www.foodstandards.gov.scot/sites/default/files/Attitudes%20to%20Diet%20and%20Health%20in%20Scotland%202015%20Report.pdf

12 FSS (2016), *Monitoring foods and drinks purchased into the home* available at http://www.foodstandards.gov.scot/publications-and-research/monitoring-foods-and-drinks-purchased-into-the-home-in-scotland

examines the impact of food and drink marketing on Scotland's young people[13]. This research found that high fat, salt and sugar foods were frequently bought by young people in response to price promotions and till-based marketing. Furthermore, the Public Health England report *Sugar reduction: from evidence into action* suggested that higher sugar food and drink items were both more likely to be promoted and more likely to be deeply promoted[14]. It also found that promotions not only encouraged people to buy more of the product/s being promoted, they also increased their overall spend – people did not compensate for buying more of the product/s on promotion by buying less of something else. Collectively, it is clear that action is required to reduce price promotions on unhealthy food and drink categories and at the same time increase promotions on healthier items.

These data relate to the retail environment, with little evidence on the extent or type of promotions outside the home. Data provided by NPD group suggest that meal deals are important, however there is no known research or survey which provides a comprehensive overview of the types of strategies employed by out of home businesses. Furthermore, while changes to advertising of higher fat, salt and/or sugar products on broadcast and non-broadcast media is not within the remit of the Scottish Government, there may be scope within Scotland to consider regulatory measures to improve the balance of promotions within premises[15]. FSS therefore commissioned Ipsos MORI Scotland to conduct research to explore the in-store marketing strategies used by out-of-home businesses to promote their products.

Aims and objectives of this research

The aim of the research was to answer the following key research questions:

- Identify how, and where, out-of-home businesses are using marketing strategies to promote their products
- Establish the types of products being promoted (less healthy versus healthier)
- Identify if, and how, businesses are targeting children with their in-store marketing strategies
- Assess if there is consistency in the strategies used by the same brands in different outlets and if any differences are linked to levels of deprivation and/or rurality of outlet location

The research focused on the marketing strategies used by branded out-of-home businesses *within-premises* and did not consider other types of marketing, such as online and broadcast advertisements. Independent

[13] Cairns, G (2015), *The Impact of food and drink marketing on Scotland's children and young people,* University of Stirling, available at http://www.stir.ac.uk/media/schools/nursing/ism/documents/Impact%20of%20Food%20and%20Drink%20on%20Scotlands%20Young%20-%20Sept%2015.pdf

[14] Public Health England (2015), *Sugar Reduction: The evidence for action - Annexe 4: An analysis of the role of price promotions on the household purchases of food and drinks high in sugar,* available at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/470175/Annexe_4._Analysis_of_price_promotions.pdf)

[15] FSS (2017), *Diet and Nutrition Board Paper. Proposals for setting the direction for the Scottish diet one year on.* available at *http://www.foodstandards.gov.scot/publications-and-research/fss-board-meeting-8-march-2016*

businesses (i.e. small, locally based businesses with no/few additional premises) were also excluded, as this would have been a much larger exercise given the variation in terms of size, geography, range of products etc.

2. Methods

Overview

The research study comprised two main phases:

1. Scoping phase
2. 240 mystery shopping visits to outlets to identify what products were being promoted and how they were being promoted.

Phase one: Scoping phase

A scoping phase took place prior to the mystery shopping visits. The first stage of this was an inception meeting attended by both the FSS and Ipsos MORI teams. This meeting was to discuss and finalise the research questions, to confirm the outlet categories and brands to be included in the research, and also the distribution of visits (the number of visits per outlet category and across the urban/ rural and deprivation categories).

The categories of outlets and specific brands included in the research were selected on the basis of previous FSS commissioned research, *An assessment of the out of home food and drink landscape in Scotland*[16], which identified that quick service (QS) establishments were the most frequently visited type of outlet in Scotland, with quick service burger and chicken restaurants, coffee shops, bakeries and retail/supermarkets highlighted as major sub categories of QS. The report also identified the types of food most commonly purchased for out of home consumption and the most popular brands (further detail is provided in Appendix A). This evidence was taken into consideration to inform the development of the project specification, in addition to ensuring that a range of different types of businesses were included, as well as those which are in operation across Scotland in different types of area (in terms of deprivation and rurality).

The list of specific products purchased by the mystery shoppers 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.[17] However, they were primarily selected in order to allow opportunity for upselling/upsizing during verbal interactions with staff. For example, on Visit 1 to one of the QS Burger/Chicken restaurants, there would be opportunity for staff to ask shoppers if they wanted fries and/or a drink with their burger. Table 2.1 shows the foods and/or drink products that were purchased on each visit at each outlet.

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[16] FSS (2015), *An assessment of the out of home food and drink landscape in Scotland*, available at http://www.foodstandards.gov.scot/assessment-out-home-food-and-drink-landscape-scotland

[17] NPD (2015), *An overview of the out of home market in Scotland: NPD CREST data to year ending December 2015,* available at: http://www.foodstandards.gov.scot/assessment-out-home-food-and-drink-landscape-scotland

Table 2.1 Items purchased by the mystery shopper at each visit

Outlet (s)	Products purchased on visit 1	Products purchased on visit 2
	QS Bakery and Sandwich	
1A	Sausage roll/similar pastry	Sandwich
1B	Sandwich	Sandwich
1C	Sandwich	Sandwich
	QS Burger/Chicken	
2A	Burger	Burger + small fries
2B	Burger	Burger + small fries
2C	Burger	Burger + small fries
	QS Coffee	
3A	Latte	Hot chocolate
3B	Latte	Hot chocolate
	QS Retail[18]	
4A	Sandwich and soft drink (part of a meal deal)	Sandwich (part of a meal deal)
4B	Sandwich and soft drink (part of a meal deal)	Sandwich (part of a meal deal)
4C	Sandwich and soft drink (part of a meal deal)	Sandwich (part of a meal deal)
4D	Bottle of water	Non-food item
	QS Retail Café (supermarket café)	
5A	Cup of tea	Sandwich
5B	Cup of tea	Sandwich
5C	Cup of tea	Sandwich

Following the inception meeting, the FSS and Ipsos MORI teams visited five of the selected brands' outlets to identify the types of marketing strategies in evidence. The Ipsos MORI research team continued the visits, ensuring that all selected brands had a preliminary visit to at least one of their outlets before the fieldwork began. This exercise was crucial in guiding the design of the questionnaire for the mystery shopping visits and ensuring that the range of different strategies was captured in sufficient detail. These included: price promotions (including multi-buy, reduced price, prominent low price promotion and larger size for size for same price/small amount more); meal deals; verbal 'upsizing' and 'upselling'; loyalty card schemes; celebrity endorsement/sponsorship or associations with any TV programmes/ games/ films; (other) advertisements/ promotions specifically targeted at children; competitions, prizes or gifts; free samples; products prominently

[18] The QS Retail category included supermarkets and other types of retail outlet selling out-of-home food and drink. Only marketing strategies relating to out-of-home or 'on the go' products were included in the research. In supermarkets, for example, promotions in grocery aisles (for products generally consumed at home) were not included.

displayed at or near the till point to encourage purchase; prominent posters advertising particular products; prominent soft drink branding on chiller cabinet/fridges.

Phase two: Mystery shopping visits

The main phase of the research was a series of 240 visits conducted by a team of specialist mystery shoppers.

Sampling

Outlets included in the research were selected from a sample of all the selected brands' outlets across Scotland, purchased from Retail Locations[19]. A purposive sample was drawn by selecting outlets which would provide a spread in terms of urban and rural locations, Scottish Index of Multiple Deprivation (SIMD) levels, and areas of Scotland.

During the fieldwork period, some of the outlets which were initially selected were unable to be included in the research, as they were no longer open. In these cases, new outlets were selected from the sample and where possible reflected the same characteristics (urban/rurality and deprivation) as the original outlet. In other cases where the selected outlets were not offering food, a larger store was selected.

Questionnaire design and fieldwork

The questionnaire, developed by the research team, can be found in Appendix B. To ensure a manageable amount of data was collected during each visit, the questionnaire was split into two and each outlet was visited twice. Whenever possible, both visits were undertaken by the same mystery shopper.

The fieldwork was undertaken by a team of specialist mystery shoppers, using an Ipsos MORI mobile phone app 'Ipsos Shopmetrics' to complete the questionnaire. They were fully briefed on the aims of the research and were provided with instructions on how to conduct the survey (Appendix C). They were also instructed which products to purchase (Scoping Phase section) and (where relevant) exactly how to ask for it within each outlet they visited. Careful consideration was given to these instructions, in order to allow opportunity for upselling and also to ensure comparability between visits.

The use of a mobile app to collect the data allowed shoppers to complete the survey in-store and therefore potentially record more accurate data than they would have done if they had completed the survey after the visit.

The questionnaire for the first visit focused on price promotions and meal deals (including children's meal deals). The second visit covered other promotions including celebrity endorsements, prizes and gifts, free samples, product placement, the promotion of specific products and the availability of nutritional information. The verbal upsizing and upselling of products were covered in both visits due to the fact that, unlike other elements of the questionnaire, more variation between visits might be expected (because different staff

[19] A database of multiple retail and service outlets trading in the UK- http://www.retaillocations.co.uk/

members might take a different approach or approaches might vary depending on how busy the outlet was etc.)

Prior to the main fieldwork starting, a pilot phase took place, where the questionnaires for both visits were tested in six outlets. Minor amends to the questionnaires and instructions were made based on feedback from the shoppers and analysis of the data recorded. For example, at Q1 "Were there any clear price promotions visible inside or outside of the outlet?" – if shoppers answered "No" a prompt was added to ensure that they were considering all price promotions such as multi buy offers, reductions or low price offers, before they were able to move onto the next question.

The main fieldwork was undertaken between 7th and 20th February 2017. Visits were made to 120 outlets across 15 brands - 240 visits in total. (Table 2.1).

Table 2.2 Number of visits, by brand

Outlet category 1: QS Bakery and Sandwich	Number of outlets	Number of visits	Total number of visits
1A	8	2	16
1B	8	2	16
1C	8	2	16
Outlet category 2: QS Burger/Chicken			
2A	8	2	16
2B	8	2	16
2C	8	2	16
Outlet category 3: QS Coffee			
3A	8	2	16
3B	8	2	16
Outlet category 4: QS Retail Out-of-Home			
4A	8	2	16
4B	8	2	16
4C	8	2	16
4D	8	2	16
Outlet category 5: QS Retail Café			
5A	8	2	16
5B	8	2	16
5C	8	2	16
GRAND TOTAL			**240**

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 and the location of outlets.

Outlets were categorised into two broad categories of deprivation and rurality. 'More deprived' outlets were those with postcodes in SIMD deciles 1-5 and 'less deprived' were those with postcodes in SIMD[20] categories 6-10. The 'urban' category contained outlets in bands 1-3 of the Scottish Government 6-fold Urban Rural Classification[21] (large urban areas, other urban areas and accessible small towns) and 'rural' contained outlets in bands 4-6 (remote small towns, accessible rural and remote rural). These relatively broad categories of deprivation and rurality were necessary due to the very small numbers in some of the categories. When considering whether there are any real differences in what is being offered in urban versus rural or more deprived versus less deprived locations, it should also be borne in mind that the deprivation classification of an outlet may not reflect the profile of its customers, especially in city centres.

Food and drink categories were grouped into 3 categories to provide a further level of analysis. These were:

- Less healthy products including savoury pastries, burgers, chips, fries, potato wedges, fried chicken, chicken wings, chicken nuggets, chicken strips, savoury sides (e.g. hash browns and onion rings), crisps, savoury snacks, cakes, biscuits, desserts, sweet pastries, chocolate, confectionery, cereal bars, shakes/frappes and hot chocolate.

- Healthier products including salads, pasta salads, vegetable sides, soup, fresh and dried fruit, nuts, water, plain milk, tea and coffee.

- Unclassified products including sandwiches, filled rolls, wraps, paninis, toasties, fizzy drinks, still juice drinks, pure fruit juice and smoothies.

The 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 pasta salads with a large amount of mayonnaise) 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 and soft drinks.

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 (8 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

[20] The Scottish Government. The Social Index of Multiple Deprivation: http://www.gov.scot/Topics/Statistics/SIMD

[21] The Scottish Government. Scottish Government Urban Rira Classification: http://www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification

cannot say, for example, that 'the majority of price promotions in QS Bakery outlets in Scotland are X' or '15% of QS Burger/Chicken 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.
- The sample did not include independent out-of-home businesses and the marketing strategies used by those businesses may be quite different, so the research does not necessarily present the full picture of marketing strategies used within 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.

3. Overview of promotions used

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

The most common marketing strategies recorded were price promotions (82%), the prominent placement of items near the till (68%) and meal deals (64%).

Table 3.1 Types of promotion used

Promotion strategy	% of visits where strategy identified
Base: 120 visits (except verbal 'upselling', 'upsizing' and promotion of loyalty schemes, where the base is 240 visits)	
Price promotions (not including meal deals)	82
Prominent placement of items near till	68
Meal deals	64
Verbal 'upselling' (encouragement to purchase additional items)	39
Existence of loyalty schemes	32
Verbal promotion of loyalty schemes	11
Verbal 'upsizing'	9
Children's toys with a meal deal	9
Free samples	5
Celebrity endorsement or associations with TV, films and games	4
Soft drink branding on fridges	4

4. Price promotions

Shoppers were asked to record all examples of price promotion offers which were available within each outlet. This included the following:

- Multi buys: for example, 3 for 2, buy-one get one free, 4 for £1.50 type offers.
- Reduced price: this would include offers promoted as '25p off', 'half-price', '50% off', 'normally £2.50 but now £1' etc.
- Prominent low price promotion: this is where the price is not being promoted as having been reduced (which would be covered by 'reduced price' above), but where the price is low and this is being highlighted 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 instruction on which type of promotions fell within each category (see Appendix C).

The use of such promotions may be problematic from a dietary perspective, as evidence from the retail sector suggests that less healthy products tend to be more commonly purchased on price promotion than healthier products.[22] Furthermore, some of these promotions, including multi-buy style promotions, may encourage the consumer to purchase more than they had originally intended.[23]

What type of price promotions are being used in-store?

Multi-buys and the prominent advertising of low prices were the most common forms of price promotion used by the out-of-home businesses sampled, with over a third of all price promotions being multi-buys (36%) and 29% being the prominent advertisement of low priced products.

Sixteen per cent of promotions were recorded as "other type of price promotion". These included:

- the promotion of additional items with a purchase (e.g. chicken wings for 80p when you buy other meal items)
- free children's meals with the purchase of an adult meal at Retail Cafes

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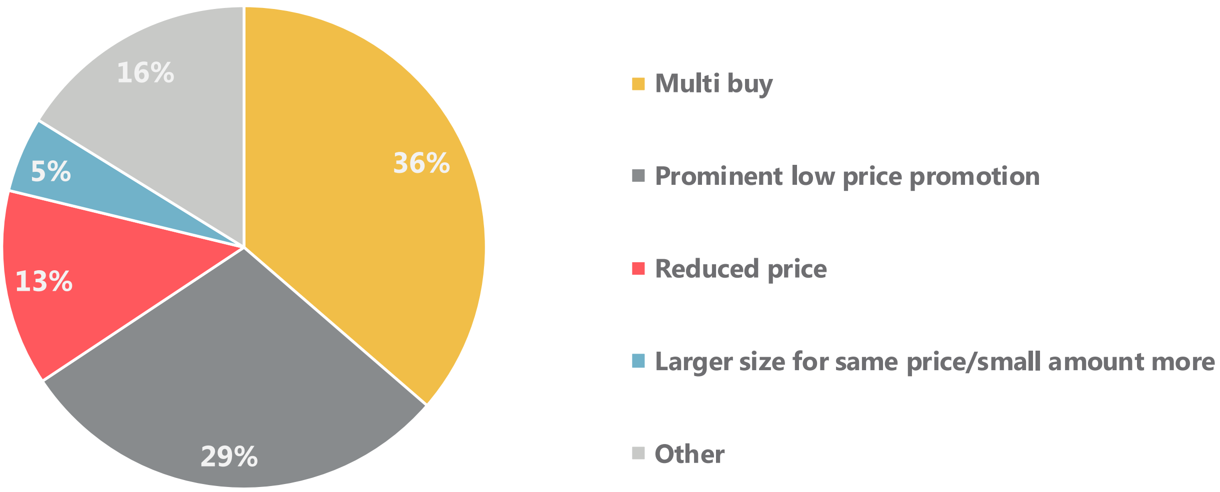
[22] FSS (2016), *Monitoring foods and drinks purchased into the home* available at http://www.foodstandards.gov.scot/publications-and-research/monitoring-foods-and-drinks-purchased-into-the-home-in-scotland

[23] Public Health England (2015), *Sugar Reduction: The evidence for action - Annexe 4: An analysis of the role of price promotions on the household purchases of food and drinks high in sugar,* available at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/470175/Annexe_4._Analysis_of_price_promotions.pdf)

- a free sandwich with the purchase of a large drink.

Thirteen per cent of promotions were reduced priced products and 5% were promotions offering a larger sized product for the same amount of money (or a small amount more[24]) than the size being purchased. (Figure 4.1).

Figure 4.1 Types of price promotion used by out-of-home businesses
Q. What was the nature of the price promotion?



Base: All price promotions (99)

The type of price promotions varied between outlet categories. Multi-buys were most commonly used in the Bakery and Retail outlets, whereas prominent low pricing was found most frequently in QS Burger/Chicken outlets. Selling a larger sized product for the same price or a small amount more than the smaller or standard sized product appeared to be less of an issue, and occurred only in the QS Burger/Chicken outlets. The coffee outlets were least likely to have price promotions (Table 4.1).

[24] Based on mystery shoppers' perceptions of "A small amount more"

Table 4.1 Type of price promotion used, by outlet category (Count)
Q. What was the nature of the price promotion?

	QS Bakery and Sandwich	QS Burger/Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Base: All price promotions (99)	*18*	*24*	*6*	*35*	*16*	*99*
Multi-buy	12	3	0	20	1	36
Prominent low price promotion	4	10	1	7	7	29
Reduced price	0	0	3	8	2	13
Larger size for the same price/ small amount more	0	5	0	0	0	5
Other	2	6	2	0	6	16

Which products are on price promotion?

Twenty per cent of all price promotions were on confectionery items or other sweet products, such as ice cream and sweet pastries (Table 4.2) while a further 11% were on soft drinks (which includes both diet and regular soft drinks), and 15% on burgers, fried chicken and chips. Combined, fruit/nuts, waters, salads and soups accounted for 15% of reported price promotions.

Table 4.2 Proportion of price promotions on each type of product
Q. What product was being advertised?

Product	%
Base: All price promotions (99)	
Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery	20
Soft drinks	11
Sandwich/filled rolls/wraps etc.)	9
Savoury pastries	7
Burgers	7
Fried chicken, chicken wings, nuggets or strips	5
Fruit or nuts	5
Water	4
Tea or coffee	4
Chips, fries or potato wedges	3
Salad (meal)/pasta salads	3
Soup	3
Other savoury sides	1
Crisps and savoury snacks	1
Pure fruit juice or smoothies	1
Shakes/frappes	1
Other	14

The QS Burger/Chicken (in particular) and Bakery outlets had a clear imbalance between the number of less healthy products (e.g. burgers, savoury pastries and cakes) and healthier products (e.g. soup and salads) they were offering on price promotion. However, this may simply reflect the profile of the foods they sell, rather than items which they specifically promote.

5. Meal deals

Meal deals are typically considered to be the offering of a main (e.g. sandwich, burger, salad etc.), drink and snack. These were identified as a marketing strategy used by out-of-home businesses which, although potentially provide cost savings to the consumer, may also encourage them to purchase and consume more than they originally intended.

Healthier options (such as water, milk and healthier accompaniments/side orders were 'obviously available'[25] with most meal deals – with children's meal deals even more so than standard deals[26] - although some outlet categories were better at providing these healthier options than others.

How widespread are meal deal offers?

Standard meal deals were commonly available and on offer at around two-thirds (64%) of the outlets visited, although they were most frequently found in QS Burger/Chicken (92%) and Retail (81%) outlets (Figure 5.1).

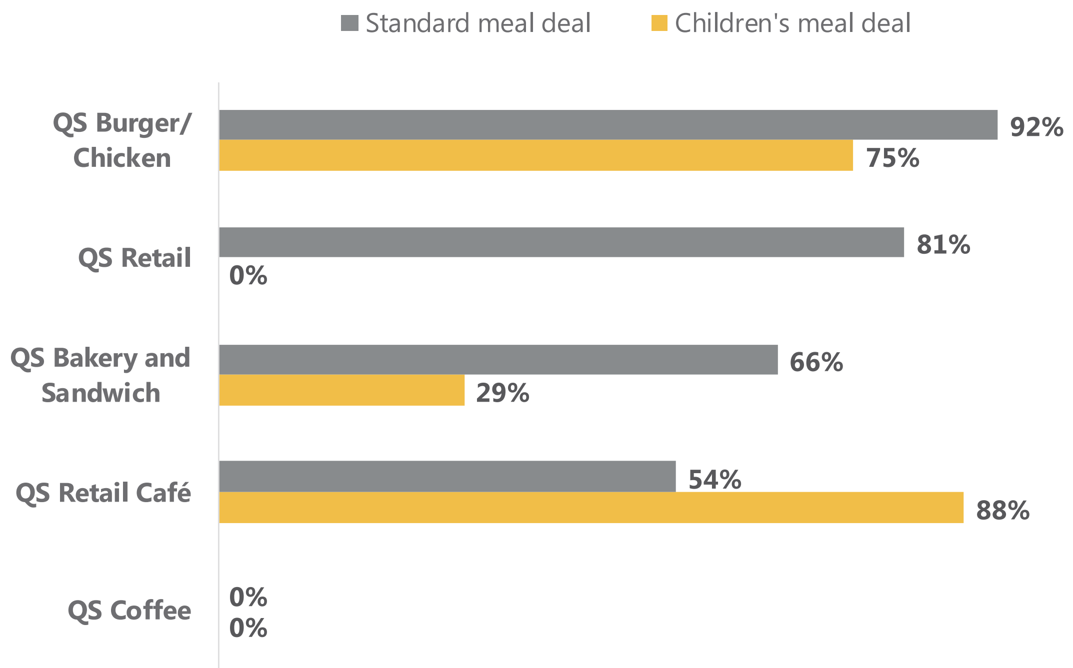
There were no meal deals available at any of the Coffee outlets, despite the research also capturing data on the availably of 'meal' deals such as a coffee and cake combinations for £X. This finding mirrors the general lack of price promotions available in the Coffee outlets visited (see Section 4).

Children's meal deals were less common throughout (available in 38% of outlets) but, as with standard meal deals, their availability depended on the outlet category. For example, children's meal deals were found in the majority of the Retail Café (88%) and QS Burger/Chicken (75%) outlets, but were less common in the Bakery and Sandwich outlets (29%). Children's meal deals were not available in the Coffee or Retail outlets visited. (Figure 5.1).

[25] During the preliminary visits, it was noted that one outlet indicated, on a poster advertising the meal deal, that fruit was one of the options. However, there was no fruit visible anywhere in the outlet. Shoppers were therefore asked to record whether the healthier options were 'obviously available'.

[26] We use the term 'standard meal deals' in this report simply to distinguish those deals that are not children's deals.

Figure 5.1 Proportion of branches offering standard and children's meal deals, by outlet category
Q. If meal deals or drink + snack deals are available, what items are included? / Q. Was there a children's meal deal available?



Base: All Visit 1 outlets: (120)

To what extent are healthier products included in meal deal offers?

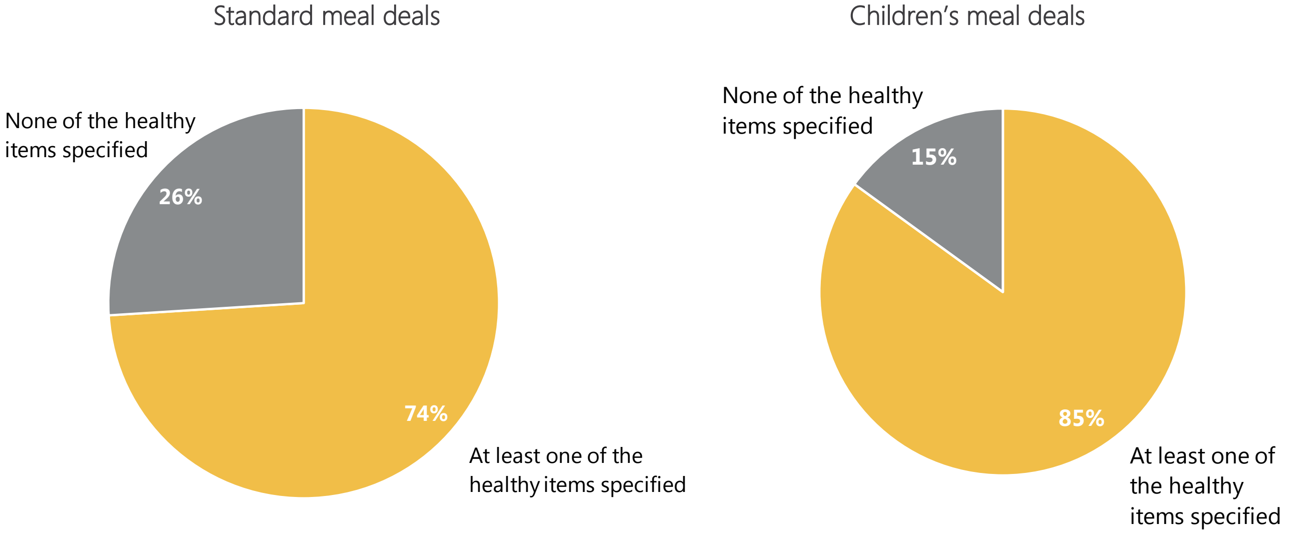
Preliminary visits undertaken during the scoping phase found that although some healthy items might be advertised as being available, they were not always *obviously* available or available at all. To asses this, the mystery shoppers were asked to record if a number of healthy items were 'obviously available' as part of the meal deal[27]. The healthy items specifically asked about were:

- water
- plain milk
- fruit, vegetables, salad, dried fruit or nuts.

At least one healthy item was obviously available with most meal deals - 74% of standard meal deals and 85% of children's meal deals. (Figure 5.2).

[27] The instructions to mystery shoppers advised that items should not be recorded as obviously available if 'For example, if they were on the signage for the meal deal, but you could not find them in the meal deal area'.

Figure 5.2 Proportion of outlets with healthy items obviously available in standard and children's meal deals
Q. Were the following healthier items obviously available to pick up (not just in the signage) in the meal deal?



Base: All standard meal deals (77) and children's meal deals (46)

Water was the option most commonly available as part of meal deal offers. Bottles of water were obviously available with 68% of standard meal deals and 67% of children's meal deals. (Figure 5.3). For standard meal deals, water was available at all but one of the Retail outlets visited, and most of the Bakery and Retail Café visits. However, it was less commonly available with QS Burger/Chicken meal deals[28]. (Table 5.1).

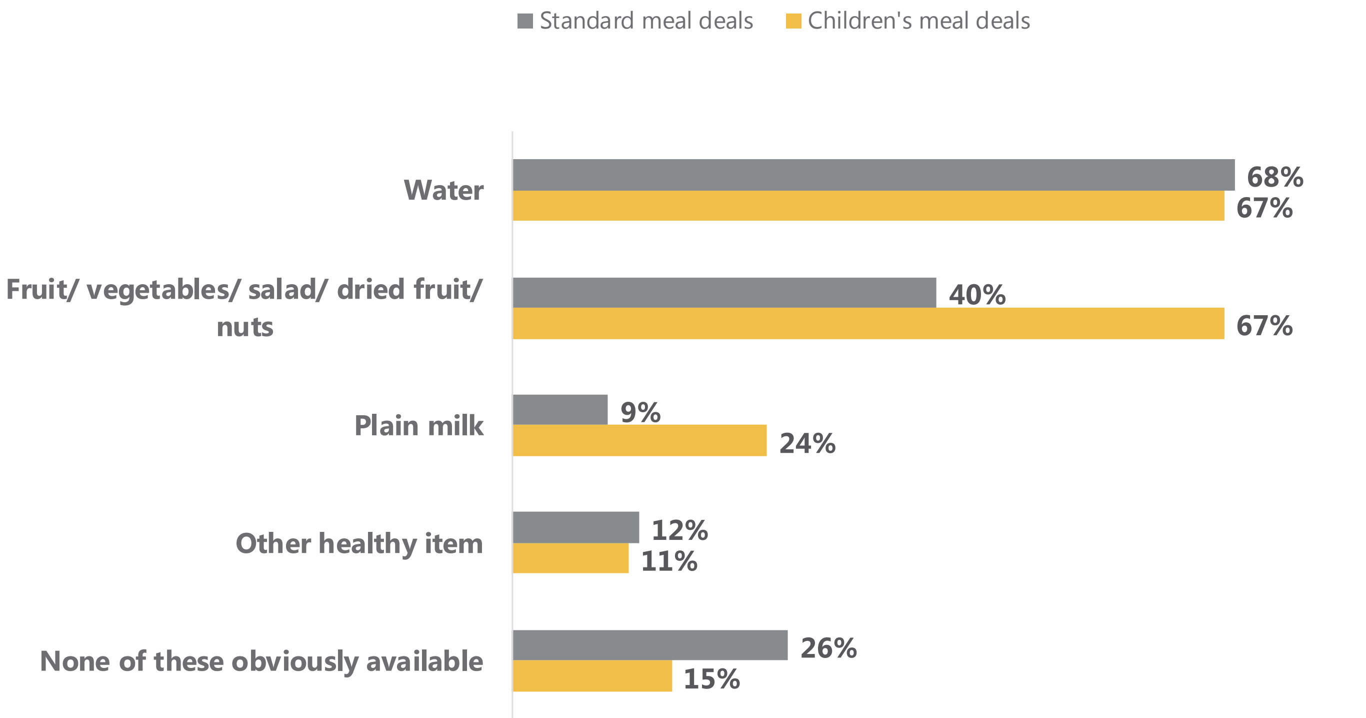
Fruit, vegetables, salad, dried fruit and/or nuts were obviously available with most children's meal deals (67%), although they were less common with standard meal deals (40%). Plain milk was also more common with children's meal deals, available with 24% of them compared to only 9% of standard meal deals (Figure 5.3).

For a small number of the meal deals on offer, shoppers recorded that "other healthy items" were available. It is worth noting that this was based on the shoppers' perception of "healthy" and therefore often did not necessarily reflect government recommendations. Where shoppers had recorded the items, these included: soup, fruit juice (including Fruit Shoot), low fat yogurt, standard yogurt, yogurt smoothies and fruit/cereal bars. The nutritional content of these products was not recorded.

[28] It may be that outlets would be happy to provide water if a customer asked for it, but the point here is that it is not promoted.

Figure 5.3 Proportion of outlets having healthy items obviously available in standard and children's meal deals, by outlet category

Q. Were the following healthier items obviously available to pick up (not just in the signage) in the meal deal?



Base: All standard meal deals (77) and children's meal deals (46)

Table 5.1 Number of visits where any healthy items were available as part of standard meal deal, by outlet category
Q. Were the following healthier items obviously available to pick up (not just in the signage) in the meal deal?

	QS Bakery and Sandwich	QS Burger/ Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Number of outlets offering meal deals	*16*	*22*	*0*	*26*	*13*	*77*
Water	12	7	-	25	8	52
Plain milk	1	2	-	1	3	7
Fruit/ vegetables/ salad/ dried fruit/ nuts	3	5	-	17	6	31
At least one of the healthy items	13	9	-	25	10	57
None of the healthy items	3	13	-	1	3	20

Table 5.2 Number of visits where any healthy items were available as part of children's meal deal, by outlet category

Q. Were the following healthier items obviously available to pick up (not just in the signage) in the meal deal?

	QS Bakery and Sandwich	QS Burger/ Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Number of outlets offering children's meal deals	*7*	*18*	*0*	*0*	*21*	*46*
Water	5	10	-	-	16	31
Plain milk	0	4	-	-	7	11
Fruit/ vegetables/ salad/ dried fruit/ nuts	2	9	-	-	20	31
At least one of these healthy items	6	12	-	-	21	39
None of these healthy items	1	6	-	-	0	7

6. Other marketing strategies

Marketing aimed at children

As well as the availability of children's meal deals at 38% of visits, a quarter of these (24%) meal deals included a toy with the purchase. These were almost exclusively available at QS Burger/Chicken outlets (Table 6.1).

Table 6.1 Number of branches offering a toy as part of a children's meal deal, by outlet category
Q. Were any toys advertised as being part of the Children's meal deal?

	QS Bakery and Sandwich	QS Burger/ Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Base: All offering children's meal deals (46)	*7*	*18*	*0*	*0*	*21*	*46*
Toy available	1	10	-	-	0	11

Celebrity endorsements and associations with TV, films and games

The endorsement of products by celebrities or associations with TV, films and games was rare: reported at just 4% of visits. Where products were being endorsed, all but one of these[29] were targeting children, with mystery shoppers identifying the prominent advertisement of products (such as meal deals) using the Trolls film or the Lego Batman Movie released in cinemas in October 2016 and February 2017 respectively – the visits took place during February 2017.

The preliminary visits found that toys associated with films were often offered as a set to collect, potentially encouraging repeat visits in order to obtain all or a number of toys within the set.

Beyond this, the research found little evidence of outlets using celebrity endorsements or associations with TV programmes or films to promote their products to either children or adults.

Free samples

Offering products as free samples or "tasters" to encourage consumers to purchase particular products was uncommon; occurring at only 5% of outlets visited. With this particular marketing strategy, there were no clear trends across outlet categories. However, there did appear to be a trend for the *type* of products being promoted in this way: half of the samples were in the 'cakes, biscuits, confectionery or other sweet items' category (although it should be noted that this was based on a very small number of free samples – n=6).

[29] Although overall numbers were small

Product placement

The placement of items near the till point (which may encourage additional consumption) was common, with 68% of outlets using this type of strategy.

In terms of product type, again, cakes, biscuits, confectionery or other sweet products were the most commonly promoted and were displayed near the cash desk at half of the outlets visited (48%). (Table 5.3).

Table 6.2 Proportion of visits where products placed near the till point (%)
Q. Where there any products prominently displayed at or near the till point to encourage purchase?

Products	%
Base: All Visit 2 outlets (120)	
Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery	48
Crisps and savoury snacks	12
Cereal bars	12
Soft drinks	12
Fruit or nuts	9
Water	8
Sandwich/filled rolls/wraps etc.	5
Shakes/frappes	3
Pure fruit juice or smoothies	3
Other savoury sides	3
Savoury pastries	3
Soup	3
Chips, fries or wedges	3
Salad/ vegetable sides	2
Hot chocolate	2
Burgers	2
Fried chicken, chicken wings, nuggets or strips	1
Salad meal/ pasta salads	1
Other	6
No products near the till point	32

Upsizing and upselling

Upsizing

The research also assessed the level at which staff in out-of-home businesses were verbally encouraging consumers to purchase more than they intended, either through asking if they want 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 (Appendix C)[30].

It was uncommon for staff to ask mystery shoppers if they would like to *upsize* their order, during the visits.

At the visits where the items purchased allowed an opportunity for upsizing, this only occurred at 9% of visits, and almost exclusively at Coffee and QS Burger/Chicken outlets. (Table 6.4).

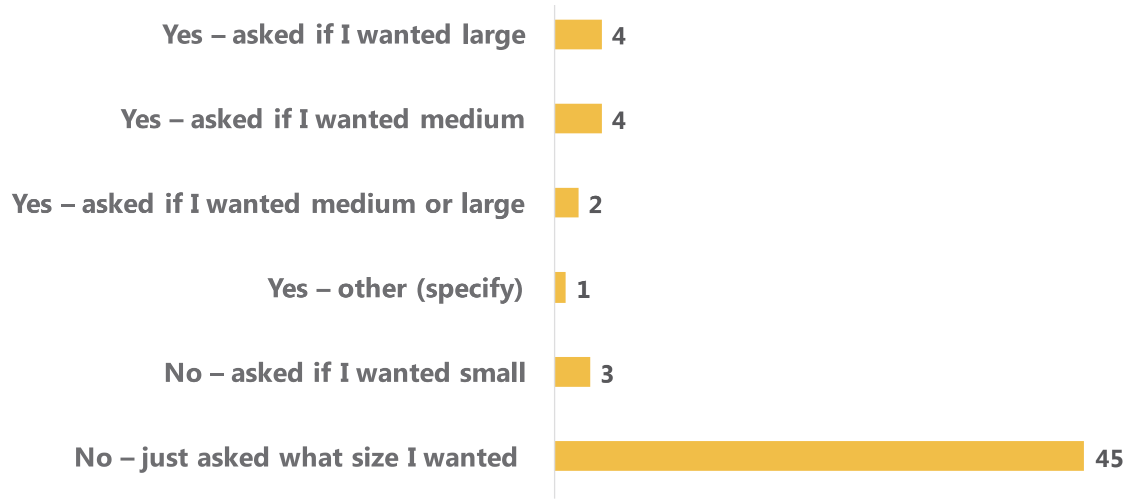
Table 6.3 Number of visits where staff suggested 'upsizing'
Q. Were you asked if you wanted to upsize any part of your order?

	QS Bakery	QS Burger/ Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Base: All visits with potential for item purchased to be 'upsized"	*16*	*48*	*32*	*0*	*24*	*120*
Mystery shopper asked if they'd like to 'upsize' their order	1	5	5	0	0	11

At a total of 59 visits (out of 120, where there was the potential for upsizing), mystery shoppers were asked to clarify what size of the product they wanted. In most cases (n=45), they were simply asked what size they wanted and there was no attempt by staff to encourage the purchase of a larger size. (Figure 6.1).

[30] For example, for different visits, shoppers were instructed to ask for 'a hot chocolate' (rather than 'a large hot chocolate'), 'a cheeseburger' rather than 'a quarterpounder with fries' and to select a sandwich that was part of the meal deal (but not pick up other items from the meal deal).

Figure 6.1. Number of visits where mystery shoppers were asked to clarify what size they wanted
Q. Were you asked if you wanted to upsize any part of your order



Base: Visit 1 and Visit 2 outlets where mystery shoppers were asked to indicate the size of their order (59)

Upselling

Verbal *upselling* during visits was more common, occurring at 39% of all visits. (Figure 6.2). However, this was based on a very broad definition of 'upselling' which included the 11% of visits where the shopper was asked if they wanted anything else (in general) and the further 8%[31] of visits where they were asked if they would like a drink with their purchase.

Shoppers were asked if they would like syrup or cream in their drink at only 5 out of the 32 coffee visits, and were asked if they would like to add fries to their order at only 4 out of the 48 QSR visits.

Most of the remaining cases of upselling related to meal deals (discussed below).

Using meal deal promotions to upsell

As mentioned in Chapter 5, the offering of meal deals within out-of-home businesses was common in the establishments visited. 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 the QS Burger/Chicken and Retail outlets. Among the QS Burger/Chicken outlets, verbal promotion of meal deals – asking the shopper if they wanted a meal when they had asked for a burger (at Visit 1) or a burger and fries (at Visit 2) – varied by brand. At the outlets

[31] If we exclude the visits where the shopper was *already* buying a drink (and therefore very unlikely to be 'upsold' (another) drink), they were asked if they would like a drink with their purchase on 13% of visits.

of one brand, shoppers were asked if they wanted a meal at 10 of the 16 visits (at 5 of the 8 Visit 1s and at 5 of the 8 Visit 2s). At the outlets of the other two QS Burger/Chicken brands, there were only 3 instances of upselling across the 32 visits. At none of the 13 instances of upselling to a meal deal, was there specific mention of water being available as one of the drink options.

Verbal promotion of meal deals was more consistent in the Retail outlets. At Visit 1 (where shoppers purchased a sandwich and soft drink which were part of the meal deal), staff pointed out that they could have an extra item as part of the meal deal at 11 of 24 visits (4 of 8 visits at 2 brands and 3 of 8 visits at the third brand[32]). During visit 2, where shoppers were instructed to only purchase the cheapest sandwich they could see, (not necessarily as part of a meal deal), there was no promotion of meal deals. In other words, meal deals in Retail outlets were only promoted to shoppers purchasing more than one item that was within the deal.

However, there appeared to be a difference between Retail brands in relation to whether healthier snack options were promoted as part of the meal deal. Shoppers were asked to record whether they were told the item(s) they had selected were part of a meal deal and whether staff mentioned fruit as an option within the meal deal – or if staff only offered less healthy options such as cake or crisps. At one brand, fruit was mentioned at 3 of the 4 instances of upselling to a meal deal while at the other two brands it was not mentioned despite these brands having 3 and 4 instances of upselling.

Loyalty reward schemes

Loyalty reward schemes (such as points cards) can be used by out-of-home businesses to encourage repeat custom. A third (32%) of branches were advertising such schemes, although this was more common in Coffee and Retail outlets: 63% of Coffee outlets and 41% of Retail outlets actively advertised their loyalty schemes at the time the fieldwork was undertaken. (Table 6.5).

Table 6.4 Percentage of visits where a loyalty scheme was advertised, by outlet category

	QS Bakery and Sandwich	QS Burger/ Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Base: All visit 2 outlets	*24*	*24*	*16*	*32*	*24*	*120*
Loyalty scheme advertised in-store	7	2	10	13	6	38

[32] One brand was excluded from this analysis because sandwiches and/or meal deals were not available in all branches.

The verbal promotion of loyalty schemes was less common, occurring at 11% of visits. This was the most prevalent among Retail outlets, with such schemes being verbally promoted at 22% of those visits (Table 6.6).

Table 6.5Percentage of visits where a loyalty/ reward scheme was verbally promoted, by outlet category

	QS Bakery and Sandwich	QS Burger/ Chicken	QS Coffee	QS Retail	QS Retail Café	Total
Base: All visit 1 and 2 outlets (240)	48	48	32	64	48	240
Loyalty scheme verbally promoted by staff	5	1	2	14	4	26

Other (non-price) promotion of products

Mystery shoppers were asked to record if there were any other ways in which products were being promoted, beyond price promotions, celebrity endorsements or associations with TV, films or games.

Most commonly, these other strategies were the use of prominent posters to advertise or promote specific products (88% of other promotions recorded). A further 5% of these promotions were prominent soft drinks branding on fridges. A further 6% were recorded as “other” types of advertising – which included the advertisement of specific products using shelf labelling and sandwich boards outside of outlets.

17% of these promotions were on cakes, confectionery or sweet products, 15% were on sandwiches, rolls or wraps, 13% on teas and coffees and 11% on burgers (Table 6.7).

Table 6.6 Percentage of other (non-price) promotions on different food items

Products	%
Base: All other (non-price) promotions recorded (94)	
Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery	17
Sandwich/filled rolls/wraps etc.	15
Tea or coffee	13
Burgers	11
Fried chicken, chicken wings, nuggets or strips	6
Shakes/frappes	6
Soft drinks	5
Savoury pastries	3
Salad (meal) /pasta salads	3
Soup	3
Chips, fries or potato wedges	2
Savoury sides	2
Hot chocolate	2
Crisps and savoury snacks	1
Other	10

7. Availability of nutritional information within premises

The provision of nutritional information within premises allows consumers to make more informed decisions when purchasing food and drink items from out-of-home businesses. A separate study by Ipsos MORI provides some information about the type and nature of nutritional information available online.[33]

The research assessed the availability of calorie content and further nutritional information (for example, fat content) within the outlets beyond that available on pre-packaged products – for example: on menus, posters, signage on shelving and signage behind the counter. The preliminary visits found that out-of-home products within Retail outlets tended to be pre-packaged, with nutritional information on the packaging. For this reason, these outlets were excluded from the analysis of this question. Some QS Burger/Chicken items also had nutritional information on the boxes that items were served in. Although this packaging was generally only available to the consumer *after* the purchase has been made – past the point of making a decision – these outlets *were* still included.

Calorie content, beyond information on packaging, was available in 60% of the outlets visited (excluding Retail outlets), although this varied depending on outlet category (Table 7.1).

Table 7.1 Proportion of outlets with calorie information available, by category

	QS Bakery and Sandwich	QS Coffee	QSR Chicken/ Burger	Retail Café	Total
Base: All Visit 2 outlets, excluding QS Retail (88)	24	16	24	24	88
Calorie information available	16	12	14	11	53

The mystery shoppers judged that the calorie information was 'readable/ large enough to easily read' at 85% of outlets with such information displayed.

The availability of further nutritional information (e.g. fat content), was less common, and was only available within 35% of outlets.

33 Ormston R, McAteer G and Hope S (2017), *Informed Decisions? Availability of Nutritional Information for a Sample of Out of Home Food Outlets in Scotland*, FSS, available at http://www.foodstandards.gov.scot/publications-and-research/availability-of-nutritional-for-a-sample-of-out-of-home-food-ou

8. Differences by deprivation and rurality?

One of the aims of the research was to assess whether there was consistency in the strategies used by the same brands in different outlets and whether there were any clear differences linked to levels of deprivation and/or rurality of outlet location. Overall, there was no clear pattern in terms of price promotions or meal deals being linked to the urban/rural or deprivation profile of the outlets. However, given the relatively small numbers involved, further research is needed to explore this issue in more detail.

9. Conclusions

There are a number of practices in place which make the environment challenging for consumers to make healthier choices. However, the findings of the research are in some ways encouraging; verbal 'upsizing' was uncommon, offering free samples of products happened very rarely and at least one healthy option was available in the majority of meal deal offers.

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

   There was little evidence of staff actively encouraging customers to choose larger sizes through verbal 'upsizing'. However, 'upselling' was more common and multi-buy promotions and meal deals were prominent throughout the outlets visited. 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.

2. Encouraging consumers to purchase unhealthy foods rather than healthier foods

   Most of the common marketing strategies (product placement, price promotions and general promotions) were on less healthy products. Positively, healthier items (particularly water) were available within meal deals and especially children's meal deals. However, when set against less healthy options, such as crisps or confectionery, consumers may find it hard to choose the healthy option.

3. 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. While some outlet types are doing better than others, (calorie content was available in 75% of the coffee outlets versus 46% of the Retail cafes), overall it was unavailable at 40% of the outlets.

Appendix A – Rationale for brand selection

The out of home market can be broken down as follows:

- Quick Service Restaurant (QSR):
  - QS Burger
  - QS Fish and Chips
  - QS Chicken
  - QS Sandwich
  - QS Bakery
  - QS Coffee
  - QS Pizza/Italian
  - QS Ethnic
  - Retail/Supermarket ('on the go' sections and in store cafés only)
  - Petrol Station
- Pubs
- Full Service (excluding Cafe/Bistro)
- Café/Bistro
- Travel & Leisure
- Canteen (Workplace)
- Canteen (College/University)
- Vending machine

All outlet types captured within this research were sub categories of 'Quick Service Restaurant' (QSR). QSRs accounted for the largest share of visits to the out of home market in Scotland in 2015 (53.6% of total visits).

Within QSRs, the following sub categories (selected for inclusion in the research) accounted for 38% of total out of home visits (Table A1)

Table A1 Share of out of home visits – categories included in the research

Category	% of total out of home visits
QS Retail/Supermarket	13.2%
QS Burger	8.8%
QS Coffee	5.7%
QS Bakery	5.6%
QS Sandwich	3.1%
QS Chicken	1.6%

The following sub categories of QSR were excluded:

- QS Ethnic (5.6%)
- QS Fish and Chips (3.9%)
- QS Pizza/Italian (2.0%)

This was for two main reasons. Firstly, it was felt that businesses retailers within these categories were more likely to be independent retailers or small chains. It was important that the brands included in the research had representation across Scotland in order that consistency across brands and differences in relation to deprivation and rurality could be explored. Secondly, the budget allocated for the purchase of items at each visit would likely have been too small to purchase the types of products sold by outlets in these categories (e.g. a fish supper, pizza, or meal from a Chinese restaurant).

Petrol stations constituted a very small proportion of out of home visits and were excluded for this reason.

Non-QSR outlets were excluded for the following reasons:

- Pubs and full service restaurants - the length of time it would take for the visit and the likely costs of food and drink available within these types of outlets

- Vending machines, workplace/university canteens and travel and leisure - impractical for shoppers to access and/or largely independent businesses rather than brands.

The particular brands included within each category were selected on the basis of evidence provided to FSS by NPD Group. These were all branded businesses operating within Scotland and known to be key players within each QSR sub category.

Appendix B- Questionnaires for Visit 1 and Visit 2

FSS In-store marketing questionnaire
Visit 1

*Please note that there is no Q18 in this questionnaire

Price promotions

ASK ALL

Q1	Were there any clear **price promotions** visible inside or outside of the outlet?	
	Yes (Go to Q2)	
	No (Go to Q6a)	

ASK ALL who answer yes (code 1 at Q1 or code 1 at Q5)

Q2	What product was being advertised?	
	Sandwich/filled rolls/wraps etc. (include paninis and toasties but not burgers)	
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes)	
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	
	Chips, fries or potato wedges	
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	
	Savoury sides (include hash browns, onion rings)	
	Salad (meal) / pasta salads	
	Salad or vegetable sides	
	Soup	
	Crisps and savoury snacks (Include pretzels, all popcorn)	
	Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery (include doughnuts, flap jacks, waffles, pancakes, ice cream)	
	Cereal bars (include protein bars and nature bars etc.)	
	Fruit or nuts (include dried fruit and dried fruit bars)	
	Cold drinks:	
	Fizzy drinks and still juice drinks	
	Water (plain – still, sparkling or hint of fruit)	
	Pure fruit juice or smoothies	
	Shakes/frappes	
	Plain milk	
	Hot drinks:	
	Tea, or coffee (All teas and herbal teas, americanos, lattes or cappuccinos)	
	Hot chocolate	
	Other (specify)	

ASK ALL who answer yes (code 1 at Q1 or code 1 at Q5)

Q3	What was the nature of the price promotion?	
	Multi buy	
	Reduced price	
	Prominent low price promotion (e.g. £1 offers on shelf edge/ fridges)	
	Larger size for same price/small amount more	
	Other (specify)	

ASK ALL who answer yes (code 1 at Q1 or code 1 at Q5)

Q4	How and where was this advertised? (Multicode)	
	Signage ***outside*** of outlet	
	Signage in outlet ***window***	
	Leaflets distributed ***outside*** of the outlet	
	Leaflets ***inside*** the outlet	
	Signage on walls ***inside*** the outlet	
	Signage on fridges/ shelves/ by products	
	Products on display in queue area	
	Signage near till area	
	Other (specify)	

ASK ALL who answer yes (code 1 at Q1)

Q5	Were there any other clear price promotions 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).

Other price promotions- meal deals

Q6a	If meal deals or drink + snack deals are available, what items are included? (Please select all that are available)	
	Main + drink	
	Main + drink + snack	
	Main + drink + side (e.g. burger and drink and fries)	
	Drink and snack (e.g coffee and cake)	
	No meal deals visible	

Q6b	Were the following healthier items obviously available to pick up (not just in the signage) in the meal deal? (Please select all that are included)	
	Water (still, sparkling, hint of fruit)	
	Plain milk	
	Fruit/ vegetables/ salad/ dried fruit/ nuts	
	Other healthy item (specify)	
	None of these were obviously available	

Q7	Was there a children's meal deal available?	
	Yes	
	No	

If children's' meal deal available (code 1 at Q7)

Q8	Were any toys advertised as being part of the Children's meal deal?	
	Yes	
	No	

If children's' meal deal available (code 1 at Q7)

Q9a	What items are included in the meal deal?	
	Main + drink	
	Main + drink + snack	
	Main + drink + side (e.g. burger and drink and fries)	
	Drink and snack	
	A selection of food items + drink (e.g. pick 6 items)	

Q9b	Were the following healthier items obviously available to pick up (not just in the signage) in the meal deal? (Please select all that are included)	
	Water (still, sparkling, hint of fruit)	
	Plain milk	
	Fruit/ vegetables/ salad/ dried fruit/ nuts	
	Other healthy item (specify)	
	None of these were obviously available	

Staff/verbal interaction

Q19	Were you asked if you wanted to up-size any part of your order?	
	No/not applicable	
	No – just asked what size I wanted	
	No – asked if I wanted small	
	Yes - asked if I wanted medium	
	Yes - asked if I wanted large	
	Yes – asked if I wanted medium or large	
	Yes – other (specify)	

If Yes (code 1) at Q19

Q20	And did the member of staff indicate any cost advantage to up-sizing your order?	
	Yes	
	No	

Q21	Were you offered any additional items or told part of meal deal when placing your order?	
	Yes - told part of a meal deal and I could get crisps/ cake etc. with the items (fruit not mentioned)	
	Yes - told part of a meal deal and I could get other items (fruit mentioned)	
	Yes – told part of a meal deal and I could get a drink (water not mentioned)	
	Yes – told part of a meal deal and I could get a drink (water mentioned)	
	Yes- asked if I wanted cake (or similar)	
	Yes- asked if I wanted cream/ syrup with my drink	
	Yes- asked "would you like a drink with that"	

	Yes- asked "would you like fries with that"	
	Yes- asked if wanted specific product placed on the till point (e.g. large chocolate bar) (Please specify)	
	Yes - asked if I "wanted anything else" generally	
	Yes- Other (record)	
	No	

Q22	Did staff indicate any cost advantage to adding the additional item(s)?	
	Yes	
	No	

Q23a	Did staff mention any loyalty/reward programmes?	
	Yes	
	No	

Q31	Please provide any additional feedback which you feel may add additional value/insight to your visit report	
	TEXT	
	NA	

FSS In-store marketing questionnaire
Visit 2

*Please note that there is no Q18 in this questionnaire

Endorsements, TV/ film associations, competitions, gifts and prizes

Q10	Was there any celebrity endorsement/sponsorship or associations with any TV programmes/ games/ films inside or outside of the outlet?	
	Yes	
	No	

If yes (code 1) at Q10

Q11	Please provide details of **all** of the celebrity endorsements/sponsorships and/ or the TV programmes, games or films being advertised outside and inside of the outlet. (Please record any ***products*** associated with these) (Please include whether ***inside/outside*** of outlet)	
	TEXT (include whether inside or outside of outlet)	

If yes (code 1) @ Q10

Q12	Were there any (other) advertisements/ promotions specifically targeted at children?	
	Yes	
	No	

If yes (code 1) at Q12

Q13a	What was the nature of the advertisement/ promotion?	
	Individual toys with products	1
	A set of toys to collect on different visits when purchasing products	2
	Packaging aimed at children	3
	Children's meals (excluding meal deals covered by visit 1)	4
	Other (specify)	5

Ask if code 3 at Q13

Q13b	On what type of products was the packaging aimed at children? (Please select all that apply)	
	Sandwich/filled rolls/wraps etc. (include paninis and toasties but not burgers)	
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes)	
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	
	Chips, fries or potato wedges	
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	
	Savoury sides (hash browns, onion rings,)	
	Salad (meal) / pasta salads/ soup	
	Salad or vegetable sides	
	Soup	
	Crisps and savoury snacks (Include pretzels, all popcorn)	
	Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery (include doughnuts, flap jacks, waffles, pancakes, ice cream)	
	Cereal bars (include protein bars and nature bars etc.)	
	Fruit or nuts (include dried fruit and dried fruit bars)	
	Cold drinks:	
	Fizzy drinks and still juice drinks	
	Water (plain – still, sparkling or hint of fruit)	
	Pure fruit juice or smoothies	
	Shakes/frappes	
	Plain milk	
	hot chocolate	
	Other (specify)	

Q14	Were there any (other) competitions, prizes or gifts being advertised (not aimed at children)?	
	Yes	
	No	

If yes (code 1) @ Q14

Q15	Please provide details of ***all*** of the products, prizes, gifts and competitions being advertised (Please state whether advertised ***inside/outside*** of outlet)	
	TEXT	

Q16	Were there any products being sampled in the outlet?

	Yes	1
	No	2

If Yes (code 1) at Q16

Q17	What kind of products were being sampled? (Please select all that apply)	
	Sandwich/filled rolls/wraps etc. (include paninis and toasties but not burgers)	
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes)	
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	
	Chips, fries or potato wedges	
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	
	Savoury sides (hash browns, onion rings,)	
	Salad (meal) / pasta salads	
	Salad or vegetable sides	
	Soup	
	Crisps and savoury snacks (Include pretzels, all popcorn)	
	Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery (include doughnuts, flap jacks, waffles, pancakes, ice cream)	
	Cereal bars (include protein bars and nature bars etc.)	
	Fruit or nuts (include dried fruit and dried fruit bars)	
	Cold drinks:	
	Fizzy drinks and still juice drinks	
	Water (plain – still, sparkling or hint of fruit)	
	Pure fruit juice or smoothies	
	Shakes/frappes	
	Plain milk	
	Hot drinks:	
	Tea, or coffee (All teas and herbal teas, americanos, lattes or cappuccinos)	
	hot chocolate	
	Other (specify)	

Staff/verbal interaction

Q19	Were you asked if you wanted to up-size any part of your order?	
	No/not applicable	
	No – just asked what size I wanted	
	No – asked if I wanted small	
	Yes - asked if I wanted medium	
	Yes - asked if I wanted large	
	Yes – asked if I wanted medium or large	
	Yes – other (specify)	

If Yes (code 1) at Q19

Q20	And did the member of staff indicate any cost advantage to up-sizing your order?	
	Yes	
	No	

Q21	Were you offered any additional items or told part of meal deal when placing your order?	
	Yes - told part of a meal deal and I could get crisps/ cake etc with the items (fruit not mentioned)	
	Yes - told part of a meal deal and I could get other items (fruit mentioned)	
	Yes – told part of a meal deal and I could get a drink (water not mentioned)	
	Yes – told part of a meal deal and I could get a drink (water mentioned)	
	Yes- asked if I wanted cake (or similar)	
	Yes- asked if I wanted cream/ syrup with my drink	
	Yes- asked "would you like a drink with that"	
	Yes- asked "would you like fries with that"	
	Yes- asked if wanted specific product placed on the till point (e.g. large chocolate bar) (Please specify)	
	Yes - asked if I "wanted anything else" generally	
	Yes- Other (record)	
	No	

Q22	Did staff indicate any cost advantage to adding the additional item(s)?	
	Yes	
	No	

Q23a	Did staff mention any loyalty/reward programmes?	
	Yes	
	No	

Q23b	Was there any visible advertising of loyalty/ reward programmes in store?	
	Yes	
	No	

Q24	Where there any products prominently displayed at or near the till point to encourage purchase? (Please select all that apply)	
	Sandwich/filled rolls/wraps etc. (include paninis and toasties but not burgers)	
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes)	
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	
	Chips, fries or potato wedges	
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	
	Savoury sides (hash browns, onion rings,)	
	Salad (meal) / pasta salads	
	Salad or vegetable sides	
	Soup	
	Crisps and savoury snacks (Include pretzels, all popcorn)	
	Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery (include doughnuts, flap jacks, waffles, pancakes, ice cream)	
	Cereal bars (include protein bars and nature bars etc.)	
	Fruit or nuts (include dried fruit and dried fruit bars)	

	Cold drinks:	
	Fizzy drinks and still juice drinks	
	Water (plain – still, sparkling or hint of fruit)	
	Pure fruit juice or smoothies	
	Shakes/frappes	
	Plain milk	
	Hot drinks:	
	Tea, or coffee (All teas and herbal teas, americanos, lattes or cappuccinos)	
	hot chocolate	
	Other (specify)	
	No products	

Other promotions

Q25	And were there any other ways specific products were advertised, that have not already been mentioned? (Inside or outside of the outlet) Please do **not** include price promotions (e.g. multi-buys, meal deals) as these were covered during Visit 1 (If there are more than three, please record the three most prominent)	
	Yes- Prominent posters advertising particular products	
	Yes- Prominent fizzy drink branding on chiller cabinet/ fridge (eg. Coca Cola)	
	Yes- Other (specify)	
	No	

If Yes (code 1) at Q25

Q26	What product was being advertised? Single code	
	Sandwich/filled rolls/wraps etc. (include paninis and toasties but not burgers)	
	Savoury pastries (include sausage rolls, steak or chicken or cheese bakes)	
	Burgers (include beef, chicken, vegetarian, filet-o-fish)	
	Chips, fries or potato wedges	
	Fried chicken, chicken wings, nuggets or strips (or other chicken sides)	
	Savoury sides (hash browns, onion rings,)	
	Salad (meal) / pasta salads	
	Salad or vegetable sides	
	Soup	
	Crisps and savoury snacks (Include pretzels, all popcorn)	
	Cakes/Biscuits/Desserts/Sweet pastries/Chocolate or Sweet confectionery (include doughnuts, flap jacks, waffles, pancakes, ice cream)	
	Cereal bars (include protein bars and nature bars etc.)	
	Fruit or nuts (include dried fruit and dried fruit bars)	
	Cold drinks:	
	Fizzy drinks and still juice drinks	
	Water (plain – still, sparkling or hint of fruit)	
	Pure fruit juice or smoothies	

	Shakes/frappes	
	Plain milk	
	Hot drinks:	
	Tea, or coffee (All teas and herbal teas, americanos, lattes or cappuccinos)	
	hot chocolate	
	Other (specify)	

ASK ALL who answer yes (code 1 at Q25)

Q27	Were there any other promotions or products being advertised?	
	Yes- Prominent posters advertising particular products (Go- to Q26)	
	Yes- Prominent fizzy drink branding on chiller cabinet/ fridge (eg. Coca Cola) (Go- to Q26)	
	Yes- Other (specify) (Go- to Q26)	
	No (Go to Q28)	

If yes at Q25, repeat Qs 26-27. Only repeat twice (recording three only)

Nutritional content information

Q28	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- other (specify where)	3
	No	4

If yes (codes 1-3 at Q28)

Q29	And was this calorie information readable/ large enough to easily read?	
	Yes	
	No	

If yes (codes 1-3 at Q28)

Q30	Was there any further nutritional information obviously available? (e.g. fat content)	
	Yes- information on labels on shelves	
	Yes- information on the menu/ behind the till point	
	Yes- other (specify where)	
	No	

Q31	Please provide any additional feedback which you feel may add additional value/insight to your visit report	
	TEXT	
	NA	

Appendix C- Interviewer instructions

(References to specific brands contained in the original instructions have been deleted).

Food Standards Scotland: In-store marketing Shopper Instructions

Background and aims of the research:

This research is being carried out on behalf of Food Standards Scotland (FSS). They are looking to establish what kind of promotions, strategies and advertisements are being used to promote both healthy and unhealthy 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, 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 [names of outlets] 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.

In visits to retail cafes, you only need to pay attention to promotions at the entrance to the café area and within the café area – not the rest of the store.

Questions are asked about the following key areas: price promotions, meal deals, upselling of products by staff, competitions and endorsements, other promotions and advertising of products and nutritional content information. We are also particularly interested in promotions aimed at children.

* **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, 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.

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

Include diet fizzy drinks, Fruit Shoots, Capri-sun etc. under ‘Fizzy drinks and still juice drinks’. Only include 100% pure fruit juice and smoothies under ‘Pure fruit juice and smoothies’.

Do NOT include whole boxes of chocolates (there might be Valentine’s Day offers on these) as these are not 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 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.

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 Q6a-9b:**

Q6b and Q9b both ask: “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.**

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.

***VISIT 1: Section 3- Being served/ Staff interaction**

Q19-Q22 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. You must therefore go to manned tills rather than any self-service checkouts.

Q19- We are interested here in whether – since you are planning to get the smallest size on offer – 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."

Q21- please look out for cashiers trying to sell you other items which are placed at the till point / cash desk and record the details if this occurs.

Q21-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 etc.

***VISIT 2: Section 1- Celebrity endorsements, sponsorships, associations with TV/ films and competitions, prizes or gifts:**

Q11 is asked if you select "Yes" at Q10 (to there being celebrity endorsement/sponsorship or associations with any TV programmes/ games/ films).

For **Q11,** please record details of **all** of them in this text box. Please include: the **products** they were advertising, if they were advertised **inside/ outside** of the outlet and which **TV programme, film, celebrity etc.** was associated with the promotion. If any of them are specifically targeting children, you should record this also.

Q15 is asked if you say "Yes" at Q14, that there are competitions, prizes or gifts being advertised. As with **Q11,** please record **all** that are visible and record full details including the competition, prizes etc., **products** associated with them and whether these advertisements were located **inside or outside** of the outlet.

Q16 asks whether there were any free samples of products. In supermarkets, only include any free samples of 'out of home' products in that area of the store or the till/queue area.

***VISIT 2: Section 2- Being served/ Staff interaction**

Q19-22 Same as Visit 1

Q24 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 and supermarket cafes, 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 Q25-Q27**

Qs 25-27 are to capture any other advertisements or promotions (not price promotions) which have ***not*** already been recorded- for example, a poster advertising a specific product (burger, latte etc.). For these questions, if there are more than three, **please choose the three most prominent to record.** If you feel you have already recorded everything, you will move onto questions 28-30 on nutritional information

***BOTH VISIT 1 AND VISIT 2: Final question Q31**

Q31 asks you to provide any further feedback. This can be anything that you think would be useful in terms of healthy and unhealthy 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 **small** (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.

The detailed instructions on what product to buy in each outlet are not included here as they would potentially identify the brands involved.

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