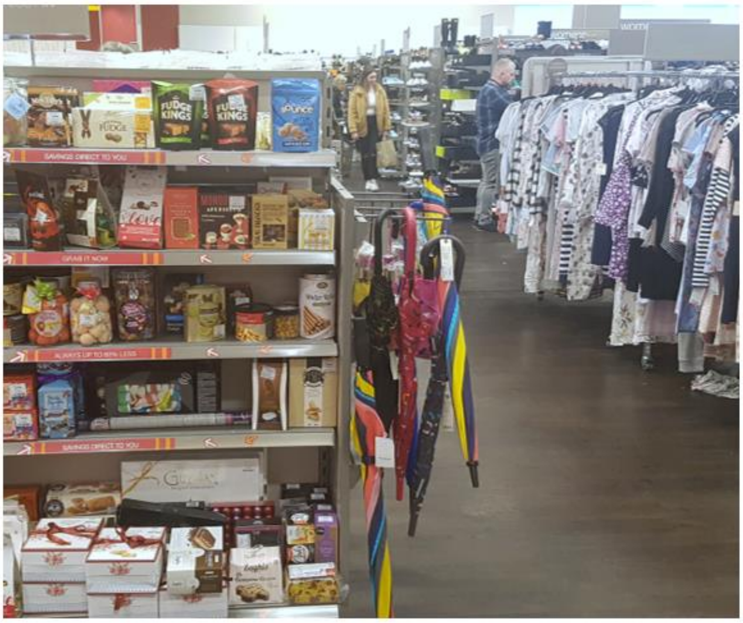

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Public Health England

Availability, placement, marketing & promotions of HFSS content foods in traditional non-food retail environments

Strand 2:

Consumers Experiences of food and drink availability and marketing in non-food stores

UK Health Forum and the Health Equalities Group

Strand Lead: Health Equalities Group, March 2019

Report commissioned by Public Health England

This report was jointly produced by UK Health Forum and Food Active (part of the Health Equalities Group).

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Acknowledgements

The survey was implemented by Beth Bradshaw, Dr Matthew Philpott and Richard Glendinning, Health Equalities Group.

Thanks to Vicki Coulton (Public Health England), Jo Nicholas (Public Health England), Dr Amelia Lake (Teesisde University), Dr Tom Burgoine (CEDAR), Danielle Costigan (UK Health Forum), Vandyck Adomake-Mensah (UK Health Forum), Dr Benshuai Xu (UK Health Forum), Dr Abbygail Jaccard (UK Health Forum), Dr Laura Webber (UK Health Forum).

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Executive summary

The government recognises that obesity is a major health problem in England. The latest government statistics show that 57% of women and 66% of men are overweight or obese, while nearly a third of children aged 2 to 15 are overweight or obese. This problem affects people from poorer areas the most, where children aged 5 are twice as likely to be obese compared to children in the least deprived areas.

A new trend in food marketing is an increase in the placement, availability and promotions of less healthy foods in a variety of "non-food" stores, such as at the tills of clothing and DIY stores. There are concerns that this increased availability could contribute to an increase in the buying and eating of less healthy foods by individuals, potentially increasing their likelihood of becoming overweight or obese.

This report was commissioned by Public Health England as part of a project led by the UK Health Forum. It has involved an online consultation of over 2,000 people between aged 16 – 65+ years in the UK, of whom around 1,600 were from England, to find out about and understand their experience of food and drink availability and promotion in non-food stores. The findings are presented for England only and the report complements a fieldwork study undertaken by the Health Equalities Group which mapped the types of food and drink products sold and promoted in non-food stores in three pilot areas of England.

Headline findings

- Seven out of 10 people (70%) who visited a non-food store in the last month reported having seen a food or drink item on sale

- The most common types of food or drink that these consumers reported seeing on sale during their last visit to a non-food store were sweets and chocolates (60%, n=620) followed by sugary drinks (56%, n=575), then diet drinks (49%, n=503) and savoury snacks (49%, n=500).

- 42% (n=409) of consumers reported purchasing food or drink while shopping in non-food stores in the last month. The majority (66%, n=552) of the food or drink items that were reported as purchased was classified as less healthy e.g. sweets and chocolate, savoury snacks, sugary drinks and energy drinks.

- The most common less healthy food or drinks that consumers purchased were sweets and chocolate and sugary drinks, purchased by 12% (n=1140) and 9% (n=88) of consumers respectively. Purchases of healthier options were led by drinks such as water and fruit juice (9%, n=89) and diet/zero drinks (7%, n=66).

- There were significant gender differences in reported food and drink purchasing habits. Men were more likely to purchase food and drink (49%, n=218) than women (37%, n=191) while shopping.

- Men were also more likely to report planning to buy food or drink before going into a store (53%, n=115), than women (33%, n=64). Women were more likely to decide to purchase an item while in store (64%, n=122) than men (42%, n=91).

- 78% (n=318) of respondents said they purchased a food or drink item while shopping because they were hungry or thirsty at the time. 42% (n=173) of respondents reported that they purchased a food or drink item because it was on special offer or promotion.
- More consumers supported rather than opposed efforts to restrict the sale of less healthy food or drinks in games and toy shops, which primarily target children. Women were more likely to be in favour of restricting sales of food and drinks in non-food stores than men.

- In general, consumers on lower incomes and consumers aged 55+ were more likely to support restrictions on the sale of less healthy food and drinks in non-food stores. Those who recalled seeing less healthy food and drink items on sale during their last visit were also more likely to support restrictions on the sale of those items.

Introduction

The government recognises that obesity is a major health problem in England. The latest government statistics show that 57% of women and 66% of men are overweight or obese, while nearly a third of children aged 2 to 15 are overweight or obese [1]. This problem affects people from poorer areas the most, where children aged 5 are twice as likely to be obese compared to children in the least deprived areas. Adults who suffer from overweight and obesity have similar health inequalities to children. Tackling the high burden of obesity will help to reduce health inequalities in England.

Marketing of less healthy foods is contributing to obesity.[2] Research shows that all forms of marketing influence how children and adults choose and purchase food.[3] A new trend in food marketing is an increase in the placement, availability and promotions of less healthy foods in a variety of "non-food" venues, such as at the tills of clothing and DIY stores. There are concerns that this new form of marketing could contribute to an increase in the buying and eating of less healthy foods by people, contributing to excess calorie intake.

This report is part of a project commissioned by Public Health England and led by the UK Health Forum to support the government's aim to significantly reduce England's rate of childhood obesity and associated inequalities within the next ten years. The project aims to map the extent and impact of the availability, placement and promotion of less healthy food in the "non-traditional food sector" (such as around the checkouts of leading clothing retailers), and assess public appetite for action in this area. It has three main strands:

Strand one: A fieldwork survey to map and understand the product type, location and related marketing and promotions of food and drinks within the non-traditional food retail sector in three pilot areas of England.

Strand two: A project to engage people in the community on their 'lived experience' of this new form of food marketing, how it is affecting them, and whether they think it is something that needs to be addressed. Find out whether there are differences in the 'lived experience' and impacts of this new form of unhealthy food marketing between people from poorer versus better off backgrounds.

Strand three: An exercise to explore options on how to map the extent of the placement of less healthy food in non-food settings across regions using modelling estimates and/or point of interest datasets of the impact of potential sales.

Aims

This report is for strand two of the project. It has involved consulting a sample of people in England to find out about and understand their 'lived experience' of unhealthy food marketing in the non-food retail sector. Views from people were sought using an online questionnaire. Responses were received from over 2,000 people in the UK, around 1,600 of whom were from England. The respondents were between the ages of 16 – 65+ years.

It aimed to find out from respondents:

- What type(s) of food and drinks they are exposed to in non-food stores
- Whether people purchase and consume food and drinks that are available and marketed in non-food stores on the high street
- What type(s) of food and drinks are purchased
- Whether people think that there should be any restrictions on HFSS food and drink availability in non-food stores

The project engaged with people across all parts of society, from deprived households to more affluent homes, to find out whether or not there are differences in experiences of this type of food marketing between disadvantaged and non-disadvantaged groups.

Methods

The questions were asked as part of a monthly nationally representative online quota sample survey of all adults aged 16+ in the UK. The survey was quota controlled with targets set for age, sex, class, income and region and these variables were also used for weighting purposes. The survey was carried out during the first two weeks of March 2018.

Shoppers were asked about their experiences of shopping and exposure to food or drink in different types of food and drink stores typically found on the high street (see Appendix 1 for a list of the questions). Food and drink sold within in-store cafes and restaurants within non-food stores was explicitly excluded from the project. The methods for identifying and selecting the categories of stores, and food and drink items for consideration have been described in the accompanying report for the fieldwork survey: *Project Report on Field Work. Strand 1: Map and understand the availability and marketing of less healthy foods and drinks in traditional non-food retailers across three pilot areas of England.*[4]

The survey described nine categories of different types of non-food stores typically found on the high street:

- Department stores, like House of Fraser and Debenhams
- Clothing, textile and footwear stores, like New Look and Top Shop
- Pharmacists, chemists and cosmetics shops, like Boots and Superdrug
- Newsagents, stationery and gift shops, like WH Smith and Paperchase
- Homeware stores, like Lakeland and DFS
- DIY stores, like B&Q and Homebase
- Sports and outdoor store, like JD sports and Cotswolds
- Audio and visual entertainment, like HMV and Game
- Games and toys, like The Entertainer and Toys R Us

The project assessed consumers reported recall of the availability, marketing and/or promotions of the following food and drink products in non-food stores:

Less healthy food and drink	• Biscuits e.g. biscuit/cereal bars and cookies • Cakes e.g. brownies and muffins • Sweets and chocolate e.g. boiled sweets and chocolate bars • Ice cream/lollies e.g. soft scoop and juice lollies • Sweet pastries e.g. croissants and Danish pastries • Savoury pastries e.g. meat pies and sausage rolls • Savoury snacks e.g. crisps, salted/roasted nuts, dried meat snacks, sweet/salty popcorn. • Sugary drinks (including sports drinks) e.g. Coca-Cola, Oasis and Powerade • Energy drinks e.g. Monster and Relentless • Milkshakes e.g. Friji and Yop
'Healthier' food and drink	• Diet/zero drinks e.g. Coke Zero and Pepsi Max • Healthier food options e.g. fresh fruit, vegetable batons, plain popcorn, unsalted nuts • Healthier drinks e.g. water or fruit juice
Other (not categorised according to healthiness)	• Ready to eat foods e.g. pre-packaged sandwiches, ready meals and pasta

Key findings

Demographics of the respondents

A sample of 2,004 people completed the survey from across the four nations of the UK. The sample was weighted to 2,000 to be representative of the UK population. 84% (n=1,682) of the respondents were from England, 51% were female and 49% male. Older adults aged 65+ were the largest group of respondents (22%, n=370), followed by adults aged 35-44 (19%, n=313) and those aged 16-24 were the smallest group (12%, n=197).

Respondents in the lower income bracket of £14,500 - £24,999 were the largest group (26%, n=413) and those in the highest income bracket of £50,000+ the smallest group (15%, n=230). The majority of respondents were white (91%, n=1,819) – with South Asians making up the largest group of ethnic respondents at (n=57, 3%). The full demographic data on the participants, including age, sex, class, ethnicity, region in England and UK nation, are provided in Tables A to G Appendix 1. No significant differences were found between the results for England and the other nations in the UK.

The results are reported for England only (no significant differences were evident across UK nations). Base numbers vary according to the number of respondents for each question and are provided at the bottom of the results tables.

Types of non-food stores visited by consumers

Around 87% (n=1,460) of respondents reported that they had visited at least one of the stores of interest in the last month. As can be seen in Table 1 below, pharmacists, chemists and cosmetic stores were the stores most likely to have been visited by consumers in the month preceding the survey (63%, n=1,066), followed by newsagents (43%, n=718) and clothing and footwear stores (37%, n=630).

Women were more likely to visit pharmacists, chemists and cosmetic stores, games and toy stores, and clothing and footwear stores than men, while men were more likely to report visits to newsagents, DIY stores and sports stores than women. Younger age groups were more likely to visit clothing and footwear stores, games and toy stores, and audio and visual entertainment stores than older adults, while older adults were more likely to visit pharmacists, chemists and cosmetic stores than younger ones. Higher income groups were more likely to visit all store types than those on lower incomes (Appendix 2).

Table 1: Stores most frequently visited by consumers in the last month, by sex

			Sex			
BASE =1682	England		Male		Female	
Pharmacists, chemists and cosmetics shops	63%	1066	56%	460	70%	602
Newsagents, stationery and gift shops	43%	718	46%	379	39%	339
Clothing, textile and footwear stores	37%	630	29%	235	46%	395
DIY stores	33%	563	38%	311	29%	248
Department stores	32%	541	35%	283	30%	258

Sports and outdoor stores	21%	351	24%	198	18%	153
Games and toys	19%	322	17%	142	21%	180
Audio and visual entertainment	17%	293	20%	162	15%	132
Homeware stores	14%	236	14%	115	14%	121
Net: ANY	**87%**	**1460**	**88%**	**716**	**86%**	**740**

Reported availability of food and drink in non-food stores

Of the 1,460 people who had visited any type of the store categories included in the survey, 70% (n=1,030) recalled seeing a food or drink item on sale during a recent visit. The most common types of food and drink that consumers reported seeing on sale are summarised in Table 3 below. These were led by sweets and chocolates (60%, n=620) followed by sugary drinks (56%, n=575), then diet drinks (49%, 503) and savoury snacks (49%, n=500). There were no overall differences in recall of food or drink on sale by gender, age or UK region.

Table 2: Types of food and drink available during most recent visit to non-food stores

Type of food or drink BASE = 1030	% who saw food or drink on sale	Number
Less healthy food or drink		
Sweets and chocolate e.g. boiled sweets and chocolate bars	60%	620
Sugary drinks (including sports drinks) e.g. Coca-Cola, Oasis and Powerade	56%	575
Savoury snacks e.g. crisps, salted/roasted nuts, dried meat snacks, sweet/salty popcorn.	49%	500
Biscuits e.g. biscuit/cereal bars and cookies	37%	379
Energy drinks e.g. Monster and Relentless	36%	370
Cakes e.g. brownies and muffins	23%	236
Milkshakes e.g. Friji and Yop	21%	215
Ice cream/lollies e.g. soft scoop and juice lollies	17%	174
Savoury pastries e.g. meat pies and sausage rolls	15%	158
Sweet pastries e.g. croissants and Danish pastries	11%	116

Healthier food or drink		
Diet/zero drinks e.g. Coke Zero and Pepsi Max	49%	503
Healthier drinks e.g. water or fruit juice.	47%	487
Healthier food options e.g. fresh fruit, vegetable batons, plain popcorn, unsalted nuts	27%	278
Other		
Ready to eat foods e.g. pre-packaged sandwiches, ready meals and pasta.	41%	422
NET: ANY	**94%**	**966**

Food and drink purchased from non-food stores

A total of 966 respondents answered the question of whether or not they had purchased any food or drink during their last visit to a store category of interest (Table 3). Of these respondents, 42% (n=409) reported purchasing food or drink during their last visit to a non-food store. Men (49%, n=218) were more likely to purchase any type of food and drink than women (37%, n=191), and the difference was statistically significant.

Sweets and chocolate and sugary drinks were the most frequently purchased less healthy food items, purchased by 12% (n=114) and 9% (n=88) respondents respectively. Healthier options were led by drinks such as water and fruit juice (9%, n=89) and diet/zero drinks (7%, n=66).

Table 3: Reported food or drink purchases during last visit to a non-food store

Type of food or drink BASE = 966	% who purchased item	Number
Less healthy food or drink		
Sweets and chocolate e.g. chocolate bars	12%	114
Sugary drinks (including sports drinks) e.g. Coca-Cola, Oasis and Powerade	9%	88
Savoury snacks e.g. crisps, salted/roasted nuts, dried meat snacks, sweet/salty popcorn.	8%	75
Biscuits e.g. biscuit, cereal bars and cookies	7%	63
Energy drinks e.g. Monster and Relentless	6%	58
Savoury pastries e.g. meat pies and sausage rolls	4%	42

Cakes e.g. brownies and muffins	3%	33
Ice cream/lollies e.g. soft scoop and juice lollies	3%	25
Milkshakes e.g. Friji and Yop	3%	30
Sweet pastries e.g. croissants and Danish pastries	2%	24
Healthier food or drink		
Healthier drinks e.g. water or fruit juice	9%	89
Diet/zero drinks e.g. Coke Zero and Pepsi Max	7%	66
'Healthier food options' e.g. fresh fruit, vegetable batons, plain popcorn, unsalted nuts	4%	39
Other		
Ready to eat foods e.g. pre-packaged sandwiches, ready meals and pasta.	10%	92
Any food or drink purchased	**42%**	**409**
Any less healthy food or drink purchased	**30%**	**290**

The majority of reported food and drink purchases (66%, 552/838 total purchases) were classified as less healthy.

Reported drivers for purchasing food and drink while shopping

Of those who reported purchasing a food or drink item while shopping (n=409) just over half (52%, n=219) reported that they had decided to purchase an item whilst in store. Fewer respondents (44%, n=179) said they planned to buy food or drink before going into the stores. Men (53%) were more likely than women (33%) to report planning to buy food or drink before going into a non-food store. Women (64%) were more likely to decide to purchase an item in store (42%). The differences between the genders were statistically significant.

78% (n=318) of respondents said they purchased a food or drink item while shopping because they (or someone they were with) were hungry or thirsty at the time.

42% (n=173) of respondents reported that they decided to purchase a food or drink item because it was on special offer or promotion (e.g. 2 for 1, discounted price).

53% (n=219) of respondents who purchased a food or drink item said that if they had not bought it at the store, they would definitely have bought it elsewhere; 42% (n=173) said they might have bought it elsewhere but couldn't say for sure.

Support for restricting sales of food and drinks in non-food stores

All respondents (n=1,682) were asked whether there should be restrictions on the sale of less healthy food and drinks such as crisps, chocolate, sweets, cakes, savoury snacks and fizzy drinks in non-food stores. More consumers opposed rather than supported restrictions for all store categories except games and toy stores, which primarily target children (Table 4); 45% (n=752) of respondents agreed there should be restrictions on the sale of unhealthy food and drinks in games and toy stores, compared to 43% (n=719) who disagreed.

Gender differences were evident, with women being more likely to be in favour of restricting sales of food and drinks in non-food stores than men (Table 5). This applied across all store types. In addition, more women were in favour of restrictions than were opposed to such restrictions in three store categories: games and toy stores (support 49%; oppose 38%), clothing and footwear (support 44%; oppose 43%), and audio and visual entertainment (support 44%; oppose 42%).

In general, support for restricting the sale of food and drinks in non-food stores was higher among lower income groups (e.g. those earning £14,500 – £24,999) and older consumers aged 55+. Those who recalled seeing less healthy food and drink items on sale during their last visit were also more likely to support restrictions on the sale of those items. Tables summarising support for restrictions by age and income are available in Appendix 3.

Table 4: Support for restricting sales of less healthy food and drinks in non-food stores

BASE = 1,682	Yes, should be restrictions		No, shouldn't be restrictions		Don't know	
Games and toy stores	45%	752	43%	719	13%	211
Clothing, textile and footwear stores	40%	678	46%	781	13%	222
Audio and visual entertainment	41%	682	45%	764	14%	236
Sports and outdoor	39%	661	47%	797	13%	224
DIY stores	36%	610	50%	843	14%	228
Homeware stores	36%	606	50%	834	14%	241
Pharmacists, chemists and cosmetic shops	35%	589	53%	892	12%	201
Department stores	32%	532	55%	932	13%	218
Newsagents, stationery and gift shops	20%	343	69%	1154	11%	185

Table 5: Support for restricting sales of less healthy food and drinks in non-food stores by gender

	Yes, should be restrictions		No, shouldn't be restrictions	
Base: Male 818; Female 859	Male	Female	Male	Female
Games and toy stores	40%	49%	48%	38%
	325	423	389	330
Clothing, textile and footwear stores	36%	44%	50%	43%
	297	377	410	371
Audio and visual entertainment stores	37%	44%	49%	42%
	302	376	404	360
Sports and outdoor stores	35%	43%	51%	44%
	288	370	419	377
DIY stores	34%	38%	53%	48%
	277	329	430	414
Homeware stores	34%	38%	52%	47%
	275	327	429	405
Pharmacists, chemists and cosmetic shops	34%	35%	53%	54%
	282	302	432	460
Department stores	30%	33%	57%	54%
	246	281	466	466
Newsagents	20%	21%	68%	69%
	163	177	559	595

How children influence food or drink purchases while shopping

52% (n=875) of all respondents had children or grandchildren. When shopping with children or grandchildren, those consumers responding (n=852) reported that children or grandchildren most frequently pestered them to purchase food or drink while shopping in newsagents (37%, n=311), pharmacists, chemists and cosmetic stores (21%, n=179), and games and toy stores (18%, n=154). Just under half of respondents, 43% (n=370), reported that children had not asked them to purchase food or drink in any of the stores identified (Table 6).

Table 6: Shops where children were most likely to ask carers to buy them food or drink

	England	Male	Female
Base	852	393	456
Newsagents, stationery and gift shops	37%	31%	42%
	311	121	190
Pharmacists, chemists and cosmetics shops	21%	13%	28%
	179	52	127
Games and Toys stores	18%	16%	20%
	154	63	90
Department stores	12%	12%	11%
	99	48	50
Clothing, textile and footwear stores	10%	6%	15%
	89	22	67
DIY stores	8%	4%	11%
	69	17	51
Sports and outdoor stores	6%	7%	6%
	51	26	26
Audio and visual entertainment	6%	4%	8%
	48	14	34
Homeware stores	5%	3%	7%
	44	11	33

None of these	43%	46%	41%
	370	179	188

Survey limitations

The survey provides a snapshot of the food and drink that around 1,600 consumers in England reported was available in non-food retail stores during March 2018. There are a number of limitations which need to be considered when interpreting the results.

Firstly, the exercise relied on consumers' recall of their shopping experiences over the period of one month, which may affect the reliability of the findings.

Variations within the sample sizes of different sub-categories of consumers may also warrant some caution in the interpretation of the results. For example, there was some variation in the use of store categories by socioeconomic status, with more affluent groups (ABC1) more likely to visit department stores and homeware stores compared to less affluent groups.

Consumers on lower incomes (£34,999 or less) were less likely to visit any of the store categories included in the survey compared to those on higher incomes (for example, 16% of those in the income bracket under £14,499 had not visited any of the stores included in the survey in the last month study compared to 6% of respondents from the highest income category). These differences were statistically significant. In addition, owing to the small numbers in sub-categories it was not possible to report on the data by ethnicity.

Foods were classified as healthier and less healthy based on a pragmatic selection of product categories, but this approach had its limitations. For example, while fruit juices were classified as 'healthier' for the purposes of this study, the Eatwell Guide recommends that consumption should be limited to a maximum of 150ml per day owing to high levels of free sugars. However, few single-serve portions of fruit juice are currently available for sale in shops at this healthy size and most single-serve fruit juice drinks are much larger.

Finally, it is also difficult to define a non-food store, as the complementary fieldwork study presented in strand 1 found.[4] For example, stores that are categorised as 'pharmacists, chemists and cosmetic stores' – such as Boots – also sell a variety of ready-to-eat food products such as sandwiches, salads and drinks.

Similarly, it could be argued that newsagents such as WH Smith could be classified as 'traditional' food stores based on the level of food and snacks that they sell and consumers who purchase food or drink products from these stores may deliberately go into them to do so. The classifications and ways in which consumers use different types of stores to purchase food or drink could be explored in future studies.

Discussion

Less healthy food and drink are frequently reported to be available in non-food stores

70% (n=1,030) of respondents who visited a non-food store in the month prior to the survey reported seeing food or drink on sale during their last visit. Less healthy foods and drinks were the most common types of food or drink that consumers reported seeing on sale. These were led by sweets and chocolate (seen by 60%, n=620, of respondents) followed by sugary drinks (56%, n=575), and savoury snacks (49%, n=500).

Healthier food and drinks were led by diet drinks (49%, n=503) and healthier drinks such as water and fruit juice (47%, n=487). These findings are in line with those of the fieldwork study which surveyed food and drink availability in non-food stores across different types of locations and found that sweets and chocolates were the most common food or drink option available (42% of stores), followed by sugary drinks (10% of stores).[4]

Around 42% (n=409) of consumers said they purchased food or drink while shopping in non-food stores. The majority of the food or drink that was purchased (66%, n=552) was classified as less healthy. Sweets and chocolates (12% n=114) and sugary drinks (9%, n=88) were the most frequently purchased less healthy food items. Purchases of healthier options were led by drinks such as water and fruit juice (9%, n=89) and diet/zero drinks (7%, n=66).

Over half of consumers who purchased food or drink from non-food stores said that their purchases were unplanned

52% (n=219) of consumers who made a purchase reported that they decided to purchase a food or drink item while in store. Fewer respondents (44%, n=179) said they planned to buy food or drink before going into the stores. There were statistically significant differences in purchasing patterns and intentions between the genders. Men (53%, n=115) were more likely to report planning to buy food or drink before going into a non-food store than women (33%, n=64). Women were more likely to decide to purchase an item while in store (64%, n=122) than men (42%, n=91).

Consumers reported purchasing the food or drinks because they were hungry or thirsty (78%, n=318). Promotions were also identified as a driver of food purchases with 42% (n=173) of consumers reporting that they were influenced by promotions to purchase those foods. This finding is supported by the accompanying fieldwork study which found that sweets and chocolate were associated with the highest number and variety of promotions of all food and drink categories, led by discounted pricing, point of purchase (checkout area), and two for one offers.[4]

The findings also resonate with previous analyses that have found that promotions account for a significant proportion (40%) of expenditure on food and drinks in England, and that less healthy products are promoted more than other foods [3].

Consumers support restricting the availability of less healthy food in stores aimed at children

More consumers support restricting the sale of less healthy food or drinks in games and toys shops (45%, n=752) than oppose such restrictions (43%, n=719). Women are more likely than men to support restrictions of sales of unhealthy food and drink within non-food stores. Women who support such restrictions outnumber men (and women opposed to restrictions) in several store types including games and toys, clothing and footwear, and audio and visual entertainment stores. Support for restricting availability is also linked to awareness that less healthy food is available in non-traditional settings - those who recalled seeing less healthy food and drink items on sale during their last visit were more likely to support restrictions on the sale of those items.

In addition, lower income groups are more likely than higher income groups to support restrictions on the sale of less healthy food and drinks in non-food stores. This finding is important because these groups suffer disproportionately from higher levels of diet-related ill health such as obesity. Obesity levels in the most deprived 10% of children are approximately double that of the least deprived 10% [1].

Implications

This report provides a snapshot (March 2018) of consumers' perspectives and experiences of food and drink availability in non-food retail settings. The main implications are:

- Most consumers see food or drink items on sale in non-food stores. These products are led by less healthy categories such as sweets and chocolate and sugary drinks

- A substantial proportion of consumers purchase food or drink items in non-food stores and most of the food or drink purchased is less healthy.

- There is support to reduce exposure to less healthy food availability and promotions in non-food stores which target children and young people (i.e. game and toy stores). Women are more likely to support restricting less healthy food products in non-food stores than men.

- Those consumers who recall seeing less healthy food or drinks on sale in non-food stores are more likely to support restrictions on their availability. Raising awareness of the issue of the availability and promotion of less healthy food and drink in non-food stores may increase public support for action to restrict the availability of those foods.

This was only a snapshot survey and further research is needed to assess impacts and implications of the increased availability and marketing of less healthy food and drink in non-food stores on the population's food purchasing and consumption patterns and health outcomes.

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4 Bradshaw B. Project Report on Field Work. Strand 1: Map and understand the availability and marketing of less healthy foods and drinks in traditional non-food retailers across three pilot areas of England. Liverpool, 2018.

Appendix 1: Survey questions

The next set of questions are about the types of shops and other stores you visit, and the type of food and drinks you might see for sale that can be consumed outside of the premises.

1. Which, if any, of the following types of shops and other places have you personally been to in the last month? PLEASE MARK ALL THAT APPLY
    - Department stores, like House of Fraser and Debenhams
    - Clothing, textile and footwear stores, like New Look and Top Shop
    - Pharmacists, chemists and cosmetics shops, like Boots and Superdrug
    - Newsagents, stationery and gift shops, like WH Smith and Paperchase
    - Homeware stores, like Lakeland and DFS
    - DIY stores, like B&Q and Homebase
    - Sports and outdoor store, like JD sports and Cotswolds
    - Audio and visual entertainment, like HMV and Game
    - Games and toys, like The Entertainer and Toys R Us

None of these

Don't know

2. On your last visit to (EACH NAMED AT Q1), did you see any food or drinks for sale, such as crisps, chocolate, sweets, cakes, savoury snacks, fizzy drinks, pre-packaged sandwiches, plain popcorn and fruit juice?

    LIST ONLY THOSE MARKED AT Q1

Yes/no/don't know (FOR EACH MENTIONED AT Q1)

- Department stores, like House of Fraser and Debenhams (excluding cafes in store)
- Clothing, textile and footwear stores, like New Look and Top Shop (excluding cafes in store)
- Pharmacists, chemists and cosmetics shops, like Boots and Superdrug
- Newsagents, stationery and gift shops, like WH Smith and Paperchase
- Homeware stores, like Lakeland and DFS
- DIY stores, like B&Q and Homebase (excluding cafes in store)
- Sports and outdoor store, like JD sports and Cotswolds
- Audio and visual entertainment, like HMV and Game

- Games and Toys, like The Entertainer and Toys R Us

IF ALL NO, GO TO Q10

IF 1 YES, GO TO Q4

IF 2 OR MORE YES, GO TO Q3

3. IF 2 OR MORE SELECTED 'YES' AT Q2.

Which <u>one</u> of these types of places have you visited most often in the last month? LIST ONLY THOSE MENTIONED AT Q2

- Department stores, like House of Fraser and Debenhams
- Clothing, textile and footwear stores, like New Look and Top Shop
- Pharmacists, chemists and cosmetics shops, like Boots and Superdrug
- Newsagents, stationery and gift shops, like WH Smith and Paperchase
- Homeware stores, like Lakeland and DFS
- DIY stores, like B&Q and Homebase
- Sports and outdoor store, like JD sports and Cotswolds
- Audio and visual entertainment, like HMV and Game
- Games and Toys, like The Entertainer and Toys R Us

4. Thinking about your most recent visit to…….. (SINGLE TYPE TAKEN FROM Q2 OR Q3), what types of food and drink were available to buy and consume outside of the premises (PLEASE MARK ALL THAT APPLY)

Biscuits e.g. biscuit/cereal bars and cookies

Cakes e.g. brownies and muffins

Sweets and chocolate e.g. boiled sweets and chocolate bars

Ice cream/lollies e.g. soft scoop and juice lollies

Sweet pastries e.g. croissants and Danish pastries

Savoury pastries e.g. meat pies and sausage rolls

Ready to eat foods e.g. pre-packaged sandwiches, ready meals and pasta.

Savoury snacks e.g. crisps, salted/roasted nuts, dried meat snacks, sweet/salty popcorn.

Healthier food options e.g. fresh fruit, vegetable batons, plain popcorn, unsalted nuts

Sugary drinks (including sports drinks) e.g. Coca-Cola, Oasis and Powerade

Energy drinks e.g. Monster and Relentless

Milkshakes e.g. Friji and Yop

Diet/zero drinks e.g. Coke Zero and Pepsi Max

Healthier drinks e.g. water or fruit juice.

Other

None on sale on last visit – GO TO Q10

Can't remember – GO TO Q10

5. Did you buy any of these types of food or drink items during your most recent visit to……..? LIST ONLY THOSE MENTIONED AT Q4

Biscuits e.g. biscuit, cereal bars and cookies

Cakes e.g. brownies and muffins

Sweets and chocolate e.g. chocolate bars

Ice cream/lollies e.g. soft scoop and juice lollies

Sweet pastries e.g. croissants and Danish pastries

Savoury pastries e.g. meat pies and sausage rolls

Ready to eat foods e.g. pre-packaged sandwiches, ready meals and pasta.

Savoury snacks e.g. crisps, salted/roasted nuts, dried meat snacks, sweet/salty popcorn.

'Healthier food options' e.g. fresh fruit, vegetable batons, plain popcorn, unsalted nuts

Sugary drinks (including sports drinks) e.g. Coca-Cola, Oasis and Powerade

Energy drinks e.g. Monster and Relentless

Milkshakes e.g. Friji and Yop

Diet/zero drinks e.g. Coke Zero and Pepsi Max

Healthier drinks e.g. water or fruit juice.

None bought on last visit – GO TO Q10

Can't remember – GO TO Q10

6. ASK ALL WHO BOUGHT SOMETHING ON THEIR MOST RECENT VISIT. Did you plan to buy these things before you went into the store or did you decide to do so when you were inside?

Planned before

Decided inside

Can't remember

7. Did you buy these items because you or someone you were with was hungry or thirsty at the time?

Yes

No

Can’t remember

8. And did you buy them because they were on a special offer (e.g. 2 for 1, discounted price)?

Yes

No

Can’t remember

9. If you had not bought this food or drink item at this store, would you have bought it somewhere else?

Yes – definitely

Maybe

Don’t know

10. ASK ALL: Do you think there should be any restrictions on food and drinks, such as crisps, chocolate, sweets, cakes, savoury snacks, fizzy drinks, being sold in the following places:

Yes, should be restrictions/ No, shouldn’t be restrictions/ Don’t know (for each below)

- Department stores, like House of Fraser and Debenhams (excluding cafes in store)
- Clothing, textile and footwear stores, like New Look and Top Shop (excluding cafes in store)
- Pharmacists, chemists and cosmetics shops, like Boots and Superdrug
- Newsagents, stationery and gift shops, like WH Smith and Paperchase
- Homeware stores, like Lakeland and DFS
- DIY stores, like B&Q and Homebase (excluding cafes in stores)
- Sports and outdoor store, like JD sports and Cotswolds
- Audio and visual entertainment, like HMV and Game
- Games and Toys, like The Entertainer and Toys R Us

11. Do you have children or grandchildren aged under-16?

Yes, children

Yes, grandchildren

No – GO TO Q13

For respondents with children/grandchildren

12. Think about when you are out shopping with your children or grandchildren. Do they ever want you to buy food and drink that is available to purchase at any of the following places? PLEASE TICK ALL THAT APPLY.

Department stores, like House of Fraser and Debenhams (excluding cafes in store)

Clothing, textile and footwear stores, like New Look and Top Shop (excluding cafes in store)

Pharmacists, chemists and cosmetics shops, like Boots and Superdrug

Newsagents, stationery and gift shops, like WH Smith and Paperchase

Homeware stores, like Lakeland and DFS

DIY stores, like B&Q and Homebase (excluding cafes in stores)

Sports and outdoor store, like JD sports and Cotswolds

Audio and visual entertainment, like HMV and Game

Games and Toys, like The Entertainer and Toys R Us

13. Please select which best describes your ethnicity from the list below:

- White
- Black
- South Asian
- Mixed
- Other

Appendix 2: Stores most frequently visited by consumers in the last month, by age and income

	Age						Income				
	16-24	25-34	35-44	45-54	55-64	65+	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000 +
Baseline	197	254	313	284	264	370	319	413	343	270	230
Pharmacists, chemists and cosmetics shops	50%	64%	61%	65%	65%	69%	57%	63%	65%	68%	67%
	98	163	192	186	172	257	182	260	223	184	154
Newsagents, stationery and gift shops	36%	39%	45%	40%	49%	45%	39%	41%	45%	43%	47%
	71	99	140	113	128	167	125	169	155	116	109
Clothing, textile and footwear stores	56%	51%	43%	35%	32%	19%	30%	37%	40%	38%	43%
	111	129	135	99	84	72	96	152	137	104	99
DIY stores	26%	33%	31%	36%	34%	38%	21%	31%	36%	43%	41%
	52	83	96	101	89	142	68	129	123	117	95
Department stores	32%	31%	33%	29%	34%	33%	21%	28%	32%	38%	46%
	63	79	102	84	91	123	67	114	109	103	107
Sports and outdoor stores	29%	28%	27%	18%	15%	12%	15%	19%	24%	22%	28%
	57	71	84	52	41	46	47	80	83	61	66

Games and toys	25%	41%	29%	15%	6%	5%	16%	18%	23%	18%	27%
	50	104	90	42	16	20	51	72	78	49	62
Audio and visual entertainment	35%	23%	22%	16%	10%	6%	15%	19%	19%	15%	20%
	69	60	69	46	26	23	49	77	64	41	45
Homeware stores	16%	15%	13%	12%	16%	13%	8%	11%	17%	15%	21%
	31	38	40	35	43	49	27	47	57	41	49
None of these	7%	6%	11%	13%	18%	14%	16%	13%	12%	7%	6%
	14	14	33	38	47	53	51	53	41	18	13
Net: ANY	91%	92%	87%	85%	82%	85%	83%	86%	87%	90%	93%
	180	233	272	242	217	317	264	357	298	244	214

Appendix 3: Tables showing support for restricting sales of less healthy food and drink by age and income

Table 7 Support for restricting sales of less healthy food and drinks in non-food stores by age

	Games and toy stores					
Base: All adults 16+	197	254	313	284	264	370
	16-24	25-34	35-44	45-54	55-64	65+
Yes, should be restrictions	40%	38%	40%	41%	55%	51%
	79	96	125	118	145	190
No, shouldn't be restrictions	49%	49%	45%	47%	33%	36%
	97	125	140	134	86	135
Don't know	11%	13%	15%	11%	12%	12%
	21	32	47	32	33	46
	Clothing, textile and footwear stores					
	16-24	25-34	35-44	45-54	55-64	65+
Yes, should be restrictions	34%	32%	34%	34%	52%	51%
	66	81	105	98	138	190
No, shouldn't be restrictions	54%	54%	51%	53%	34%	37%
	106	137	160	151	91	136
Don't know	12%	14%	15%	12%	13%	12%
	25	36	47	35	35	44
	Audio and visual entertainment					
	16-24	25-34	35-44	45-54	55-64	65+
Yes, should be restrictions	38%	33%	32%	36%	51%	50%
	75	84	101	101	136	186

No, shouldn't be restrictions	49%	54%	51%	50%	35%	36%
	96	138	161	143	93	133
Don't know	13%	13%	16%	14%	13%	14%
	26	32	51	40	35	52
Sports and outdoor stores						
	16-24	**25-34**	**35-44**	**45-54**	**55-64**	**65+**
Yes, should be restrictions	34%	36%	34%	33%	51%	46%
	67	90	107	93	135	170
No, shouldn't be restrictions	54%	52%	51%	53%	37%	40%
	107	131	160	152	99	148
Don't know	12%	13%	15%	14%	12%	14%
	24	32	45	40	31	52
Homeware stores						
	16-24	**25-34**	**35-44**	**45-54**	**55-64**	**65+**
Yes, should be restrictions	29%	28%	30%	31%	48%	46%
	57	71	95	88	126	170
No, shouldn't be restrictions	56%	54%	54%	55%	40%	42%
	111	136	168	157	107	156
Don't know	15%	18%	16%	14%	12%	12%
	29	47	50	39	31	45
DIY stores						
	16-24	**25-34**	**35-44**	**45-54**	**55-64**	**65+**
Yes, should be restrictions	33%	28%	29%	31%	48%	46%
	66	70	90	88	127	169

No, shouldn't be restrictions	52%	57%	56%	55%	41%	42%
	103	144	175	156	109	156
Don't know	14%	16%	15%	14%	10%	12%
	28	40	47	40	27	46

Pharmacists, chemists and cosmetic shops

	16-24	25-34	35-44	45-54	55-64	65+
Yes, should be restrictions	33%	33%	27%	29%	45%	41%
	65	84	86	83	118	152
No, shouldn't be restrictions	58%	54%	57%	61%	44%	47%
	115	136	178	172	117	174
Don't know	9%	13%	16%	10%	11%	12%
	17	34	49	29	28	44

Department stores

	16-24	25-34	35-44	45-54	55-64	65+
Yes, should be restrictions	27%	29%	28%	25%	39%	38%
	53	74	88	72	103	142
No, shouldn't be restrictions	62%	55%	57%	63%	49%	50%
	123	139	179	178	129	184
Don't know	11%	16%	15%	12%	12%	12%
	21	40	46	34	32	44

Newsagents

	16-24	25-34	35-44	45-54	55-64	65+
Yes, should be restrictions	25%	23%	20%	14%	21%	21%
	50	59	64	39	54	77

No, shouldn't be restrictions	65%	63%	67%	75%	70%	69%
	129	161	208	213	186	257
Don't know	9%	13%	13%	11%	9%	10%
	18	34	40	33	24	36

Table 8 Support for restricting sales of less healthy food and drinks in non-food stores by age

	Games and toy stores				
Base: All adults 16+	319	413	343	270	230
	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	40%	51%	44%	49%	38%
	127	212	152	131	88
No, shouldn't be restrictions	45%	38%	45%	40%	51%
	145	155	154	107	117
Don't know	15%	11%	11%	12%	11%
	46	46	37	31	26
	Clothing, textile and footwear stores				
	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	36%	50%	40%	43%	24%
	116	208	138	117	55
No, shouldn't be restrictions	47%	38%	48%	47%	63%
	149	158	163	127	144
Don't know	17%	11%	12%	10%	13%
	54	47	42	26	31
	Audio and visual entertainment stores				

	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	31%	49%	41%	41%	36%
	100	202	142	111	84
No, shouldn't be restrictions	51%	38%	45%	49%	53%
	161	158	153	131	121
Don't know	18%	13%	14%	10%	11%
	58	53	48	28	25

Sports and outdoor stores

	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	34%	47%	39%	43%	30%
	110	193	135	117	68
No, shouldn't be restrictions	49%	40%	48%	46%	59%
	157	167	166	123	137
Don't know	16%	13%	12%	11%	11%
	52	53	42	30	25

Homeware stores

	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	28%	45%	37%	39%	27%
	88	188	128	105	62
No, shouldn't be restrictions	55%	41%	51%	49%	60%
	175	169	173	131	138
Don't know	18%	14%	12%	12%	13%
	56	56	41	34	30

DIY stores					
	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	30%	43%	37%	39%	28%
	94	178	128	106	65
No, shouldn't be restrictions	54%	44%	51%	50%	59%
	173	182	175	134	135
Don't know	16%	13%	11%	11%	13%
	51	54	39	30	30

Pharmacists, chemists and cosmetic shops					
	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	34%	43%	34%	34%	26%
	107	178	116	92	59
No, shouldn't be restrictions	53%	46%	53%	58%	63%
	168	190	182	156	145
Don't know	14%	11%	13%	8%	11%
	44	45	44	22	26

Department stores					
	Under £14,499	£14,500-£24,999	£25,000-£34,999	35,000-£49,999	£50,000+
Yes, should be restrictions	29%	37%	31%	34%	25%
	92	154	105	93	57
No, shouldn't be restrictions	54%	50%	59%	57%	63%
	173	205	204	153	145
Don't know	17%	13%	10%	9%	13%

	54	54	34	25	29
Newsagents					
	Under £14,499	**£14,500-£24,999**	**£25,000-£34,999**	**35,000-£49,999**	**£50,000+**
Yes, should be restrictions	20%	22%	19%	23%	20%
	62	90	66	61	45
No, shouldn't be restrictions	67%	67%	71%	67%	73%
	214	278	243	182	168
Don't know	14%	11%	10%	10%	7%
	43	45	34	27	17

Appendix 4: Demographic information of survey respondents

Table A: Survey respondents by UK nation

Nation	Percent	Number
England	84%	1682
Scotland	8%	168
Wales	5%	94
Northern Ireland	3%	56

Base = 2004

Table B: Sex (England only)

	Male	Female
Percent	49%	51%
Number	818	859

Base = 1677

Table C: Age (England only)

Age	Percent	Number
16-24	12%	197
25-34	15%	254
35-44	19%	313
45-54	17%	284
55-64	16%	264
65+	22%	370

Base = 1682

Table D: Class (England only)

Group	Percent	Number
AB	21%	350
C1	31%	527
C2	23%	387
DE	25%	417

Base 1681

Table E: Ethnicity (England only)

	Percent	Number
White	90%	1511
South Asian	3%	56
Black	2%	41
Mixed	2%	34
Other	2%	29
Would rather not say	1%	9

Base = 1682

Table F: Income (England only)

	Percent	Number
Under £14,499	20%	319
£14,500-£24,999	26%	413
£25,000-£34,999	22%	343
35,000-£49,999	17%	270
£50,000+	15%	230

Base = 1575

Table G: Survey respondents by region in England

Region	Percent	Number
North	28%	466
Midlands	30%	509
South (including London)	42%	707

Base = 1682

Author

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Acknowledgements

The survey was implemented by Beth Bradshaw, Dr Matthew Philpott and Richard Glendinning, Health Equalities Group.

Thanks to Vicki Coulton (Public Health England), Jo Nicholas (Public Health England), Dr Amelia Lake (Teesisde University), Dr Tom Burgoine (CEDAR), Danielle Costigan (UK Health Forum), Vandyck Adomake-Mensah (UK Health Forum), Dr Benshuai Xu (UK Health Forum), Dr Abbygail Jaccard (UK Health Forum), Dr Laura Webber (UK Health Forum).