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RESEARCH TENDER CALL

TENDER INFORMATION DOCUMENT

Project Reference No.: 10-2015

Project Title:


“Investigation into the balance of healthy versus less-healthy food promotions among Republic of Ireland food retailers”

1. Objective/Knowledge Gap

The key public policy driver for this research is the prevention and tackling of overweight and obesity in Republic of Ireland (ROI). One in four children and two in three adults are carrying excess weight ([1](#), [2](#)). In addition the evidence indicates a social class gradient in weight status with lower social classes having a higher prevalence of overweight and obesity. It is estimated that 12% households in ROI experience food poverty, the inability to access a healthy diet ([3](#)).

The foods available in retail outlets have a strong influence on the food eaten. Research conducted by **safefood** and others have indicated the price and food promotions influence food choices ([4-6](#)). In order for policy makers and retail sector to provide recommendations on strategies to increase consumer accessibility to healthier food products (in terms of number, range and variety) sold on promotional offer within retail stores in ROI, it is important to have an underpinning evidence base. **safefood** were not able to identify any study to date that explored food promotions in the retail environment in ROI. This research will begin to address this information gap and provide insights into the balance of food promotions between healthy and less-healthy foods and to gain insights from both retailers and consumers.

It is envisaged that the implementation of the recommendations from this research programme, in the long term, will enable healthier food shopping and thereby help improve consumer diets.


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2. ***Aim and Objectives***

The aim of this research is to provide an evidence base on the balance of healthy versus less-healthy food promotions in the Irish retail sector, that will inform the development of recommendations for strategies to increase consumer accessibility to healthier food products (in terms of number, range and variety) sold on promotional offer in retail stores in ROI.

The objectives are

1. To conduct an independent audit of food promotions within specified food categories in a selection of food retailers across ROI to:
 - a. Identify the current balance of healthy/ less-healthy promotional offers consumers face in retail stores;
 - b. To determine if the balance in relation to 'healthiness' (see section (a) in technical specification) of food promotional offers differs between store type (where 'type' refers to, for example, multinational and supermarkets, discount stores, convenience/'symbol' and independent stores) and if these do differ, to determine how they differ.
2. To conduct stakeholder interviews with food retail managers to:
 - a. Share the results of the store audit and ascertain their views on the findings;
 - b. Collect detailed information on how retailers make decisions about food promotions;
 - c. Collect annual data on retail offer activity if available;
 - d. Capture retailers' views on how food promotions influence consumers' purchasing behaviour;
 - e. To actively engage in discussion with retailers on suggesting proposals to increase consumer accessibility to healthier food products and explore the suitability of such proposals in terms of commercial feasibility and consumer acceptability.

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3. To determine consumer perceptions on the following:

- a. The balance of food promotion between healthy and less-healthy foods available in retail outlets in ROI;
- b. Their main motivations for choosing foods on promotional offers;
- c. On the proposals identified by retailers in objective 2e.


3. Background

No study to date has been identified by **safefood** which has explored the ROI food retail environment in relation to the balance of healthy versus less-healthy food promotions. There is global evidence from econometric modelling studies indicating that sales promotions can influence consumption patterns by influencing the purchasing choices of consumers and encouraging them to eat more (7). Research (limited) has shown an imbalance in the number of promotions for healthy versus unhealthy foods (8) and also a greater prominence and accessibility to unhealthy promotions even when there is an equal number of healthy promotions (9).

An East Anglian Study (9) in 2012 showed that almost 40% of all supermarket spending in the UK is on offers, with more than half of all spending on offers being on multi-buy deals. Highly promoted product categories were soft drinks, alcohol, confectionery, ready meals, sauces, yoghurts and meat/poultry/fish. Less promoted product categories were fruit, vegetables and dry grocery goods. While there was a good balance of supermarket offers available, however prominence and accessibility were an issue as less-healthy items tended to be the most prominent offers.

A Which? Consumer Report in December 2012 (10) showed how food companies can have an enormous influence on food choices through the types of products they offer, how they are promoted and labelled and the prices charged.

A recent study in the UK (11) found that overall, less healthy options were promoted with a similar frequency to healthy options. However, after controlling for the cost, discount and brand-specific effect, the sales uplift associated with price promotions was larger in less-healthy than in healthier food categories. In addition, higher- socio economic groups were

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more responsive than lower socio economic groups to promotions for both healthier and less-healthy foods.

A study in NI funded by the Food Standards Agency has been completed investigating food promotions in the jurisdiction and is due for publication later in the year. It is planned that the current work will be comparable with the NI work.

4. Approach

The research will employ a three stage approach.


Stage 1

The first stage will undertake an independent retail audit of promotions within specified food categories in a selection of food retailers across the ROI. The retail audit should review the current provision of healthy / less healthy food offers in an ROI regionally representative sample of food retail stores i.e. a sample representative of the type and spread of food retail stores across ROI. The contractor will be expected to make contact with each of the retail stores to be included and secure agreement to commence and conduct the audit.

It is intended that this audit be conducted on two occasions at least three months apart and be used as a baseline from which to measure the effectiveness of future interventions with ROI retailers.

Stage 2

The purpose of this stage is to engage with the retail sector in ROI to better understand food promotions from their perspective and to identify feasible strategies in this area for the future. Case studies and interviews should be used to illuminate retailers' motivational drivers for how and why certain food products are offered on promotion. This information should be used to identify and propose feasible interventions to persuade retailers to promote healthier products in store and encourage consumers to purchase these healthier food products. How these potential strategies could be implemented within the ROI retail context should be explored and reported.

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Stage 3

This stage of the research will complete the 360 degree perspective of food promotions in the retail sector by providing the consumer perspective. It can use a qualitative, quantitative or mixed method approach to elucidate consumer's knowledge, attitude and use of food retail promotions.

5. Technical Specification

- (a) Scope of research
- (b) Sample sizes
- (c) Seasonality
- (d) Data handling and Reporting
- (e) Quality assurance

(a) Scope of the research


A full justification and rationale for the proposed methodology (including recruitment strategies) and analytical approach will be required. It will be necessary to indicate for all stages how the proposed data will be collected, analysed and reported. Total costings are to be included in the tender also.

If tenderers believe an alternative methodology would be superior that that proposed in this tender, we ask for this to be outlined in their bid and a separate costing submitted.

Stage 1

With respect to each store audited, the audit should include:

- The total number of promotions;
- The products on promotion (including weight);
- For each product on promotion: the type of promotion (e.g. by one get one free offers, multi-buys, meal deals, single item discounts, promotional bundling e.g. 3 for the price of 2, long term repeat promotions, etc.);
- For each product on promotion: the original product price immediately prior to promotion and percent price discount;

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- For each product on promotion: the cost-saving for the consumer based on difference from the original price;
- Prominence, position and accessibility of promotions.

To address some of these issues, consultation with the retail store manager may be required.

In choosing the stores for participation the following should be taken into account:


- Both rural and urban representation;
- Both areas of deprivation and non-deprivation (www.pobal.ie/Pages/New-Measures.aspx) be represented;
- A range of food retail outlet types are to be included - multinational and national supermarkets, discount stores, convenience/symbol stores and independent stores;
- Specialist stores focusing on a narrow range of foods should be excluded such as green grocers, bakers, butchers and chocolatiers.

Healthy / less healthy food promotions should be defined in the same way as the NI project. It classifies foods in relation to fat, sugar and salt contents and is based on current UK government criteria used for colour coding food front of pack nutrition labelling ([12](#)). The detail will be shared with successful tenderer if the methodology has not been published.

Stage 2

Key areas to be explored with retailers include:

- Their understanding of the effect of promotions on purchase behaviour;
- Their rationale for promoting foods on offer at certain times;
- The popularity of promotions within specific food categories;
- The promotional strategies used by retailers;
- Healthiness of promotions;
- Types of promotions (e.g. price reduction, BOGOF) consumers preferred;
- Length of promotion cycles;

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- What would motivate retailers to make a greater proportion of their promotional offers healthy?

It is recognised that many promotional decisions are not driven at a local levels for chain stores so it is important that the regional or national perspective is sought

Furthermore, researchers should aim to collect historical data for the previous 12 months on retail store activity in relation to food promotions if possible. Tenderers are encouraged to propose their own recommendations on how to access food retailer data. Note: We are only interested in food retailers selling a wide variety of foods - therefore specialist retailers such as, for example, green grocers, bakers, butchers and chocolatiers should be discounted.


Stage 3

The adults consumers included in this phase of the research will be the main food shopper in their household. The sample needs to be representative of both males and females, different age groups, rural and urban households and of different social classes.

(b) Sample sizes

Careful consideration needs to be given to sample sizes in each stage of the research to ensure robustness.

Tenderers should present their plans for sub-group analysis in stage 1 and 3. In stage 1 for example the research requires comparison between outlet types of the balance of healthiness of foods on promotional offer. In doing so they should be guided by (a) the plausibility of providing a clear, distinct definition of each sub-group, and (b) the availability of relevant data for each sub-group. Developing a plan to operationalise given sub-groups should also help tenderers to reach conclusions about sample sizes required for the audit to draw statistically significant conclusions, and **tenderers should include suggested sample size information in their bids.**

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(c) Seasonality

The audit must also take into consideration the impact any seasonal offers could have on the balance of offers. Tenderers should outline how they will manage and limit the effect of seasonal promotions.

(d) Data Handling and Reporting

1. An interim report (electronic and hardcopy) containing a summary of the findings to date will be submitted to **safefood** at six monthly intervals of the research.
2. The contractor is responsible for collating all results and a final report will be submitted to **safefood** on completion of the study.
3. All forms, documentation and electronic files must be retained by the contractor until further notice from **safefood** in case of issues arising after the completion of the research.


(e) Quality Assurance

safefood will visit the contractors during the course of the survey to assess how the work is being carried out.

6. **Proposed Activities/Deliverables**

The proposed activities and deliverables will be dependent on the methodology proposed and will include:

- Submission on a 6 monthly basis of a summary report;
- Report and dataset from an independent audit of promotions within specified food categories in retail stores across ROI;
- Report on in-depth interviews with a ROI nationally representative sample of food retailers;
- Report outlining the findings from the consumer research;

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- Detailed recommendations of potential strategies to increase consumer accessibility to an increased number, range and variety of healthier food products sold on promotion. Also appropriate proposals on how these strategies could be implemented;
- Submission of a final report to be submitted to **safefood** within the 18 month study period, this should contain the full research findings along with a stand-alone summary.

7. ***Evaluation of Tenders***

Tender bids will be evaluated according to the quality of proposals and applicants using the following criteria:

Quality of the proposal:

1. Anticipated deliverables;
2. Research method and facilities;
3. Value for money;
4. Potential for application;
5. Work plan, including the overall timeframe.

Quality of Applicants:


1. Experience in subject area;
2. Quality Assurance and Quality Control measures in place.

8. ***Duration of Project***

Estimated duration of the project: Maximum 18 month. A detailed timescale of research should be submitted by each applicant.

9. ***Tender Application Forms and Guidelines***

The Tender Application Form and associated Guidelines can be downloaded from www.safefood.eu. They can also be obtained by emailing research@safefood.eu, quoting the project reference number **10-2015**. Alternatively please contact **safefood** as per the details below.


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