Survey of Food and Drink Promotions in an Online Retail Environment

March 2021

Obesity Action Scotland

Obesity Action Scotland
Healthy weight for all

Contents

EXECUTIVE SUMMARY

Online grocery shopping is on the rise and has been accelerated by the COVID-19 pandemic[1] but we have limited knowledge about price promotions and virtually no evidence on non-monetary food and drink promotions in this environment. This survey is a follow up to our In-store Survey of Food and Drink Promotions in physical retail stores published in March 2020.[3] It provides the first Scotland-based analysis of food and drink promotions in an online retail environment giving spotlight on all food and drink, discretionary products and alcohol.

The survey included 6 online supermarkets and used two shopping baskets (healthy shopping list and standard shopping list) to collect data on food and drink promotions, based on 6 shopping events in March and 12 in November/December 2020. An average shopping event had 510 promotions, of which 61% were non-monetary and 39% were price promotions. Around a fifth of promotions were for discretionary products and around a tenth for alcohol. The discretionary products most often promoted were confectionery, crisps, ice-cream and dairy desserts and soft drinks, but this varied between the supermarkets.

Temporary price reduction was the most frequently employed type of price promotion (57% of price promotions). The most frequently employed non-monetary promotions were at the stage of selecting items (on product landing pages and in the search results) or in the offers tab, however, again there was a large variation between the supermarkets.

We did not observe any effect of basket contents on the number of discretionary product promotions but we saw a small effect for alcohol: a researcher shopping for basket 2 (standard shopping list) that included alcohol was offered more alcohol promotions than when shopping for the healthy basket shopping list. There was, however, a clear seasonal trend for food and drink promotions, with more offered in November/December 2020 than in March 2020. The trend was stronger for discretionary products and alcohol than for food and drink in general.

Findings of this survey, summarised above, have the following implications:

- At least a fifth of food and drink promotions were for discretionary products; in the context of the obesity epidemic and poor national diet this strengthens the case for the introduction of restrictions
- Non-monetary promotions in an online retail environment are more important than in physical stores. This is because online shoppers cannot see the stock; and without non-monetary promotions they would only see items they search or actively browse for. This survey is a first step to better understanding of the effects of this type of promotion
- Temporary price reductions require to be considered in any proposed restrictions. It was the most frequently employed type of price promotion (57% of price promotions). Based on our research,[3] this was a higher proportion than in-store (30%).
- Any restrictions to HFSS promotions should cover as many promotion types as possible. Supermarkets employed different combinations of price promotions and non-monetary promotions, demonstrating that many combinations work. This indicates that introduction

of restrictions to only some types of promotions is likely to lead to compensation with other types

- Any restrictions to HFSS promotions should not have seasonal exemptions
- Further research into promotion personalisation should be conducted. Promotion personalisation strategies were not obvious using a new shopping account that had no purchase history. However, literature suggests that promotions personalisation strategies are effective and actively used, and so further research could reveal the extent of their use

INTRODUCTION

Online grocery shopping is on the rise and has been accelerated by the COVID-19 pandemic[1] but we have limited knowledge about price promotions and virtually no evidence on non-monetary food and drink promotions in this environment. This gap was highlighted in our rapid evidence overview published in December 2020.[2]

This survey is a follow up to our In-store Survey of Food and Drink Promotions in physical retail stores published in March 2020.[3] It explores the extent of promotions of food and drink, including promotions on products high in fat, sugar and salt (HFSS), also called discretionary products,[4] as well as on alcohol (which was not included in our previous survey) in an online retail environment in Scotland.

Scottish Government consulted on restricting price and non-monetary promotions of unhealthy food, both in-store and online, in 2018;[5] and at the beginning of 2020 was working on the Restricting Food Promotions Bill. Due to the coronavirus outbreak this work was paused; justified by the new unknown economic, business and equity impacts.[6] Promotions, however, continue to affect the purchase and consumption of unhealthy food.

METHODS

To understand the extent and types of food and drink promotions in an online retail environment, we looked at grocery sections on the websites of all UK supermarkets offering an online shopping service with delivery in Scotland in March 2020: Tesco, Asda, Sainsbury's, Morrisons, Iceland and Waitrose.

Shopping baskets

To be able to explore promotions offered during a shopping event, we created an 'avatar' account in every supermarket, using one Glasgow city centre address. To recreate a shopping experience, we used two pre-defined shopping baskets. Basket 1 (healthy) was adopted from a sentinel mapping study of healthy food retailing in Scotland[7] and included 35 food and drink items. Basket 2 (standard) was based on the Grocer 33 list[8] published in January 2020, and included 31 food and drink items and 2 domestic products. Contents of both baskets are listed in Appendix 1 and 2. We used two different baskets to understand whether basket contents could determine promotions offered. Data on promotions were collected separately for each basket.

Data collection

Data were collected during the first two weeks of March 2020, immediately before the first lockdown (6 shopping events), and again during the last week of November and the first week of December 2020 (12 shopping events). Information was saved in the form of screen shots and recorded in Excel for counting and summary.

Each shopping event involved 6 steps, summarised in Table 1. These steps aim to recreate a typical online grocery shopping event, including exposure to food and drink promotions. Before accessing each online supermarket to collect data, in order to minimise the potential effect of typical internet use on types or volume of food and drink promotions, we used a simple protocol of clearing browsing history, download history, cookies and other site data, cached images and files, site permissions and hosted app data (step 1 in Table 1). Additionally, the avatar accounts we created were new, and therefore did not have shopping history or saved shopping lists.

The first set of data on food and drink promotions were collected from the main page of the grocery section, and from the offers tab on that page (step 2). To identify shopping basket products, after logging in (step 3), we used a search function, which was available in every online supermarket. We recorded all food and drink promotions offered when searching for basket items and selecting them, naming this group of data 'selecting items' (step 4). At the 'selecting items' stage, the promotions were being displayed on individual products' landing pages and on the search results pages. Once the basket was full, we proceeded to checkout. At this point, in most supermarkets, food and drink promotions were offered again, which we also recorded and named 'checkout' (step 5). We did not make any purchases.

Table 1. Steps of data collection.

	Steps	Data collected
1.	Clear browsing history, cookies etc.	
2.	Open grocery section of an online supermarket	'main page' and 'offers tab'
3.	Log in with an avatar account, using Scottish address	
4.	Search for items from pre-defined lists (basket 1 and 2) and add them to the basket (do this for each basket separately)	'selecting items'
5.	Proceed to checkout	'checkout'
6.	Do not check out and empty the shopping basket	

Classifying food and drink items

Every promoted food or drink item was defined as **'discretionary'** if it belonged to one of the nine groups proposed by the Scottish Government in the consultation on reducing health harms of foods high in fat, sugar and salt (Figure 1). Items were defined as **'other'** if they did not fall into any of the 9 groups, or **'alcohol'**.

1. Confectionery
2. Sweet biscuits
3. Crisps
4. Savoury snacks
5. Cakes
6. Pastries
7. Puddings
8. Soft drinks with added sugar
9. Ice-cream and dairy desserts

Figure 1. Nine groups of discretionary products[9]

Classifying promotions

In this survey, we counted promotions, not products. All promotions were split into price promotions and non-monetary promotions (Figure 2). Price promotions were further split into temporary price reductions (TPRs), multibuys, meal deals and loyalty scheme points (where these points could be exchanged for goods). As no literature on types of non-monetary promotions in an online groceries retail environment was identified, we categorised these promotions based on their location, which in this context means on their presence at different stages of an online shopping event. We therefore categorised them into 'main page', 'offers tab', 'selecting items' and 'checkout'. Examples of all above types of promotions are included in Appendix 3a. Figure 3 shows how the promotions were classified on an example of one product.

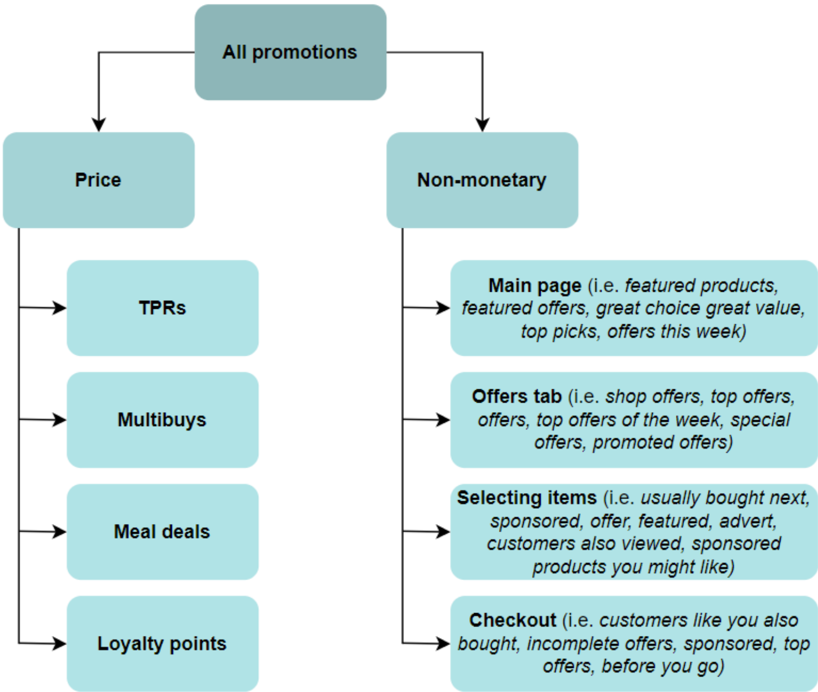
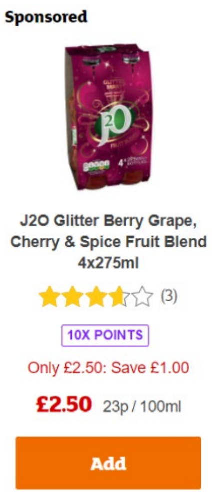


Figure 2. Classification of food and drink promotions in an online grocery retail environment adopted in this survey. TPRs – temporary price reductions



This product was on 3 promotions at the same time:

- Price promotions:
  - ✓ temporary price reduction
  - ✓ loyalty points
- Non-monetary promotions:
  - ✓ selecting items (it was displayed on a page of a product from one of our shopping baskets (lemonade from shopping basket 2)

Figure 3. Example of how promotions were classified in this survey.

An alternative way to classify non-monetary promotions would be by their appearance: either standard size on a white background (as on Figure 3; this was the case for majority of non-monetary promotions), or visually highlighted by a coloured background, larger size, animation/movement, or with other products gathered into a theme. We did not choose this classification, however Appendix 3b includes examples of both standard and visually highlighted non-monetary promotions.

FINDINGS

Table 2 summarises all data on food and drink promotions that were collected as part of this survey. Data on Basket 2 items in March were partly collected, but checkout was not possible in any of the supermarkets due to the COVID-19 outbreak and looming lockdown: all delivery slots were booked. Therefore, the incomplete Basket 2 data from March was not used for this analysis. As a result, we analysed data on 18 shopping events: 6 in March (Basket 1, one event for every supermarket) and 12 in November/December (Basket 1 and 2, one shopping event for each basket for every supermarket).

Table 2. Summary of data on food and drink promotions collected and used as part of this survey.

	Data collection step	March	November/December
	Step 2. Main page & offers tab	✓	✓
Basket 1	Step 4. Selecting items	✓*	✓
	Step 5. Checkout	✓	✓
	Basket prices (not promotions)	✓	✓
Basket 2	Step 4. Selecting items	-	✓
	Step 5. Checkout	-	✓
	Basket prices (not promotions)	-	✓

* For March, basket 1, data is partially missing from Sainsbury's and Morrisons. The majority of food and drink promotions in these shops were displayed not on individual products' landing pages like in the other 4 supermarkets, but on the search results pages. Unfortunately, these were not recorded in March.

Promotions of all food and drink

During the 18 shopping events, we counted a total of 9180 food and drink promotions. Therefore, an average shopping event had 510 promotions. The following summaries are presented for an average shopping event. Where baskets and seasons are compared and averages are not from all 18 events, this is clearly indicated.

A customer, during an average online grocery shopping event, was exposed to 510 promotions, of which 61% (310) were non-monetary promotions and 39% (200) were price promotions. While there was a large variation between the supermarkets in how many promotions they offered (Figure 4), every supermarket offered more non-monetary promotions than price promotions.

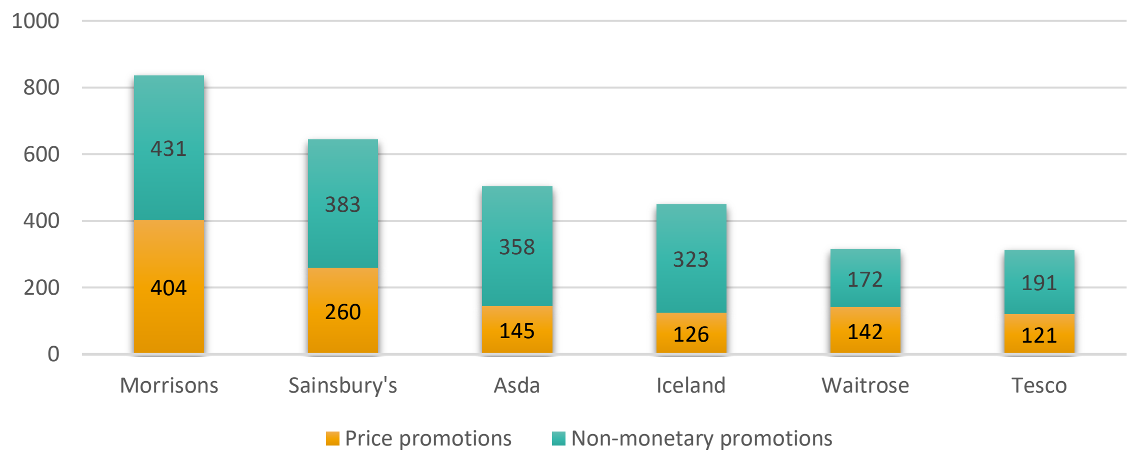


Figure 4. Average number of promotions split into non-monetary and price promotions, for every online supermarket.

Interpretation & comment

In an online grocery retail environment, non-monetary promotions seem to be more prevalent than price promotions. This is not surprising considering the definition of non-monetary promotions that we adopted – linked to location. While in a physical store, a shopper can see many products on a shop's shelves, even if they are not promoted, an online shopper will only see a product if it appears on the website (and therefore is promoted), or if they specifically search for it. Therefore, placing promoted goods on a grocery retailer's website in areas that shoppers must visit while shopping online (i.e. main page, product landing pages or checkout) is a logical strategy.

Promotions of discretionary products and alcohol

Over a fifth (21%, n=107) of all food and drink promotions during an average shopping event were for discretionary products, and 1 in 10 (11%, n=55) were alcohol promotions. Again, supermarkets differed in this respect (Figure 5).

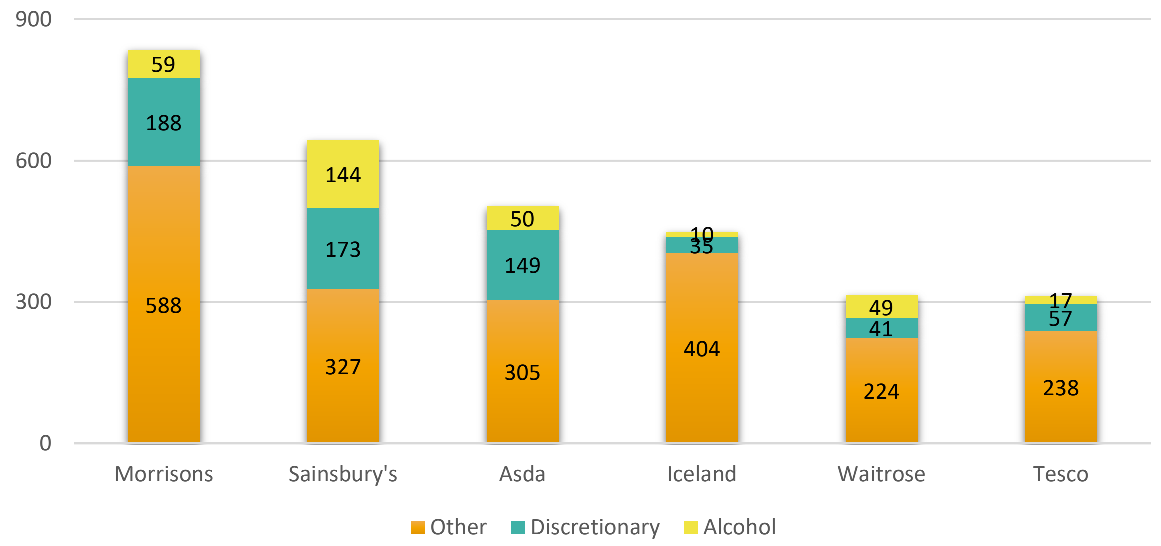


Figure 5. Average number of promotions split by type of promoted product (discretionary, alcohol and other food and drink) and by supermarket.

Out of 107 promotions of discretionary products during an average shopping event, 63% (n=67) were non-monetary promotions and 37% (n=40) were price promotions. Similarly, to all food and drink promotions, the number of discretionary product promotions varied significantly between the online supermarkets, and most promotions were non-monetary (Figure 6).

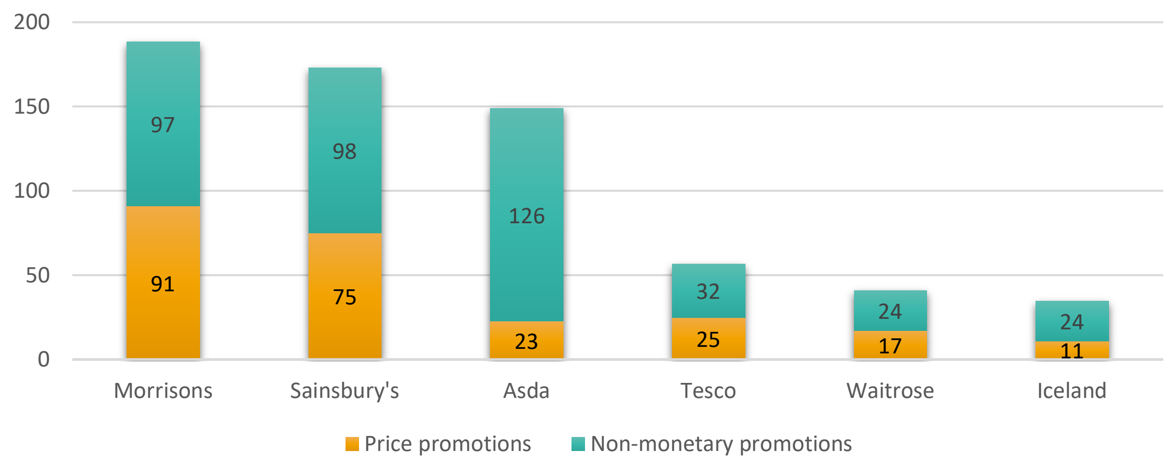


Figure 6. Average number of discretionary product promotions, split by type of promotion and by supermarket.

Among discretionary product promotions, confectionery, crisps and ice-cream and dairy desserts were promoted most often (Figure 7). However, these proportions varied greatly between the supermarkets (Figure 8).

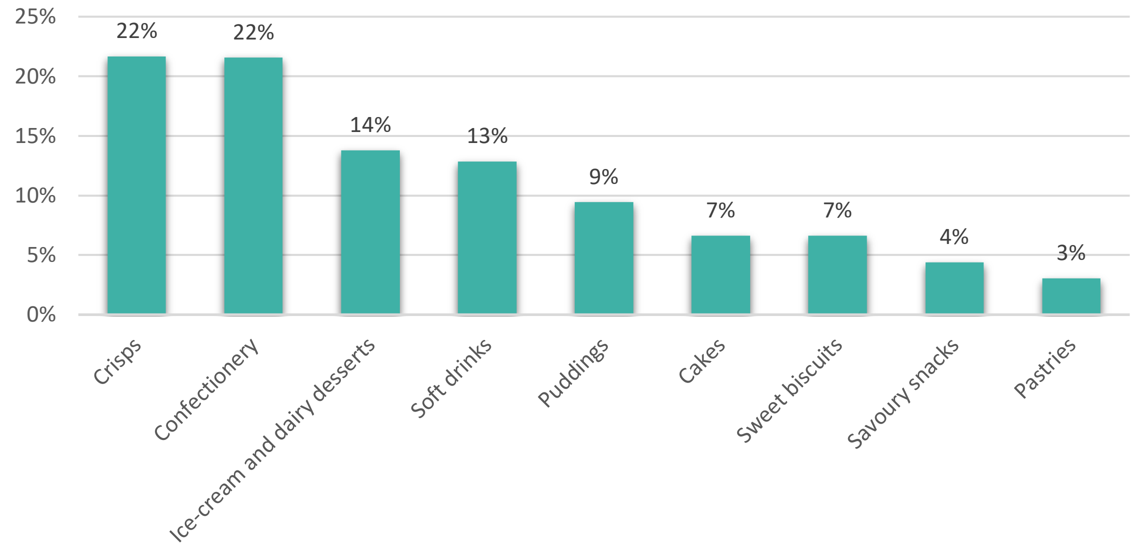


Figure 7. Proportion of all discretionary product promotions, split by discretionary product group.

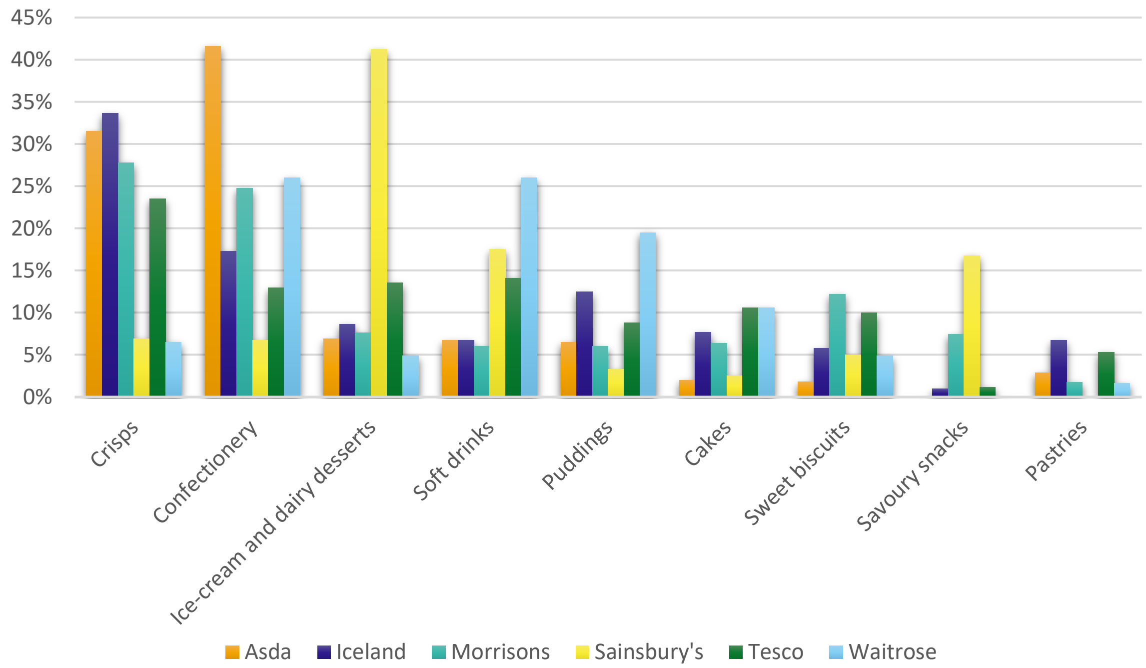


Figure 8. Proportion of all discretionary product promotions, split by discretionary product group and by supermarket.

Interpretation & comment

Around a fifth of promotions were for discretionary products, and around a tenth for alcohol. There was a large variation in the number of promotions of discretionary products between supermarkets.

Our in-store promotion survey revealed that 40% of promotions were for discretionary products, which is a larger proportion compared to online (21%).[3] This however, may not be directly comparable. This is because in this survey, shopping accounts were new and without shopping history, which limited potential for personalised promotions.

Unfortunately, we did not look at alcohol promotions in-store.

Price promotions

Out of 200 price promotions offered during an average online grocery shopping event, 114 (57%) were temporary price reductions, 78 (39%) were multibuys, 6 (3%) loyalty scheme points and 2 (1%) meal deals (Figure 9). The supermarkets, however, had very different proportions of price promotion types (Figure 10). For example, Sainsbury's was the only supermarket to offer loyalty scheme points and almost no multibuy promotions, while Morrisons and Tesco were the only supermarkets offering meal deals.

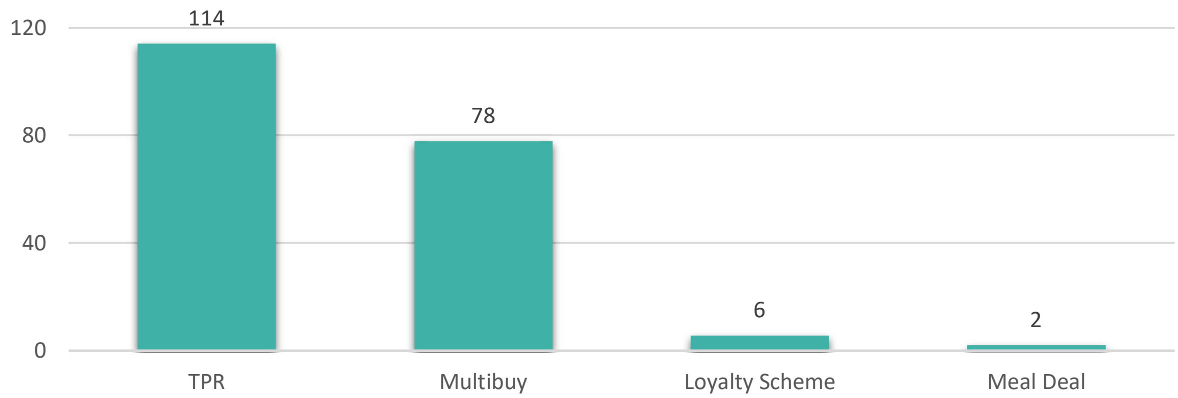


Figure 9. Number of price promotions offered during an average online grocery shopping event, split by type of price promotions.

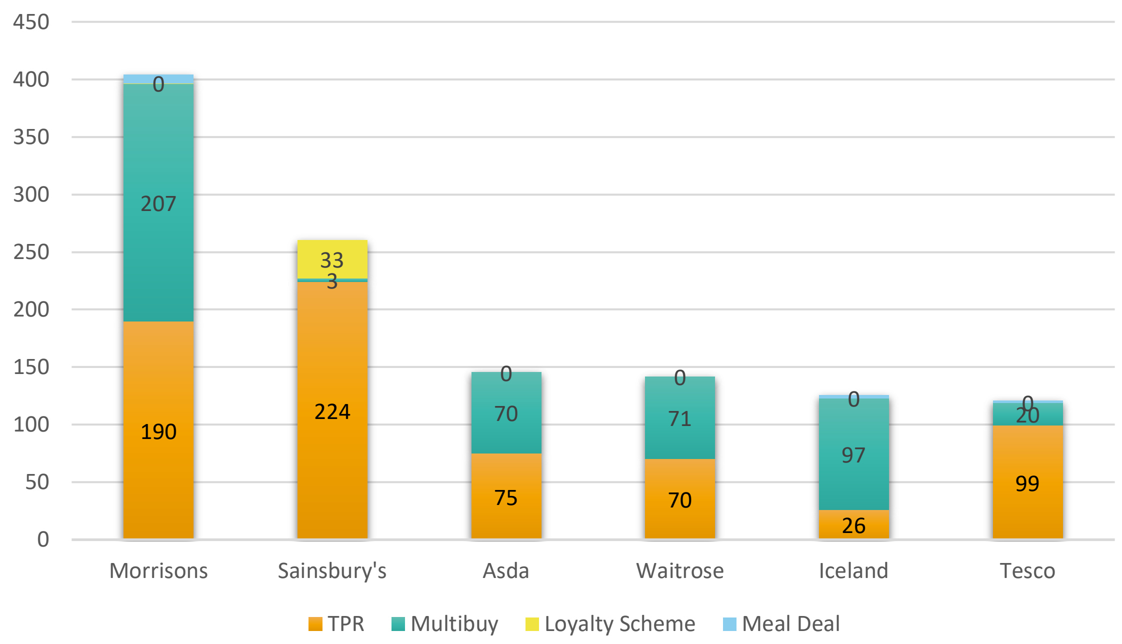


Figure 10. Number of price promotions offered during an average online grocery shopping event, split by supermarket and by type of price promotion.

Interpretation & comment

Among price promotions, the most often used type was TPR (57% of price promotions), followed by multibuy (39%). This stands in contrast with findings from our in-store promotions survey, in which TPRs constituted around 30% of price promotions.

Considerable differences between supermarkets indicate that many combinations of price promotion types work for online grocery retailers.

Non-monetary promotions

Out of 310 non-monetary promotions offered during an average online grocery shopping event, 142 (46%) appeared at the stage of selecting basket items, 114 (37%) were in the offers tab, 31 (10%) on the main page and 23 (7%) at the checkout (Figure 11). However, the supermarkets differed greatly in the proportion of promotions displayed at different stages of a shopping event (Figure 12).

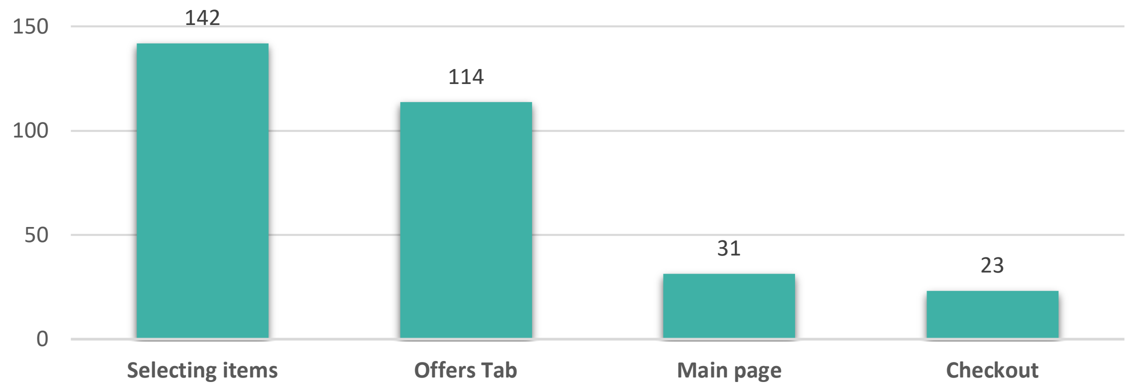


Figure 11. Number of non-monetary promotions offered during an average online grocery shopping event, by type of non-monetary promotion.

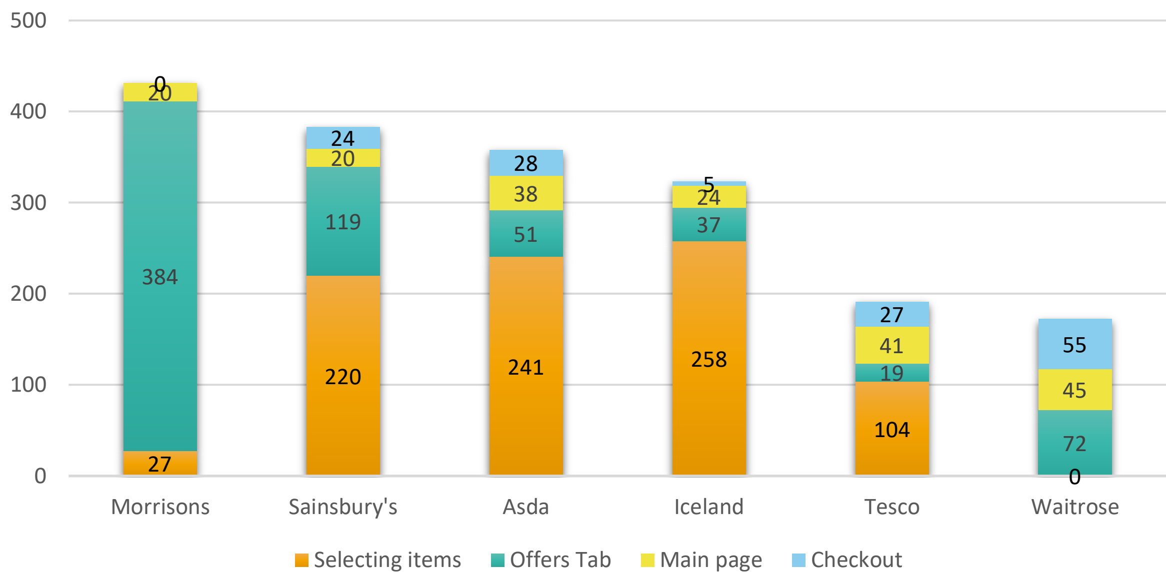


Figure 12. Number of non-monetary promotions offered during an average online grocery shopping event, by supermarket, and by type of non-monetary promotion.

Interpretation & comment

Non-monetary promotions (products appearing at different locations on a retailer's website) seem to be more important in an online retail environment because without them a shopper would see only products they search for through the search tool or browse for in the grocery categories sections. The majority of non-monetary promotions were found at the stage of selecting items (on product landing pages and in the search results) or in the offers tab. Large differences in the number of products promoted at different stages of a shopping event, shows that different combinations can work for online grocery retailers.

Healthy basket vs. standard basket

In November/December we collected data on two baskets, covering 12 shopping events. This allowed comparison of promotions offered depending on the type of products purchased: basket 1 included only healthy food and drink products (n=35) and basket 2 included a standard grocery shopping list (n=33) of mixed food and drink products including 6 discretionary items, one alcoholic drink and two non-food items (see Appendix 1 and 2). To eliminate the effect of different number of food and drink products in the two baskets, and to be able to compare 'healthiness' of promotions offered for each basket, we looked at the proportion of promotions of discretionary products and alcohol between the two baskets.

Overall, the proportion of discretionary product promotions was the same for the two baskets in November/December (23%). There were, however, differences between the supermarkets. Asda, Sainsbury's and Waitrose offered a slightly smaller proportion of discretionary product promotions when shopping for basket 2 items. Contrastingly, Morrisons, Tesco and Iceland offered a larger proportion of discretionary promotions when shopping for basket 2 items (Figure 13).

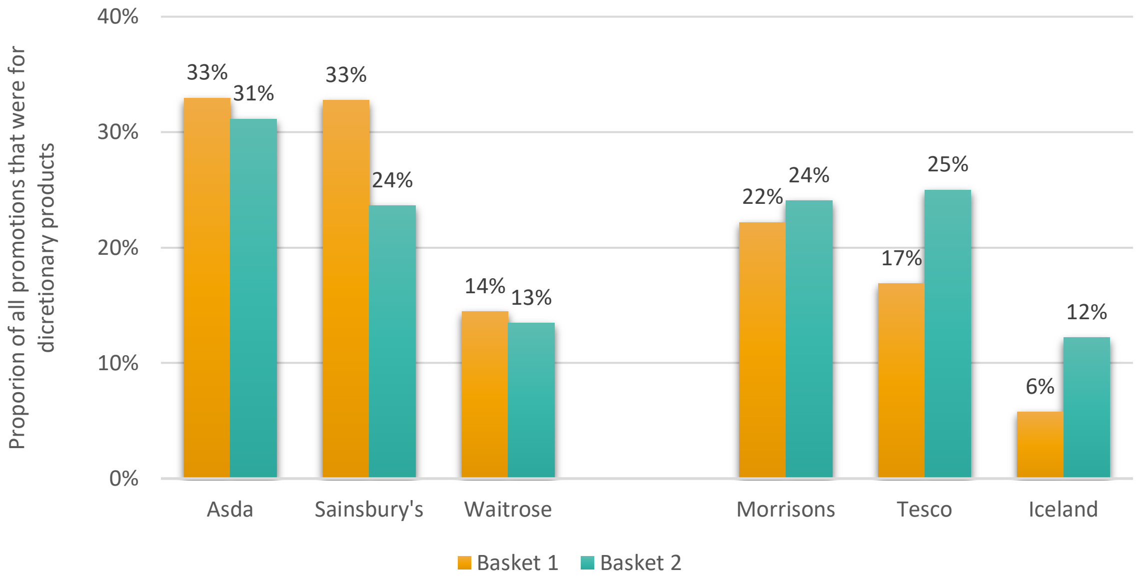


Figure 13. Discretionary product promotions as a percentage of all food and drink promotions, offered during an average online grocery shopping event, by basket and by supermarket.

The proportion of alcohol promotions was similar between the baskets: 10% of all food and drink promotions offered when shopping for healthy basket items were for alcohol; for the standard basket, which had one alcoholic drink item in it, this was 12%. Again, there were differences between the supermarkets (Figure 14). Waitrose and Morrisons offered a smaller proportion of alcohol promotions when shopping for basket 2 items. Sainsbury's, Tesco, Asda and Iceland, however, offered larger proportion of alcohol promotions when shopping for basket 2 items.

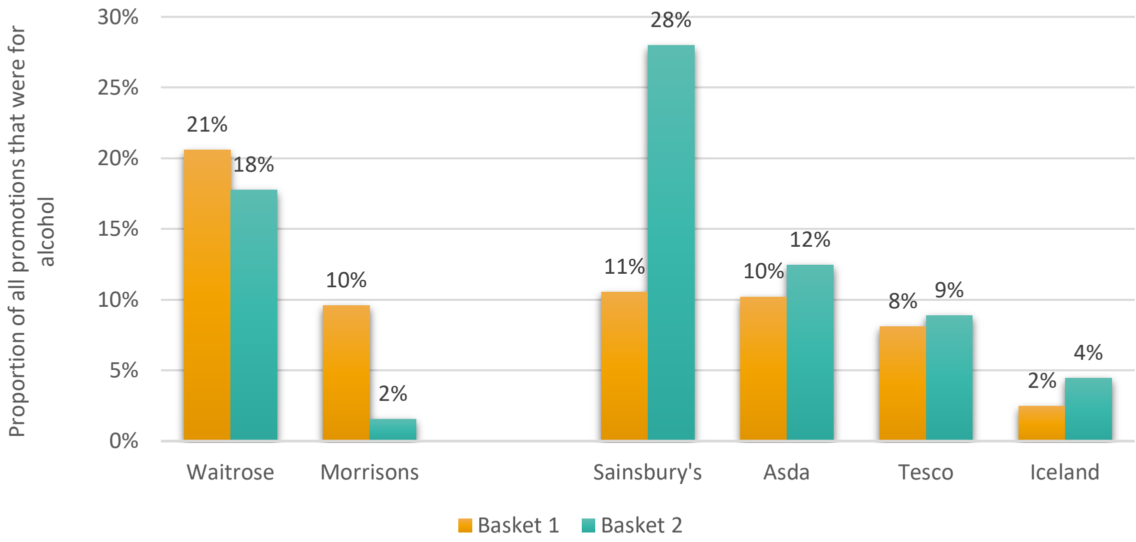


Figure 14. Alcohol promotions as a percentage of all food and drink promotions, offered during an average online grocery shopping event, by basket and by supermarket.

Interpretation & comment

Although we hypothesised that a smaller proportion of discretionary product and alcohol promotions would be offered when shopping for the healthy basket items compared to the standard basket items, we saw no indication of this for discretionary food and drink and only a small effect for alcohol.

The reason we expected more alcohol and discretionary products promotions for the standard basket (that included discretionary and alcohol items) was an assumption that the supermarkets would be likely to promote items in which a shopper showed interest by selecting them into their basket. We made such an assumption as our evidence overview found that individually customised price promotions, which are based on shopper characteristics, could increase retailers' profits, both in physical retail stores and online. Perhaps such a customised promotions strategy is not fully effective for a first-time online customer, like our avatar account, who did not have any history of purchase. To explore the extent of promotion personalisation, further research that includes shopping history should be conducted.

Seasonal difference

The impact of season was explored by comparing the number of promotions offered for basket 1 only between March and November/December. Therefore, the six shopping events in March are compared to the six shopping events in Nov/Dec. Basket 2 (standard) data were not fully collected in March, so seasonal analysis was not possible.

Figure 15 shows average numbers of promotions for all food and drink, discretionary products and alcohol. On average, for all food and drink promotions, supermarkets offered slightly more promotions in November/December compared to March 2020 (417 promotions per event in March vs. 467 per event in November/December; or 112%). For discretionary food and drink this difference was larger. Supermarkets on average promoted 66 discretionary products per event in March, and 117 per event in November/December (177% increase). This difference was the most pronounced for alcohol. In March, supermarkets offered 17 promotions of alcohol per shopping event and in November/December this rose to 59 alcohol promotions per event (360%).

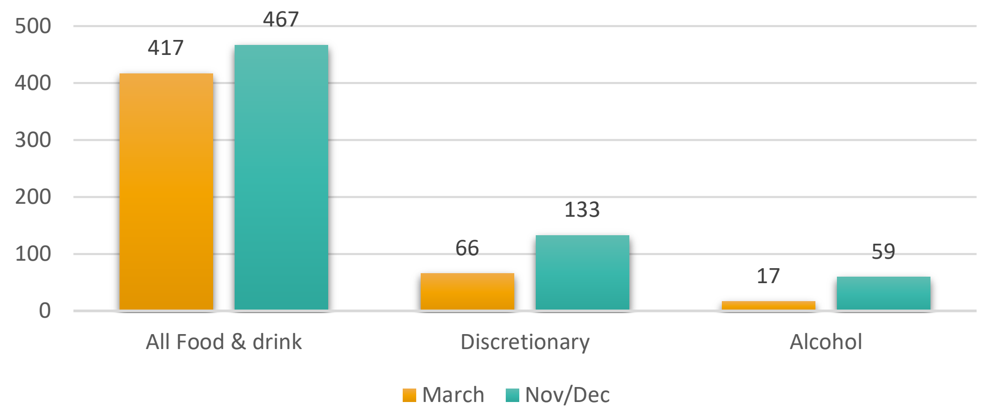
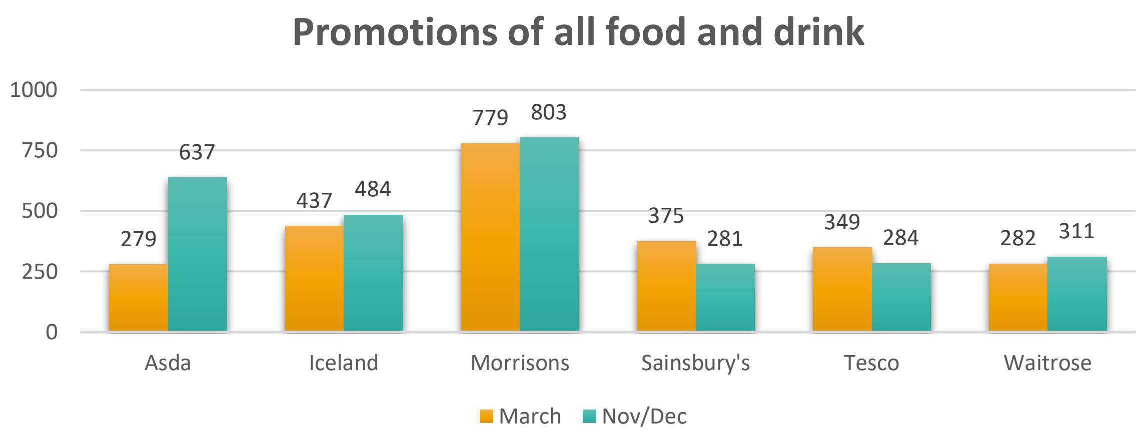


Figure 15. Number of promotions of all food and drink for an average shopping event, in March and November/December 2020.

However, there was a considerable variation in the number of promotions offered by individual supermarkets. Figure 16 shows numbers of promotions each supermarket offered in March and in November/December, for all food and drink (a), for discretionary products (b) and for alcohol (c).

a)



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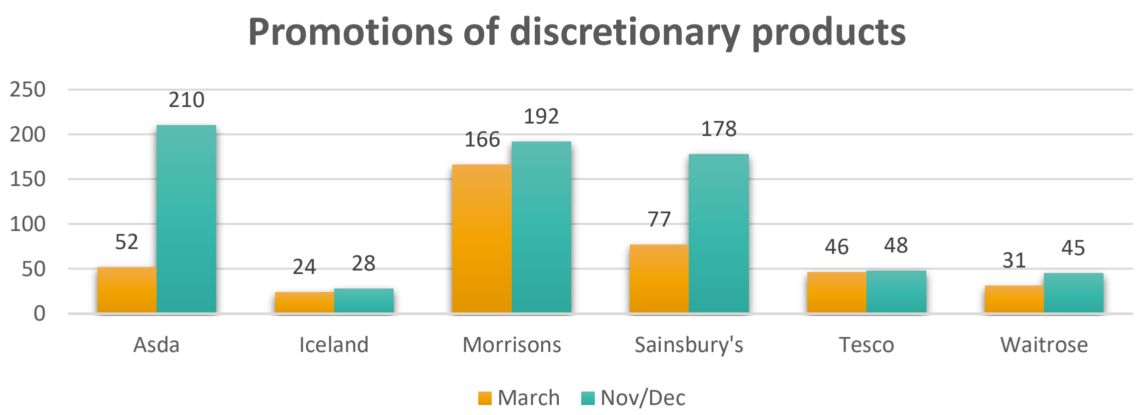

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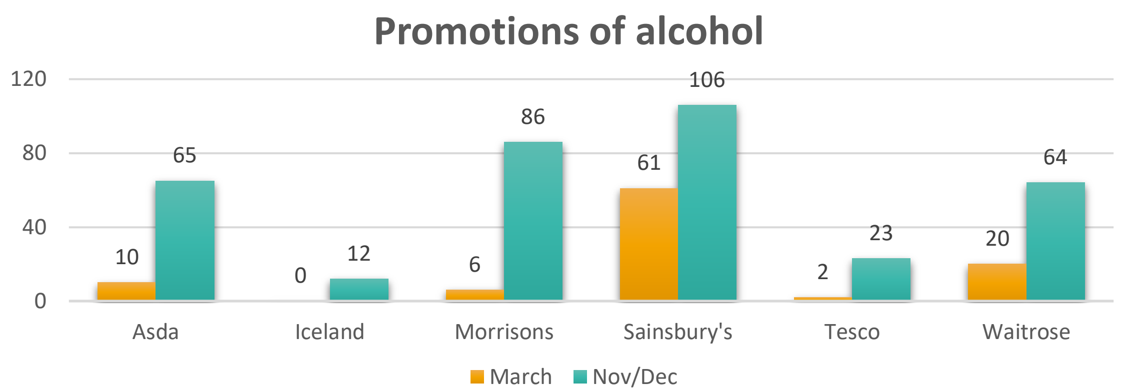

Figure 16. Number of promotions of all food and drink (a), discretionary food and drink (b) and alcohol (c) in March and November/December 2020, by supermarket. In order to conduct this seasonal comparison of all supermarkets, we removed promotions from the search results pages at the 'selecting items' stage from November/December for the two shops (Morrisons – removed 94 promotions and Sainsbury's – removed 534 promotions).

Interpretation & comment

There was a seasonal trend for the number of promotions offered during an average shopping event, with more food and drink promotions offered in November/December than in March. Although themed promotions were not recorded in this survey, there was an obvious Christmas theme in November/December.

While the seasonal trend was, in most cases, rather small for all food and drink, the trend for promotions of discretionary products was stronger, and the trend for alcohol promotions was the strongest. This confirms previous observations by Food Standards Scotland[10] showing around a 10% increase in calories purchased between October and December, compared to the rest of the year. The uplift was much higher in the purchase of some discretionary food categories, reaching 100%, over the festive season (confectionery, cakes and pastries). What is most relevant to this survey, is the finding that the pattern of total purchase trends mirrored the pattern of promotions, particularly for discretionary foods. We could therefore propose that purchase of alcohol was also likely to mirror the pattern of promotions.

LIMITATIONS

Although we collected relatively large amount of data (18 shopping events across 2 time-points), the survey had its limitations. The effect and extent of targeting/personalisation of food and drink promotions could not be well detected with our survey design because the online shopping accounts were newly created for each supermarket, did not have any shopping history, and we did not proceed to payment. Moreover, we cleared cookies before each shopping event to increase comparability of events. This, however, would be unlikely in real life and it could have resulted in fewer targeted promotions being offered. Our rapid evidence overview indicated that shopping lists or shopping history may affect promotions offered, and this could be explored in further research.

SUMMARY

This survey provides the first Scotland-based analysis of food and drink promotions in an online retail environment. Conducted at two time points in 2020, it captured online grocery retail environment immediately prior to the first COVID-19 lockdown, and was repeated at the end of the year. The survey included 6 online supermarkets and used two shopping baskets to collect data on food and drink promotions, based on 18 separate shopping events.

An average shopping event had 510 promotions, of which 61% were non-monetary and 39% were price promotions. Around a fifth of promotions were for discretionary products and around a tenth for alcohol. The discretionary products most often promoted were confectionery, crisps, ice-cream and dairy desserts and soft drinks, but this varied between the supermarkets.

Temporary price reduction was the most frequently employed type of price promotion (57% of price promotions). The most frequently employed non-monetary promotions were at the stage of selecting items (on product landing pages and in the search results) or in the offers tab, however, there was a large variation between the supermarkets.

We did not observe any effect of basket contents on the number of discretionary product promotions but we saw a small effect for alcohol: a researcher shopping for basket 2 (standard) that included alcohol was offered more alcohol promotions than when shopping for the healthy basket. There was, however, a clear seasonal trend for food and drink promotions, with more offered in November/December than in March 2020. The trend was stronger for discretionary products and alcohol than for food and drink in general.

IMPLICATIONS

Findings of this survey, summarised above, have the following implications:

- **At least a fifth of food and drink promotions were for discretionary products; in the context of the obesity epidemic and poor national diet this strengthens the case for the introduction of restrictions.** Promotions of discretionary food and drink made up 21% of all food and drink promotions. This was lower than in our in-store promotion survey,[3] where 40% of promoted products were discretionary. Although encouraging, this could be an under representation of promotions because we used new shopping accounts without shopping history. The literature indicates that shopping history is key to personalising promotions. It is possible that preference for discretionary products, detected through shopping history, would result in more promotions of discretionary products, bringing the proportion closer to the one observed in-store.
- **Non-monetary promotions in an online retail environment are more important than in physical stores.** This is because online shoppers cannot see the stock; and without non-

monetary promotions they would only see items they search or browse for. This survey is a first step to better understanding of the effects of this type of promotion.

- **Temporary price reductions require to be considered in any proposed restrictions.** Temporary price reduction was the most frequently employed type of price promotion (57% of price promotions). Based on our research,[3] this was a higher proportion than in-store (30%).
- **Any restrictions to HFSS promotions should cover as many promotion types as possible.** Supermarkets employed different combinations of price promotions and non-monetary promotions, demonstrating that many combinations work. This indicates that introduction of restrictions to only some types of promotions is likely to lead to compensation with other types.
- **Any restrictions to HFSS promotions should not have seasonal exemptions.** Our survey detected seasonal fluctuations in the number of promotions, with more promotions offered during the run up to Christmas than in March 2020. This trend was stronger for discretionary products and alcohol than food and drink in general.
- **Further research into promotion personalisation should be conducted.** Promotion personalisation strategies were not obvious using a new shopping account that had no purchase history. However, literature suggests that promotions personalisation strategies are effective and actively used, and so further research could reveal the extent of their use.

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APPENDICES

Appendix 1. Basket 1 – healthy basket

Healthy basket items were based on the Healthy Eating Indicator Shopping Basket (HEISB) [7]. Where possible, we chose supermarket own brand products (not value and not luxury ones). The items we included in the basket varied very slightly from the ones listed in HEISB, where they did, the HEISB item is shown in brackets and in italics.

Fruit

1. Red Grapes *(white grapes)*
2. Strawberries *(orange juice)*
3. Gala Apples (if no Gala then Braeburn; if no Braeburn then Granny Smith)
4. Raspberries *(frozen berries)*
5. Bananas
6. Oranges
7. Pears *(pineapple)*

Vegetables

8. Carrots
9. Onions
10. Courgettes *(peas)*
11. Iceberg lettuce
12. White cabbage *(sweetcorn)*
13. Broccoli
14. Closed cup mushrooms *(peppers)*
15. Cauliflower *(tomatoes)*
16. Spinach *(cucumber)*
17. Parsnip *(baked beans)*

Dairy products

18. Cheddar Cheese *(skimmed milk)*
19. Unsalted butter block *(low fat spread)*
20. Full fat yogurt – large tub (Greek style[1]) *(low fat fruit yogurt)*
21. Semi-skimmed milk (2 pints)

Ready meal product

22. Pizza simple margherita *(ready-made lasagne)*

Carbohydrate products

[1] Most stores did not offer whole milk yogurt (full fat yogurts contain around 3.5% fat), and the researcher who collected data in March was selecting Greek style full fat yogurt instead. As fat content of Greek-style full fat yogurts is 3 times that of the whole milk ones, it would be more accurate to choose low fat options (1-2.5% fat). However, for basket comparability between March and November/December, Greek-style full fat yogurts were also selected in Nov/Dec.

23. White potatoes
24. White penne 500g
25. White long grain rice 500g
26. Whole-wheat penne 500g *(brown bread rolls)*
27. Brown rice 500g
28. White sliced bread 800g *(oven chips)*
29. Wholemeal sliced bread 800g
30. Oats
31. Cornflakes *(Weetabix)*

Protein products

32. 2 Chicken breast fillets
33. 2 Salmon fillets
34. Cooked ham slices *(fresh haddock fish)*
35. Beef steak mince 5% fat (250g or if unavailable, then 500g)

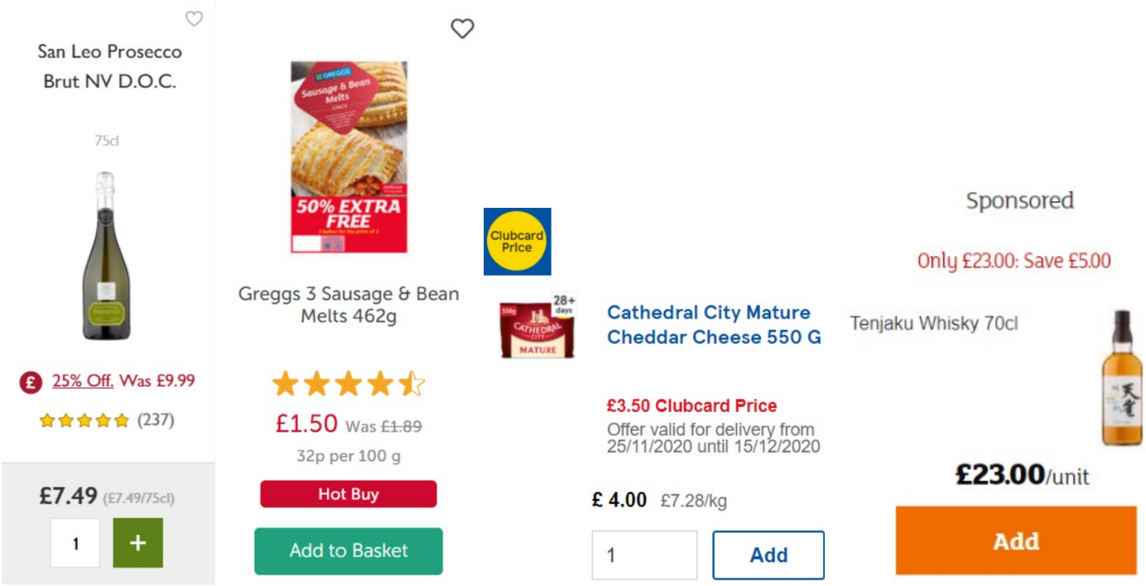
Appendix 2. Basket 2 – standard basket

Shopping Basket 2 was based on the The Grocer 33 list published in January 2020 [8]. Items in italics are two non-food items that were included in the list.

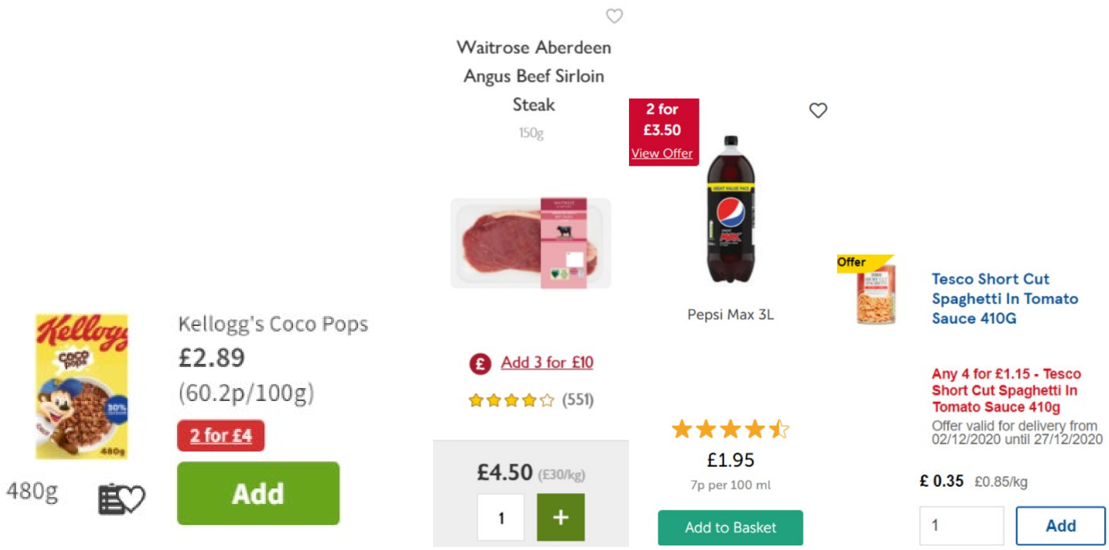
1. Gala apples
2. Baked beans (around 400g can)
3. *Shampoo*
4. Victoria sponge cake
5. Cornflakes
6. Butter brioche rolls
7. Cheetos cheese puffs
8. Chicken
9. Chicken goujons
10. Chopped tomatoes
11. Conchiglie pasta shells
12. Lemonade
13. Double cream
14. Flora spread
15. Fusilli pasta
16. Vanilla ice cream
17. Linda McCartney's burgers
18. Maltesers
19. Mixed pepper stir-fry
20. Mixed vegetables
21. Mozzarella
22. Plums
23. Pork sausages
24. Quorn mince
25. Raspberries
26. Ruby port
27. *Sponge cloths*
28. Corn on the cob
29. Tomato puree
30. Tortilla wraps
31. John West tuna chunks in brine
32. UHT milk- semi-skimmed 1L
33. Warburton's wholemeal loaf

Appendix 3a. Promotion classification used in this survey: examples

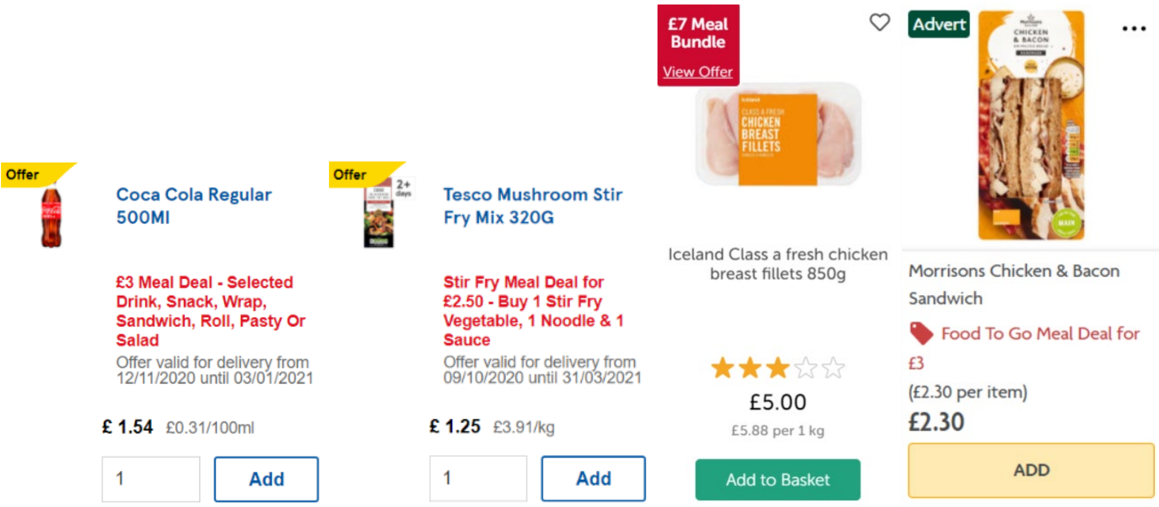
Price promotions – Temporary price reductions



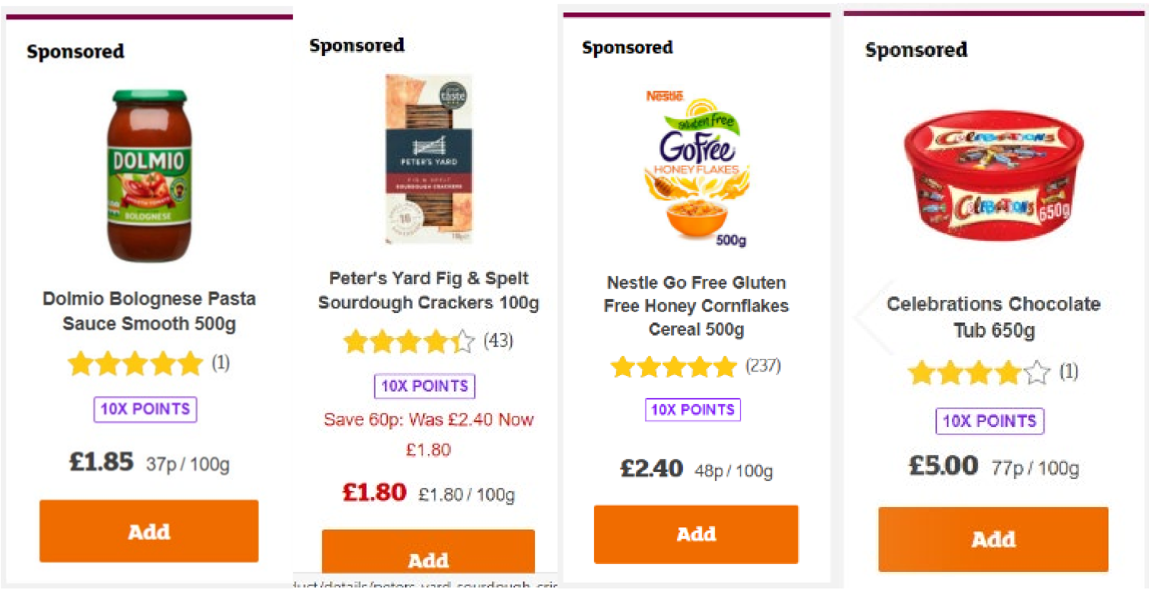
Price promotions – multibuys



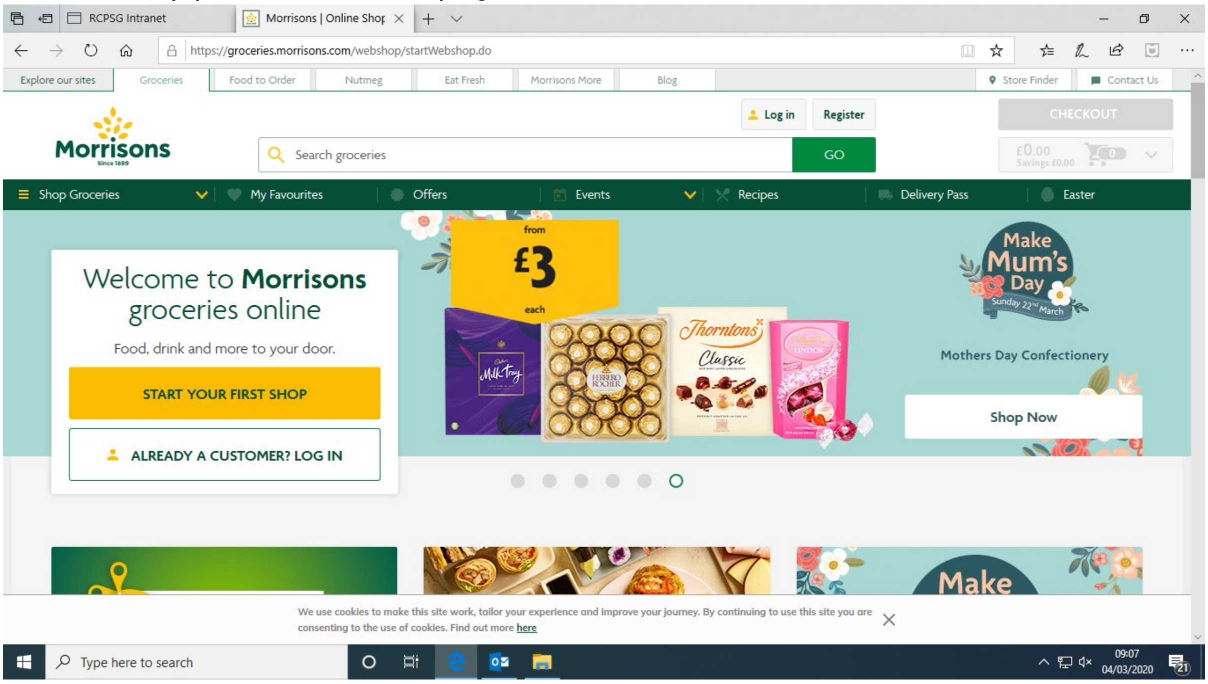
Price promotions – meal deals



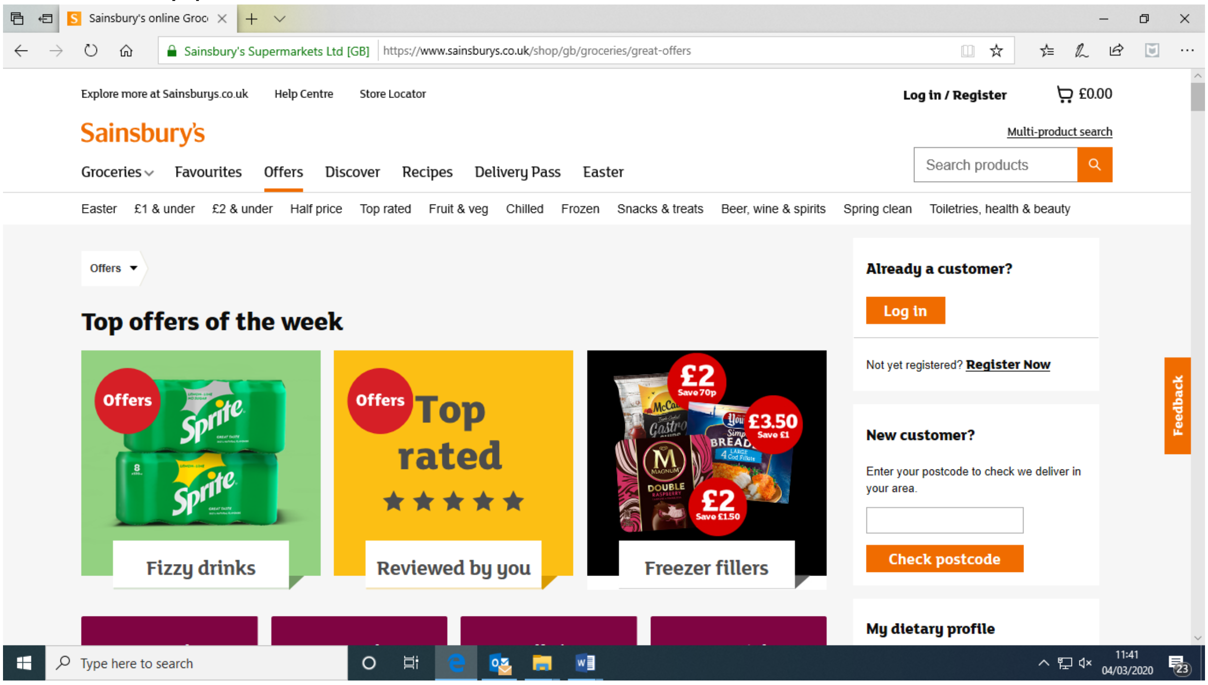
Price promotions – loyalty points



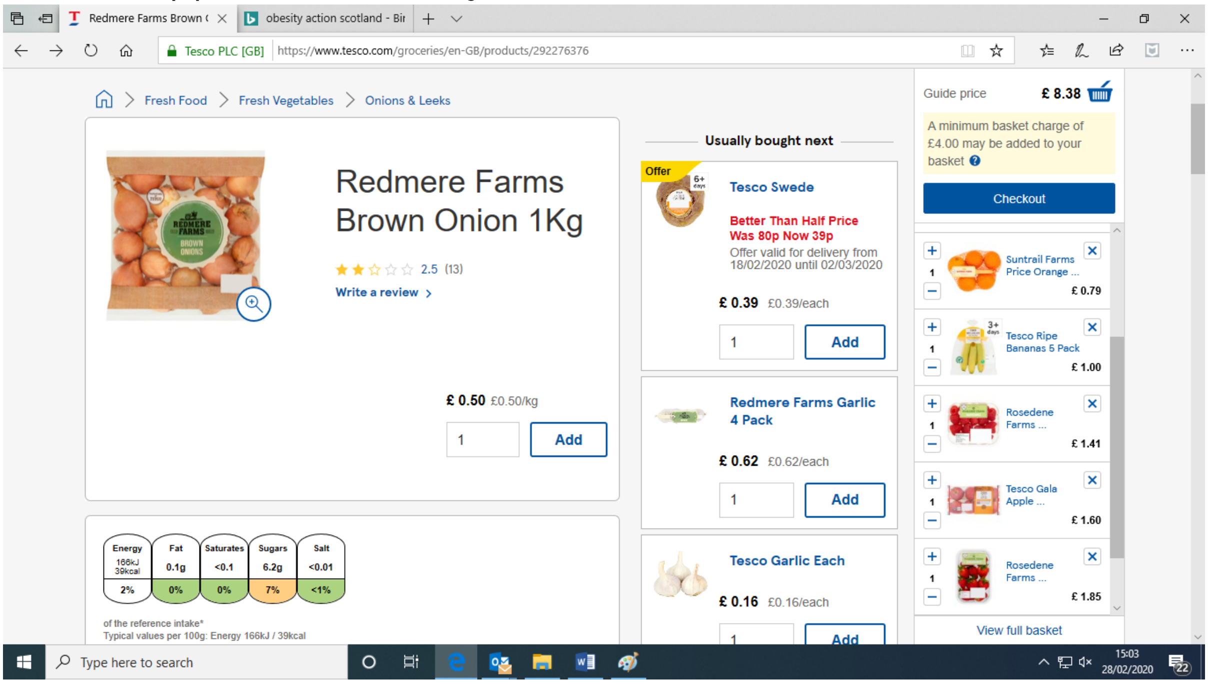
Non-monetary promotions – Main page



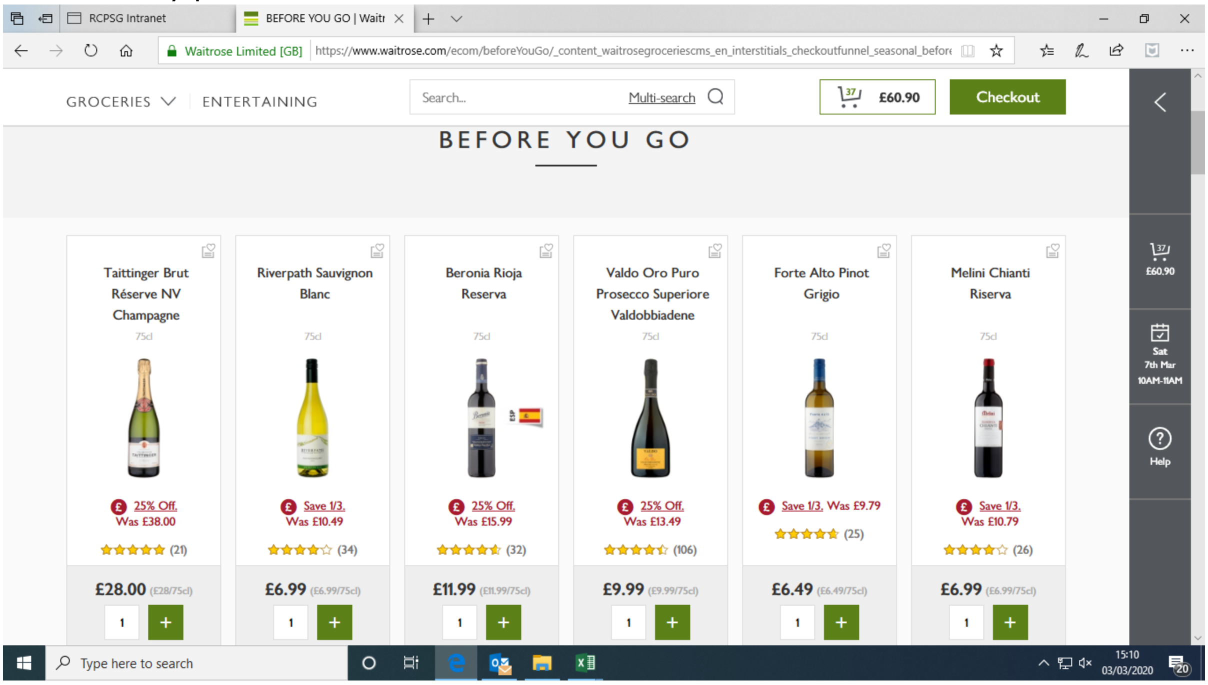
Non-monetary promotions – Offers Tab



Non-monetary promotions – Selecting items

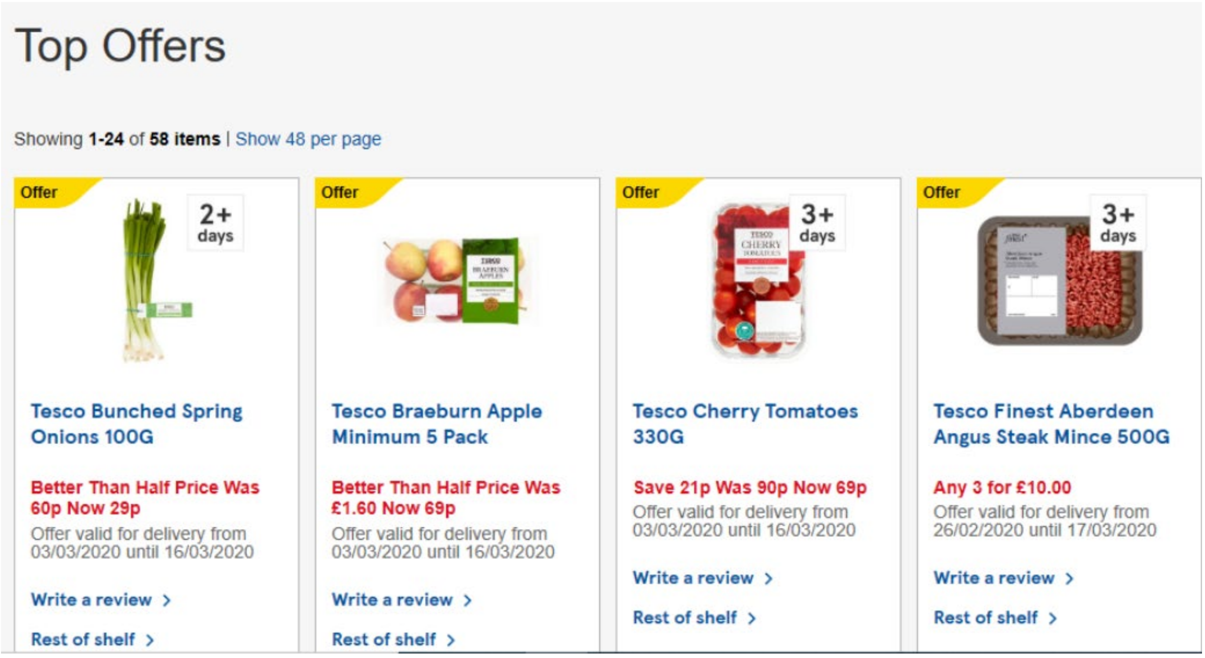


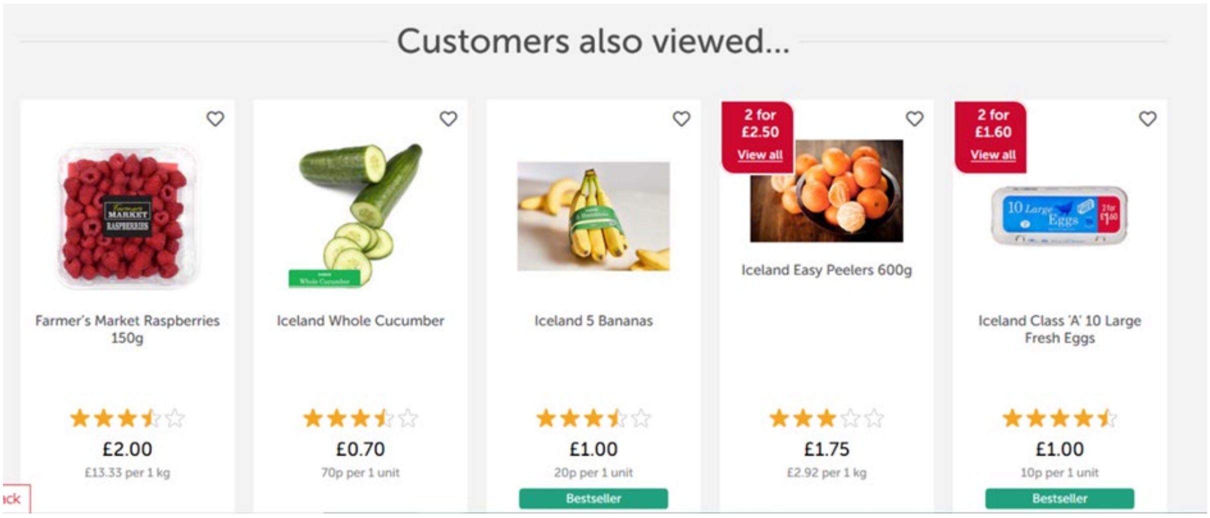
Non-monetary promotions – Checkout

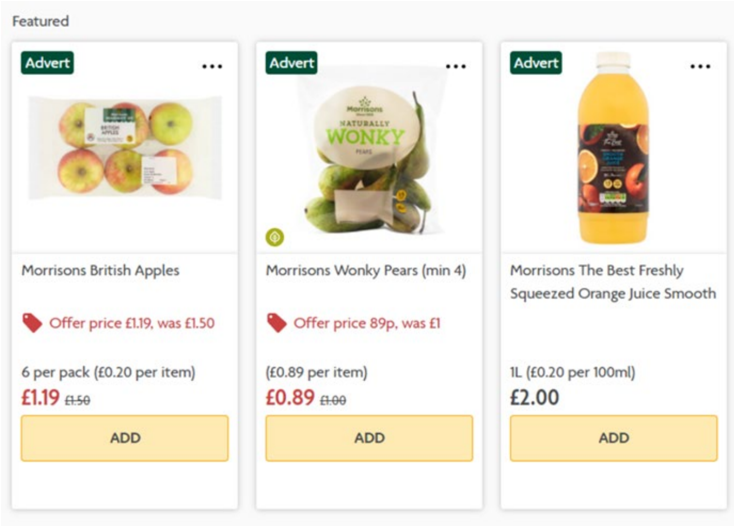


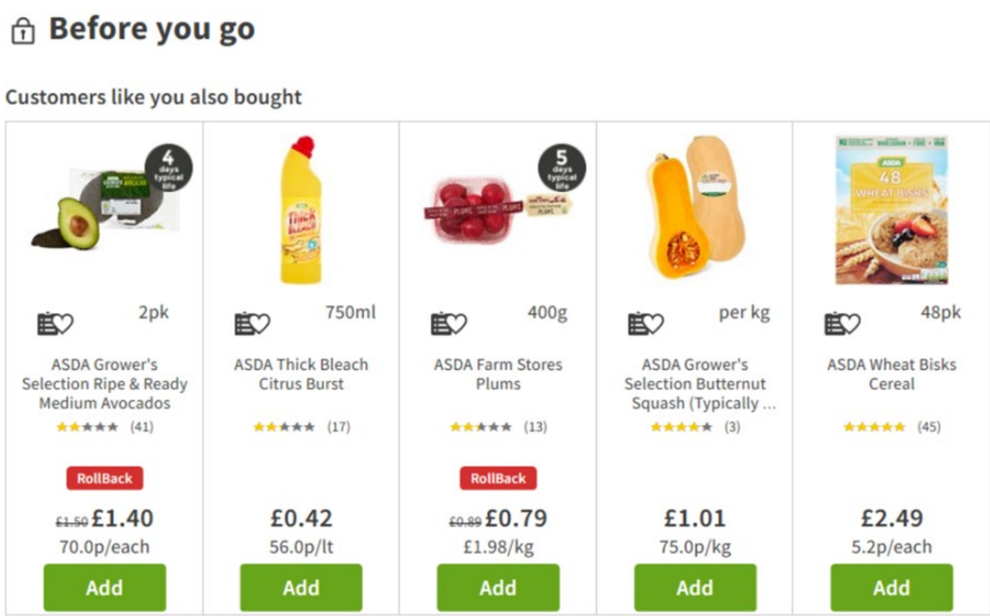
Appendix 3b. Alternative way to classify non-monetary promotions: examples

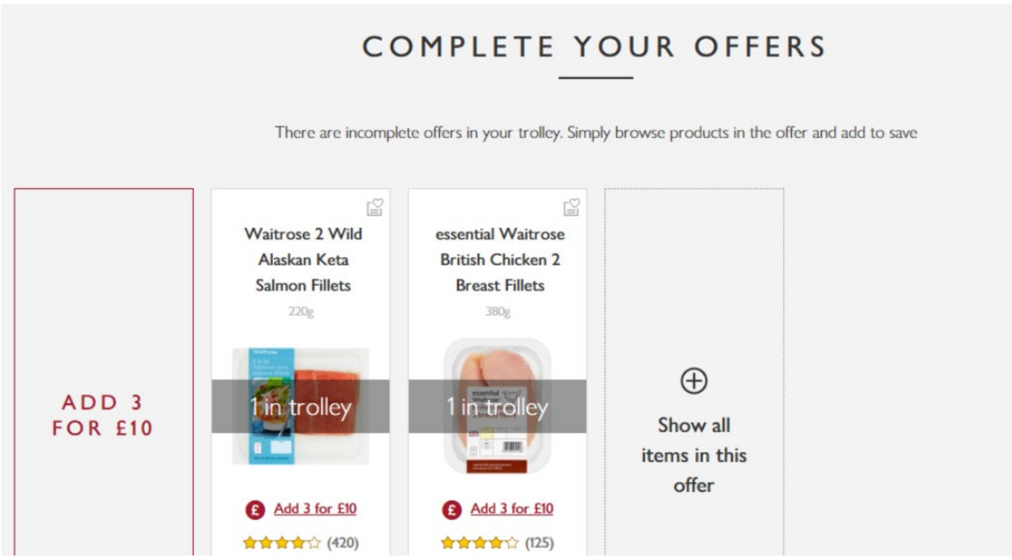
Standard:






Featured
Advert
Morrisons British Apples
Offer price £1.19, was £1.50
6 per pack (£0.20 per item)
£1.19 £1.50
ADD
Advert
Morrisons Wonky Pears (min 4)
Offer price 89p, was £1
(£0.89 per item)
£0.89 £1.00
ADD
Advert
Morrisons The Best Freshly Squeezed Orange Juice Smooth
1L (£0.20 per 100ml)
£2.00
ADD


Before you go
Customers like you also bought
2pk
ASDA Grower's Selection Ripe & Ready Medium Avocados
(41)
RollBack
£1.50 £1.40
70.0p/each
Add
750ml
ASDA Thick Bleach Citrus Burst
(17)
£0.42
56.0p/lt
Add
400g
ASDA Farm Stores Plums
(13)
RollBack
£0.89 £0.79
£1.98/kg
Add
per kg
ASDA Grower's Selection Butternut Squash (Typically ...
(3)
£1.01
75.0p/kg
Add
48pk
ASDA Wheat Bisks Cereal
(45)
£2.49
5.2p/each
Add


COMPLETE YOUR OFFERS
There are incomplete offers in your trolley. Simply browse products in the offer and add to save
ADD 3 FOR £10
Waitrose 2 Wild Alaskan Keta Salmon Fillets
220g
1 in trolley
Add 3 for £10
(420)
essential Waitrose British Chicken 2 Breast Fillets
380g
1 in trolley
Add 3 for £10
(125)
Show all items in this offer

Visually highlighted: