

Buywell Retail Project

Final Report March 2010



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Summary

Buywell is one strand of Well London¹, a five year, Big Lottery funded programme that works to improve the health of residents living in 20 deprived areas of the city. The Well London Alliance², led by the London Health Commission, invests in local community-led projects:

- Promoting mental health and well-being
- Improving healthy eating choices
- Promoting access to open spaces and increasing physical activity

The projects are focused on the local level (Lower Super Output Areas) and aim to use an integrated, community development and capacity building approach to improving community health and well-being. Since food plays an important part in contributing to a community's well being, Well London partner, London Sustainability Exchange commissioned Sustain: the alliance for better food and farming to coordinate the implementation of the Buywell initiative.

The Buywell Retail Project was developed as one aspect of the broader Well London food project, which aims to make it easier for people living in Well London areas to buy good quality, affordable and culturally appropriate and healthy food locally.

The Buywell Retail project aimed to support local convenience stores, in particular, to improve access to fresh, affordable and sustainable fruit and vegetables in Well London areas and other low-income areas of London. The project was run from March 2009 until March 2010. This report outlines what we did, what happened as a result, and what we learned from the pilot project. This report only comments on the Retail element of the Buywell project. Other initiatives supported through Buywell will be evaluated as part of the wider Well London evaluation from April 2011 to March 2012, led by the University of East London³.

- Fifteen stores (six stores in Well London Lower Super Output Areas and nine stores in Tower Hamlets) were supported to make changes to help them sell more fresh fruit and vegetables. Each retailer received an individual store development plan, business support, fresh produce training, Change4Life marketing materials and a launch event.
- Fruit and vegetable sales increased by an average of 60% across the fifteen stores – the biggest increase was 318% and the smallest 18%.
- All the retailers responded positively to the project. Two key elements of success were having a store manager with good community links, and/or having a store manager who agreed to invest in a new chiller for displaying fruit and vegetables.

¹ Well London is a five year programme that works with local groups and community-led projects to encourage healthy eating and physical activity, and improve open spaces and mental health in 20 deprived areas of the city. For more information on the Well London programme visit <http://www.london.gov.uk/welllondon/>.

² The Well London Alliance is made up of the London Health Commission, Central YMCA, Groundwork London, London Sustainability Exchange, University of East London, Arts Council England and South London and Maudsley NHS Trust.

³ For more information on Well London evaluation visit: <http://www.london.gov.uk/welllondon/about/research.jsp>

- The customer evaluation has shown that more people are buying fruit and vegetables from the stores after the changes and customers are more positive about their local store.
- Customers also reported eating more fruit and vegetables after the store changes; just over half of those surveyed said that they now eat fruit and vegetables daily after the changes, compared to just under a third before.
- One positive and unexpected result of the project was that local supplier, Community Food Enterprise, is being recommended by Costcutter as a preferred supplier to 41 of their stores in East London.

Introduction

Background

Many deprived communities suffer from poor availability of fresh, affordable fruit and vegetables, which can lead to an unhealthy diet and thereby widen health inequalities. Local convenience stores are located at the heart of these communities and form an integral part of the local economy. Often these family owned businesses have been established over many years, and sales typically comprise confectionery, newspaper and tobacco products, with limited sales of fresh foods.

There is a misperception in the convenience sector about the profitability of fresh produce versus other products, because retailers attempting to stock fresh fruit and vegetables often experience poor sales and high wastage. However, this is largely due to poor quality produce, high prices and a lack of understanding on how the category needs to be managed and displayed. Fruit and vegetables can be a highly profitable category so working with businesses to grow their sales of fresh produce can provide a long lasting and profitable way to tackle the poor provision of healthy food that many low income Londoners experience.

Previous successful projects

"Eatwell in Sandwell" was a project run from 2004 to 2006, funded by the Neighbourhood Renewal Fund (NRF) and led by Sandwell Primary Care Trust. One element of this was Shopwell, which supported four stores to improve the amount and variety of fruit and vegetables stocked. The intervention worked directly with the shops and a local cash and carry, where a training CD was on display. A fresh produce consultant and NHS staff worked intensely with the four stores, making over 25 visits to each store to support the retailer. The results reflect this high level of support with sales of fresh produce increasing by an average of 186% during the project⁴.

The Scottish Grocers' Federation Healthyliving Programme was established and funded by the Scottish Executive in 2004. The programme is now in entering its fourth phase with over 600 stores taking part. The aim is to increase the availability of fresh fruit and vegetables throughout Scotland, in both deprived and affluent areas where little or no option exists to buy

⁴ Neighbourhood Renewal Fund 'Eatwell in Sandwell' 2004-6: Successes, challenges, learning outcomes and opportunities Final Evaluation Report June 2006

these products. The programme has established successful activities for increasing sales which has resulted in an average increase in fruit and vegetable sales of 30%⁵.

The Department of Health Convenience Stores programme was launched in November 2008. The first phase aimed to increase the availability of fresh fruit and vegetables in deprived areas in the North East. Some 100 stores were involved with an average sales increase of 47%. Stores also saw an increase in total sales and improved customer perception⁶.

The Buywell Retail Project

Buywell is one strand of Well London⁷, a five year, Big Lottery funded programme that works to improve the health of residents living in 20 deprived areas of the city. The Well London Alliance⁸, led by the London Health Commission, runs a portfolio of health and well-being projects. Well London is a partnership that seeks to bring an integrated empowerment approach to well-being in some of London's most deprived communities. Well London partner, London Sustainability Exchange commissioned Sustain: the alliance for better food and farming to coordinate the implementation of the Buywell project with local partners.

The Buywell Retail project aimed to support local convenience stores, in particular, to improve access to fresh, affordable and sustainable fruit and vegetables in Well London areas and other low-income areas of London. It targets some of London's most deprived areas with little or no access to fresh fruit and vegetables locally and with high levels of obesity and diet-related ill health in the local population.

The Buywell Retail Project was implemented by Rice Retail Marketing⁹ with local partner Tower Hamlets Co-operative Development Agency, and was managed by London Food Link (part of Sustain: the alliance for better food and farming). It was jointly funded by The Tower Hamlets Healthy Borough Programme; the London Development Agency, as part of the Local Food Infrastructure programme; and the Big Lottery, through the London Health Commission and London Sustainability Exchange as part of the Well London programme.

⁵ More information on the Scottish Grocers Federation Healthy Living Programme can be found at <http://scottishshop.org.uk/wp-content/uploads/2009/09/Healthy-living-2leaflet.pdf>

⁶ Results from an unpublished evaluation report by Jigsaw Research Ltd. For more information on the Department of Health Convenience Stores Programme visit

http://www.dh.gov.uk/en/Publichealth/Healthimprovement/Obesity/HealthyWeight/DH_109065

⁷ Well London is a five year programme that works with local groups and community-led projects to encourage healthy eating and physical activity, and improve open spaces and mental health in 20 deprived areas of the city. For more information on the Well London programme visit <http://www.london.gov.uk/welllondon/>.

⁸ The Well London Alliance is made up of the London Health Commission, Central YMCA, Groundwork London, London Sustainability Exchange, University of East London, Arts Council England and South London and Maudsley NHS Trust.

⁹ Independent specialists in retail marketing, who have been integral to the success of the Buywell pilot project. See <http://www.riceretailmarketing.co.uk/>

Project aims

- To encourage disadvantaged communities to buy and eat more fresh, sustainably produced fruit and vegetables, through a pilot scheme to support small retailers
- To report on current constraints and identify opportunities to improve the supply and sales of good quality fresh, sustainably produced fruit and vegetables in small retail outlets
- To evaluate the scheme and make recommendations so that what we learn can be used and adapted throughout London.

Project targets

- Support 15 stores to increase sales of fresh fruit and vegetables – six located in Well London Lower Super Output Areas¹⁰, nine in Tower Hamlets
- Increase of 30% in sales of fruit and vegetables, on average, across the 15 stores
- Provide business support and training for 15 businesses – at least one member of staff trained in each of the 15 shops
- 50% of users of the shops reporting a positive change in their local shop
- Explore the market opportunities for increasing the amount of sustainable, locally produced fruit and vegetables

Appointment of project partners

Rice Retail Marketing (RRM) was recruited through an open tender: Four organisations applied, and RRM was chosen because of their successful experience managing the Department of Health convenience store programme in the North East along with substantial experience in food retail marketing. Because the majority of stores the project was working with are located in Tower Hamlets, the Tower Hamlets Co-operative Development Agency (CDA) was taken on as a local partner to assist RRM with local knowledge and to ensure a legacy in Tower Hamlets after the Buywell Retail Project ended.

¹⁰For a map of Well London Super Output Areas visit <http://www.london.gov.uk/welllondon/>.

Costs

The Buywell Retail project was funded by:

£35,000	NHS Tower Hamlets, Healthy Borough Programme
£43,000	London Development Agency, Local Food Infrastructure programme
£20,000	Big Lottery, Well London programme via the London Health Commission and London Sustainability Exchange
£ 6,550	Big Lottery, Well London programme Contribution in staff time of Buywell Officer, which is funded by the via the London Health Commission and London Sustainability Exchange
£25,000	NHS Tower Hamlets provided additional funding direct to CDA to provide local support to RRM and to ensure a legacy to continue in the borough in future years
£126,520	TOTAL

Method

Store selection

The store selection was based on the following criteria, set by the Buywell Retail Project steering group¹¹:

- For Well London areas, the store must be located in a Lower Super Output Area (LSOA) catchment¹²
- For Tower Hamlets stores, selection focused on the 2012 High Street
- The store is a central “community hub” (near a school or community centre)
- Little or no fruit and vegetable is provided in the immediate vicinity
- There is a good flow of pedestrians
- Ideally the store is close to an existing or recently trading food co-op
- It has a potential role as a grocery top up store, as well as stocking confectionery, tobacco and news products
- The store is large enough to allow an increased range of fruit and vegetables to be stocked and therefore enable a change in behaviour

A total of 85 stores were visited in Tower Hamlets borough and in eight Well London LSOAs to identify a shortlist of 20 stores. Sixteen stores were selected from this shortlist. One store is not included in the results in this report due to delays in its launch, because the store was undergoing a full refurbishment.

Engagement

Visits were made to the selected stores to engage retailers in the project. Symbol group regional sales managers provided an introduction for affiliated stores such as Costcutter,

¹¹ The steering group included the London Food Link Buywell Officer, the Tower Hamlets Healthy Borough Programme Lead, Rice Retail Marketing Director and Tower Hamlets Co-operative Development Agency Director.

¹² <http://www.london.gov.uk/welllondon/resources/index.jsp#maps>

Londis, and Nisa. Unaccompanied visits took place for the remaining independent stores. The process of engagement required multiple visits to retailers to build trust and demonstrate why they should invest in fruit and vegetables and why they had been selected. In some cases, as many as five visits were necessary. A full list of stores can be found in Appendix A.

Store development plans

A business development plan was produced for each store. An average of two further visits were required to each store to agree the change of space, investment in chilled space, use of ambient stands and overall support from the programme. Agreements were signed with all retailers (see Appendix B).

Store changes

All retailers participating in the project received a free, branded ambient fruit and vegetable stand to be positioned next to the check-out. They also received 2,000 leaflets advertising the shop changes, seasonal recipe cards, window stickers and posters as well as Change4Life¹³ branded shelf strips and price tags (see Appendix C for images).

The Buywell Retail Project agreed to use the Change4Life branding to maintain a consistent message to retailers and the public who may be familiar with the Department of Health convenience stores project and Change4life campaign. The branded materials would also fit with the branding used by other projects which have been supported by the Tower Hamlets Healthy Borough Programme.

A financial contribution was provided to retailers to buy refrigerators and set up refrigerated displays, where appropriate. Eleven stores agreed to increase the amount of chilled space allocated to fruit and vegetables. This was either through re-allocating existing chilled space or purchasing a new chiller to display fruit and vegetables. Buywell paid for half the cost of each new chiller (up to a maximum of £2,000 per store), and six new chillers were purchased at a total cost of £12,739.

Supply

Each retailer received personalised advice on the best range, display and pricing for fruit and vegetables. This involved visits from experts in fresh produce, Community Food Enterprise¹⁴, Symbol Group fresh food advisors and wholesale market Business Development Managers.

Launch events

Fifteen stores were launched over a two week period (one remaining launch – Christies Mini Market - was planned for the next financial year, i.e. post March 2010 due to the store undergoing a full refurbishment). Each event was attended by local school children, health workers, councillors and the local press. Some 2,000 launch leaflets were distributed to shop owners, and seasonal recipe cards and free fruit (both funded by the project) were provided

¹³ The government funded health promotion campaign - <http://www.nhs.uk/change4life/Pages/Default.aspx>

¹⁴ Community Food Enterprise is a social enterprise specialising in fresh produce supply and food access in low income areas of East London - website www.c-f-e.org.uk

for shops to give out in store. Launch events aimed to build on the stores' relationship with the local community. One of the key benefits promoted to the stores is the increased publicity and interest they will receive.



Photo 1



Photo 2

Photo 1: Elfrida Primary School pupils at the launch of Londis Dunfield Road, Lewisham

Photo 2: Stebon Primary School pupils at the launch of Costcutter Lansbury, Tower Hamlets.

Press releases were sent out on behalf of the stores and launches were co-ordinated across two weeks to tie in with British Food Fortnight¹⁵. The project launch was covered in local and regional news, including a report on BBC London news¹⁶.



Photos: Examples of press coverage of the Buywell Retail project

Training and continuing support

At the start of the project each retailer received a printed guide which advised on how to improve their fruit and vegetable sales. The retailers were then invited to a training session in fresh produce retail (e.g. display techniques, ordering processes, merchandising, legal and quality issues, storage and handling). Five retailers attended the training day. Those that could not attend received follow-up visits from the project team to talk through the key

¹⁵ British Food Fortnight website www.lovebritishfood.co.uk

¹⁶ BBC London news "Cheap fresh fruit in the east end" <http://news.bbc.co.uk/go/em/fr/-/1/hi/england/8273974.stm>

messages from the training day. Each retailer was also provided with a training DVD, seasonal charts and fresh produce retailing 'Top Tips' wall chart.

Structured follow up visits were developed to monitor each retailer's progress in the following key areas; sales, correct use of branding and display materials, quality and supply of produce, pricing and marketing. Any problems revealed by these visits were dealt with by support from the project team, Symbol Groups, Wholesale Business Development Managers or Community Food Enterprise.

Evaluation

Fruit and vegetable sales figures, provided by the shop, were monitored weekly. The research company, Jigsaw Ltd, was commissioned, following a competitive tender, to evaluate changes in customer perceptions, attitudes and shopping habits.

Quantitative exit interviews, whereby people leaving the store were approached and interviewed, were conducted both pre and post the changes across fourteen stores. One store (Londis Beavers Farm, Hounslow) was excluded from the evaluation because the shop changed owners during the project. The store changes were re-launched in February 2010 and it was felt that this would not have given enough time for the in-store changes to influence shopping behaviour before the evaluation was carried out in March 2010.

Interviews were conducted with shoppers at different times of the day and on different days of the week to allow for a range of customers to be represented in the survey. All shoppers aged 16 or over were eligible for interview, regardless of whether they had bought fruit or vegetables on that occasion.

These interviews asked shoppers about their shopping habits, amount of fruit and vegetables purchased, frequency of shop visits, travel distance, awareness of the store changes, perceptions of the stores and the fruit and vegetable provision. These interviews also provided demographic profiles and postcode data for Well London stores at the pre-change stage, which was then able to be tracked once the store changes had been made. A copy of the survey used is attached in appendix F.

Qualitative accompanied shopping visits complemented these quantitative exit interviews. These provided a more in-depth understanding of customer perceptions of the changes and which elements were having the most powerful impact on attitudes and behaviour.

For the accompanied shopping trips Jigsaw Ltd. pre-recruited customers to spend 40-45 minutes talking about their current eating habits and walking round the store exploring the impact of the changes and how (if at all) this affected their behaviour. Whilst in the store the researchers also observed customer behaviour, in particular looking at how people move around the store and their interaction with fruit and vegetable display. The observation allowed a better understanding of how consumers actually behave as well as how they report their behaviour, and enabled the research findings to be put into broader context.

The project beneficiaries

Profile of retailers

The stores participating in the Buywell Retail Project are all small to medium-sized enterprises (SMEs). Ten are associated with convenience store symbol groups and six are

independent. The great majority - 94% - of the owners are male, with the largest ethnic groups being Pakistani (34%) and Indian (18%).

Main barriers to selling fruit and vegetables

From our initial meetings with retailers, we were able to identify a common set of barriers to selling good quality, affordable fruit and vegetables, as follows:

- A belief that local customers do not buy fruit and vegetables
- A belief that they cannot compete with local markets on price
- Lack of good quality, affordable supplies
- Lack of suitable display equipment
- The category is a low priority for retailers, compared with traditional impulse purchases such as confectionery, tobacco and news
- Lack of knowledge about how to maximize sales of the category

Retailers often assume that their customers would not buy fruit and vegetables from their store and any past experience selling poor quality, expensive items probably reinforced this view.

Profile of customers

The surveys conducted by Jigsaw indicated that:

- The socio-economic status of shoppers is much lower than the national average, with significantly more customers receiving benefits or described as semi-skilled or unskilled manual workers
- The majority live within five minutes walk of the store (63% pre-change, 90% post-change)
- Just under one third have children living at home (29% pre-change, 30% post-change)
- Most of the people interviewed were the principal shopper for their household (75% pre-change, 82% post-change). They reported spending an average weekly amount on food of £71 pre-change, £80 post-change

Proportion of customers that live in Well London LSOAs (for Well London stores only)

Store name and LSOA	Percentage of customers interviewed living in Well London LSOA
Coronation Mini Market, Queens Park	44%
Costcutter, Pigott St, Hind Grove	88%
CSM South Africa Rd, White City	6%
Jeffrey's Rd, Larkhall	9%
Londis Beavers Farm, Cranford	22%
Londis Dunfield Rd, Bellingham	53%

Results

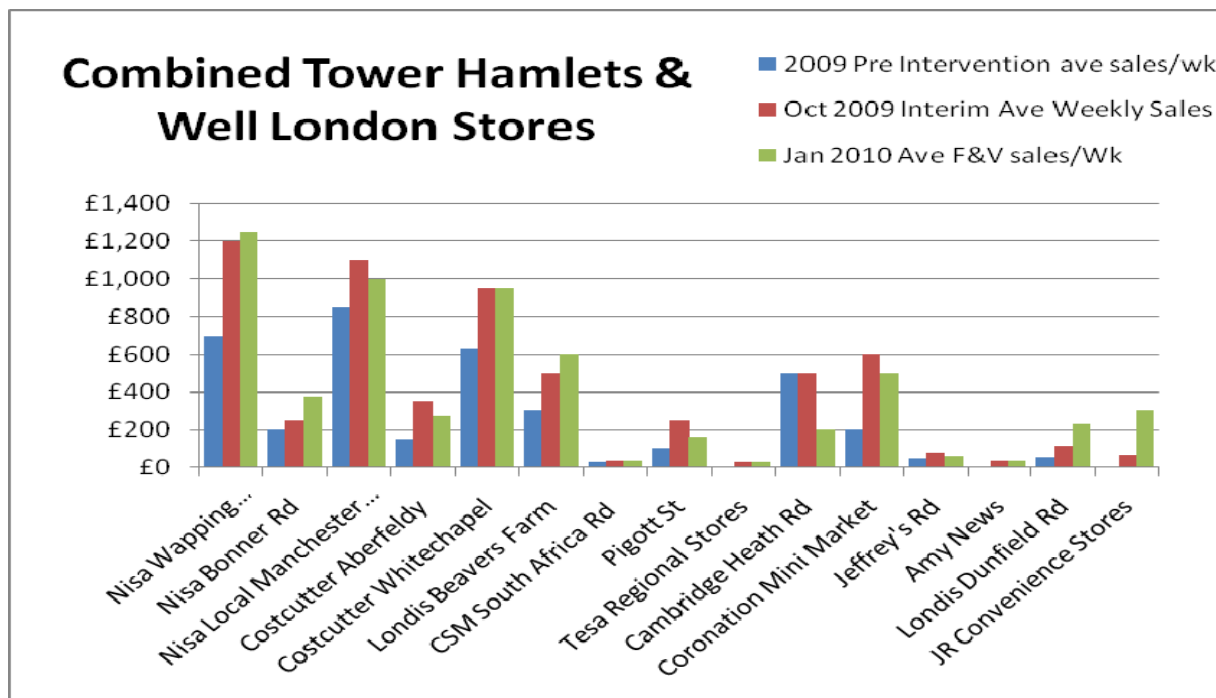
Fifteen stores made the planned changes and participated in a launch event. Below are the main results from the project:

Fruit and vegetable sales

Fruit and vegetable sales data was obtained from all participating stores three times: before the project started; after four weeks of making changes; and four months after the changes to the store were made.

After four weeks there was a total rise in sales of fruit and vegetables of 61%. Encouragingly, this rise was maintained four months after the store changes with an average increase of 60% in fruit and vegetable sales across the fifteen stores that were launched.

However, whilst most stores have maintained or even exceeded their initial sales increase, one store - Cambridge Heath Road – saw a 60% decline in sales towards the end of the project. The store owner attributed this to the opening of a Tesco store nearby. Similarly, Costcutter Aberfeldy also reported their sales declining after the initial launch due to a new Iceland store opening nearby.



Graph 1: Sales data per store before the changes and one month and four months after the changes

Table 1: Sales data for Tower Hamlets stores

Tower Hamlets Store	Type of change	2009 Pre-change Av. f&v sales/wk	Oct 2009 Interim Av. f&v sales/wk	Oct 2009 % Increase	Jan 2010 Av. f&v sales/wk	Jan 2010 % Increase
JR Convenience Stores	Chilled	£0	£70	n/a	£300	n/a

Nisa Bonner Rd	Chilled	£200	£250	25%	£375	88%
Costcutter Aberfeldy	Chilled	£150	£350	133%	£275	83%
Nisa Wapping supermarket	Chilled	£700	£1,200	71%	£1,250	79%
Pigott St	Chilled	£100	£250	150%	£160	60%
Costcutter Whitechapel	Remerchandising of chilled	£630	£950	51%	£950	51%
Nisa Local Manchester Way	Remerchandising of chilled	£850	£1,100	29%	£1,000	18%
Amy News	Ambient only	£0	£40	n/a	£40	n/a
Tesa Regional Stores	Chilled	£0	£30	n/a	£30	n/a
Cambridge Heath Rd	Ambient only	£500	£500	0%	£200	-60%
TOTAL		£3,130	£4,740	51%	£4,580	46%

Table 2: Sales data for Well London stores

Well London Store	Type of intervention	2009 Pre intervention Ave f&v sales/wk	Oct 2009 Interim Ave f&v sales/wk	Oct 2009 % Increase	Jan 2010 Ave f&v sales/wk	Jan 2010 % Increase
Londis Dunfield Rd	Chilled	£55	£110	100%	£230	318%
Coronation Mini Market	Chilled	£200	£600	200%	£500	150%
Londis Beavers Farm	Chilled	£300	£500	67%	£600	100%
CSM South Africa Rd	Ambient only	£30	£40	33%	£40	33%
Jeffrey's Rd	Chilled	£50	£75	125%	£60	20%
TOTAL		£635	£1,325	109%	£1,430	125%

Table 3: Combined sales data for all participating stores

Combined Sales from Well London and Tower Hamlets Stores	2009 Pre intervention Ave sales/wk	Oct 2009 Interim Ave sales/wk	Oct 2009 % Increase	Jan 2010 Ave F&V sales/Wk	Jan 2010 % Increase
TOTAL	£3,765	£6,065	61%	£6,010	60%

Changes in customer behaviour

The Buywell Retail intervention aimed to influence changes in consumer attitudes and consequent consumption behaviour. This was through changing the shop environment to encourage customers to buy more fresh fruit and veg (e.g. by installing a chiller and moving the display units to the front of store) and by enhancing the look and feel of the goods on offer (buying enticing looking fruit and vegetables and training shop staff on how to display them to best effect).

High profile behavioural 'prompts' were also provided through branding consistent with a well known government initiative (Change4Life). This helped to establish the credibility of the campaign messages and help to establish resonance with some members of the target audience.

One hundred and eighty-four 8 minute interviews were conducted pre and 166 post the changes across fourteen of the stores to assess the effectiveness of these measures.

Unfortunately the sample size was too small to carry out statistical analysis. However, the pre and post interviews meant we were able to assess the impact of the changes and compare the responses of a matched sample of shoppers pre and post the changes. This established that any differences in perceptions, attitudes and behaviour could be attributed to the in-store changes. The results indicated some shifts in attitudes and purchasing behaviour which are outlined and explored further below.

More customers are buying fruit and vegetables

The research noted what shoppers had bought on the day of the survey. There was a small but important increase in customers choosing to buy fruit and vegetables from the store.

There was also an increase in the number of shoppers saying they buy *any* type of fruit or vegetables (this includes canned or frozen) from the store after the changes, which may indicate a change in attitude towards the stores.

Customers report eating more fruit and vegetables

Our shoppers do appear to be more frequent consumers of fruit and vegetables after the changes: just over half of those surveyed reported that they eat fruit and vegetables daily after the changes, compared to just under a third before

Encouragingly, people reporting that they "don't eat many fruit and vegetables" had also reduced. However, other factors such as poor selection, poor quality and cost were still significant barriers to purchasing fruit and vegetables from the store for some people.

Customers' opinions of the store improve

The proportion of customers feeling "*it's a good place to shop for food*" and that the store "*Offers a good selection of healthy options*" increased after the changes. This strongly suggests that the changes have had a wider positive impact on the perceptions of the store overall.

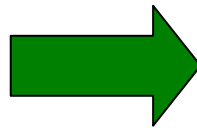
Around one third of shoppers said they had noticed changes in-store and around one quarter had noticed that the positioning of the fruit and vegetables had moved and/or that there was a better selection of fruit and vegetables. The marketing of the project had made an impact, with about half of the shoppers saying that they had noticed new promotions in store. Of these, around a third were able to name the Change4Life promotion and link it to promoting the value of eating more fruit and vegetables.

More detailed analysis of the customer interviews may be undertaken as part of the wider Well London evaluation, conducted by the University of East London.

Example of store changes: Pigott Street Costcutter, Tower Hamlets



Before: Fruit and vegetables on offer at the back of the store



After: Branded ambient stand and chiller to display fresh produce at the front of the shop

Case studies

Follow up interviews were conducted with a small number of shoppers who claimed to be purchasing more fruit and vegetables as a result of the changes. These follow-up interviews were conducted in three stores:

- Coronation Mini Market, Dart Street, W10
- Costcutter, Aberfeldy Street, E14
- Costcutter, Piggot Street, E14

The follow-up involved an in-depth qualitative interview with the respondent, both in-store and in a nearby café. The interview looked at the respondent's shopping and eating habits in more depth, including their shopping behaviour in the convenience store and the impact of

the changes. One case study is detailed below, and more examples can be found in Appendix D.

Case study one

Currently unemployed, giving up smoking and trying to improve his health

Respondent profile

- Male
- Separated from partner
- Sees child at weekends/on visits
- Looking for work at present
- Lives within five minutes walk
- Does not have a car
- Local store - Dart Street (Well London Store)

Household eating/shopping patterns

- Lives on his own and therefore is responsible for all shopping.
- Tends to do most of his shopping at the local supermarket or Iceland to try and keep costs down as he is on a tight budget. He will do a big shop every couple of weeks – a lot of what he buys is frozen so a more regular shop is less of an issue.
- Is 'not much of a cook' therefore does not prepare much fresh food. His aunt will cook a 'proper lunch with vegetables' at the weekend.
- Does eat a couple of pieces of fresh fruit every day, and sometimes frozen peas.
- Is trying to eat better and live a healthier life, due to other underlying health issues and encouragement from this father (who is also trying to live a healthier life).
- Is giving up smoking (has patches from the doctor) and is finding himself snacking more as a result.

Use of store

- Store used for top-up items such as bread and milk and other provisions such as drinks, snacks and non-perishable items.
- He is in here most days as he lives round the corner.
- He does not recall buying fresh fruit and vegetables in here before the changes, as they were 'down at the back' and therefore not top of his mind.
- His expectation is that fruit and vegetables would be more expensive than Iceland or Sainsbury's, although he appreciates that you are paying for the convenience.

Changes to the store/awareness of Change4Life

- He was aware that the fruit and vegetables had moved closer to the front of the store. They are now on the aisle you walk up to pick up your milk and approach the till and are therefore 'hard to miss'.

- The respondent was also aware of the Change4Life signage around the fridges and the loose item unit, and feels that it does serve as another reminder, while you are in the store, to try and eat more healthily.
- Due to trying to give up smoking he was finding that he was snacking on crisps and sweets in the evening as a substitute and as a result was putting on weight. He is now trying to replace this with snacking on fruit instead (typically apples and bananas). Having the fruit more prominently in the store is helping him do this, *'I will feel the need for something and come in here now and buy an apple or a banana where as before I used to buy a packet of crisps.'*
- As a result he is finding himself eating more fruit overall and from this store in particular.
- The display was seen to be adequate, although he would ideally like more choice of items, *'In the supermarket you get a whole range of items to choose from.'*



Picture: Dart Street store fruit and vegetable display

- He feels that the prices are OK for purchasing the odd item. You are ultimately paying for convenience and they are not hugely more expensive (20-30p more for four apples or bananas).

Community links

Community food co-ops

Co-ops can contribute to the health and cohesion of communities but are usually only open for a few hours each week. This can make it difficult to sell all their produce or make enough money to cover the costs. Convenience stores are located in the heart of communities, often near where food co-ops are held. The Buywell Retail Project explored opportunities for partnering shops with neighbouring food co-ops as a means of supporting each others' efforts to sell more fresh produce to the local community. Of three suitable Buywell stores, the project successfully partnered two food co-ops with their local shops. Some of the positive outcomes from this include the co-ops reducing their running costs by sharing deliveries with the shop and the store manager learning from the food co-op about pricing and the preferred types of fruit and vegetables for local people. The third store posed some difficulty due to the manager being poorly regarded by local people.

School tuck shops

With a focus on healthy eating, many schools are looking at setting up school fruit tuck shops, particularly Key Stage 2 (pupils aged between 7 and 11 years) and secondary school children who do not receive free fruit in school under the government's scheme¹⁷. The Buywell Retail Project explored creating links with local schools by encouraging retailers to provide a weekly supply of 50 items of fruit to their local school, supported by a £5 contribution from Tower Hamlets Extended Schools Coordinators. This was successfully tested in three Buywell stores that set up a supply of fruit to local school fruit tuck shops.

Retailer responses

The project was very popular among all of the participating retailers, both in terms of local community engagement and as a business and educational venture. Below are some comments from participating retailers.

I've seen my fruit and vegetable sales go up.... It encourages healthy eating

**Nisa, Manchester Way,
Tower Hamlets**

It's a really good programme....it's good for the kids and it is good for me as I sit behind the till and look at the fruit (ambient stand) all day and it makes me want that rather than crisps.

Nisa, Bonner Rd.

It has helped sales of other things as well (as fruit) as people pick up other things.....customers can get healthy foods locally and we support the local schools.

**Costcutter, Whitechapel High St,
Tower Hamlets**

It's a brilliant programme. Sales have increased and the fridge keeps the product fresher looking and increases the shelf life. It's attractive to look at now.... when people ask where can I find produce, I happily show them whereas before it was not good.

**Costcutter, Aberfeldy,
Tower Hamlets**

Customer feedback has been better now.....It's good for local people.

Fruit and vegetable sales are going up

**Costcutter, Piggot Street,
Tower Hamlets**

I like to bring in what the customers want. If they ask me for something, I can get it in the next day like chillies or whatever. I bring it straight in, they don't need to go anywhere else.

Londis, Hounslow

¹⁷ Nearly 2 million children in over 16,000 schools receive a free piece of fruit or vegetable every day through the government School Fruit and Vegetable Scheme
www.dh.gov.uk/en/PublicHealth/Healthimprovement/FiveADay/FiveADayGeneralInformation/DH_4002149

Local partnership evaluation

Because the majority of stores in the Buywell Retail Project were located in Tower Hamlets, the Tower Hamlets Co-operative Development Agency was taken on as a partner to assist the project team with local knowledge and to ensure a legacy in Tower Hamlets. During the pilot phase they developed the skills to run the project and are now funded by their local NHS to run it independently in nine additional stores in the borough throughout 2010/2011.

Feedback from Tower Hamlets Co-operative Development Agency illustrates how they have benefited from the partnership. They made the following statement about their involvement in the project:

'Tower Hamlets Co-operative Development Agency has benefited through gaining new skills, experience and contacts by working in the Buywell partnership. The following are some examples of these benefits:

- An enhanced understanding of the pressures and drivers for retailers which need to be addressed when asking them to change their stock and/or shop layout to focus more on healthy and fresh fruit and vegetables.*
- Understanding of how customers tend to 'shop with their eyes' and therefore the vital importance for retailers to display high quality fresh stock in a clean and tidy environment. Similarly, the desirability for stock not to be displayed in front of the retailer on the street.*
- The CDA has learned how to communicate effectively with local retailers and thereby exert some influence to achieve desired changes.*
- In promoting the project we have established strong and ongoing new links and partnerships with several local schools and also with some London Borough of Tower Hamlets officers. We have used these contacts to develop new projects which are also associated with healthy eating.*
- Our participation in Buywell has enabled Tower Hamlets CDA to further enhance our profile as an organisation effectively working to improve local diet and health for the most disadvantaged sections of the community.'*

Discussion

Sales

The results have been encouraging; fruit and vegetable sales increased by an average of 60% and increases were maintained in most stores. This result is particularly encouraging when compared to a similar scheme run by the Department of Health in the North East of England, where sales of fruit and vegetables increased by an average of 40%. In addition, the stores involved in the Buywell Retail Project are serving poorer communities than in the North East project, and often had never previously sold fruit and vegetables. Moreover, a significant proportion of the Buywell stores are independent, and even those that are part of a Symbol Group have tended to be less tied to their group. As a result, these retailers have required a great deal more persuasion to engage with the project.

Despite these additional problems, all stores responded positively to the project, with stores who agreed to invest in a new chiller for displaying fruit and vegetables seeing the greatest sales increase. This pattern mirrors the results seen in the Department of Health programme. Retailer investment in a chiller has proved to be an important mechanism in encouraging commitment to the project, as well as improving the quality of produce available to customers.

In the small number of stores that struggled to maintain an increase in fruit and vegetable sales, this was attributed to the opening of new supermarkets nearby. In these cases Buywell recommends that the store is monitored and provided with regular support to maintain excellent value fruit and vegetables and price competition, along with a range of produce tailored to the local customers' tastes.

One store illustrated the importance of being a local community hub. This was a highly desirable attribute in selecting the stores for the Buywell pilot project, but there was one instance (Jeffrey's Road) where this was compromised due to the priority of having a store in a designated Lower Super Output Area. In this case the manager had less consumer focus, and engagement with the local community was not as strong as with the other stores in the programme, and this is reflected in the slow increase in sales.

Customer behaviour

Despite the small survey sample sizes, the research does indicate an increase in fruit and vegetable consumption and some improvements in attitudes towards the stores. Customers seem to be spending more per visit and more customers bought fresh fruit and vegetables on the day of the survey after the changes. They also reported eating more fruit and vegetables after the changes, although it is difficult to prove definitively that this change was brought about by the in-store changes alone.

The changes do appear to have had a wider positive impact on customers' perceptions of the store. While only a small proportion of customers had specifically noticed that there was a better selection of fruit and vegetables on offer, many had noticed that the store had improved in some way and more customers felt that the store was a good place to shop for healthy food. Customers' awareness of the Change4Life branding was good and many recognised that its purpose was to encourage people to eat more fruit and vegetables.

Encouragingly, people reporting that they “don’t eat many fruit and vegetables” had reduced after the changes. However, other factors such as poor selection, poor quality and cost were still significant barriers to purchasing fruit and vegetables from the stores for some people. These are problems that a small convenience store cannot realistically be expected to overcome immediately. However, with careful monitoring and stock control it should be possible for barriers such as poor quality and selection to be reduced. Evidence from other similar projects has shown that it does take time for store owners to work out what sells and what doesn’t and over what timescale.

Supply

It was a struggle to help some of the retailers understand the vital importance of making their stock look fresh and enticing at all times. The impulse for retailers was to leave old stock out until it sold, and many took a long time to appreciate that this approach put customers off their display and prevented any of the stock being sold. Some of the smaller retailers were also operating with such weak finances that at times they could not afford to maintain an adequate stock level.

The project supported retailers to find suppliers of affordable produce and has tried to direct them towards buying more locally grown, seasonal fruit and vegetables. Each retailer, either through the training day or visits from experts in fresh produce, received advice on the best range of fruit and vegetables, and how to display and price them. This was made possible by the support of Community Food Enterprise, Symbol Group fresh food advisors and London wholesale market Business Development Managers.

Setting up local suppliers for participating retailers has raised a potential conflict with the Symbol Groups. The Symbol Groups have been very supportive of the project because they see it as improving their stores and increasing the value of fruit and vegetables stores are ordering. However, rather than going to the Symbol Group for their supply, the majority of retailers in our project were choosing to get their fruit and vegetables from a local market or other supplier. This issue has been addressed by introducing the Symbol Groups to local London suppliers. Costcutter in particular has reacted very positively to using more local suppliers. As a result of Buywell, they have set up an ordering system for their retailers to buy from Community Food Enterprise, while invoicing centrally. Costcutter recommended Community Food Enterprise as a preferred supplier to 41 of their stores in the East of London.

Local partnership approach

The partnership between Rice Retail Marketing and Tower Hamlets CDA has been beneficial to the project. Both agencies have brought specific expertise and knowledge to the project and the extra staff time that the funding could buy has been utilised to overcome the following challenges.

Considerable time and effort has gone into ensuring the retailers’ commitment and engagement, especially from the independent stores. This has meant that a much greater than anticipated amount of staff time was required. It was also very difficult to obtain regular sales data from the stores owing to the lack of a formalised reporting structure for many stores. This has required personal visits to obtain weekly sales data, so having a local partner close enough to visit retailers regularly was a huge advantage.

The average size of store involved in the Buywell Retail Project is small (approximately 1,500 square feet), and this has made it difficult to negotiate with the retailer to give up space for fruit and vegetables. The project team has had to identify products that they can persuade the retailer to reduce or relocate to elsewhere in the store. Thus, having specialist retail knowledge in the partnership has been essential for the project's success.

Unexpected outcomes

As well as achieving our original project aims and targets, there have been a number of other positive results, as follows:

- The success of the partnership with local partner Tower Hamlets Co-operative Development Agency
- Costcutter's positive reaction to buying from local suppliers. They recommended Community Food Enterprise as a preferred supplier to 41 of their stores in the East of London
- The community links with food co-ops, local suppliers and local schools have created long term loyalty. Three stores set up a supply of fruit to local school fruit tuck shops and two stores were linked to local community food co-ops.

Recommendations

This project was based on the experience of several previous initiatives across the UK that tried, successfully, to increase the amount and variety of fresh fruit and vegetables being offered and sold in shops in low income areas. Like the previous projects, this one was also very successful so the Buywell Retail Project recommends that this kind of project be adopted by local authorities and NHS Trusts as part of their routine work.

Specific elements that were key to a successful outcome include the following:

- The stores must be a central 'hub' in the community and be well regarded by local people. This central role was enhanced, with some stores, by creating new links with local schools and community groups who were able to provide encouragement and guidance to the retailers. This builds on 'social marketing' principles and supports the premise that effective engagement can be achieved through a well targeted approach run in collaboration with key community interest groups and opinion formers. Such approaches, which integrate different aspects of community development and health and wellbeing service provision, are integral to the ethos of the Well London programme and will contribute to the project's legacy.
- Providing a financial contribution to allow the retailers to invest in display equipment for their store – in this case, a chiller - is recommended. This encouraged retailers, literally, to "own" the project and lead to a greater increase in fruit and vegetable sales.
- Having a long-term link with a local partner is very valuable in providing local knowledge and skills, and – most important – a way for the project to continue after the pilot phase has ended
- Structured support, after the initial changes, was necessary to help the store managers overcome any difficulties they were experiencing, particularly around suppliers and marketing. This helped to maintain sales, which otherwise might have declined.
- The link with the Department of Health Change4Life branding materials helped not only to provide a consistent message to retailers and customers, but also – given the link with the TV advertising campaign – helped give the project some status.

To ensure that this project's success is maintained we recommend that:

- A network of support is provided for participating retailers to call on for advice, to share information and to identify new supply options.
- Sales data continues to be monitored in the medium and long term. This can be used to indicate any decline in sales in individual stores, which can then inform structured follow up visits to address any problems that are causing the drop in sales.

Next steps

The results of the Buywell Retail project will contribute to the evaluation of the Well London programme as a whole. This much larger evaluation will address some of the aspects this evaluation process was unable to, such as;

- 1) The extent to which these measures contributed to a long term change in consumer behaviour
- 2) How changes in lifestyle choices contributed to a wider improvement in wellbeing
- 3) The extent to which the retailer provided an engagement and enabling 'hub' and helped to catalyse change across the community

This evaluation process is being led by the University of East London, and will provide learning and evidence to support the spread of successful approaches into mainstream policy and practice in London and beyond.

For more information on the Well London evaluation please visit:
<http://www.london.gov.uk/welllondon/about/research.jsp>

Appendix A – List of Buywell stores

	Store	Borough	Address
1	Amy News	Tower Hamlets	Amy News, 83 Whitechapel High St, London E1 7QX
2	Cambridge Heath Rd	Tower Hamlets	Cambridge 2 Supermarket & Off Licence, 64-66 Cambridge Heath Rd, London, E1 5QJ
3	Christie's Mini Mart	Tower Hamlets	Christie's Mini Mart 1-2 Bircham St, Poplar, London E14 0SH
4	Coronation Mini Market	Westminster	19, Dart Street, Kilburn, W10 4NA
5	Costcutter Aberfeldy	Tower Hamlets	45-47 Aberfeldy Street, London, E14 0NU
6	Costcutter Whitechapel High St	Tower Hamlets	92-93 Whitechapel High St, London E1 7RA
7	Costcutter Pigott St	Tower Hamlets	156-160 Pigott Street, Poplar, E14 74W
8	CSM South Africa Rd	Hammersmith & Fulham	CSM food & Wine, 61-63 South Africa Road, W12 7PA
9	Jeffrey's Rd	Lambeth	Premier, 91-93 Jeffrey's Rd, Clapham SW4 6QA
10	JR Convenience Stores	Tower Hamlets	JR Convenience Store (Firdaus Ltd), 71-73 Ben Johnson Rd, London E1 4SA
11	Londis Beavers Farm	Hounslow	Beavers Farm Estate Post Office, 69 Salisbury Road, TW4 7NW
12	Londis Dunfield Rd	Lewisham	19-21 Dunfield Road Lewisham, SE6 3RW
13	Nisa Bonner Rd	Tower Hamlets	Nisa Local, 2-4 Bonner Rd, E2 9JS
14	Nisa Local Manchester Way	Tower Hamlets	Muree Food Stores Ltd. 286 Manchester Road E14 3HW
15	Nisa Wapping supermarket	Tower Hamlets	Wapping Supermarket 172-176, The Highway, Wapping E1W 3DD
16	Tesa Regional Stores	Tower Hamlets	Tesa Regional Store (Saltwell News), 5 Saltwell St, London E14 0DQ

Appendix B – Retailer agreement

[Retailer Business Address]

[Date]

Dear [Retailer Name]

Buywell Retailer Commitment Form

You have been chosen as one of 15 stores to be part of the Buywell Project.

The project is working with stores like you across London to help local people to eat more fresh fruit and vegetables, for the benefits to their health, by providing them with much better choice and quality locally.

A reminder of some of the advantages to your business:

- You are taking part in high profile work, funded and supported by major regional agencies, including the NHS, the London Development Agency and the Big Lottery.
- What you are doing fits in with what your customers are reading about in the press and seeing on TV – the Change 4 Life advertising campaign.
- Your customers want to eat more healthily – YOU are giving them the opportunity to buy what they need locally.
- You will benefit from a local advertising campaign to bring shoppers into your store to see the changes.

This agreement entitles you to:

- Funds of up to 50% towards the cost of a [X meter chiller¹⁸]
- Free leaflets
- Free posters in front of store
- Free ambient stand to display fruit at checkout
- Free in-store signage
- Free business advice and support to help you sell fruit and vegetables more effectively

Retailer Commitment:

¹⁸ Up to the total value of £4000 including VAT, unless otherwise agreed in writing.

By signing this commitment form you are agreeing to the following statements:

1. We will stock 10 or more varieties of fresh produce (fruit and vegetables)
2. We will allocate [X meters] of prominent [chilled/outside] space to fresh fruit and vegetables
3. We will keep all items funded by the grant safely and in good repair
4. We will make sure we have adequate insurance cover for all of them
5. We will not change the purpose for which the grant funded items are used
6. We will supply you with the information that you ask for and will allow you to inspect the displays
7. We will tell you if any grant funded items become damaged, destroyed or stolen and will repair or replace them
8. We will not dispose of or sell the items given to us. We understand that our grant has come from public funds and we accept that we will be required to repay all or part of the money we receive if we dispose of or sell items funded by the grant.
9. We will not take out any loans secured on any capital items funded or part-funded by the grant

This agreement will operate until March 2011. If you are not sure about anything in this form please feel free to discuss it with Hannah Williams:

Hannah Williams
Sustain: the alliance for better food and farming
94 White Lion Street
London
N1 9PF
020 7837 1228

Signed [Retailer – Management]_____

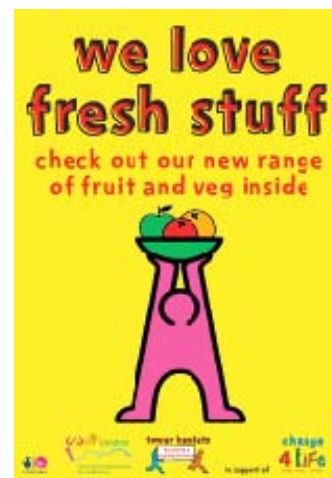
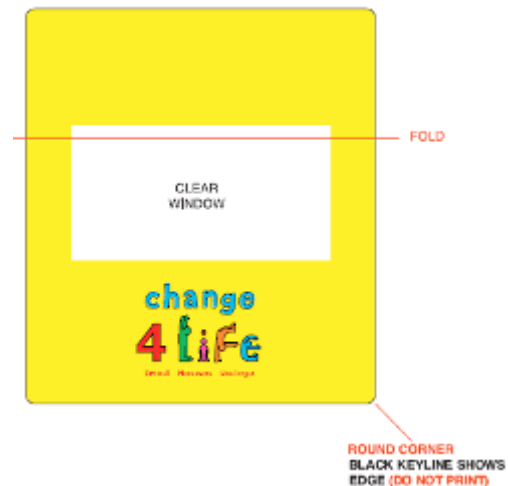
Name [Retailer – Management] _____

Signed [Sustain]_____

Name [Sustain]_____

Thank you for being part of Buywell

Appendix C – Point of sale materials



Butternut squash and sweetcorn soup

Serves 4

Ingredients

1 tablespoon of vegetable oil or a knob of butter
1 medium onion, chopped
1 medium butternut squash or pumpkin, peeled and
chopped (removing seeds)
½ small tin of sweetcorn
1 pint of vegetable stock
Grated parmesan
Freshly ground black pepper



Preparation time: 5 minutes

Cooking time: 30 minutes

Recipe from: Well London Buywell Project www.sustainweb.org/buywell

Method

- Peel and chop the onion and butternut squash
- Heat the oil in a deep pan, add the onion and cook until it softens
- Add the butternut squash and cook for further 5 mins
- Pour the vegetable stock into the pan, cover and leave to simmer for 20-30 minutes, or until the squash is soft
- Drain and add the sweetcorn to the pan
- Transfer the lot into a blender and mix until smooth
- Season with black pepper
- Serve in individual bowls with grated parmesan on top



Roast Vegetable Chips

Serves 8

Ingredients

6 potatoes, peeled and cut into sticks or wedges
3 large carrots, peeled and cut into sticks or wedges
3 parsnips, peeled and cut into sticks or wedges
3 tablespoons olive oil



Method

- Heat the oven to 220C/425F/Gas 7.
- Toss all the vegetables with the olive oil and put in two large roasting tins.
- Bake in the oven until tender, about 40-50 minutes. Sprinkle with sea salt and serve at once.

Preparation time: 10 minutes

Cooking time: 40-50 minutes

Recipe from: White City Food Centre, Phoenix High School
www.phoenixhighschool.org



Spicy cauliflower & potatoes

Serves 4

Ingredients

450g potatoes
1 cauliflower
50g piece fresh root ginger
1 hot green chilli (optional)
4 tablespoons vegetable oil
black mustard seeds cumin seeds & ground cumin (1
teaspoon of each)
1/2 teaspoon turmeric
Salt and pepper



Preparation time: 10 minutes

Cooking time: 20-30 minutes

Recipe from: Azadk Recycling, Lambeth www.lambethrecycling.org.uk

Method

- Peel the potatoes and cut into large chunks. Boil for 8 minutes and drain.
- Meanwhile, cut the cauliflower into small florets and peel and chop the onion and ginger. Stir the chilli (discard the seeds for a milder flavour).
- Heat the oil in a pan and add the onion and ginger. Cook until soft and brown. Mix in the chilli and spices and cook for 2 minutes, constantly stirring. Now add the potatoes and cauliflower and stir well to coat them in the spice mixture. Add in 3 tablespoons of water and season with salt and pepper.
- Cover with lid and leave to cook gently over a medium heat for about 10 minutes or until the vegetables are tender. Should the mixture become dry, add a little more water.



Banana & strawberry smoothie

Serves 1

Ingredients

1 banana
2 large strawberries
1 large tablespoon of natural yoghurt
1 teaspoon of honey
½ pint of milk



Method

- Place the banana, strawberries, natural yoghurt and honey into a glass.
- Top up glass with milk.
- Transfer all ingredients into blender and mix.
- Pour into a clean glass and serve with a straw.

Preparation time: 5 minutes

Recipe from: City Gateway's Child, Youth & Family Support Community Centre,
Tower Hamlets www.citygateway.org



Appendix D - Case studies

See page 17 for Case study one.

Case study two – A mother of two who is struggling to get her children to eat more fruit and vegetables

Respondent profile

- Female
- Works part time
- Has two young school-aged children
- Single mother
- Lives within five minutes walk of store
- Local store – Dart Street (Well London Store)

Household eating/shopping patterns

- She lives at home with her two children and does all the family shopping.
- Her life is very busy as she works part time and manages this with the children's school and childcare.
- She struggles to get the children to eat healthily. They started off eating fruit and vegetables as toddlers but have stopped wanting to eat things since the older one went to school. The younger one then copies the elder child.
- She tries to encourage them to eat more fruit and vegetables by 'hiding' things but it is a continual struggle.
- Evening meals tend to be fairly quick when she gets in from work e.g. fish fingers, peas and potatoes but she will make a stew when she has time (e.g. one day a week she finishes work a bit earlier).
- She eats fruit and vegetables herself and hopes that as her children see her do this they will come around themselves.
- The vast majority of her shopping is done in a weekly shop in the local supermarket as it is cheaper and they have good deals.

Use of store

- Store is used for top-up items such as bread and milk
- It tends to be visited on a regular basis as it is just round the corner.
- She has recently started to buy herself a piece of fruit to eat on the way to work if she has run out.

Changes to the store/awareness of Change4Life

- Having the fruit and vegetables in a more obvious position has made her start to buy a bit more fruit overall. Prior to the changes she never brought fruit and vegetables from the store as it was not something you would associate with the store.
- She now will pick up some fruit on the way to work once her weekly shop has run out. Prior to this she would not have bothered as she does not have time to go out of her way

in the mornings. She is therefore eating a few more items of fruit a week as a result of the changes.

- The signage and the displays also help her think about it if she is popping into the store on the way to work.
- She does not use the store for topping up with vegetables as she always has frozen vegetables in the freezer if they run out, and they are quicker to prepare when she is working.
- The respondent has seen the Change4Life signage and has also seen the adverts on the television. She thinks it is a good idea to encourage all of us to eat better and having it in the store does make you think when you go in.
- The quality and displays are seen to be acceptable, *"You have all the basics there."* She is hoping to see strawberries and raspberries in the summer as these are easy fruits to get the children to eat.

Case study three – Eating more fruit and vegetables for a healthier diet and buying more from Costcutter

- Aged 48
- Lives at home with her Mother, for whom she is a carer
- Does not work
- Lives within five minutes walk of Costcutter (Aberfeldy Street, E14 branch, Tower Hamlets)
- Does not drive

Household eating/shopping patterns

- Since her Mother's stroke in November 2009, the respondent now has full responsibility for all the shopping and cooking. In addition, she has also recently found out that she has diabetes so has to be more careful with the diet she eats.
- There was a sense that the respondent is now taking care to understand what foods she needs to eat. She claimed to enjoy cooking and rarely buys ready-meals. Typically, she will cook meals such as shepherd's pie, spaghetti bolognese, roast dinners and will make cakes from scratch. She will always eat with her Mother and they are often joined by her boyfriend in the evenings.
- She is unable to leave her Mother for long periods of time so this has changed how she shops, with more reliance on local stores. Her own health also means that she is not able to carry heavy loads over long distances, so again local stores are used for heavy items such as dog food.
- The local market will be used for some fruit and vegetables as it offers very good value for money. Tesco, Asda and Somerfield are also used for more main shops, with Asda being the most preferred, based on price. Local stores are used to top-up the main shop.
- Fresh fruit and vegetables are an important part of her diet and she buys a wide variety of produce; in fact she claimed to buy too much fruit, much of which is wasted as it doesn't get eaten but she likes to have it on hand. She really likes dark, leafy vegetables such as

greens and brussels sprouts and loves oranges and plums. *"I try to go for fruit now as my treat rather than sweets"*.

Use of Costcutter

- The respondent demonstrated loyalty to the various local shops, using one for her paper and milk, whilst Costcutter is more likely to be used for bread and other food top-up items. She also uses Costcutter for the lottery and her boyfriend's cigarettes and this, it seems, brings her in almost every day.
- The late opening hours are the main appeal of Costcutter. She felt that they did not offer as many price promotions as other local Costcutter stores she has visited, but the location and late hours means the store is very convenient.
- She is very familiar with the layout of the store and will spend time browsing, specifically to see what is on offer. She finds it irritating that the store is often changing so it is harder to find her usual items.
- This respondent very much associates Costcutter with a place to buy fruit and vegetables and will often use it to make purchases such as bananas, a lemon, and onions.

Changes to the store/awareness of Change4Life

- The Change4Life campaign had been noticed and the respondent felt it had encouraged her to think more about buying fruit as a treat rather than sweets. *"It attracts your attention and makes you buy more"*.
- She was aware of the layout of the store and thus the position of the fresh fruit and vegetable fixture was not an issue. It's where she expects it to be and *"it's right by where you go in"*. She also felt it was good to see the display face-on as you were coming out of the store, it served as a reminder that fresh food was available to buy.
- There was some feeling that the range on offer was a little limited, although it was enough for basic needs. However, the introduction of more treat focused fruit, such as strawberries or grapes for instance, would encourage her to buy even more.
- More obvious promotions on price would also encourage more frequent purchases. This respondent was very price aware and would price check items against prices she had seen in Somerfield and other supermarkets.
- Overall she liked the Change4 Life décor; she felt it made the displays more attractive and brightened the store. In addition, she had been encouraged to buy more fresh fruit and vegetables and the convenience of these being in her local store was a key benefit for her current situation.

Case study four – Already eats healthily but more convenient location of fresh fruit and vegetables means she now buys more

- Aged 28
- Lives with her son, aged 4
- Works as a police officer, shift work
- Lives within five minutes walk of Costcutter, (Pigott Street, E14 branch, Tower Hamlets)
- Does not drive

Household eating/shopping patterns

- Her son's tastes in foods were an important consideration in terms of the types of foods bought and prepared. It was clear this respondent had encouraged her son to eat healthily and she described him as loving almost all fruit and vegetables. Broccoli and pasta were his favourites but she also cooked other comfort foods such as shepherd's pie and spaghetti bolognese.
- Her main shop was done at Tesco, although this was a bus ride away, so the local store is relied on for everyday top-up items. However, Tesco does offer a very good selection of fresh foods.
- When not working, the respondent's aim is to eat meals with her son. However, if she is working her son is cared for by her Mother who will also prepare food for him. Then her own meals can be very sporadic and she will just grab whatever is in the fridge.

Use of Costcutter

- Costcutter is visited every day, either to buy sweets on the way home from school for her son or for top-up food items, such as bread, milk, yoghurts and fresh fruit and vegetables. She did not buy frozen vegetables as she felt they did not taste as good.
- This respondent is sensitive to offers, but only on the foods she would buy anyway. She mentioned a leaflet that Costcutter regularly produces and puts through her letterbox detailing all the current offers and she said she would use this information to help her plan what to buy from them.
- This respondent was very positive about her local Costcutter now having a range of fruit and vegetables and said it was a very convenient way of being able to keep on top of healthy snacks and lunchboxes for her son and for herself, "*otherwise I would have to get the bus down to Tesco and so I would probably just forget it*". In particular, the late opening hours also allowed her to buy fresh food at all times, especially important given her working patterns.
- She was familiar with the store and used the whole store to stock up on food and other household items. There was some sense that if they sold fresh meat products, she might use them even more.

Changes to the store/awareness of Change4Life

- The introduction of fresh fruit and vegetables had proved to be a very positive move for this respondent. The convenience of being able to pop across the road and buy fresh food was very welcomed.

- She had noticed the Change4Life campaign, which had continued to highlight the importance of eating healthily but this respondent felt her diet was already this way inclined. However, the convenience factor had meant she was now able to buy even more fresh food.
- In-store the fixture looked quite empty but the respondent felt this was not a usual representation and, even so, there were enough basic items such as onions, garlic and tomatoes. The range is not as wide as in the supermarkets but she does not expect it to be, just as long as there is enough for basic needs.
- The position of the fresh fruit and vegetable fixture was liked; *“it’s just as you walk in and it jogs your memory to buy”*. As the store was browsed, there were sacks of loose vegetables at the back, away from the fixture. However, the respondent felt this was fine as she would notice them anyway and space would prevent them being included at the main fixture.

Appendix E - Buywell partners



London Food Link, Sustain: the alliance for better food and farming

Contact: Hannah Williams

Hannah@sustainweb.org



RETAIL MARKETING
Specialists in Local Marketing

Rice Retail Marketing

Contact: Stephanie Rice

Stephanie@riceretailmarketing.co.uk



TOWER HAMLETS CDA

Tower Hamlets Co-operative Development Agency

Contact: Gregory Cohn

gregory@co-operation.coop



NHS Tower Hamlets Healthy Borough Programme

Contact: Judith Shankleman

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Appendix F – Customer Survey

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13th October 2008

Buywell Store Evaluation Research V1 **Pre Stage Interview**

Interviewer Name : _____ I.D. No. _____

Respondent Name : _____

Respondent Address : _____

Postcode : _____ Telephone No : _____

INTERVIEWER DECLARATION

I declare that this interview has been conducted strictly in accordance with your specifications within the MRS Code of Conduct and with a person totally unknown to me.

Signed (**INTERVIEWER**) : _____ Date _____

INTERVIEWER NOTE: Please intercept respondents after they have paid for their purchases. Please ensure respondent is looking away from the forecourt/has their back to the site if possible and does not look around the site in order to answer the questions (we want their answers to be as unprompted as possible).

INTRODUCTION

Good morning/afternoon/evening. I am conducting a survey about why people shop in their local convenience stores. I have a few questions which should take a maximum of 6 minutes.

STORE

- A 1
- B 2
- C 3
- D 4
- E 5
- F 6
- G 7
- H 8
- I 9
- J 10
- K 11
- L 12
- M 13
- N 14
- O 15

1. Sex

- Male 1
- Female 2

2. Age

Under 16 CLOSE
Over 16 CONTINUE

3a.

Day of Week of Interview	
Monday	1
Tuesday	2
Wednesday	3
Thursday	4
Friday	5
Saturday	6
Sunday	7

3b. Time of interview

- Daytime/daylight 1
- Evening/dusk 2

Insert exact time of interview

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SCREENING

SHOWCARD A

Q4 How often do you visit **this** store? SINGLE CODE.

- Every day 1
- Most days 2
- A few times each week 3
- About once a week 4 CONTINUE

More than once a month but less than once a week5
 About once a month.....6
 Less than once a month.....7

Never visited this convenience store before today8 **THANK & CLOSE**

Q5 How long does it take you to walk to this store from where you live, work or go to school?
 SINGLE CODE

Less than 5 minutes1 CONTINUE
 Six- ten minutes2 CONTINUE

Ten minutes or over3 **THANK & CLOSE & COUNT**

Q5b Do you have access to a car which you can drive? SINGLE CODE

Yes1
 No.....2

SECTION 1 – ATTITUDES AND BEHAVIOUR – THIS STORE

Q6 What, if anything, have you bought in the store today?

WRITE IN ALL PURCHASES FOR FRUIT AND VEGETABLES (FRESH, FROZEN OR CANNED) WRITE IN SPECIFIC DETAILS OF FOOD E.G. FRESH CARROTS, TINNED PEARS RATHER THAN SIMPLY FRUITS OR VEGETABLES

CODE CATEGORY OF FOOD BELOW

Fresh fruit1
Fresh vegetables.....2
Canned fruit.....3
Canned vegetables4
Frozen fruit5
Frozen vegetables.....6
 Sweets/confectionary7
 Crisps/snacks.....8
Other food items9
 Household goods (e.g. cleaning products) 10
 Toiletries..... 11
 Newspapers/magazines..... 12
 Cigarettes 13
 Other14
 Nothing..... 15

IF CODE 15 AT Q6 SKIP TO Q9a.

Q7. How much did you spend in the store today? WRITE IN USING POUNDS AND PENCE. USE LEADING ZEROS

£					.		
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Don't know/refused14

Q8. Of the things you bought here today, were there any that you had **not planned** to buy before you came into the store? SINGLE CODE

Yes1 ASK Q8b
No.....2 SKIP TO Q9a

Q8b. Which items did you decide to buy **after** you arrived at the store?

Fresh fruit1
Fresh vegetables.....2
Canned fruit.....3
Canned vegetables4
Frozen fruit5
Frozen vegetables.....6
Sweets/confectionary7
Crisps/snacks.....8
Other food items9
Household goods (e.g. cleaning products) 10
Toiletries..... 11
Newspapers/magazines..... 12
Cigarettes 13
Other14
Nothing..... 15

SHOW CARD B

Q9a What types of products on this list do you ever buy from this store?
CODE ALL THAT APPLY

Q9b. And what types of products would you not think of buying from this store?

Fresh fruit1 1
Fresh vegetables.....2 2
Canned fruit.....3 3
Canned vegetables4 4
Frozen fruit.....5 5
Frozen vegetables6 6
Sweets7 7
Crisps/snacks.....8 8
Other food items9 9
Household goods (e.g. cleaning products)10 10
Toiletries.....11 11
Newspapers/magazines.....12 12
Cigarettes13 13
Other14 14

SHOW CARD C

Q10a How often do you typically buy fresh (not frozen or canned) fruit and vegetables, either from this store or somewhere else? SINGLE CODE. TRY AND PROBE FOR A ROUGH ANSWER

- Every day1
 Most days.....2
 A few times each week3
 About once a week4
 More than once a month but less than once a week5
 About once a month.....6
 Less than once a month.....7
I do not buy fruit and vegetables8 REFER TO Q.11
 Don't know (DO NOT SHOW).....9

ASK ALL EXCEPT CODE 8 AT Q10a

SHOW CARD D

Q10b When you buy fruit and vegetables who are you typically buying them for?

- Myself only1
 Me and my partner2
 Me and my family/children3
 Me and other people I live with (not family/partner).....4
 Other5

ASK IF CODE 1 OR 2 AT Q9A AND **NOT** CODE 8 AT Q10A

Q11 And thinking back to the last five times you brought fresh fruit and vegetables roughly how many of these occasions were from this store? SINGLE CODE

0 of the last 5 times	1 of the last 5 times	2 of the last 5 times	3 of the last 5 times	4 of the last 5 times	5 of the last 5 times	Don't know
1	2	3	4	5	6	7

Q11b What puts you off buying or buying more fresh fruit and vegetables from this store? CODE ALL THAT APPLY

- The quality of them/they are old/out of date1
 They are not very obvious/don't think of them for this2
 I forget/don't think about it.....3
 The selection is poor.....4
 I don't eat many fruit and vegetables.....5
 I did not know they sold them6
 Other (SPECIFY-WRITE IN BOX BELOW)7

Don't know5

SHOW CARD E

Q12 Using the scale on this card, from excellent to poor, how would you rate this store on each of the following..... READ OUT STATEMENTS. SINGLE CODE PER STATEMENT

	Poor				Excellent	
	DK					
Offering a good selection of healthy food options	1	2	3	4	5	6
Offering a good selection of fresh fruit and vegetables	1	2	3	4	5	6
Displaying the fresh fruit and vegetables in an appealing way	1	2	3	4	5	6
Being a good place buy fresh fruit and vegetables.....	1	2	3	4	5	6
As a place to shop for food	1	2	3	4	5	6

SECTION 2 – ATTITUDES AND BEHAVIOUR – TOWARD FRUIT AND VEGETABLES

DO NOT ASK IF CODE 8 AT Q10. INSTEAD SKIP TO Q.14a

Q13 Where else do you buy your fresh fruit and vegetables? SINGLE CODE

Q13b Where do you buy **most** of your fresh fruit and vegetables?

Other local convenience stores	1	1
Other local supermarkets.....	2	2
Order them online	3	3
At school/college/work	4	4
I do not buy them	5	5
This store	n/a	6
Don't know	7	7

ONLY ASK Q13c OF THOSE WHO HAVE ANOTHER STORE WHERE THEY BUY MOST OF THEIR FRUIT AND VEGETABLES AT Q13b i.e. CODES 1-3 AT Q.13b

SHOW CARD E2

Q13c Using the scale on this card, how would you rate the fresh fruit and vegetables available in this convenience store with those available from the place where you buy most of your fruit and vegetables.

FirstlyWould you say that the quality of the fruit and vegetables in this store is better or worse than the ones available in your main store/place you buy them (SHOW CARD)
Secondly ... Would you say that the selection of the fruit and vegetables in this store is better or worse than the selection in your main store/place you buy them

	Much Better	A little better	About the same	A little worse	A lot worse	Don't know
Quality	1	2	3	4	5	6
Selection	1	2	3	4	5	6

SHOW CARD F

Q14a How often do you typically eat fruit and vegetables either when out and about or at home? SINGLE CODE. TRY AND PROBE FOR A ROUGH ANSWER

Every day	1
Most days.....	2
A few times each week	3
About once a week	4
More than once a month but less than once a week	5
About once a month.....	6
Less than once a month.....	7

I do not eat fruit and vegetables.....	8
Don't know (DO NOT SHOW).....	9

SHOW CARD G

ONLY ASK IF CODE 1-6 AT Q14a

Q14b How important is it to you personally do eat a good selection of fruit and vegetables on a regular basis? SINGLE CODE.

Very important.....	1
Fairly important	2
Not particularly important.....	3
Not at all important.....	4
I don't know – it is all pretty confusing	5

IF CODE 1 OR 2 AT Q14a ASK Q14c

Q14c Realistically, how many portions of fruit and vegetables do you tend to find you are able to eat in a typical day? WRITE IN NUMBER. USE LEADING ZEROS

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Don't know 10

Q14d Do you have children under 16 living at home ? SINGLE CODE

Yes.....	1	ASK Q14e
No.....	2	SKIP TO 15

IF CODE 1 AT Q14d ASK Q14e

Q14e Realistically, how many portions of fruit and vegetables each do your children eat in a typical day? IF MORE THAN ONE CHILD AND IT DIFFERS ASK FOR A ROUGH NUMBER. IF NOT POSSIBLE ASK TO BASE ON THEIR YOUNGEST.WRITE IN NUMBER. USE LEADING ZEROS

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Don't know 10

ASK ALL

Q15 What puts you off eating more fresh fruit and vegetables than you do at the moment?

Too expensive.....	1
Take time to prepare/lack of time.....	2
They go off too quickly	3
I am hardly ever at home	4
Not easily available locally.....	5
I do not like them.....	6
My family/household do not like them.....	7
I do not do the shopping	8
I don't think about it.....	9
Its boring - there are always nicer/more interesting things to eat...	10
Nothing.....	11
Don't know	12

SHOW CARD H

Q16 Which of the following statements best describes how healthy you think your/your families typical diet is? SINGLE CODE. TRY AND PROBE FOR A ROUGH ANSWER

- Extremely healthy1
- Very healthy2
- We try to be healthy but do not always succeed3
- Not particularly healthy4
- Not at all healthy5
- The advice seems to change all the time, so I am not really sure....6

Q7a Have you see or heard any advertising or promotions about a Government healthy living campaign called Change4Life? SINGLE CODE

- Yes1 ASK Q17b
- No.....2 SKIP TO 18a

ONLY ASK Q17b and c IF YES AT Q17a

Q17b Where have you heard about this? PROBE: Anything else? DO NOT READ OUT.

CODE ALL THAT APPLY.

- TV advertising 1
- Radio..... 2
- Posters 3
- Leaflets..... 4
- How are the kids questionnaire 5
- Items in TV programmes..... 6
- Website advertising..... 7
- Kids are looking at it in school/nursery 9
- Other 10

ASK ALL

Q18a How often do you personally tend to do the food shopping in your household?
READ OUT

- Most of the time1
- Sometimes2
- Rarely.....3
- Never.....4

SHOWCARD I

Q18b Which of the following best describes how you typically shop for food in your household?
READ OUT

- We do one main shop a week which pretty much covers us1
- We do a main shop but also top up as needed2
- We do lots of small shops as and when we need things3
- Don't know4

ONLY ASK IF CODE 1-2 AT Q18a

Q19. How much does your household typically spend on food a week?
WRITE IN USING POUNDS AND PENCE. USE LEADING ZEROS

£				.		
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Don't know/refused14

SECTION 3 – CLASSIFICATION

We are now going to ask you some questions for classification purposes. These are simply used to help us analyse the data and will not be used to identify you in any way.

SHOW CARD J

C1. Which of these best describes your working status?

- Working full time, 30 or more hours per week1
- Working part time, 8 to 29 hours per week2
- Working less than 8 hours per week.....3
- Unemployed.....4
- Student.....5
- Retired.....6
- Prefer not to say.....7

SHOW CARD K

C2. Which of these age bands do you fall into?

- 16-19 years..... 1
- 19-24 2
- 25-34 3
- 35-44 4
- 45-54 5
- 55-64 6
- 65+ 7
- Prefer not to say 8

SHOW CARD L – LIST OF POSTCODES AND MAP IF NECESSARY

C3. Do you currently live in any of the following postcode areas?

- Yes 1
- No..... 2
- Don't know..... 3

C4. Which member of your household is the Chief Income Earner, that is the person with the largest income, whether from employment, pensions, state benefits, investments or any other sources?

- RESPONDENT1
- RESPONDENT'S SPOUSE\PARTNER.....2
- OTHER ADULT3
- Don't know4

Working status of Chief Income Earner (CIE)

EMPLOYED	1
SELF-EMPLOYED	2
DEPENDENT ON STATE BENEFIT	3
NOT WORKING, OTHER INCOME	4
Don't know	5

IF CODED 04, CODE GRADE

COLLECT OCCUPATION OR PREVIOUS OCCUPATION DETAILS OF CIE

What is the type of firm where the CIE works?

What is the job actually done by the CIE?

What is the title, rank, grade, etc of the CIE?

How many people work there altogether?

How many is the CIE responsible for?

Does the CIE have any qualifications?

YES	1
NO	2
Don't know	3

CODE SOCIAL GRADE BASED ON RESPONDENT ANSWERS

A	1
B	2
C	3
D	4
E	5

SHOW CARD L

C5 What is your annual household income before tax?

Up to £10,000	1
£10,001 - £15,000	2
£15,001 - £20,000	3
£20,001 - £25,000	4
£25,001 - £30,000	5
£30,001 - £40,000	6
£40,001 - £60,000	7
£60,001 +	8
Don't know	9
Refused	10

SHOW CARD M

C6 Who lives in your household with you?

Multi code

Just myself (Single code)	1
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Husband/wife/partner/parents	2
Children under 6 yrs	3
Children aged 6-13	4
Children aged 14-16	5
Other male aged 17+	6
Other female aged 17+	7

C7 How many people in total live in your household?

One	1
Two	2
Three	3
Four	4
Five	5
Six	6
More than six	7

SHOWCARD N

C8. How would you describe your ethnic origin? SINGLE CODE

White	1
Mixed	2
.....	
Asian or Asian British	3
.....	
Black or Black British	4
.....	
Chinese	5
.....	
Other	6

C9. Are you registered disabled? SINGLE CODE

Yes	1
No	2

THANK AND CLOSE