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HEALTH AND SOCIAL CARE

Consumer Survey on Shopping Behaviours and Meal Deals: Evidence Brief

Prepared by Scottish Government Health and Social Care Analysis: Population Health Unit – January 2024

This paper presents a summary of key data from a consumer survey commissioned by Scottish Government to Progressive Partnership. It was conducted in Scotland in September 2023. This evidence, in combination with stakeholder engagement, a rapid evidence review conducted by Public Health Scotland and other evidence, was used to inform the detail of proposals for further consultation on regulations to restrict volume and location of food high in fat, sugar or salt (HFSS).

A quota sample of 1187 adults in Scotland age 18+ years were asked a number of questions in relation to shopping behaviours and meal deals during September 2023. The sample was weighted to be representative of the Scottish adult population by age, sex and socioeconomic status. Statistical analysis was conducted but is indicative only due to the quota design, which has larger margins of error than a random probability design.

See also the accompanying Data tables and Technical Report from Progressive Partnership with added summary tables generated by Scottish Government.

Grocery Shopping

Respondents were asked what percentage of their grocery food shopping they obtained from the following store types (either online or in-store):

- Large supermarket stores
- Discount stores
- Local/convenience stores
- Other

Overall, the majority of grocery shopping is purchased from supermarkets (60%), followed by discounters (28%) with only a small percentage obtained from local/convenience stores (10%) or other types of store (2%).

All groups, except for ethnic minority (EM) groups, do the majority of their shopping from supermarkets. There are no differences in where people shopped by gender or disability. There are some differences by age, ethnicity, area of deprivation and rurality.

Age - Older people (55+) do more of their grocery shopping at supermarkets (65%) than younger people (58% for 35-54yrs and 55% for 18-34yrs). Younger age groups get a greater proportion of their shopping from discounters than older groups (31% for 18-34yrs vs 25% for 55+yrs).

Ethnicity - White groups do more of their grocery shopping at supermarkets (61%) than EM groups (48%). EM groups generally obtain a greater proportion of their shopping from discounters than white (33% vs 28%), although this difference is not statistically significant.

Socioeconomic status (SES) – The least deprived (SIMD5) do more of their grocery shopping at supermarkets (62%) than the most deprived (SIMD1; 53%). SIMD1 get a greater proportion of their shopping from discounters (35%) than SIMD5 (27%). There is no statistically significant differences by other measures of SES (income and social group).

Rurality – Those from remote rural locations report significantly less of their shopping is purchased from discounters (20%) compared to accessible rural (28%) and 'Rest of Scotland' (i.e. urban) (29%).

All groups only obtain a relatively small percentage of their shopping from local/convenience stores. The youngest age group obtain a little more (12%) than older groups (9-10%). There is a tendency for EM groups to obtain more than white groups (14% vs 10%), although this difference is not significant.

See Table 1 in Data Tables on Tab titled "SHOPPING – Summary Tables"

Eating Out

Dine in at or takeaway

In questions DV3a to DV3d, respondents were asked, "How often do you dine in at, or get a takeaway delivered from, the following types of places?":

- Fast-food outlets and takeaways
- Full/table service restaurants, pubs or bars
- Cafés and coffee shops
- Other places

Response options were: Several times a week; About once a week; About 2-3 times a month; About once a month; Less than once a month; Never; Don't know.

The main places people report eating out at are fast food outlets/takeaways and cafes and coffee shops, with almost one fifth (19%) reporting eating out at both these locations at least once a week or more and over half reporting once a month or more (56% and 53%, respectively).

Proportion reporting frequency of eating out at different types of OOH outlet

Store type	% eat out at outlet at least once a week	% eat out at outlet at least once a month	% eat out at outlet at least sometimes
Fast-food outlets and takeaways	19	56	84
Full/table service restaurants, pubs or bars	6	37	84
Cafés and coffee shops	19	53	82
Other places	8	20	44

Analysis by population groups suggests some notable differences. Assessment is more robust against a frequency of once a month or more due to subsample sizes.

Gender – A higher proportion of men report eating out once a month or more at restaurants/pubs (40%) and ‘other’ outlets (25%) compared to women (34% and 16%, respectively).

Age – Younger age groups (18-34) report eating out more often at all types of outlets compared to older groups no matter the frequency.

SES – A higher proportion of those in social groups AB eat out at restaurants/pub/bars, café and coffee shops and other places compared to social groups DE no matter the frequency. A higher proportion of those with high income compared to low income eat out at all outlets at least once a month or more or at least sometimes. However, a higher proportion of those from the most deprived areas eat out at fast food/takeaways at least once a month compared to the least deprived. There is the same tendency for eating at these outlets at least sometimes, but the result is not significant.

Ethnicity – A higher proportion of those from EM groups report eating out at all outlets no matter the frequency. Most, but not all results are statistically significant. Where they are not significant, they still show the same tendency.

Disability – There are some indications that non-disabled eat out more at all outlet types monthly or at least sometimes, but no differences at once a week or more.

Rurality – Urban generally eat out more at all outlet types based on once a month or at least sometimes data.

See Tables 2, 3 & 4 in Data Tables on Tab titled "SHOPPING – Summary Tables"

Food on the Go (FOTG)

In questions DV4a to DV4f, respondents were asked "How often do you get food 'on the go' from the following types of places?":

- Fast-food outlets and takeaways
- Cafés and coffee shops
- Bakery and sandwich shops
- Supermarkets
- Convenience stores
- Other places

Response options were: Several times a week; About once a week; About 2-3 times a month; About once a month; Less than once a month; Never; Don't know.

Proportion reporting frequency of getting 'food on the go' from different types of outlets

Store type	% FOTG from outlet at least once a week	% FOTG from outlet at least once a month	% FOTG from outlet at least sometimes
Supermarkets	18	47	73
Bakery and sandwich shops	14	47	78
Café and coffee shops	13	39	69
Fast food/takeaway	13	45	74
Convenience stores	12	29	56
Other	7	22	50

The main places people report getting FOTG are from supermarkets and bakery /sandwich shops with 18% reporting getting FOTG at least weekly from supermarkets and 14% from bakery/sandwich shops. Nearly half report getting FOTG at least monthly from either of these.

Analysis by population groups suggests some notable differences. The data is better for a frequency of once a month or more due to subsample sizes.

Gender – A higher proportion of men report getting FOTG from all outlet types.

Age – A higher proportion of younger people report getting FOTG from all outlets types with the youngest age group (18-34) getting more than those age 35-54 and this latter group getting more than those age 55 years or older.

SES – A higher proportion of those in social groups AB compared to DE report getting FOTG from all outlet types. A higher proportion of high income compared to low income report getting FOTG from all outlet types.

Ethnicity – A higher proportion of those from EM groups compared to white respondents report getting FOTG from all outlet types, with the exception of other places.

Disability – A higher proportion of non-disabled than disabled report getting FOTG at least sometimes from all outlets with the exception of convenience stores.

Rurality – A higher proportion of urban respondents compared to rural report getting FOTG from all types of outlets. The direction of findings is consistent even though not all the differences are statistically significant.

See Tables 5, 6 & 7 in Data Tables on Tab titled “SHOPPING – Summary Tables”

Meal Deals

Extent of purchasing

Responses to the consumer survey supports an understanding that meal deals are purchased frequently by a sizeable proportion of the population:

- 21% of adults in Scotland purchase a lunch meal deal at least once per week;
- 9% of adults in Scotland purchase an evening meal deal at least once per week;
- 24% of adults in Scotland purchase either a lunch or evening meal deal at least once per week.

Characteristics associated with higher purchases of meal deals: younger age; higher affluence; ethnic minority (EM); non-disabled; living in urban areas.

Gender – A higher proportion of men than women purchase lunchtime meal deals at least once a week (24% vs 19%). A higher proportion of women than men purchase evening meal deals at least sometimes (29% vs 23%).

Age – The proportion who purchase lunch or evening meal deals either weekly or at least sometimes decreases with age.

Socioeconomic status (SES) – Overall, the data suggests that those who are more affluent are more reliant on meal deals.

A higher proportion of those in social groups AB compared to CD purchase lunch or evening meal deals at least weekly and sometimes.

A higher proportion of those with high incomes purchase lunch meal deals (79%) than those on mid (56%) or low incomes (50%) at least sometimes. Numbers purchasing meal deals are too small to make meaningful comparisons.

No statistical differences are found comparing most and least deprived for purchase of lunch or evening meals either at least once a week or sometimes.

Ethnicity – A higher proportion of those from EM groups consistently report purchasing lunch or evening meal deals at least weekly or sometimes compared to those from white groups.

Disability – A higher proportion of non-disabled report purchasing lunch meal deals at least sometimes (60%) than disabled (53%).

Rurality – A higher proportion of urban residents report purchasing of lunch meal deals at least weekly or sometimes than those from rural areas. The same tendency can be observed for evening meal deals, though not statistically significant and with very small subsample numbers.

See Tables 1, 2 & 3 in Data Tables on Tab titled "MEAL DEAL Summary Tables"

Items commonly purchased and whether healthy or not

Lunch Meal Deals

The survey asked, "Thinking about the type of lunchtime meal deal you most often purchase, what do you tend to choose to include as a main?". The following response options could be selected and more than one could be selected:

- Sandwich (including baguettes, sub sandwiches etc.)
- Wrap
- Pie
- Sushi
- Pasta salad
- Other (please specify)
- A main doesn't tend to be part of the meal deals I buy

A similar style of question was asked separately about a snack and a drink. See technical report and output tables for further details on response options for these items.

In each element of the meal deal, healthier items and less healthy items were grouped together to compare the extent to which healthier versus less healthy items were bought.

Responses to the consumer survey indicate that lunch meal deals mostly consist of a sandwich and crisps and either a sugar-sweetened beverage (SSB) or a low calorie soft drink. The results support the concern that add-on snacks or drinks to the main item tend to be HFSS.

Top three items purchased for lunch meal deals[1]

Item category	**Lunch** (% reporting this is what they typically include. Multi-code so do not sum to 100%)	**Balance of healthier vs less healthy**
Main	Sandwich – 84% Wrap – 36% Pasta Salad – 21%	Any healthier – 96% Any less healthy – 18%
Snack	Crisps – 68% Chocolate – 32% Fruit/nuts – 22%	Any healthier – 29% Any less healthy – 88%
Drink	Regular soft drink (SSB) – 39% Sugar free soft drink (low cal) – 39% Water – 24%	Any healthier – 69% Any less healthy – 54% (inc. fruit juice/smoothie)

See Table 4 in Data Tables on Tab titled “MEAL DEAL Summary Tables”

Evening Meal Deals

In questions 14a to 14e, the survey asked, “Thinking about the type of evening meal deal you buy from supermarkets, what do you tend to choose to include as a [insert starter, or main, or side, or dessert or drink]?” Respondents were able to write in free text what they typically purchased.

The table on the next page offers a summary of the analysis of free text responses and presents the reported top three ranked items typically purchased as part of an evening meal deal from a supermarket – those estimated to be **healthier** (from perspective of contribution to calories) are in bold.

A third (36%) of those who report ever purchasing an evening meal, indicate they typically include a starter by stating what type in the free text box.

Analysis of the free text indicates the top 3 choices for starter are: soup, Indian or similar style of starters and bread, mostly garlic bread (17%, 12% and 10% of the 107 classifiable mentions respectively – 39% combined). Potentially healthier items, such as fruit or salad made up 12% of mentions combined.

[1] Although the consumer survey suggests the ‘mains’ component is largely ‘healthier’, the main is challenging to classify for these results due to lack of nutritional information. Sandwiches in this study have been classed as healthier (in comparison to pasties or pies) but many may fail nutrient profiling modelling The nutrient profiling model - GOV.UK (www.gov.uk).

Top ranked elements of evening meal deals reported by consumer survey respondents who purchased them (base of 323)

Meal element	Rank 1 item	Rank 2 item	Rank 3 item
Starter	**Soup**	Indian or similar style of starters – fried e.g. pakora	Bread, mostly garlic bread
Main	**Sandwich or wrap**[2]	Chicken dish (unspecified mainly but included chicken in sauce or roast chicken)	Pasta dish (mostly just listed as pasta, but several reported lasagne or macaroni)
Sides	Chips/fries/wedges	**Veg or salad**	Garlic bread/naan
Dessert	Cheesecake	General dessert (trifle, tiramisu, sticky toffee pudding)	Cake
Drink	Fizzy soft drink (not known if sugar added or not)	Alcohol (mainly wine)	**Diet fizzy soft drink**

See Table 5 in Data Tables on Tab titled “MEAL DEAL Summary Tables”

The vast majority who report buying an evening meal deal (93%), indicate they typically include a main by stating what type in the free text box.

Analysis of the free text indicates the top 3 choices for main are: sandwich or wrap; a chicken dish (unspecified mainly but included chicken in sauce or roast chicken); and a pasta dish (mostly just listed as pasta, but several reported lasagne or macaroni) (19%, 18% and 16% of classifiable mentions, respectively). Pizza comes fourth (12%). Specific mention of vegetarian dishes or salad or pasta salad dishes are only made by 3%.

The large majority who report buying an evening meal deal (80%), indicate they typically include a side by stating what type in the free text box.

Analysis of the free text indicates the top 3 choices for sides are: chips/fries/wedges, veg or salad and garlic bread/naan (23%, 23% and 12% of classifiable listed items, respectively).

50% of sides appear to be less healthy compared to 40% healthier and around 10% unable to estimate how healthy they might be.

[2] Classed here as healthier compared to pasties or pies but may fail the nutrient profiling model (NPM) - The nutrient profiling model - GOV.UK (www.gov.uk)

A sizeable majority of those who report buying an evening meal deal (66%), indicate they typically include a dessert by stating what type in the free text box.

Analysis of the free text indicates the top 3 choices for desserts are: cheesecake, a general type of dessert (e.g. trifle, sticky toffee pudding, tiramisu, etc) or cake (26%, 18% and 17% of classifiable listed items, respectively). Only 2% claim to purchase fruit and 4% yoghurt.

A sizeable majority of those who report buying an evening meal deal (72%), indicate they typically include a drink by stating what type in the free text box.

Analysis of the free text indicates the top 3 choices for drinks are: fizzy soft drink, alcohol (mainly wine), or diet fizzy soft drink (36%, 23% and 12% of classifiable listed items, respectively).

Only 7% claimed to purchase water (or flavoured water) and 3% fruit juice.

See Tables in Data Tables on Tab titled “Evening Meal Deals summary Q14”

Motivations for purchasing meal deals

Question 11 of the survey asked “What is the main reason you buy a lunch meal deal?”

Respondents were able to choose multiple responses from the following options:

- Price/value for money
- Convenience
- Taste/enjoyment
- Variety
- Treat
- Health (e.g. nutritional value)
- Other (please specify)
- Don’t know

The survey findings indicate that value for money is a key driver of purchasing, but with little difference by SES and second in importance to convenience. Value for money was cited by 56% of those purchasing lunch or evening meal deals, but convenience was cited by 76% of those who purchase lunch meal deals and 66% of those who purchase evening meal deals.

Taste and a treat are relatively more important in relation to evening meal deals than for lunch meal deals.

Importance of different motivations for purchasing **lunch meal deals** in rank order:

Motivation	% who selected this
Convenience	76%
Price/value for money	56%
Taste/enjoyment	28%
Treat	20%
Variety	18%
Health (e.g. nutritional value)	6%
Other (please specify)	2%
Don't know	1%
Weighted base	683

Importance of different motivations for purchasing **evening meal deals** in rank order:

Motivation	% who selected this
Convenience	66%
Price/value for money	56%
Taste/enjoyment	42%
Treat	42%
Variety	20%
Health (e.g. nutritional value)	6%
Other (please specify)	0%
Don't know	0%
Weighted base	311

For lunchtime meal deals:

Convenience – There is no difference in the proportion who selected this by population group.

Price/value for money – This is more important to men compared to women (62% vs 51%); younger age groups (18-34 and 35-54) compared to those 55 years and older (57% and 60% vs 50%, respectively); and disabled compared to non-disabled (64% vs 53%).

Taste/enjoyment – This is more important to the mid age range group (35-54) compared to those 55 years and older (33% vs 22%); and disabled compared to non-disabled (34% vs 25%).

Treat – This is more important to women compared to men (24% vs 16%); and to accessible rural compared to 'Rest of Scotland' (i.e. urban) (34% vs 20%).

For evening meal deals, numbers are generally too small to make meaningful comparisons of motivations between different population groups.

See Tables 6 and 7 in Data Tables on Tab titled "MEAL DEAL Summary Tables"

Perceptions of how meal deals influence purchasing of additional items

Respondents were asked, "To what extent do you agree with the following statement: buying a meal deal means I buy and consume items I would not otherwise have purchased?"

A majority (56%) agree that buying a meal deal means they buy and consume items they would not otherwise have purchased compared to 21% that disagree and 22% who neither agree or disagree.

There are no statistically significant differences by population group.

See Table 8 in Data Tables on Tab titled "MEAL DEAL Summary Tables"

Anticipated actions if restrictions placed on inclusion of less healthy items in meal deals

Question 18 asked a hypothetical question about what action consumers would take if less healthy items were no longer able to be purchased as part of a meal deal: "If less healthy items, such as 'off-the-shelf' pre-packed pasties, crisps, chocolate, sugary drinks, pizzas, garlic bread etc. were not available as part of meal deals, what do you think you would do?"

The results indicate that restricting meal deals has the potential to influence positive behaviour change for a sizeable proportion of those who purchase meal deals - 32% say they would just buy a healthier meal deal; 9% would just buy a main; and a further 9% feel the question not applicable as they don't buy less healthy items.

Others may change little around what they eat at lunch or evening. A fifth indicate they would purchase additional items anyway (22%), purchase items desired but not as a meal deal (19%) or take their own snacks/drinks from home[3] (9%).

No other unintended consequences are highlighted – no one cites an alternative response to those set out in the survey and listed above. For example, switching to loose food items or going to takeaways is not mentioned, which was an unintended consequence suggested by industry in the consultation.

Proportion and number reporting their most likely response

Option	Percent	Number
Still buy a meal deal but one that includes non-restricted, healthier items	32%	240
Buy the healthier meal deal and any additional items I want on top	22%	163
Buy the items I want separately (i.e., not a meal deal)	19%	144
Just buy a main and take my own snack/drink from home	9%	69
Just buy and eat a main with no additional items	9%	67
Other (please specify)	0%	3
Not applicable – I do not buy less healthy, pre-packed items when I buy meal deals	9%	64
Total	100%	750

See Table 9 in Data Tables on Tab titled “MEAL DEAL Summary Tables”

Public Opinion on restricting meal deals

Question DV19a asked, “To what extent do you support or oppose the idea of excluding less healthy ‘off-the-shelf’ pre-packed items as part of a meal deal to support healthier diets and reduce the risk of obesity? (Less healthy items can still be bought, but not as part of a meal deal. Meal deals with healthier items can still be offered)”. Response options were: Strongly support; Support; Neither support nor oppose; Oppose; Strongly oppose; Don't know.

The Public is generally supportive of healthier meal deals, although not emphatic. A greater proportion are supportive of restrictions on meal deals (40%) than oppose (24%), although a large proportion state neither support nor oppose (34%).

[3] Which may or may not be healthier.

Age – The youngest age group (18-34) are more likely to support than those age 55 years and older (45% vs 36%).

Ethnicity – Those from EM groups are more likely to support than those from white groups (59% vs 39%).

There are no differences between other population groups.

See Table 10 in Data Tables on Tab titled “MEAL DEAL Summary Tables”

How to access background or source data

The data collected for this <statistical bulletin / social research publication>:

☐ are available in more detail through Scottish Neighbourhood Statistics

☒ are available in the accompanying supplementary Data Tables

☐ may be made available on request, subject to consideration of legal and ethical factors. Please contact <email address> for further information.

☐ cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.

This report is available on the Scottish Government Publications Website (http://www.gov.scot/Publications/Recent)

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