

Out of place

The extent of unhealthy foods in prime locations in supermarkets

The Obesity Health Alliance, November 2018



Executive Summary

- More than one in three children has a weight classified as overweight or obese by the time they leave primary school aged 11.¹ This increases their risk of developing conditions such as Type 2 diabetes, cancer, heart disease and liver disease in later life as well as associated mental health problems.
- Children aged four to ten are eating twice as much free sugar as the recommended daily intake and this is a key driver of rising levels of childhood obesity and tooth decay.² Children with a weight classified as overweight or obese eat between 140 and 500 excess calories per day, depending on their age and sex.³
- The location of unhealthy food and drinks in convenient or busy locations in shops can encourage shoppers to buy more of those products.
- The Obesity Health Alliance (OHA) visited five supermarkets to survey the types of food and drink products that are promoted in prominent locations in-store. Products were included in the analysis if they contribute significantly to children's sugar and calorie intake based on the following criteria:
 1. Food and drink products included in Public Health England's (PHE) sugar reduction programme or drinks eligible for the soft drinks industry levy (SDIL) - also referred to as 'sugary food and drinks' in this report.
 2. Food products proposed for inclusion in PHE's calorie reduction programme.ⁱ

Key findings

- 43% of all food and drink products located in prominent areas, such as store entrances, checkout areas, aisle ends or free standing display units (FSDUs) were for sugary foods and drinks.
- Three of the five supermarkets surveyed had sugary food and/ or drinks located at checkout areas.
 - Asda: 73% of food and drink products located at checkouts were sugary foods and/ or drinks.
 - Morrisons: 47% of food and drink products located at checkouts were sugary foods and/ or drinks.
 - Aldi: 30% of food and drink products located at checkouts were sugary foods and/or drinks.
- 70% of all food and drink products located in prominent areas were for food and drinks that contribute significantly to children's sugar and calorie intake.
 - 42% were sugary food and/ or drink products included in PHE's sugar reduction programme
 - 27% were products included in PHE's calorie reduction programme
 - Only 1% were drinks eligible for the SDIL
- The use of moveable FSDUs to promote sugary products was particularly common. 79% of food and drink products included in FSDUs were sugary food and/ or drinks included in PHE's sugar reduction programme.
- Less than 1% of food and drink products promoted in high profile locations were fruit or vegetables. According to 'The Eatwell Guide', to achieve a healthy balanced diet we should eat five portions of fruit and vegetables daily – making up over a third of our diet.
- There was considerable variation between the supermarkets surveyed. For example, on the day of the survey, one supermarket (Aldi), had food and/ or drinks promotions at just one of the five locations included in the survey.

ⁱ At the time of the analysis the categories for the calorie reduction programme had not been finalised. Analysis is based on categories proposed by PHE in October 2018.

The extent of sugary food and drinks located in prominent areas is concerning, with 43% of the food and drinks promoted in prominent locations being products that contribute the most to children's sugar intake. Combined with the lack of fruit and vegetables promoted in prominent locations, this shows how the retail promotional environment does not align with healthy eating guidelines and makes it harder for families to make healthy choices when shopping. Our survey showed variation across different supermarkets, particularly in relation to the promotion of sugary foods and drinks at locations like checkouts, so a regulatory approach is needed to create consistency within stores and a level playing field for all companies.

We are calling on the Government to restrict the placement of unhealthy food and drinks in high profile locations in supermarkets to help families make healthier choices when shopping.

About location based promotions

Where products are positioned in shops has an impact on how likely we are to buy them. The visibility of products in a retail environment has a nudging effect on shoppers and ultimately influences which products they choose to buy.⁴ There is evidence to show that when products are placed in convenient and eye-catching locations, such as shop entrances or aisle ends, sales of these products are positively impacted.⁵⁶⁷

In recognition of the role the location of a product plays in encouraging purchases, the UK Government announced its intention to ban the promotion of unhealthy food and drink by location in chapter 2 of its plan, 'Childhood obesity: a plan for action.'⁸

About this report

The OHA surveyed the food and drinks products placed at four highly visible locations in one outlet of five different supermarket chains with the biggest UK market share.⁹ The locations surveyed were store entrances, trolley and self checkout areas, aisle ends (facing the central aisle only) and free standing display units (FSDUs).

Aldi was included in the survey due to its market share. On the day of the survey, food and/or drinks were promoted in only one of the five locations. This data has been included in the report for comparison purposes.

The food and drink products surveyed were analysed against the food and drink categories included in PHE's sugar reduction programme and those proposed for inclusion in PHE's calorie reduction programmes.

Products were included in the analysis based on the following criteria:

- Food and drink products included in PHE’s sugar reduction programme. These are the foods and drinks that contribute the most sugar to children’s intakes.¹⁰
- Drinks eligible for the soft drinks industry levy (SDIL) based on having a sugar content of 5 grams of sugar per 100 millilitres.¹¹
- Food products proposed for inclusion in PHE’s calorie reduction programme.ⁱⁱ These are foods that contribute significantly to children’s calorie intake and where there is scope for reformulation and portion size reduction. Unprocessed foods are not included in this programme.

Alcohol was excluded from the analysis.

Data was collected during two weeks in August 2018. This survey provides a snapshot of the type of food and drinks promoted in prominent locations seen on a single visit and does not provide a comprehensive review of each retailer’s approach to promotions. See appendix 1 for more information on methodology.

Survey findings

70% of all food and drink products placed in prominent locations were food and drinks included in either of PHE’s sugar or calorie reduction programmes or eligible for the SDIL, therefore products that contribute significantly to children’s sugar and calorie intake.

There was considerable variation between the different supermarkets included in the survey:

Supermarket	No. of food and drink products included in the survey	No. of food and drink products included in sugar reduction programme	% of food and drink products included in sugar reduction programme	No. of food and drink products included in calorie reduction programme	% of food and drink products included in calorie reduction programme	No. of drinks products subject to SDIL	% of drinks products subject to SDIL	Totals
Aldi (only data from checkout area – no food promotions at other locations)	27	8	30%	7	26%	0	0%	56%
Asda	420	242	58%	75	18%	3	1%	76%
Morrisons	225	68	30%	79	35%	3	1%	67%
Sainsbury’s	403	177	44%	105	26%	2	0%	70%
Tesco	220	55	25%	81	37%	0	0%	62%
Totals	1,295	550	42%	347	27%	8	1%	

ⁱⁱ At the time of the analysis the categories for the calorie reduction programme had not been finalised. Analysis is based on categories proposed by PHE in October 2018.

Store entrances

Products were included if they were located within 10 metres of the store entrance and were not part of a fixed area (e.g. magazine rack, sandwich fridge).

- 86% of food and drink products located at store entrances were for products that contribute significantly to children's sugar and calorie intake, including crisps, cakes and confectionery. There was variation between the stores visited:
 - Asda: 85% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 4% of foods promoted were products that contribute significantly to children's calorie intake.
 - Morrisons: 60% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 15% of food and drinks promoted were products that contribute significantly to children's calorie intake.
 - Tesco: 32% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 60% of foods promoted were products that contribute significantly to children's calorie intake.
- On the day of the survey, Aldi and Sainsbury's did not have any food and drink products located in the store entrance

Checkout areas

Data was collected from one trolley checkout area and one self-checkout area.

- 67% of food and drink products located at checkout areas were for food and drinks that contribute significantly to children's sugar and calorie intake, including chocolate and confectionery. There was variation between the stores visited:
 - Asda: 73% of food and drinks promoted were products that contribute significantly to children's excess sugar intake. An additional 7% of foods promoted were products that contribute significantly to children's excess calorie intake.
 - Morrisons: 47% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 11% of foods promoted were products that contribute significantly to children's calorie intake.
 - Aldi: 30% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 26% of foods promoted were products that contribute significantly to children's calorie intake.
- On the day of the survey, Tesco and Sainsbury's did not have any food and drink products located at checkout areas.

Aisle ends

Data was collected on products displayed on fixed aisle end shelving (also called gondola ends). Only the aisle ends facing the central aisle of the supermarket were included.

- 67% of food and drink products located at aisle ends were for products that contribute significantly to children's sugar and calorie intake. There was variation between the stores visited:
 - Sainsbury's: 45% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 25% of foods promoted were products that contribute significantly to children's calorie intake.
 - Asda: 44% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 27% of foods promoted were products that contribute significantly to children's excess calorie intake.
 - Morrisons: 22% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 46% of foods promoted were products that contribute significantly to children's calorie intake.
 - Tesco: 24% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 33% of foods promoted were products that contribute significantly to children's calorie intake.
- On the day of the survey, Aldi did not have any food or drink products located at aisle ends.

Other location based promotions

The survey also collected information on food and drink products promoted in other prominent locations. The most prevalent type of promotion was the use of free standing display racks (FSDUs). These are flexible shelving units, usually branded, that were frequently placed in prominent areas such as aisle ends or near checkout areas. The vast majority of these racks promoted food and drinks that contribute to children's excess sugar and calorie intake including chocolate confectionery, crisps and sugary cereals.

- 83% of food and drink products located in FSDUs were for products that contribute significantly to children's sugar and calorie intake.
 - Asda had 81 FSDUs: 79% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 5% of foods promoted were products that contribute significantly to children's calorie intake.
 - Sainsbury's had 8 FSDUs: 38% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 63% of foods promoted were products that contribute significantly to children's calorie intake.
 - Morrisons had 26 FSDUs: 27% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 46% of foods promoted were products that contribute significantly to children's calorie intake.
 - Tesco had 10 FSDUs: 30% of food and drinks promoted were products that contribute significantly to children's sugar intake. An additional 60% of foods promoted were products that contribute significantly to children's calorie intake.
- On the day of the survey, Aldi did not have any food and drink products being promoted in FSDUs.

Discussion and recommendations

According to PHE statistics, children had already consumed more than their recommended sugar intake for this year by June – just six months into 2018.¹² Too much sugar can lead to weight gain, obesity and tooth decay. In addition, evidence shows that boys and girls with a weight classified as overweight or obese consume up to 500 and 290 calories too many each day respectively.³ This is why PHE is encouraging manufacturers and retailers to reduce sugar and calories in products that contribute significantly to children’s sugar and calorie intake by 20%. The sugar reduction programme is already underway and the results after one year were disappointing, with only three out of the eight food categories meeting or exceeding the first interim target of 5%.¹³

With childhood obesity rates continuing to rise, it is clear that more needs to be done to encourage manufacturers and retailers take a responsible approach to the manufacture and promotion of unhealthy food and drinks.

Our survey shows that the majority of food and drinks promoted in high profile locations in the supermarkets surveyed were for processed products that significantly contribute to children’s sugar and calorie intake. There was variation between supermarkets, particularly in the location of sugary food and drinks in store entrances and checkouts. This may reflect voluntary commitments supermarkets have made to restrict unhealthy products in some prominent areas. However regulation is needed to create a consistent approach and a level playing field for all companies.

Restricting the promotion of unhealthy food and drinks in prominent locations will help families avoid impulse purchases of unhealthy foods, making healthier choices easier.

The Obesity Health Alliance is a coalition of over 40 health charities, medical royal colleges and campaign groups working together to tackle obesity.
obesityhealthalliance.org.uk
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