

ALCOHOL

CHANGE<sup>UK</sup>

# All over the shop

How supermarkets  
utilise store layout  
to **sell** us more  
alcohol



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# Summary

It is now common practice for supermarkets to display and promote alcohol in almost all parts of their stores. Research by **Alcohol Change UK** has found supermarkets in Wales showcasing alcohol at store entrances, the ends of food aisles, in checkout areas, and alongside other goods including children's products.

Given the major role that supermarkets play in influencing customers' alcohol purchasing behaviours, the Welsh Government should look again at how these retailers display and promote alcohol within their stores. It should investigate how it could implement measures adopted elsewhere, like Scotland, where alcohol for sale is confined to a single area of the premises.



## Alcohol consumption and harm in Wales

- Alcohol is a causal factor in more than 60 medical conditions, including mouth, throat, stomach, liver and breast cancers; high blood pressure, cirrhosis of the liver; and depression<sup>1</sup>
- In 2018-19, 16% of adults were 'hazardous' drinkers (consuming between 15 and 50 units a week) and 2% were 'harmful' drinkers (consuming more than 50 units a week)<sup>2</sup>
- In 2017/18, there were 54,900 alcohol-related hospital admissions<sup>3</sup>
- Approximately 1,500 deaths are attributable to alcohol consumption each year, which is 1 in 20 of all deaths<sup>4</sup>



# Shopping for alcohol

## The role of store layout

Where we choose to purchase and consume alcohol has been changing in recent times. In 2019, only around 30 per cent of alcohol in the UK was sold in the on-trade (pubs, bars and restaurants), down from 47 per cent at the turn of the century.<sup>5</sup>

For many of us, the supermarket has become our main place to buy alcohol, partly because of convenience and partly because prices are typically lower than in pubs.<sup>6</sup>

This is still the case despite a growth in online alcohol sales,<sup>7</sup> meaning a physical trip to the local supermarket (or off-licence) remains the main method of buying alcoholic drinks for most shoppers in Wales.

**“Nothing in grocery stores happens by accident.”**

*Vasillis Dalakas, Consumer Behaviour Expert<sup>8</sup>*

A variety of factors drive consumers' purchasing decisions during their supermarket shop, including price, quality, pack size, nutritional information, perceived product benefits and store layout.<sup>9</sup>

The latter - essentially, how and where products are displayed - plays a crucial role. Retailers use stock placement to drive consumer purchases, including the use of

- ‘dump bins’ (wire baskets in which goods are usually piled in a relatively disordered manner);
- free-standing display units in the centre of aisles;
- the store foyer and entrance areas;
- end-of-aisle displays and shelf-edge signage designed to draw attention to particular products and promotions; and
- checkout areas, where shoppers can browse and choose products whilst they queue.<sup>10</sup>

Products placed in these areas of a store are usually on promotion and have been shown to contribute significantly to overall sales. A study in Germany found that, whilst the checkout space accounts for only 1 per cent of sales space in most supermarkets, it delivers more than 7 per cent of total sales.<sup>11</sup> Similarly, the UK Government estimates that goods placed in ends-of-aisles contribute 20 per cent of total supermarket

sales,<sup>12</sup> and have been shown to substantially increase sales volumes specifically in relation to alcohol.<sup>13</sup>

Some UK supermarket retailers have adopted policies, in recent years, limiting the display of products like confectionery at their checkout areas, to help their customers make healthier choices<sup>14</sup> - a further acknowledgment perhaps of how certain prime locations encourage purchases. Alcohol, however, has been omitted from these policies, which is remarkable, given that it is a leading risk factor for ill-health, early mortality and disability.<sup>15</sup>

## The Scottish model

Customers will “no longer encounter numerous alcohol displays as they select their everyday groceries - which may help to emphasise that alcohol is not an ordinary commodity, should not be seen as such, and should not be sold as such.”

*Criminal Justice Directorate (Scotland)<sup>16</sup>*

Unlike in Wales and England, where there are no restrictions on where alcohol can be displayed within a store, the Licensing (Scotland) Act 2005 (as amended by the Licensing (Mandatory Conditions No. 2) (Scotland) Regulations 2007) requires that alcohol for sale in Scotland can only be displayed in either or both of:

- 1) a single area of the premises, and
- 2) a single area of the premises which is inaccessible to the public (typically in a kiosk behind a bank of the till areas, alongside tobacco).<sup>17</sup>

These are known as “alcohol display areas” and were introduced in response to the Scottish Government’s concerns that “omnipresent alcohol displays encourage us to think of alcohol as an ordinary commodity”<sup>18</sup> rather than a potentially harmful substance, the sale of which needs to be more carefully managed.<sup>19</sup>

A subsequent amendment to the legislation has made it illegal, from 2011, for a supermarket in Scotland to advertise an alcoholic drinks promotion outside of the alcohol display area. This includes a ban on posters and A-boards, and also on alcohol branded non-alcoholic products such as foods and clothing.<sup>20</sup>



Above: Layout of a convenience store illustrating alcohol sales areas<sup>21</sup>

## All over the shop

As noted above, in Wales there are no restrictions on where alcohol can be displayed within a store. Between the 1st January and 31st December 2019, Alcohol Change UK visited a variety of supermarkets in south Wales to capture evidence of exactly where displays of alcohol were located within these stores. Below are some examples of what we found:

### The ‘decompression zone’



The relatively empty space at the entrance area of large stores is known in the retail industry as the ‘decompression zone’, and its purpose is to slow the walking speed of shoppers in order to browse products more easily.<sup>22</sup> Shoppers at the Tesco and Asda stores pictured below were greeted with crates of beer to help slow them down to optimum ‘shopping speed’.



### End-of-aisle displays



### Crates in the aisles



### Cross-merchandising: foods



### Cross-merchandising: children's movies



End-of-aisle displays, like the one's pictured in Morrisons and Sainsbury's above, have been described as "astute shopper traps" because of their ability to drive impulse purchases.<sup>23</sup> The producer Grant's is likely to have paid the retailer to showcase their free-standing promotional display in this part of the store.<sup>24</sup>

Shoppers at Tesco and Sainsbury's would need to have navigated around the 5ft high displays of alcohol captured above. Carlsberg UK's trade website in 2011 advised off-trade retailers to "create stacks of your promotional beers" and "site stacks away from the beer fixture to drive impulse purchase."<sup>25</sup> It appears this advice is still being adhered to today.

Supermarkets were found to use most areas of their stores to display alcohol. Pictured above are bottles of wine next to the frozen foods section in Tesco and boxes of beer in the fruit and vegetables section of Co-op.

The research found alcohol sold alongside Disney products in Sainsbury's and Tesco. Leading supermarkets have voluntarily pledged not to cross-market or cross-promote alcohol with "products that are designed to primarily appeal to children."<sup>26</sup> Also found were examples of alcohol being displayed alongside Kinder chocolates and Easter eggs.



## Seasonal opportunities



Pictured above: Bottles of Prosecco alongside Mother's Day flowers at Tesco, and Christmas alcohol sited in front of the deli and cheese counter at Morrisons. Our research found retailers using Easter, Halloween, major sporting events, and the seasons of the year more generally, as alcohol promotion opportunities. Drinks giant Diageo's Senior Customer Category Manager recently stated that convenience stores are presented with "the perfect opportunity to capitalise on these events by driving impulse purchasing and trip spend with eye catching displays and cross category merchandising".<sup>27</sup>

## Alcohol at the checkouts



The checkout areas within supermarkets are regarded as key spaces for retailers to drive incremental sales.<sup>28</sup> The examples above show alcohol displayed at Tesco's kiosk area and boxes of beer located at the entrance to the self-checkout area in Sainsbury's. It is well-established that prominent displays like these drive unplanned purchases; that is, they prompt customers to make additional purchases rather than simply substituting one product for another.<sup>29</sup>

# The need for legislative change

From this research, it is clear that leading supermarkets are using all areas of their stores in Wales to display and promote alcohol – alcohol is, literally, all over the shop.

The research found examples of alcohol being displayed at the entrance of stores, in store windows visible from outside, in the centre of aisles dotted through the store, at the ends of aisles selling non-alcoholic goods, and in the checkout areas and, often, being promoted at discount prices. Previous research has shown that many of these parts of the stores are 'high value' areas that generate incremental sales and drive impulse purchases.

"Selling alcohol directly alongside grocery staples like fruit and vegetables... promotes alcohol as just another ordinary commodity, rather than a potentially harmful substance that should be sold and used with greater care."

The research also found widespread practice of selling alcohol directly alongside grocery staples like fruit and vegetables, other fresh foods, frozen food products and soft drinks. These practices promote alcohol as just another ordinary commodity, rather than a potentially harmful substance that should be sold and used with greater care.<sup>30</sup>

Major supermarkets have previously voluntarily pledged to adhere to particular standards to ensure alcohol is sold responsibly. For example, the 2005 Social Responsibility Standards for the Production and Sale of Alcoholic Drinks in the UK, which was drawn up by the Wine and Spirit Trade Association, the British Beer and Pub Association and the Scotch Whisky Association, stated that "where practicable, it is best not to place alcoholic drinks near the entrance to the store".<sup>31</sup> The research found numerous examples of alcohol located in that very area.

Similarly, the Retail of Alcohol Standards Group – a voluntary collaboration between retailers including the 'big four' supermarkets – Asda, Morrisons, Tesco and Sainsbury's – issued guidance in 2017 on the responsible retail of alcohol in England and Wales. Signatories pledged to "place alcohol products

responsibly in store and have due regard for its location and proximity to other products" and to "not cross-market or cross-promote alcohol with products that are designed to primarily appeal to children."<sup>32</sup>

Given that the research found examples of alcohol being promoted alongside Disney-branded clothes and movies, as well as Easter eggs and other chocolates, it is safe to conclude that supermarkets are failing to meet their own standards. Children themselves have described alcohol as being highly visible throughout their day within their local community and have called on alcohol to be less visible in shops.<sup>33</sup>

"When you go to the till, you pass the big alcohol bit."

"There are four aisles of alcohol in Asda."

*Children's comments on supermarket alcohol*<sup>34</sup>

Unlike in Wales and England, where decisions about where and how alcohol is displayed and promoted within their stores still rests with the retailers, other countries such as Scotland and Ireland<sup>35</sup> have made it illegal to promote and sell alcohol outside of a designated area of the store. Whilst the impact of this legislative change on alcohol consumption and harm has not yet been evaluated, there is evidence from other spheres that removing products that are potentially harmful to health from key selling spaces can influence consumers' buying choices.<sup>36</sup>

"It is safe to conclude that supermarkets are failing to meet their own standards."

The Welsh Government needs to look again at how supermarkets in Wales are promoting and selling alcohol. As it has acknowledged, alcohol misuse is a major public health issue<sup>37</sup> and action to reduce alcohol harms remains a pressing need. Restricting alcohol for sale to a single area of the premises will help ensure that alcohol is promoted and sold more responsibly in Wales, and alongside other measures such as the recently introduced minimum unit price for alcohol, will represent another piece of the public health jigsaw that will ultimately save lives.



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