



Obesity Action
Scotland

Healthy weight for all

In-store survey of food and drink promotions

March 2020



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#NastyNudge

Report by Obesity Action Scotland

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Background

The new programme for Scottish Government published in September 2019¹ includes a commitment to introduce legislation restricting some of the promotions of foods high in fat, sugar and/or salt (HFSS or discretionary products). Discretionary food and drink are products that we do not need in our diet. They tend to be high in calories and of low nutritional value,³ and when consumed regularly they can harm health in the long term. We know that in Scotland we consume too many discretionary products.

To explore the balance and extent of discretionary food and drink promotions in Scotland, a survey was conducted in four local supermarket stores in Glasgow.

Methods

Four local supermarket stores (A, B, C and D) in Glasgow's city centre were visited in January 2020. To allow observation of seasonal change in promotions, one of the stores (A) was also visited in August 2019.

Data on price promotions and non-monetary promotions of all food and drink were collected in the visited stores with the covert use of a camera. As the stores were not approached for permission to collect this data, chain names are not provided. The collected data was transcribed in Excel and summarised.

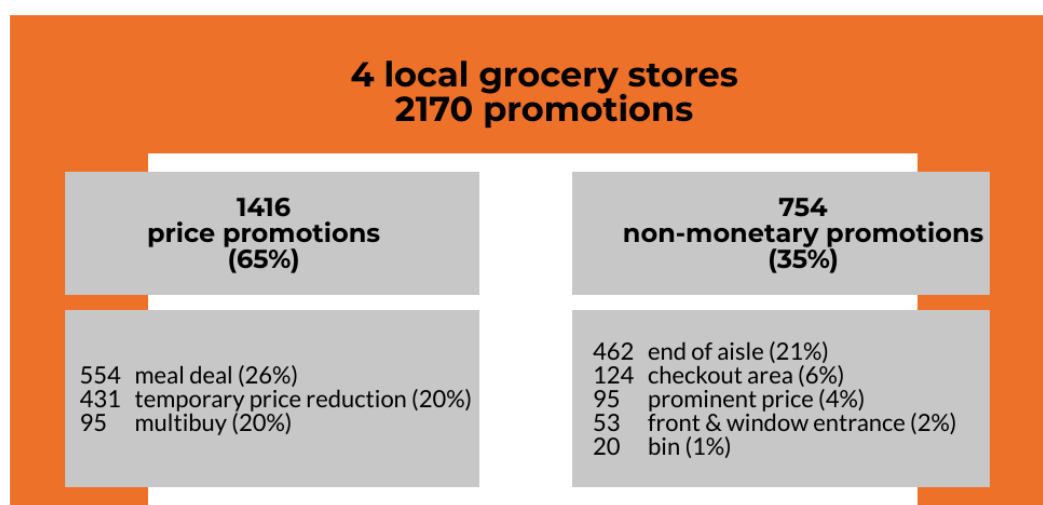
All promoted products were categorised into either 'discretionary' (HFSS) or 'other' products according to the proposed by the Scottish Government category approach.² This approach suggests restricting promotion of the following discretionary food groups:

- 1) Cakes
- 2) Confectionery
- 3) Crisps
- 4) Pastries
- 5) Puddings
- 6) Savoury snacks
- 7) Soft drinks with added sugar
- 8) Sweet biscuits
- 9) Ice-cream and dairy desserts (group not confirmed)

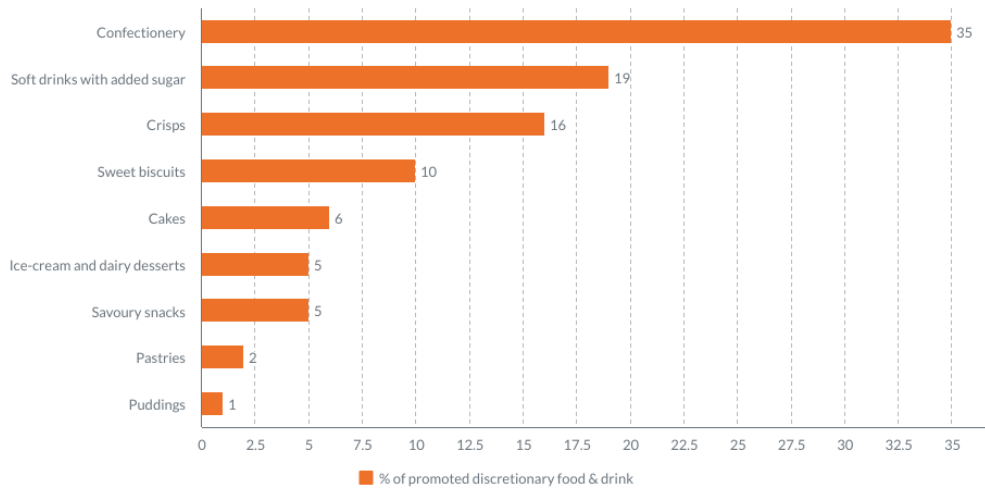
Classification of the products was not always straightforward as definitions for the above categories were not yet proposed. Therefore, some assumptions were made. First, it was assumed that the 'ice-cream and dairy desserts' group will be covered by the restrictions. Second, soft drinks with any amount of added sugar were classified as discretionary irrespectively of sugar concentration. This included products not covered by the soft drinks industry levy. Third, when it was not clear whether a product was confectionery or sweet biscuit (i.e. Twix bar), it was classified as confectionery.

Main findings:

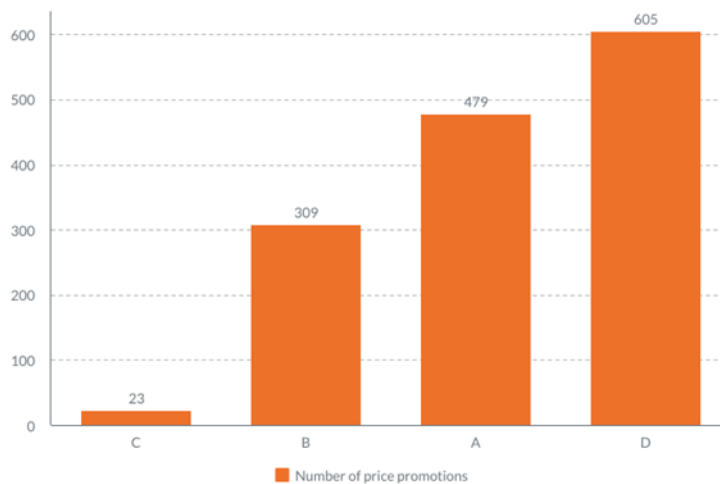
1. In the four local grocery stores in Glasgow visited in January 2020, there were 2170 promotions including 1416 price promotions and 754 non-monetary promotions



2. Overall, 40% (869) of promotions were for discretionary food and drink and 60% (1301) was for other products
3. Techniques used most often to promote discretionary products were: meal deals (211), end of aisle displays (182), TPRs (164), and multibuy (151)
4. Three most extensively promoted discretionary categories were confectionery (35% of all discretionary products), soft drinks with added sugar (19%), and crisps (16%)



- There were considerable differences between volume of all food and drink promotions between the 4 visited stores: while store C had 112 promotions, store D had 812. The proportion of discretionary to all other food and drink was close to 40%:60% in all stores
- Number of price promotions differed between the stores, with store C offering 23 price promotions and shop D 605 price promotions. The visited stores also had very different profiles of price promotions: two stores used 3 types of price promotions (multibuy, meal deal and TPR), one store did not use multibuys, and one did not use meal deals



- Store A was visited twice: in August 2019 and in January 2020. In January 2020 there were slightly fewer food & drink promotions (643 vs. 683) and less promotions of discretionary products (42% vs. 58%) than in August 2019
- The store visited twice, used different ratios of price promotions in August 2019 and in January 2020. Specifically, in January 2020 there were three times fewer TPRs (50 vs. 159) but more multibuys and meal deals

Observations and conclusions

First, the finding that in all visited stores 40% of promoted food and drink was discretionary highlighted how normal the presence of those products became. To determine which products were less healthy (discretionary) we used categories proposed by the Scottish Government. However, there are many other methods for identifying unhealthy products; some of them would result in a much higher proportion than the observed 40%.

Second, the three top promotions used to sell unhealthy food and drink were meal deals, end of aisle displays and temporary price reductions. This shows that both price promotions and non-monetary promotions need to be addressed. While meal deals are popular in local stores that are convenient for people during their lunch breaks, end of aisles and temporary price reductions are not specific to local stores and are widely used.

The stores we visited used varying numbers of promotions and different profiles of promotions, indicating that local grocery stores have a considerable flexibility when deciding how many and which promotions to employ. Additionally, one store that we visited two times, had different ratio of discretionary food on promotion and very different profile of price promotions, showing that such changes were possible in relatively short time.

Legislation restricting promotion of discretionary products could reduce the number of negative nudges to buy unhealthy food and drink we face every day. It would also create a level playing field for the retailers, making sure that those who decide to promote healthier products are not at financial disadvantage.

Limitations

First, as we collected data on promoted food and drink only, it was not possible to determine what proportion of all food and drink was promoted. Second, although data was collected in four stores only due to low resources, those 4 stores most likely represented other local stores from the same chains. This can be assumed because chain stores use planograms – diagrams which stipulate where each individual products is positioned and how many facings each products is allocated.

Call for action

We call on the Scottish Government to introduce comprehensive restrictions to the promotion of discretionary food and drink, covering as many promotion types and discretionary products as possible. The more comprehensive the restrictions, the smaller chance that retailers would switch between promotion types, and the bigger potential improvement of population's diet and health.

References

1. The Scottish Government (2019) Protecting Scotland's Future. The Government's Programme for Scotland 2019-20. Edinburgh
2. The Scottish Government (2018) Reducing health harms of foods high in fat, sugar or salt: consultation. Edinburgh
3. Food Standards Scotland (2018) Situation Report: The Scottish Diet: It needs to change. 2018 update.