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Market Context

With an overall market share of 8.2% and a breakfast-specific market share of 19.6% in the food-to-go sector, Greggs is the UK's leading food-to-go brand (LSE 2024). Also, despite strong competition from large multinational fast-food chains like McDonald's, Costa Coffee, and Pret A Manger, Greggs has still managed an 11.3% increase in total sales in 2024 (Statista 2025a). However, 57% of Greggs users are 40+ years old, two-thirds of which are aged between 40 and 59 (YouGov 2020) and so an objective of increasing market share among younger customers would be important in expanding their brand awareness and likely their digital presence. This combined with the fact that almost half of the vegan population are aged 25-39 and that 27% are aged 18-24 (YouGov 2020) means Greggs' recent expansion into plant-based products was a significantly advantageous decision. Greggs currently has over 2,600 stores (Greggs 2025), including 44 (Motorway Services 2025) at motorway service areas (MSAs) and 7 at airports (Forbes 2023). Moreover, due to the current cost-of-living crisis, Greggs' position as a more budget-friendly food-to-go store may give it a competitive edge, allowing for further expansion.

Interpretation of research objectives

The first objective of our research will be to measure and compare demand for Greggs with respect to the different locations its services are offered (transport hubs, universities, business parks, high streets) as well as how their consumer behaviour varies between location types, such as the proportion of consumption between Greggs' menu categories in order to see if anything is being over- or understocked, or insufficiently advertised. Our second objective will be to review consumer attitudes of the new line of healthier and plant-based options now offered by Greggs and to identify barriers to consumer participation as well as the key driving factors of purchase. Our third research objective will be to evaluate user experience (UX) and customer expectations of the Greggs app and Greggs' loyalty programme, including personalisation, discounts, ease of use and the level of perceived convenience. Lastly, our fourth objective will be to assess Greggs' brand perception across different demographics and possible customer segments, including age and people who currently do not or will not use Greggs as a food-to-go option.

Modes of fieldwork and design choices

A brief overview of the proposed fieldwork:

Aim 1 (quantitative)	<ul style="list-style-type: none">• <i>Short online ordinal/ Likert scale surveys for universities and business parks, then questionnaire offered</i>• <i>Brief street interviews (using the same questions as the online survey) at transport hubs, then questionnaire offered</i>
Aim 2 (both)	<ul style="list-style-type: none">• <i>Focus group and questionnaire for qualitative analysis</i>• <i>Short online ordinal/ Likert scale survey for quantitative analysis</i>
Aim 3 (qualitative)	<ul style="list-style-type: none">• <i>Focus group and questionnaire</i>
Aim 4 (quantitative)	<ul style="list-style-type: none">• <i>Short online ordinal/ Likert scale survey, then questionnaire offered</i>• <i>Telephone survey (using the same questions as the online survey), then questionnaire offered</i>

Short online surveys would be used for aims 1, 2, and 4, with a lottery system incentive of a £250 gift card which they're entered for at completion as it's a cost-effective way of increasing participation, possibly even more-so among students. This short survey will include concise multiple-choice questions such as: "when did you last have a meal from Greggs?" (ordinal scale), "My ranking of food-to-go chains are:" (ranking of 5 options), and "I enjoy eating a meal from Greggs" (Likert scale). This is because they are fast and low-cost, and they will be easier to process and analyse later but we will need to avoid 'professional panellists' (respondents who agree to answer as many surveys as possible with minimal effort to simply receive incentives which results in worse quality data). To do this we will screen participants to reduce the level of low-quality respondents, as well as the responses using attention checks (such as a question with an obvious answer placed partway through) and a CAPTCHA check (to avoid bots). Also, we will ensure the survey is engaging, using simple and relevant questions, in order to increase the respondent's enthusiasm and therefore response quality. However, an online survey may target the more tech-savvy sample members and so may exclude the older age groups. To remedy this, for aim 4, we will ensure we reach the older demographic by conducting additional telephone surveys as they're fast, inexpensive and excellent for quick response questions. Furthermore, for aim 1, brief 'street-interviews' using convenience sampling would be used at transport hubs as online surveys are more targeted towards university and business park consumers. This is also fast, cost-effective and would ensure we analyse one of Greggs' key location types:

transport hubs. We will need to allow for a somewhat lower response quality for this as respondents may be in a rush. Moreover, to delve deeper into aim 2 and assess aim 3 in sufficient detail, we will conduct multiple, sequential (each done soon after the previous one with moderators learning from previous focus groups) dual-moderator focus groups to collect the responses which, as there are two moderators (one with incomplete understanding to maintain a productive discussion, and one with a complete understanding to ensure all targeted topics are covered), should create a balanced, fair and comprehensive overview of the samples thoughts and opinions. During the focus groups, we would run multiple idea facilitating activities to try and gather new insights about aims 3 and 2. For example, we would start by asking them to create mood boards using pictures we've supplied of a variety of Greggs products, as well as some competitors products, and ask them to write their perceptions of the items and what words they associate with them, such as 'delicious', 'greasy', or 'healthy'. We would also repeat this for different aspects of the Greggs' app such as its' general user interface and its' discounts and personal rewards system. This ought to act as an idea board for the moderators to base their discussion on as well as help the group relax and feel more at ease to contribute ideas with each other. Throughout the rest of the focus group, the moderators would start probing the group, and then specific individuals by asking questions such as "Could you explain that further?" and "Many of you are nodding, could someone tell me more about why they agree?". The moderators could then use projective techniques to find underlying motivations or attitudes that may be harder to convey directly. An example of this would be completion techniques, where respondents are asked to complete a stimulus such as, "Using the Greggs' app makes me feel...", "After eating from Greggs, I felt...", or "I had a Greggs' vegan meal and afterwards I thought..." to get them to expand on their attitudes about Greggs' vegan or healthy option. Another example would be to use expressive techniques getting the participants to try to explain how a third party would feel in specific situations, subconsciously reflecting how it might make them feel in certain situations, like receiving discounts from Greggs or going onto the app and seeing there were no discounts relevant to them (which they would then be probed about to ascertain what types of items they feel don't get personal discounts enough). We will incentivise participation in the focus groups by offering £20 gift cards as they can appeal to almost all audiences and are easy to distribute and measure expenditure on. At the end of the focus groups for aim 2 and 3, and for the online and over-the-phone surveys, we will also use an optional questionnaire (shown in the appendix) which would be rewarded with £10 gift cards to ensure a reasonable response rate.

We believe these analyses should take 2-4 weeks depending on respondent and moderator availability, including about 2 weeks to prepare for any fieldwork or qualitative methods, then 1 week to conduct them and 1 week to perform the analyses on the collected data.

We decided not to use in-depth interviews as while they do go into more depth about an individual's opinions and attitudes, we felt that a focus group would be a faster and cheaper method of obtaining views and insights into the average Greggs consumer. Also, we would need much more time to conduct enough interviews to ensure the sample would not be too biased by certain individuals' views. We also decided against observational methods as even though they are a good way of avoiding any self-report bias and having more real-life accurate results, it would also be time-consuming, and we wouldn't be able to dig deeper to reveal why the observed consumers were making the observed decisions. Also, there are ethical concerns because if the people being observed aren't aware that they're being watched then they aren't consenting to being recorded for research but if they are made aware and consent to being observed then the observed behaviours may not be realistic as they may act differently once they know someone is watching (e.g., choosing healthier options than they otherwise would).

Sampling methods and sample size

The research population will be as proposed: UK adults who regularly use food-to-go services, but with a disproportionately high sampling of key consumers, including commuters, students, and office workers. In order to have a sufficient sample size of each segment or demographic in our research population we will include UK adults in the following proportions:

Individual type	Proportion of sample
Commuters (of which are Office Workers*)	0.75 (0.5)
Students	0.08
Unemployed and economically inactive	0.17

**Arbitrarily chosen as we were unable to find relevant data*

We will attempt to ensure that the following demographic proportions, based on UK average demographics, are met within 4%:

Age Range	Proportion (GOV.UK 2023)	Income Level	Proportion (ONS 2023)	Ethnicity	Proportion (ONS 2021)	Sex	Proportion
18-24	0.11 /	Student	0.12 / 0.05	White	0.817	Male	0.49

	0.105						
25-34	0.17 / 0.171	0 - 16,500	0.14 / 0.15	Black	0.040	Female	0.51
35-49	0.24 / 0.245	16,501 - 34,500	0.30 / 0.30	Asian	0.093		
50-64	0.24 / 0.247	34,500 - 85,000	0.30 / 0.30	Mixed	0.029		
65+	0.23 / 0.232	85,000+	0.14 / 0.20	Other	0.021		

Where i/k is given as the proportion, that represents the chosen proportion out of the actual (assumed) proportion.

The total size of our samples will be based on the UK adult population which is 54.2 million (GOV.UK 2023) and the proportion of UK adults that eat fast food once a week which is around 15% (Statista 2024). For the online surveys we will use an initial sample size of 875, allowing for roughly a 56% (Meng-Jia Wu, S. et al. 2022) non-response rate, which gives us a final sample size of around 385. For the street interviews, we would like transport hubs to make up around 16% of research for aim 1, which amounts to a sample size of 73 respondents across the different locations. This proportion was chosen because we found that there are 400 Greggs in petrol stations and roughly 29 in rail stations and airports across the UK which means that 429 of Greggs' 2,618 stores (equal to 16%) are in transport hubs (Statista 2025b). For aim 4's telephone surveys, we will have an initial sample size of 580, which due to the fact that the non-response rate of over-the-phone surveys is around 90% (Fowler, F.J., Jr. 2019) will result in 58 responses (50% of the 65+ demographics proportion (0.23) of the sample population (equal to online survey respondents plus interview survey respondents for aim 4)). The focus groups will be in sizes of 6 which is small enough to remain intimate so that all participants will be able to contribute and be heard, but also large enough that participants should be able to bounce off of each other's ideas and for the moderators to collect a reasonable amount of data in each focus group. New focus groups will be conducted until either almost no new ideas have been revealed or 8 focus groups have occurred at which point the increase in new insights may no longer justify the increased spending on focus group incentives.

Quantitative Work and Multivariate Analysis

We will then perform quantitative analysis on both the data we've collected, and the secondary data about Greggs' which we're able to source, in order to provide insights about Greggs' research aims. Also collecting demographic data where possible will allow our results to be clustered where relevant in order to see if certain consumer segments are worth targeting more than others in order to increase demand. From the short survey that was conducted online, in-person, and over the phone, we will conduct more standard quantitative methods for question 1 (how they rank 5 food-to-go chains) to get descriptive statistics such as finding the median rank as well as non-parametric tests. We will use ordinal regression for question 2 (how recently they've consumed a Greggs meal) and 3 (enjoyment of Greggs), cluster analysis with cross-tabulations for question 4 (on-the-go eating behaviour), and multiple group discriminant analysis (MDA) for question 5 (usage of healthy and/ or plant-based options). For question 1, we will first look at what proportion of respondents ranked Greggs first, what Greggs' median rank is, and how it differs by demographics and different customer segments. Then we will use Wilcoxon's signed rank test against each of Greggs mentioned competitors to see if its rank is significantly higher or lower. The median value will be used as it is less affected by skewed data and our data will possibly be skewed. This analysis should reveal more about aim 4 and how Greggs is perceived relative to its competitors. For questions 2 and 3, we would use ordinal regression to model how often different demographics and consumer segments consume Greggs (question 2) to see if, for example, older and richer respondents are more likely to have eaten a Greggs more recently, and to model attitudes towards and enjoyment of Greggs (question 3) by demographic, location, and population type (e.g., student or commuting office worker). However, this is only possible if we are able to assume there is no multicollinearity in the data. Both of these will provide insights into research aims 1 and 4 and so provide insights into potential consumer demand in different locations and brand perception across demographics. To conduct this ordinal regression, we are assuming "proportional odds" which means we're assuming that the effect of moving up 1 level between answer options (e.g. 'once a week' to 'once a month') is the same regardless of which answer options we're moving between. For question 4, we would use cluster analysis to discern if there are any possible groupings between on-the-go dining behaviours, such as eating on-the-go, dining in, or drive-thru and any demographics or location types. This would answer aim 1 and reveal if specific types of on-the-go eating are more appealing to some demographics at certain location types, such as if commuting adults tend to prefer using a drive-thru at service stations on their way to work. To do cluster analysis, we would need to assume that there's no multicollinearity in the data (i.e. that none of the demographic or location variables have a linear relationship). We could investigate this further by visualising the data in cross-tabulations to see which behaviours are most common with different

demographics, such as if people on higher incomes are more likely to sit down to eat. For question 5, we would look into the more quantitative side of aim 2 (attitudes towards Greggs' healthy and plant-based options) using MDA on the response to question 5 and demographic information to find out and group which aspects of a respondents' demographics are most associated with their choice of plant-based and healthy options at Greggs, as well as if certain demographics are much more unaware of these options because one of question 5's options is "I didn't know they offered that". In order to use MDA here, we need to assume that there's no multicollinearity between demographics and that the groupings found are mutually exclusive and collectively exhaustive.

For our analysis on secondary data, such as company records or financial data, we would compare sales data between location types to see if certain types of stores perform better or worse in different regions of the UK, such as if service station Greggs are more popular in England or Scotland. Greggs' menu is currently split into the following categories: breakfast, savouries and bakes, drinks and snacks, sandwiches and salads, sweet treats, and hot food. We could also discover what types of products are more popular between different locations in the UK, such as if 'breakfast' food is more popular in the southwest and 'hot food' is more popular in the northeast. This could also reveal the areas of the UK where interest for healthier and/ or plant-based options is higher, allowing Greggs to better target those areas. We could also use the data on the Greggs' app to find out where it's most and least popular, as well as what the common usage behaviours of those with the app are (whether they use the discounts often or if they just use the loyalty programme) which would allow Greggs to target regions that are using it less. For the Likert-scale questions 6-17 in the questionnaire, we would use factor analysis in order to find common factors or themes which can group the statements, allowing us to use them for qualitative interpretation and so help inform Greggs about aims 2 and 3.

Questionnaire design

The first five questions of the questionnaire make up the questions that would be used for short online surveys, and phone and street interviews as they have been designed to be quick to ask and easy to answer in order to have a higher response rate for quantitative analysis where more data results in more accurate data and therefore inference for aims 1 and 4. After these five questions are answered, the respondent is asked if they would like to complete the rest of the questionnaire, if they say yes then they will complete it in the order shown, but if they say no then they will be asked five quick, optional personal information questions about their demographics. The rest of the questionnaire would go deeper into the different aspects of the research aims as for the qualitative analysis we want to gather insights, ideas, and opinions, as well as their popularity. Questions 6-17 are

Likert-scale questions designed to quickly assert attitudes and opinions about aims 2 and 3, scored on a 5-point scale from strongly disagree to strongly agree with a neutral option. All questions were designed to be as unambiguous as possible in order to obtain clear results that will be better suited for analyses later. These questions were also designed to be answerable quickly in order to reduce respondents getting tired or bored and increase survey completion rates. Questions 18-20 are long answer questions where respondents are able to write extended responses about their opinions on aims 2 and 3 from which we can extract key words for each question to explore what the most common thoughts and opinions on each topic are and visualise them using a word cloud. Finally, questions 21-25 are the demographics questions which ease into how personal the questions are to maximise willingness to respond, starting with asking about how often they commute to work.

Other Potential Research Objectives and Techniques

Another aspect of Greggs' current business we believe would be worth researching would be their current 'delivery' (through Uber Eats and Just Eat) and 'click & collect' services, especially as since COVID-19 there has likely been an increase in demand for convenient delivery systems. In order to assess this qualitatively, we could include the topic in the focus groups, asking respondents if they prefer delivery or click & collect and why, as well as examine their experiences of using it, such as if they've had poor delivery times or issues with the method of ordering their Greggs' meal. We could also evaluate this quantitatively by secondary data analysis on where there is the most demand for it as well as what food categories on Greggs' menu are most in demand. Moreover, we could further analyse these using surveys to find the proportion of customers using them, any barriers to consumers using these services, and preferences on pricing and timings.

Executive summary

Our qualitative methods of research, such as focus groups and longer answer questionnaire questions would help make targets for improvements relevant to each of the given aims, and our qualitative methods of analysis such as ordinal regression of Likert scale questions, discriminant and factor analysis, and secondary data analyses we could advise on what markets are being over- or under-targeted and what product categories are over- or under-supplied. The results and implications of our market research would significantly aid Greggs' ability to make informed decisions to improve their business.

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Appendix

- Age group proportions were calculated as the proportions given of the age group (GOV.UK 2023) divided by the total proportion of the UK population included (18+) which is 79.1%.
- Income proportions for students is calculated by multiplying the proportion of UK adults aged 18-24 (ONS 2021) by the proportion of 18-24 year olds in education (GOV.UK 2025) giving a result of $0.477 \times 0.105 = 5.01\%$.
- Sample size calculation: $\text{sample size} > [1.96^2 \times 0.5 \times (1 - 0.5) / 0.05^2] = 384.16$
where: 1.96 is the z-value for a 95% confidence level, 0.5 is the assumed proportion (null hypothesis) and 0.05 is the margin of error
- **Questionnaire:**
Questions 1-5 are included in the short online survey. If "Aim #" is "P", that indicates a personal information question which is optional but preferred.

Greggs' Questionnaire			
Aim #	Q#	Question	Answer
4	01	My ranking of food-to-go chains out of A-Greggs, B-KFC, C-McDonalds, D-Pret-A-Manger, and E-Costa Coffee are: (1 is most favourite and 5 is least favourite)	1 2 3 4 5
1, 4	02	When did you last have a meal from Greggs? (1-Today, 2-Within the last week, 3-Within the last month, 4-Within the last year, 5-Never)	1 2 3 4 5
1, 4	03	How much do you agree with the following statement: "I enjoy eating a meal from Greggs". (1-Strongly agree, 3-Neutral, 5-Strongly disagree)	1 2 3 4 5
1	04	When you are eating on-the-go (such as commuting to or from work), do you: 1-Prepare food at home, 2-Sit down to eat, 3- Find a drive-thru, 4-Grab food and eat it on the way, or 4-Grab food and eat it at your destination.	1 2 3 4 5
2	05	Have you had one of Greggs' healthier or plant-based	

Greggs' Questionnaire			
		options within the last two weeks? <i>(1-Both, 2-Healthier options, 3-Plant-based options, 4-Neither, 5-I didn't know they offered that)</i>	1 2 3 4 5
Please say how much you agree with the following statements: <i>(1-Strongly Agree, 2-Somewhat Agree, 3-Neither Agree Nor Disagree, 4-Somewhat Disagree, 5-Strongly Disagree)</i>			
2	06	I am satisfied with the selection of healthier options at Greggs.	1 2 3 4 5
2	07	I am satisfied with the quality of healthier options at Greggs.	1 2 3 4 5
2	08	I am satisfied with the selection of plant-based options at Greggs.	1 2 3 4 5
2	09	I am satisfied with the quality of plant-based options at Greggs.	1 2 3 4 5
2	10	I am likely to try a healthier or plant-based meal at Greggs within the next two weeks.	1 2 3 4 5
3	11	I enjoy using the Greggs app.	1 2 3 4 5
3	12	I find the Greggs app's layout to be easy-to-use.	1 2 3 4 5
3	13	I use the Greggs app regularly.	1 2 3 4 5
3	14	I would recommend the Greggs app to family or friends.	1 2 3 4 5
3	15	I enjoy the personalisation included in the Greggs app.	1 2 3 4 5
3	16	It is faster to order on the Greggs app for Click & Collect.	1 2 3 4 5
2, 3	17	I order healthy or plant-based options on the Greggs app.	1 2 3 4 5

Greggs' Questionnaire			
2	18	What is your opinion on Greggs' healthier and plant-based options?	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
3	19	How would you describe your experience and expectations for the Greggs app and loyalty programme? Please include opinions on personalisation, discounts, ease-of-use, and convenience.	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
NA	20	Are there any other changes or suggestions you would like Greggs to consider?	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
P	21	How often do you commute? (A-All week, B-Once a week or more, C-Rarely or never)	A B C
P	22	How would you define your sex? (A-Female, B-Male, C-Other)	A B C
P	23	What age group are you? (A_18-24, B_25-34, C_35-49, D_50-64, E_65+)	A B C D E
P	24	How would you define your ethnicity?	

Greggs' Questionnaire			
		<i>(A-White, B-Black, C-Asian, D-Mixed, E-Other)</i>	A B C D E
P	25	What income bracket do you fall under (in GBP£)? <i>(A_Student, B_0-16,500, C_16,501-34,500, D_34,501-85,000, E_85,001+)</i>	A B C D E