

Inside our Supermarkets

Australia 2020

**Assessment of the healthiness
of Australian supermarkets**



Inside our supermarkets: Assessment of the healthiness of Australian supermarkets, Australia 2020.

Sacks G, Schultz S, Grigsby-Duffy L, Robinson E, Orellana L, Marshall J, Cameron AJ

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Unhealthy diets are a major public health issue in Australia.

Along with obesity, the unhealthy diets of many Australians are leading contributors to poor health, and have a high cost to the economy.

Excess consumption of food and beverages such as chocolate, confectionery, chips and soft drinks is a key driver of unhealthy diets.



<7%

OF AUSTRALIANS CONSUME DIETS CONSISTENT WITH THE AUSTRALIAN DIETARY GUIDELINES



>35%

OF ENERGY INTAKE COMES FROM DISCRETIONARY FOOD SUCH AS CHOCOLATE, CONFECTIONERY, CHIPS AND SOFT DRINKS

Supermarkets are a key setting for addressing unhealthy diets in Australia

Supermarkets are the main source of food for most Australian households. The supermarket environment, including the amount of shelf-space allocated to different products, the promotion of foods in prominent in-store locations, and price discounting practices all have a major impact on what people choose to buy.

Socioeconomic factors influence the healthiness of diets

People living with socioeconomic disadvantage experience higher rates of diet-related diseases, are less likely to consume diets consistent with recommendations, and are more likely to over-consume unhealthy food. Understanding if and how the supermarket environment contributes to socioeconomic disparities is an important public health priority.

Measuring the healthiness of Australian supermarkets

In this study, we assessed the degree to which the in-store environments within major Australian supermarket chains (Coles, Woolworths, ALDI and independent stores) promote healthy eating, and how this varies according to the level of socioeconomic disadvantage of the area in which the stores were located. We conducted an in-store audit of 104 stores (26 from each chain) in Victoria in 2019. This study follows a 2018 assessment of the policies and commitments of Australian supermarkets in relation to obesity prevention and nutrition.

Measures included:



Australian supermarkets heavily promote unhealthy food and beverages in-store

CHECKOUTS

Unhealthy food was present at
90%
of staff-assisted checkouts

The top 3 food and beverage categories displayed at checkouts



*Unhealthy drinks include soft drinks, energy drinks, sports drinks and iced tea.
**Healthier drinks include water and flavoured milk

Of discounted food and beverages,
7.5 times
more items were unhealthy than healthy



END-OF-AISLE DISPLAYS

Of all end-of-aisles that displayed food and beverages,
80%
had at least one type of unhealthy item on display

The top 3 food and beverage categories displayed at end-of-aisles



*Unhealthy drinks include soft drinks, energy drinks, sports drinks and iced tea

Of discounted food and beverages,
2 times
more items were unhealthy than healthy



SOCIOECONOMIC DIFFERENCES

The proportion of shelf space allocated to unhealthy food and beverages, compared with healthy items, was

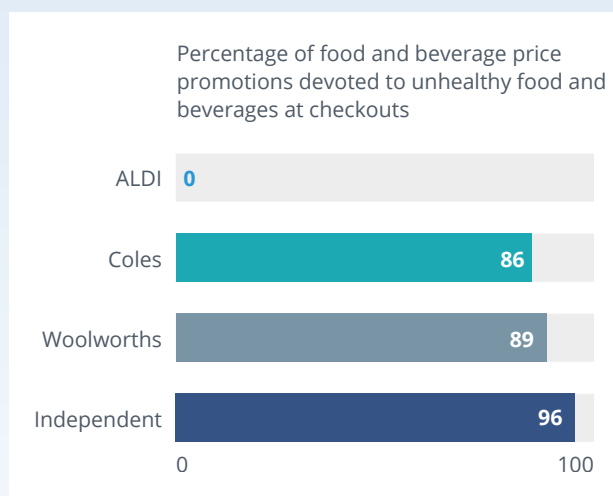
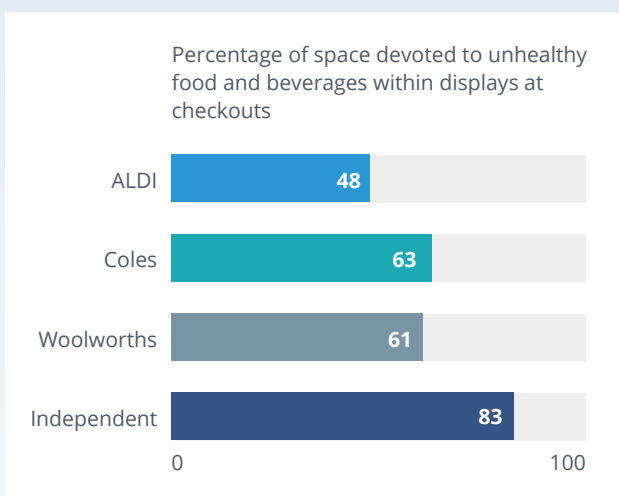
9.7% higher

in the most disadvantaged areas (compared with the least disadvantaged areas) for Coles, Woolworths and ALDI stores

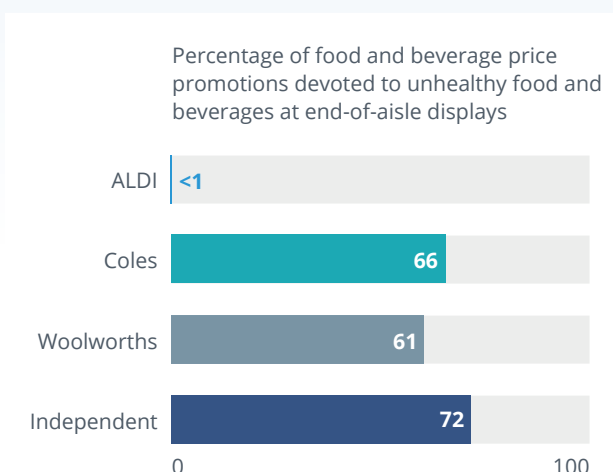
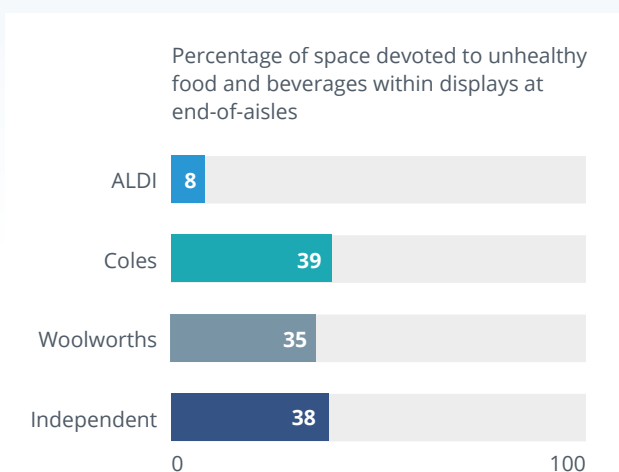
Findings by supermarket group

- **Coles and Woolworths stores** were similar in their heavy promotion of unhealthy food and beverages at checkouts and end-of-aisle displays. This was true for both the space allocated to these products in displays, and the proportion of products on price promotion.
- **ALDI** had significantly less space at checkout displays devoted to unhealthy food and beverages than other supermarkets. ALDI had no price promotions on unhealthy food or beverages at checkouts and almost none at end-of-aisle displays.
- **Independent stores** generally had higher proportions of display space and more price promotions devoted to unhealthy food and beverages compared to healthy items than other supermarket chains.

Checkouts



End-of-aisle displays



Summary and implications

- **Australian supermarkets heavily promote unhealthy food and beverages in-store.** They do this by allocating more shelf-space to unhealthy items compared with healthy items, as well as promoting and discounting these foods in prominent in-store locations (e.g. end-of-aisles and checkouts).
- **It is almost impossible to pay for groceries without being exposed** to unhealthy food and beverages.
- For some indicators of in-store healthiness, **supermarkets located in more socioeconomically disadvantaged areas were less healthy** than those located in less disadvantaged areas.
- **The healthiness of the supermarket environment differs by chain.** ALDI stores provided lower in-store exposure to unhealthy food at end-of-aisle displays and checkouts, compared to the other major chains. There was little difference between Coles and Woolworths on key indicators of in-store healthiness.
- Supermarkets can contribute to improving Australian diets by:
 - **Providing** healthier checkouts that do not display chocolate, confectionery and soft drinks
 - **Replacing** unhealthy items with healthy food and beverages or non-food items at end-of-aisle displays
 - **Allocating** less shelf-space to unhealthy items relative to healthy food and beverages
 - **Offering** fewer discounts on unhealthy food and beverages and lowering the magnitude of discount on unhealthy items.



In order to improve Australian diets, we need to set higher standards around the way supermarkets promote unhealthy food.

Unhealthy diets are a critical public health issue in Australia

Unhealthy diets and obesity are leading drivers of diet-related diseases and preventable deaths in Australia,¹ and have significant impacts on individuals, communities, the health-care system and the economy.²

The number of adults living with obesity has doubled in the last 10 years and, if trends continue, more than three-quarters of Australians are likely to be living with overweight or obesity by 2030.³

In Australia, few people eat diets consistent with recommended dietary guidelines. Only one-third of Australians consume the recommended servings of fruit, less than 4% eat the recommended minimum servings of vegetables, and over 35% of energy intake comes from unhealthy (discretionary) food and drinks such as chocolate, confectionery, chips, sweet biscuits and soft drinks.⁴

Overconsumption of discretionary food and beverages is a key source of excess energy, sugar, fat and sodium in the diet and a major driver of unhealthy diets and obesity.⁵

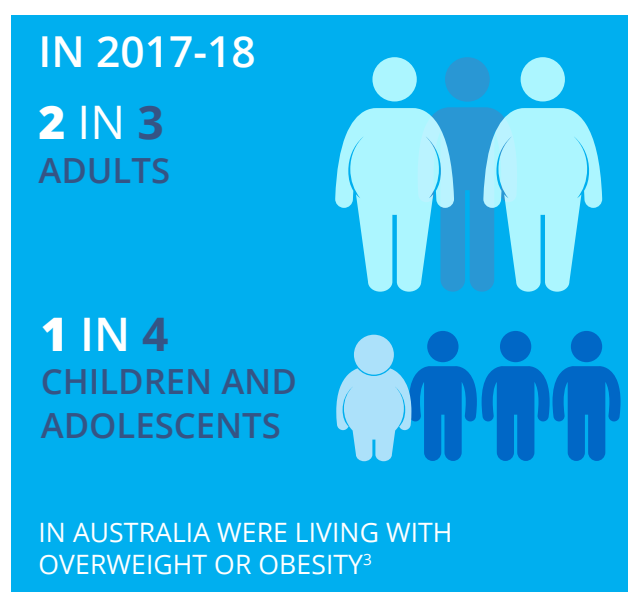
Supermarkets are a key setting for addressing unhealthy diets in Australia

Supermarkets are the main source of food for most Australian households.⁶ The food available and promoted in supermarkets has a major impact on what people choose to buy. An average Australian supermarket now stocks thousands of packaged food and beverages, many of which are unhealthy.⁷ The placement and price promotion of foods in prominent in-store locations, such as at end-of-aisles (endcaps) and checkouts, has a significant impact on purchasing.^{8,9}

Socioeconomic factors influence the healthiness of diets

In Australia, people living with socioeconomic disadvantage experience higher rates of diet-related diseases,¹⁰ are less likely to eat diets consistent with recommendations, and are more likely to have high intakes of unhealthy food.¹¹

Understanding if and how the supermarket environment contributes to socioeconomic disparities is an important public health priority.



¹ Australian Institute of Health and Welfare 2016. Australian Burden of Disease Study (2011)

² Colagiuri S, et al. The cost of overweight and obesity in Australia. MJA 2010; 192(5):260-264

³ Australian Bureau of Statistics (ABS). National Health Surveys, Overweight and Obesity in Adults, Australia. 2018

⁴ Australian Bureau of Statistics (ABS). Australian Health Survey: Consumption of food groups from the Australian Dietary Guidelines Australia 2011-12

⁵ Cohen D, et al. Not enough fruit and vegetables or too many cookies, candies, salty snacks, and soft drinks? Public Health Reports 2010; 125:88-95

⁶ Spencer S, Kneebone M. FOODmap: An analysis of the Australian food supply chain. 2012 Australian Government: Canberra

⁷ Walker K, et al. Product variety in Australian snacks and drinks: How can the consumer make a healthy choice? Pub Health Nutr 2008; 11(10), 1046-1053

⁸ Glanz K, et al. Retail grocery store marketing strategies and obesity: An integrative review. Am J Prev Med 2012; 42:503-512

⁹ Tan PJ, et al. Assessing the sales effectiveness of differently located endcaps in a supermarket. J Retail Cons Serv 2018; 43:200-208

¹⁰ Australian Institute of Health and Welfare (2018). Australia's health 2018

¹¹ Sui Z, et al. Discretionary food and beverage consumption and its association with demographic characteristics, weight status, and fruit and vegetable intakes in Australian adults. Pub Health Nutr 2017; 20:274

Supermarket food environments are important for promoting healthy eating

Policy action that targets food environments has been identified as a critical means of improving population diets.¹ Governments, supermarkets and food and beverage companies all have important roles to play in creating food environments that encourage healthy eating.²

In order to develop effective government and corporate policies to improve the supermarket food environment, it is important to first understand the current healthiness of Australian supermarkets.

Are supermarkets promoting healthy eating?

This report followed a 2018 assessment of supermarket retailer's policies and commitments related to obesity prevention and nutrition.³

The 2018 assessment rated four major Australian retailers on how comprehensive, transparent and specific their policies were across six domains. None of the retailers scored over 50/100.

In relation to the in-store environment, the 2018 assessment recommended that supermarkets:

- Introduce universal healthy checkouts (with no unhealthy items, such as confectionery and sugar-sweetened beverages, on display near registers) across all stores nationally,
- Limit price promotions (e.g. price discounts and 'buy-one-get-one-free' specials) on unhealthy items, and
- Increase the proportion of healthy items displayed in high-traffic areas (e.g. end-of-aisle displays).

This study assessed the extent to which these practices were implemented within major Australian supermarket chains.



*Governments,
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¹ Swinburn B, et al. The global obesity pandemic: shaped by global drivers and local environments. Lancet 2011; 378(9793): 804-814

² Swinburn B, et al. The Global Syndemic of Obesity, Undernutrition, and Climate Change: The Lancet Commission report. Lancet 2019; 393 (10173): 791-846

³ Sacks G, Robinson E, Cameron A for INFORMAS. Inside our supermarkets: Assessment of company policies and commitments related to obesity prevention and nutrition, Australia 2018. Deakin University: Melbourne. www.insideourfoodcompanies.com.au/supermarkets

Study aims

In this study, we assessed the placement and price promotion of healthy and unhealthy food and beverages in over 100 stores from four major Australian supermarket groups: Coles, Woolworths, ALDI and independent stores.

We also investigated whether the indicators assessed varied by the level of socioeconomic disadvantage of the areas in which the stores were located.

The objective was to describe the supermarket food environment and the degree to which supermarkets promote healthy eating, and to identify specific areas of focus for government, supermarket retailers and food manufacturers.

Protocol and audit tool

The audit tool used was based on an existing protocol for the assessment of supermarket food environments developed by the INFORMAS network.¹

Tailored to the Australian context, the tool measured shelf-space dedicated to selected healthy and unhealthy food and beverages in their usual shelf position, as well as the placement and price promotion of healthy and unhealthy items in dynamic end-of-aisle displays, checkout displays and temporary free-standing promotional displays (island bins).

Supermarkets selected for inclusion

A total of 104 stores located in metropolitan areas of Melbourne and Geelong (in Victoria) were audited. Stores were selected across quintiles of socioeconomic disadvantage, based on the Australian Bureau of Statistics Index of Relative Socio-economic Advantage and Disadvantage.

The sample included 26 stores per supermarket group, and included 10 stores from the lowest socioeconomic position (SEP) quintile, 8 stores from the two highest SEP quintiles and 8 stores from the remaining 2 quintiles (medium SEP).

Supermarket group	Market share*	No. of stores included in this study
Woolworths	37.2%	26
Coles	30.3%	26
ALDI	9.2%	26
Independent supermarkets**	16.2%	26

* Based on IBIS World data (food and grocery retail sector market share for financial year 2017-18)

** Independent supermarkets include Metcash (IGA), Australian United Retailers (including Foodworks brand) and other independent supermarkets

¹ INFORMAS (International Network for Food and Obesity/NCDs Research, Monitoring and Action Support) is a global network of public-interest organisations and researchers that seeks to monitor and benchmark public and private sector actions to create healthy food environments and reduce obesity and non-communicable diseases globally. www.informas.org

INDICATORS ASSESSED

Location	Indicator ¹	Food classification
1 Shelf-space of selected food and beverages in usual aisle location	Proportion (%) of shelf-space allocated to selected unhealthy food and beverages compared with selected healthy food and beverages	Healthy food and beverages included fresh and frozen fruit and vegetables Unhealthy food and beverages included chips, chocolate, confectionery, sweet biscuits, soft drinks and energy drinks
2 Checkouts	Proportion (%) of the total number of displays ³ where unhealthy food and beverages were present	Healthy food and beverages included all food and beverages classified as part of the Five Food Groups according to the Australian Dietary Guidelines (ADGs) Unhealthy food and beverages included all food and beverages classified as 'discretionary' according to the ADGs
3 End-of-aisles displays	Proportion (%) of space within displays ³ devoted to healthy and unhealthy food and beverages	
4 Other in-store locations ²	Proportion (%) of space within displays ³ allocated to healthy and unhealthy food and beverages on price promotion Average magnitude of discount of temporary price promotions on healthy and unhealthy food and beverages ⁴	

¹ Each indicator was calculated for all stores, for each supermarket group and for each level of socioeconomic disadvantage in which the stores were located

² Other in-store locations include island bins located at 'entrance of store' and 'elsewhere in-store'. 'Elsewhere in-store' refers to island bins found in locations excluding those near checkouts, end-of-aisles and store entrance

³ Displays include fixed displays and temporary island bins containing food and beverages

⁴ Average magnitude assessed for end-of-aisle displays and island bin displays only

1] Shelf-space allocated to selected healthy and unhealthy food

The shelf-space allocated to food and beverage categories influences consumer purchases: more shelf-space typically leads to more sales.

Coles, Woolworths and ALDI showed similarly high proportions of shelf-space dedicated to selected unhealthy vs. healthy food and beverages (Fig 1).

- For Coles, Woolworths and ALDI stores combined, the proportion of shelf-space allocated to unhealthy food and beverages compared with healthy items was 9.7% higher in the most socioeconomically disadvantaged areas compared with the least disadvantaged. The overall proportions and pattern according to level of socioeconomic disadvantage were similar across all of these three supermarket groups (Fig 2).

While independent supermarkets had the highest proportion of unhealthy food and beverages compared to healthy items, there was considerable variation between individual stores.

- In contrast to the other three supermarket chains, independent stores from the most socioeconomically disadvantaged areas had a lower proportion of shelf-space devoted to unhealthy food and beverages (Fig 2).
- Two independent stores located in areas of high cultural diversity resembled fresh food markets and had substantial space devoted to fruit and vegetables compared with unhealthy food.

FIG 1 Proportion (%) of shelf-space devoted to selected categories of unhealthy compared to healthy food and beverages*

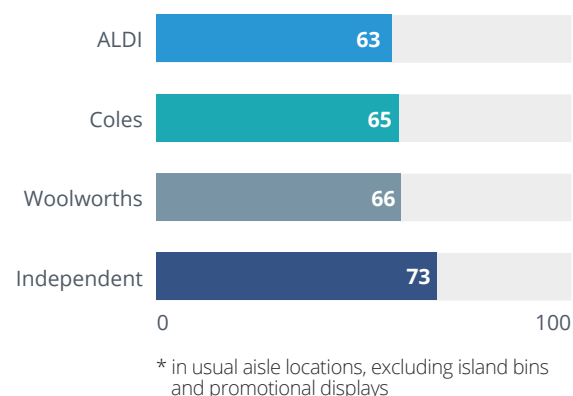
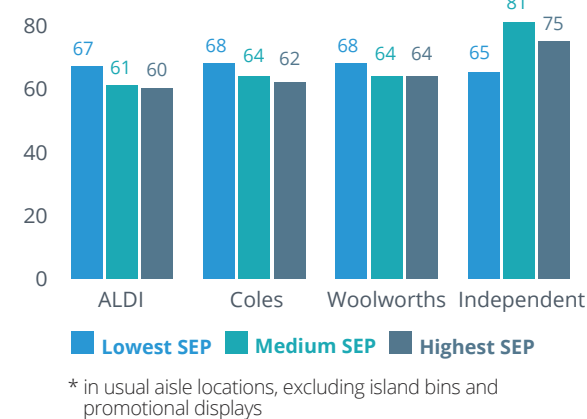


FIG 2 Proportion (%) of shelf-space devoted to selected categories of unhealthy compared to healthy food and beverages*, by socioeconomic position (SEP)



Key recommendations

- Reduce** the shelf-space allocated to unhealthy food and beverages (including chips, confectionery, sweet biscuits, soft drinks and energy drinks) relative to healthy food and beverages (fresh and frozen fruit & vegetables) in all Australian supermarkets
- Ensure** stores in the most disadvantaged areas do not disproportionately market unhealthy food and beverages, in comparison to stores in other areas

2] Checkouts

Displays at checkouts and temporary island bins located near checkouts are designed to encourage shoppers to make impulse purchases as they pay for their groceries. Price promotions on items located near checkouts act as a further incentive for impulse purchases.



The predominant food and beverage categories found at checkouts were:

Category	% of display space devoted to food category
Chocolate	31%
Gum and Mints	29%
Unhealthy beverages	18%
Healthier beverages	12%
Other food	10%

■ Unhealthy
 ■ Healthy

- Unhealthy beverages included sugar-sweetened and artificially-sweetened soft drinks, energy drinks, sports drinks, flavoured water and iced tea
- Healthier beverages included water and flavoured milk
- Other food included chips, nuts, sweet biscuits and nut bars

It is almost impossible to pay for groceries without being exposed to unhealthy food and beverages

- The majority of stores used island bins to promote food and beverages near checkouts, and most (86%) of these island bins displayed unhealthy items.
- When checkouts did not display unhealthy food or beverages, items such as magazines, batteries, personal care items, water and flavoured milk were promoted.
- No differences were observed in the healthiness of checkout displays according to level of socioeconomic disadvantage.

Of discounted food and beverages, **7.5 times** more items were unhealthy than healthy

Findings by supermarket group

- There was no significant difference between Coles and Woolworths stores in relation to the display space devoted to unhealthy food and beverages at checkouts (Fig 3).
- ALDI had less space at checkout displays devoted to unhealthy food and beverages than other supermarkets (Fig 3), and no price promotions on unhealthy items at their checkouts (Fig 4).
- Independent stores had the most display space at checkouts devoted to unhealthy food and beverages (Fig 3), and more unhealthy food and beverages on price promotion at checkouts (Fig 4).
- Only 1 out of 26 Coles stores and 1 out of 26 Woolworths stores had a checkout promoted as 'confectionery-free' or 'lolly-free'. No checkouts were promoted as 'confectionery-free' in ALDI or independent supermarkets.

FIG 3

Percentage of space devoted to unhealthy food and beverages within displays at checkouts

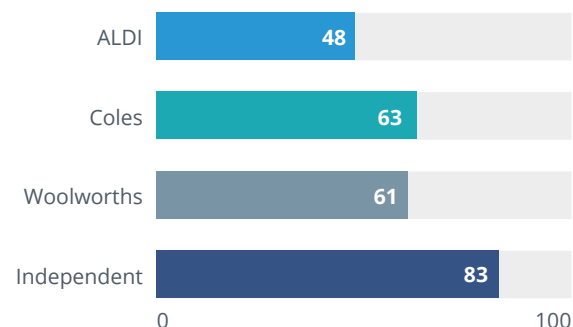
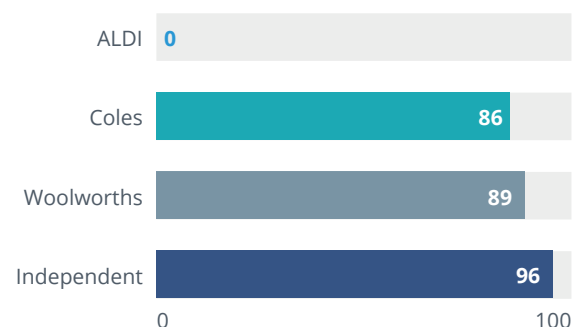


FIG 4

Percentage of food and beverage price promotions devoted to unhealthy food and beverages at checkouts

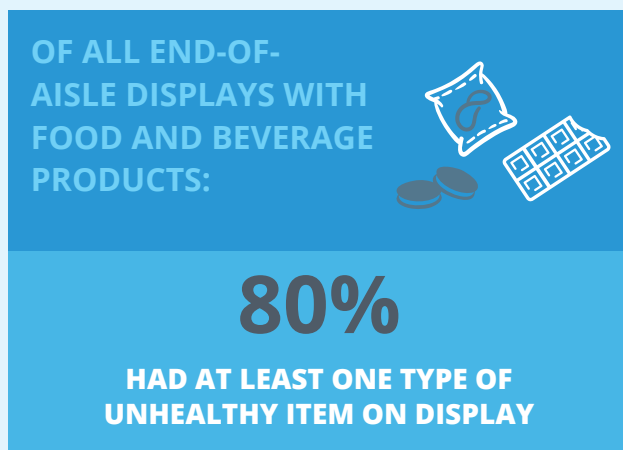


Key recommendations

- **Provide** confectionery and soft drink-free checkouts (including at display stands and island bins near checkouts) so shoppers have the option to avoid unhealthy food and beverages while paying for their groceries
- **Replace** unhealthy food at checkouts with healthy food and beverages or non-food items (such as batteries or personal care items)
- **Reduce** the number of price promotions on unhealthy food and beverages at checkouts and in island bins and other promotional displays near these checkouts

3] End-of-aisle displays

End-of-aisle displays, particularly those facing the front of store, as well as island bins positioned near aisle-ends, are key promotional locations aimed at triggering impulse purchases.



- Over three-quarters of island bins located near end-of-aisles displayed unhealthy food and beverages.
- Unhealthy food and beverages were more common at end-of-aisle displays facing the front of the store (more prominent), compared to elsewhere in-store.
- The average magnitude of discount on price promotions on display at end-of-aisles was similar for healthy (37%) and unhealthy (38%) food and beverages.
- No differences were found for any end-of-aisle indicators according to level of socioeconomic disadvantage.

The top 10 food and beverage categories found at end-of-aisle displays were:

1. Chocolate and confectionery
2. Unhealthy beverages
3. Chips
4. Fruit and vegetables
5. Sweet biscuits
6. Plain tea and coffee
7. Breakfast cereals (healthier options)
8. Sauces, stock, gravy and instant soup
9. Healthier beverages
10. Pasta and rice
■ Unhealthy ■ Healthy

- Unhealthy beverages included sugar-sweetened and artificially-sweetened soft drinks, energy drinks, sports drinks, flavoured water and iced tea
- Healthier beverages included water and flavoured milk

Of discounted food and beverages, **2 times** more items were unhealthy than healthy

Findings by supermarket group

- More space was devoted to unhealthy food and beverages at end-of-aisle displays in Coles, Woolworths and independent stores, compared with ALDI stores, which had fewer end-of-aisle displays in total (Fig 5).

At their end-of-aisle displays, Coles, Woolworths and independent stores:

- Were twice as likely to display unhealthy food and beverages compared to healthy items at displays facing the front of the store.
- Were more likely to display unhealthy than healthy food and beverages in island bins near aisle-ends.
- Had more unhealthy food and beverages on price promotion compared to healthy items (Fig 6).

ALDI's store design was markedly different from the other chains:

- ALDI stores had fewer (average of 6) end-of-aisle displays than all other supermarkets (Coles = 26, Woolworths = 25 and independent stores = 11) and almost no island bins located near aisle-ends.
- The majority of these displays were devoted to healthy food, and there were almost no price promotions on unhealthy food and beverages at ALDI's end-of-aisle displays.

FIG 5 Percentage of space devoted to unhealthy food and beverages within displays at end-of-aisles

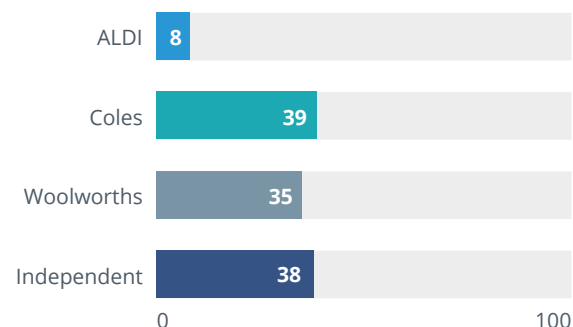
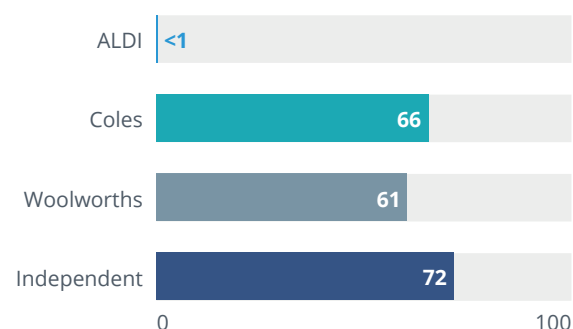


FIG 6 Percentage of food and beverage price promotions devoted to unhealthy food and beverages at end-of-aisle displays



Key recommendations (Coles, Woolworths and independent stores)

- **Reduce** the space devoted to unhealthy food and beverages at end-of-aisle displays, especially those facing the front of the store
- **Restrict** the number of island bins near end-of-aisles promoting unhealthy food and beverages
- **Reduce** the number of price promotions on unhealthy food and beverages at end-of-aisle displays and island bins located near end-of-aisles

4] Promotional displays in other locations in-store

Supermarkets use island bins for temporary promotions in various locations throughout the store.



Island bins elsewhere in-store

- Approximately half of island bins that were located elsewhere in-store displayed healthy food and beverages, while the other half displayed unhealthy items.
- Key categories found in these island bins included fruit and vegetables, beverages (healthier and unhealthy), soup, bread, condiments and confectionery.
- Overall, more healthy food and beverages were on price promotion compared to unhealthy items at island bins elsewhere in the store. However, in the most disadvantaged areas there were more unhealthy food and beverages on price promotion than healthy items.

Island bins at store entrance

- The majority of island bins located near the store entrance displayed healthy food and beverages.
- Fruit, vegetables and bread were most commonly displayed.
- The majority of price promotions were for healthy food items, however the magnitude of discount was slightly higher for unhealthy food (37%) compared to healthy food (33%).

Key recommendations

- **Reduce** the proportion of island bins throughout the store displaying unhealthy food and beverages
- **Continue** promoting healthy food and beverages in island bins at store entrances
- **Reduce** the number of price promotions in island bins displaying unhealthy food and beverages, particularly in the most disadvantaged areas
- **Reduce** the magnitude of discount for unhealthy items on price promotion

Summary of findings and recommended areas for improvement



Aspects of the supermarket in-store environment that help Australians make healthier food choices

- Most supermarkets promoted healthy food (primarily fruit, vegetables and bread) at or near the store entrance in both permanent displays and temporary island bins.
- ALDI stores provided lower in-store exposure to unhealthy food and beverages in promotional displays (end-of-aisle displays, checkout displays and island bins near these prominent in-store locations), than Coles, Woolworths and independent stores. ALDI also had fewer price promotions across all food-related promotional displays.
- Two independent stores located in areas of high cultural diversity resembled fresh food markets and had substantial space devoted to fruit and vegetables compared with unhealthy food.



Key recommendations

All supermarkets must work toward improving the healthiness of the in-store environment by:

- Reducing the proportion of shelf-space allocated to unhealthy food and beverages (including chips, chocolate, confectionery, sweet biscuits, soft drinks and energy drinks) relative to healthy food and beverages
- Providing confectionery and soft drink-free checkouts so shoppers have the option to avoid unhealthy food and beverages while paying for their groceries. Unhealthy food and beverages at checkouts could be replaced with non-food items (such as batteries or personal care items)
- Redirecting marketing strategies to promote healthy food at the end of the shopping experience (at checkouts) in a similar way as healthy food is promoted at the start of the shopping experience (at store entrance).
- Replacing unhealthy items with healthy food and beverages or non-food items at end-of-aisle displays (Coles, Woolworths and independent stores)
- Promoting healthy food and beverages in island bins throughout the store
- Reducing the number of price promotions and the magnitude of discount on unhealthy food in all promotional displays throughout the store.

Australian supermarkets heavily promote unhealthy food and beverages in-store

The shelf-space allocated to unhealthy items as well as their placement and price promotion at end-of-aisles and checkouts is at odds with the Australian Dietary Guidelines and is likely to strongly contribute to unhealthy dietary choices.

Supermarkets in the most disadvantaged areas encourage unhealthy purchases more than stores in other areas

To address current inequities in obesity and diet-related diseases, supermarkets have a responsibility to ensure that, at the very least, people living in the most socioeconomically disadvantaged areas do not have greater exposure to the promotion of unhealthy food and beverages in supermarkets than those living in more advantaged areas.

Implications for supermarkets and food companies

Supermarkets and food manufacturers can help create healthier in-store environments by establishing healthier checkouts, replacing unhealthy food and beverages with healthy food and non-food items at prominent in-store locations, and reducing the number of price promotions on unhealthy food.

Implications for government

The healthiness of supermarket in-store environments needs to be a priority as part of health promotion efforts. While the Australian government's Healthy Food Partnership (a collaboration between the government, public health sector and food industry to tackle obesity and encourage healthy eating) has made some progress in areas related to product reformulation, portion sizes, and nutrition education, the marketing of unhealthy food in supermarkets has not been an area of focus. Findings from this study provide important evidence for addressing supermarket in-store environments in government policies, such as the National Obesity Strategy, that aim to support the creation of healthy food environments and improve population diets.

Ongoing monitoring of food retail environments

Regular assessment of supermarket nutrition policies and in-store marketing practices is an ongoing research priority, and is valuable to demonstrate change over time. It is hoped that future evaluations of Australian supermarket environments will reflect concerted action by retailers, manufacturers and policy makers to promote diets consistent with the Australian Dietary Guidelines.

