Change4Life Convenience Stores Evaluation Report

Promoting the purchase of fresh fruit and vegetables in deprived areas

In partnership with ACS the voice of local shops

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Contents

1 Introduction

Many low-income areas suffer from a lack of availability of fresh fruit and vegetables which contributes to a poor diet and can widen health inequalities. Convenience stores are important outlets for low-income customers who shop more often at their local store, and for other consumers who are increasingly using the convenience sector for top-up shopping.

Convenience stores are located at the heart of a number deprived communities. Many of of these family owned businesses have been established over many years and their sales comprise the traditional categories of confectionery, news and tobacco with limited sales of fresh foods. Fruit and vegetables can be a highly profitable category, however retailers who do attempt

to stock fresh fruit and vegetables often experience poor sales and high wastage owing to a lack of understanding of how the category needs to be managed.

Drawing on experience from Scotland, the English Department of Health (DH) and the Association of Convenience Stores (ACS) have been working in partnership to improve provision of fresh fruit and vegetables in convenience stores through the Change4Life Convenience Stores programme. This programme, which uses the Change4Life branding, provides a case study of how Change4Life can be adapted for a specific setting.

A key factor in progress to date was the successful collaboration between all the partners involved from the commercial companies to local and regional health professionals and crucially the managers and staff of participating stores.

This report sets out the history and development of the project, and the results of the evaluation of the pilot phase in the North East of England.

2 Development of the Change4Life Convenience Stores Programme

2.1 Learning from previous experience – the successful Scottish Healthy Living Neighbourhood Shops Initiative

In 2004, a small group of suppliers and retailers in Scotland established a pilot project called *Healthy Living Neighbourhood Shops* to increase the availability of healthier food options throughout Scotland, in both deprived and affluent areas, where little or no option existed to buy.

The programme received funding from the Scottish Executive and worked closely with the Scottish Grocers' Federation, which represents convenience stores throughout Scotland. Through a number of different trials, the programme established clear criteria for increasing sales and also developed bespoke equipment/point of sale (POS) materials which were given to participating retailers free of charge.

Example outcomes include:

- Increasing the range of fruit drinks and decreasing the range of carbonated drinks available in-store led to a 14.6% increase in total soft drink sales and a 21% increase in cash profit.
- Displaying pieces of fruit at checkouts rather than confectionery resulted in the sale of more fruit than confectionery.
- Moving fruit and vegetables from the rear of a store to the front resulted in a 36% sales increase in the first week and has produced ongoing increases of 62% in that store.

The Scottish Executive's Report *Healthyliving Neighbourhood Shops Project* (2007) sets out this project in more detail and is available at *www.fhascot.org.uk/faha/files/Healthyliving%20Neighbourhood%20Shops%20Project%20FV.pdf*
This has led to around 600 convenience stores across Scotland improving their range, quality and stock of fresh fruit and vegetables and other healthier eating products.

2.2 Development of the English Department of Health's programme

Following the success of the Scottish pilots, DH began to develop a version of the project as part of the work to promote healthy food choices set out in Choosing Health (2004). In September 2006, DH jointly hosted a seminar with Sainsbury's at which the role of local shops was discussed. Following this, in May 2007, the then Public Health Minister met the ACS, which represents over 33,000 local shops, and key decision makers from all the leading Symbol Groups [1], to propose a partnership to improve access to fresh fruit and vegetables in deprived areas. The idea was well received and led to a series of discussions between Symbol Groups and DH officials to develop the idea in detail, and the establishment of a Steering Group responsible for making strategic decisions.

The Steering Group agreed three main objectives for the programme:

> To increase access to and availability of fresh fruit and vegetables in deprived areas with little or no access, in order to help reduce health inequalities;

> To increase sales of fruit and vegetables by focusing on improving range, merchandising, quality and communication in stores;

> To drive awareness of fruit and vegetables to the consumer through good sign posting within retail stores facilitating the Change4Life brand.

A key factor in the partnership was the agreement by the Steering Group to 'match fund' the DH contribution.

[1] A Symbol Group retailer is an independent retailer that is effectively a member of a larger organisation known as a "Symbol Group Operator" (such as SPAR).

2.3 Programme co-ordination and support

The Steering Group decided to pilot the programme in the North East of England (NE), as it scored highly on the index of multiple deprivation, has high use of convenience stores, and contains a broad mix of participating Symbol Groups. To support delivery on the ground, a Project Team consisting of Regional Sales Managers (RSMs) from each of the participating Symbol Groups was established in the NE to identify potential retailers and provide on the ground support.

One of the key lessons from the Scottish Neighbourhood Shops Initiative was the valuable role of a project co-ordinator with experience of the retail sector. As the partnership brought together two sectors that traditionally had not worked together it was critical that the co-ordinator was able to understand both the desire from retailers for increased sale and profits but also the public health objectives of the programme. Drawing on this key success factor DH also employed a project co-ordinator with a proven history in the retail industry. The project co-ordinator's role was to co-ordinate the work, identify suitable stores, engage with individual retailers and Steering Group members, chair Project Team meetings and ensure delivery of the project.

The Project Team, chaired by the project co-ordinator, met regularly in Newcastle during this pilot phase. This enabled the team to share progress and good practice, identify common problems and provide the project co-ordinator with the opportunity to visit participating stores and offer advice if a retailer appeared to be having difficulties with the fresh produce category.

In addition, through the NE Regional Obesity Lead, the programme was able to engage local Primary Care Trusts (PCTs) who provided valuable support and links to wider community initiatives and schools that helped embed the programme in the local community.

In order to help stores make the most of their improved fruit and vegetables selection, DH has produced a Retail Guide and a training DVD with handy tips on how to manage the fruit and vegetable category. These include choosing a prominent position near the front of the store for displaying the range; using appropriate display equipment that is easy to clean and stock; siting the ambient stand near the till; advice on which fruit and vegetables should be chilled and which should not; grouping similar products together and maximising colour impact; promoting seasonal items with the help of recipe cards; avoiding overfilling of shelves; and making good use of the Change4Life point of sale (POS) materials (see Annex A).

2.4 Building the links to Change4Life

During the development of the Convenience Store Programme, work was progressing in parallel to develop the Change4Life social marketing campaign. Taking advantage of the opportunity to bring both together, the Steering Group agreed to adopt the Change4Life branding becoming the 'Change4Life Convenience Store Programme'. However, the programme differs from the wider Change4Life campaign in a number of ways:

> Change4Life does not fund partner activity but the Convenience Stores Programme has a separate funding stream to support participating retailers and provide POS materials.

> DH provides intensive support to the programme, assisting in implementation through the provision of POS materials and the project co-ordinator's expertise.

> The programme focused on increasing consumer purchasing of fruit and vegetables rather than all of the diet related messages in Change4Life. It was also recognised that the customer base of the stores was much wider than the young family audience of Change4Life and therefore the programme would also benefit the wider community.

The Steering Group also agreed to ensure that participating retailers use the Change4Life branded POS materials appropriately i.e. only on the fresh fruit and vegetables category. RSMs are expected to check this when they make their regular store visits and provide advice on correct usage if required.

2.5 Working in partnership

Prospective partners joined up by signing the Change4Life Terms of Engagement that allowed them to use the Change4life branding. Initially, six major Symbol Groups signed the Change4Life Terms of Engagement. These were later joined by Landmark Wholesale, making a total of seven Symbol Groups. These Symbol Groups worked in partnership as a sector with DH, supported by the ACS. This allowed easier communication between DH and the Symbol Groups and for sharing best practice and information between Symbol Groups.

2.6 Piloting the approach – selecting the first Development Stores

Once the major Symbol Groups had become involved and the decision made to focus initially on the NE, it was vital to identify and engage the individual retailers who could act as pilot sites for the programme. The project co-ordinator worked closely with the NE Project Team visiting stores, explaining the aims and objectives of the programme and identifying those stores that met the criteria and were willing to participate. The 12 pilot stores were selected because:

1. They were located in a low-income area.

2. There was limited or no access to fresh fruit and vegetables for customers in the surrounding area.

These stores, designated 'Development Stores', received support to help them redesign the layout of the store. DH provided a range of POS materials and a contribution to a new chiller cabinet for fresh fruit and vegetables. Retailers and Symbol Groups funded the remainder of the changes to the stores. Full details of the changes made are shown in table 1 and example POS materials in Annex A.

A few vegetables previously buried in a corner

Large fruit and vegetable selection now given pride of place

The 12 Development Stores, 2 from each of the original six partner groups, were launched in November 2008. Details of the impact of these are discussed in section 3 and Annex D of this report.

2.7 A less intensive model – Roll-out Stores

Following the success of the Development Stores, the Steering Group were keen to explore whether similar results could be achieved with less intense investment and intervention. If possible, this would enable recruitment of a larger number of stores and widen the reach of the programme.

The store selection criteria were retained, but retailers were not required to make the significant changes to the store layout introduced in the Development Stores. These stores were called 'Roll-out Stores' and were launched between April and June 2009. The majority of the Roll-out Stores received POS materials to rebrand existing chiller space but received no chiller funding and less intensive support from the project co-ordinator. Full details of the changes made are shown in table 1.

By the end of June 2009, there were 15 Development Stores and 85 Roll-out Stores participating in the NE (see table 2).

Table 1: Summary of store interventions

Development Stores	Roll-out Stores
Initially 12 stores, later 17 (in parallel with Roll out stores to aid evaluation).	74 stores
Provision of new chiller cabinets dedicated to fruit and vegetables and placed at the front of store (stores received funding of 50% of the cost of the chillers from the DH.) Retailers themselves funded the remainder of the cost.	Provision of extensive POS package to enhance the existing fruit & vegetable location in store aimed at making the food and veg category one which would appeal more to customers.
Significant changes to store layout made; moving fruit and vegetables to the front of the store, expanding the space for fruit and vegetables, addition of an ambient stand for impulse buys and reviewing the range of fruit and vegetables stocked.	Rebranding of existing chillers, addition of an ambient stand for impulse buys, increased space for and range of fruit and vegetables, and movement of the fruit and vegetables to a more prominent position.
Launch leaflet placed in Healthy Start mailings sent to households within a 1 mile radius of the store, advertising the new fruit and vegetable ranges.	Launch leaflet placed in Healthy Start mailings sent to households within a 1 mile radius of the store, advertising the new fruit and vegetable ranges.
Extensive support from project co-ordinator, who advised on issues such as wastage/ marketing.	Support from RSMs.
Range of promotional activities: Majority of stores were supported at launch by the local PCT and Regional Obesity Lead with children in store sampling fruit and recipe ideas. Additional PR activity in support of Change4Life sub-brands such as Cook4Life and Breakfast4Life.	Some promotional activities: Support available from local PCT including initiatives to support Change4Life sub-brands such as Cook4Life and Breakfast4Life.
Average cost to DH per store approximately £5,100.	Average cost to DH per store approximately £300.

Table 2: Participating stores

Symbol Group	Development	Roll-out
Costcutter	3	10
Londis	3	15
Mills	2	9
Spar	2	10
Nisa	3	14
Landmark	1	12
Booker	2	4
Non-affiliated	0	1
Total	**17**	**74**

Section 3 and Annex E set out the results of research comparing the Roll-out and Development Store models.

2.8 Promotional activities

A range of promotional activities were used to raise local community awareness of the changes in stores, often developed to coincide with national work on the Change4Life programme. The 12 initial Development Stores were launched at the same time as a regional press launch for Change4Life, as the first grass roots project to use Change4Life branding. This helped increase awareness of the branding amongst customers before they came to the store and tied the Convenience Store Programme to the wider Change4Life campaign.

At the same time, Healthy Start mailings were used to inform beneficiaries that their local retailer was now stocking a good range of fruit and vegetables to encourage them to exchange their vouchers in participating stores.

Other promotional activities were timed around Breakfast4Life week in April 2009 and in December 2009 when the focus was on local activity to support Cook4Life. Seventy-five of the stores in the NE agreed to support the Cook4Life campaign, which saw 50,000 vouchers for fruit and vegetables distributed to local schoolchildren by health workers.

2.9 Approach to evaluation

A range of projects and processes were established to evaluate the impact of the programme on customer perceptions and purchasing patterns and on the stores themselves. This allowed both DH and retail partners to judge the benefits of their investment.

The evaluation can be broadly divided into three themes:

1. Implementation learning - direct feedback from participants.

2. Analysis of sales data from some participating Development and Roll-out Stores.

3. Qualitative and quantitative research focusing on consumer views of the stores, awareness of the Change4Life programme, fruit and vegetable purchasing habits and self-reported consumption of fruit and vegetables.

A summary of the results of these projects are set out in the next section with full details in the accompanying annexes. Although small-scale, these projects provide useful case studies, which enabled partners to assess progress, identify areas for improvement, assess impact and develop key learning points for future implementation.

3 Summary of evaluation findings

This section summarises the key themes emerging from the evaluation. A number of evaluation projects were undertaken in order to investigate the impact on consumer purchasing of fruit and vegetables, the commercial viability of the programme and to identify ways of improving implementation. The findings clearly demonstrate how the programme has met its original objectives, suggest areas for improvement and offer valuable insights into potential peripheral benefits. Full details of each project can be found in the accompanying annexes.

It is important to note that substantial inter-store variation occurred so some care is needed in drawing general conclusions. Such variation is unsurprising considering the differences between the individual stores. For example, stores varied in size and layout, initial customer perceptions were different, the business models varied and there were differences in existing links with the wider community. Despite this variation, the overall pattern of change and key conclusions were consistent across all stores.

3.1 Customer perceptions of stores changed

Qualitative and quantitative analysis of customer perceptions showed improvements in both the perception of the quality, selection and visibility of the stores' fruit and vegetables and of the store in general. While the positive feedback increased most dramatically directly after the changes, then falling back somewhat, it appeared to stabilise at a higher level than before the changes were made, particularly in Development Stores (See Annex D). Qualitative research also confirmed these shifts in perception and highlighted how the stores' demonstration of a commitment to healthy eating was appreciated by many customers.

The improvements were seen in both Development and Roll-out Stores compared to a group of control stores where no changes were made, with the greatest impact seen in the Development Stores (Annexes D, E). Qualitative research suggests one reason for this is the greater prominence of displays in Development Stores compared to Roll-out. For example, the positioning of the fruit and vegetables at the front of the store (See Annex E) had a particular impact.

A small scale study looking in detail at 4 Development Stores (Annex D) showed that positive response from customers was sustained 7 months after the in store changes:

- Those who feel the store was an excellent place to buy fresh fruit and vegetables increased from 14% to 25%.

- Those thinking that their convenience store was just as good or even better for quality fruit and vegetables compared to their main fruit and vegetable retailer increased from 52% to 68%.

- Those who feel the store was, overall, either a very good or excellent place to shop for food rose from 43% to 54%.

The impact of the store changes on customers varied according to their existing shopping habits (Annexes D, E). For example, customers who used the convenience stores as their main shopping outlet were more likely to have noticed the in-store promotions than those whose main shopping outlet was elsewhere. They were also more likely to have changed their opinion of the store as a good source of fruit and vegetables. Although they are not a large proportion of the total customer base, those who use convenience stores as a main shopping location are an important audience for this project. They are more likely to be from lower income groups, be retired or lone householders, have limited regular access to a car and tend to report lower fruit and vegetable consumption.

Overall, the project helped address some of the common barriers to fruit and vegetable purchasing from the convenience sector often cited by customers and positioned the stores as:

> Offering a wide range of good quality fruit and vegetables;

> Displaying fruit and vegetables in an appealing / hard-to-miss way;

> Stocking fruit and vegetables customers want to buy; and

> A place to buy fruit and vegetables.

3.2 Fruit and vegetable purchasing increased

Analysis of sales data from both Development and Roll-out Stores indicates that sales of fruit and vegetables increased substantially as the programme progressed (Annex C).

All Development Stores experienced a rise in fruit and vegetable sales, which appear to be sustained over several months, suggesting this is an effective intervention for increasing the purchase of fruit and vegetables. Increases in final fruit and vegetable sales ranged from 6%-480% with an average increase of 143%.

The majority of Roll-out Stores experienced some increase in fruit and vegetable sales although the pattern was less consistent and the rise generally smaller than for Development Stores.

Crucially, the increase in fruit and vegetable sales do not appear to be displacing other sales and retailers are not suffering financial losses due to switching of purchasing.

These changes are confirmed by the detailed study of Development Stores (Annexes D, E) which shows that shoppers increased their claimed likelihood to ever purchase fresh fruit and vegetables from these stores. More shoppers also reported recent purchases of fruit and vegetables from the Development Stores.

There are some differences between customers' self reported purchasing and the sales data itself. Self reported purchasing increased initially after the project launch then fell away, whereas the sales data indicates a general increase over time. Comparison of the Development Store model with the Roll-out model showed a limited impact on self reported purchasing in Roll-out Stores (Annex E), however the data from the stores suggests sales did increase somewhat. It is likely that customers do not recall all of their purchases however it is also possible that the sales figures may also reflect a change in the profile of shoppers rather than changes in existing customers purchasing patterns.

The qualitative research gives examples of the impact on purchasing behaviour at a micro level. Some shoppers appear to be making more 'top up' purchases of fruit and vegetables as a result of the changes in store. For a small number of people the changes in purchasing could be quite substantial. This tended to be amongst people who find it difficult to get to a supermarket. These shoppers also reported eating more fruit and vegetables as a result of the in-store changes (Annex D).

The Development Store study also reported that significantly more shoppers (57% up to 73%) claim to be eating fruit or vegetables most or every day 7 months after the start of the project. The same is true of the numbers (23% up to 34%)

claiming to eat 5 a day (Annex D). Less change was observed in the Comparison study (Annex E) although this was conducted over a shorter period. Both studies are small scale but provide an encouraging indication of change.

3.3 Being part of the wider Change4Life movement enhanced impact

In addition, the project benefited from the connection to the Change4Life movement and use of the Change4Life brand. The in depth study of 4 Development Stores found that:

> Customers aware of both the in-store and wider campaign were significantly more likely to think that eating fruit and vegetables is very important and around two fifths of those who were aware of the wider campaign claimed to be trying to eat more fruit and vegetables as a result.

> Around 15-20% of customers said they were buying ‘a little more’ or ‘a lot more’ fruit and vegetables from the store as a result of Change4Life.

> There was a greater increase in claimed fruit and vegetable purchasing and consumption in those customers who were aware of both the wider Change4Life campaign and the in-store promotion than those aware of only one of these or neither.

These findings are supported by the comparison study comparing Development and Roll-out Stores to a control sample (Annex E). Both spontaneous and prompted awareness of Change4Life was highest in Development Stores. Roll-out Stores saw small improvements in awareness of Change4Life post programme launch.

Feedback from retailers supports an improvement in customer perception because shoppers felt the store was 'giving back' to the community through participation in Change4Life. Grassroots engagement with the community, customers and health workers may help to drive sales and also increase retailers' commitment to the success of the project. This led to innovative ideas beyond the scope of the original programme. For example, the Londis store in Washington had a fruit stall at a parents evening at a local school to drive Change4Life awareness with parents and children.

3.4 Partnership working is essential and commitment led to the best results

The feedback and experiences of participants and findings of the evaluation all suggest that partnership working at both national and local levels was critical to success. Valuable implementation lessons were gathered from individual retailers and regional sales managers suggesting that the point of sale materials were popular and collation of sales data challenging. The feedback also provides a number of examples where stores worked closely with their local communities to promote the programme (Annex B).

Grassroots engagement with the community, customers and health workers may help to drive sales and also increase retailers' commitment to success. This led to innovative ideas beyond the scope of the original programme. For example, one Nisa store is supplying its local school with fruit for its tuck shop at cost price, which has led to a closer trading relationship between school and store.

The most successful stores with the greatest changes in customer feedback and increases in sales tended to be those most engaged with the programme. Site visits showed that these stores were displaying posters in their window, solving any supply problems successfully and taking care to stock goods that were appropriate for the brand and programme aims.

4 Conclusions

This programme clearly demonstrates that there is a demand for fresh fruit and vegetables from customers of convenience stores in deprived areas and that improved provision is also of commercial benefit. Participating stores have witnessed significant increases in fruit and vegetable sales and improved customer perceptions of the store. Some customers also say they are increasing their consumption of fruit and vegetables as a direct result of the changes to their local store.

The commitment of individual retailers and successful partnership working between the convenience stores sector, DH and local PCTs throughout this programme has been essential for its success. The programme also illustrates how the impact of local changes can be enhanced through links to the national Change4Life campaign.

The programme has reached approximately 17% of convenience stores in the NE.

Each Development Store was visited by the project co-ordinator to approve its suitability for investment. Retailers have been extremely positive and have welcomed a financial contribution towards developing the fruit and vegetable category. This incentive has encouraged many retailers to undergo a small refit in order to maximise the support offered.

In addition, some local areas have identified additional funding to expand the programme and are working to coordinate this activity with the central programme. The majority of local areas that have identified funding will provide support for stores through the Roll-out Store model.

And finally, the ACS, at the request of its members, submitted an application, to the Change4Life Board, for a self-funded project which would enable the sector to roll out the initiative to a larger number of stores, using the Roll-out Store model. The Board approved this application in 2009 and the ACS is liaising with members on the roll out of this programme.


get your
fresh fruit
& veg inside
change
4 life
we're here to
help you and
your family...
Rise and shine
we love
fresh stuff

Annex A – POS materials used in stores

Barkers – 10 of each per store (40 in total)

Shelf strips – 15 per store

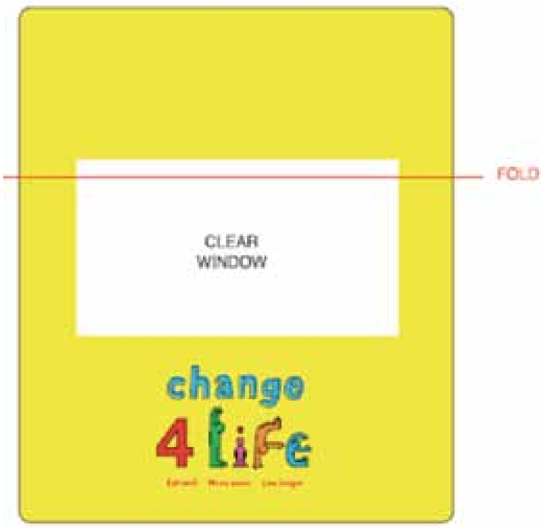
A2 Posters – 2 per store

Chiller header – 220mm x 1.25m – 2 per store

Produce stand – 1 of each per store

Window vinyl – 500mm diameter

Price overclips – 20 per store



Annex B – Implementation – feedback from participants

Once the NE pilot had been operating for a few months, participants involved in implementation were asked to provide feedback. This annex summarises the lessons learned from those participants including participating retailers, regional and national co-ordinators and the Steering Group.

Key lessons

> The project is a powerful example of how the convenience sector and local and national government can work together successfully.

> The project co-ordinator's support was critical for successful implementation and early engagement a critical part of that success.

> Developing a common language to enable working across sectors and professions takes time but is essential for successful implementation.

> Initial work towards rolling out the programme in other regions suggests a number of points related to the scalability of the programme. In particular, the commitment of the project team was crucial to the success of the programme but this has been difficult to replicate when scaling up the programme in multiple regions. In addition engagement of the symbol groups' Sales Directors, to whom Regional Sales Managers report, as well as the Marketing Directors could provide a way of ensuring that RSMs see this as a core part of their role and aid roll out.

> Selection of participating stores could be challenging and time consuming as there were many candidates. Starting this process as early as possible and drawing on the local knowledge of RSMs and PCTs helped to focus down more quickly onto likely candidates.

> The POS materials were highly thought of by participating retailers.

- Retailers were often surprised by the changes to customer perceptions and increases in sales.
- The greatest uplift in sales has come from those stores that invested in chiller equipment located in a visible location at front of store
- Retailers found it difficult to keep up with price changes in the fruit and vegetable category and did not always clearly display price ticketing, so price talkers (reusable price labels) have been added to the POS kit.
- Systematic collation of sales data in a common format proved challenging.
- There is a major opportunity to promote the Healthy Start programme to retailers who are not currently registered to accept vouchers and to let beneficiaries of the vouchers know about new participating outlets.
- Local marketing of the project was most effective where there was assistance from local PCTs.
- When stores worked in partnership with others in the local community this greatly enhanced the launch and reach of the project, for example working with local schools. Spar Ashington worked with local health workers to promote seasonal fruit and vegetables. Health workers visited the store and set up in-store sampling and/or gave nutrition advice. They have also directed local cooking clubs to the store to buy seasonal produce.
- The promotional activities such as provision of vouchers for fruit and vegetables to schools with links to Breakfast4Life and Cook4Life led to mixed results. Although voucher redemption was low, these promotions helped to maintain retailer focus on the original objective of the programme.

Annex C – Summary of store fruit and vegetable sales data

Introduction

As part of the approach to assessing the impact of the Change4Life Convenience Stores programme sales data was requested from participating stores. These data, combined with the insights from other research, give valuable objective indications of changes in consumer purchasing behaviour and enable the impact on store income to be assessed. This was a critical part of assessing the commercial viability of the programme.

Obtaining the sales data from stores was challenging, particularly from Roll-out Stores, and it is important to note the small sample available for this analysis and the considerable variation between stores. The sales data available for Roll-out Stores was also provided over a shorter time period as these stores launched later than the Development Stores. Nevertheless, the data permits a number of general observations, particularly regarding the commercial viability of the project.

Data collection and analysis

Nine Development Stores provided weekly sales data over a period of months including collation of sales data prior to the start of the project to allowed pre and post intervention comparison of fruit and vegetable sales. The analysis is based on the data provided by the Development Stores from late September 2008 until June 2009. There was variation between stores on the precise time period over which data was provided but the most consistent coverage was between November 2008 and March 2009.

Seventeen Roll-out Stores provided sales data over a shorter time period ranging from five to thirteen weeks between March and June 2009.

The data was collated by Regional Sales Managers (RSM) who obtained the information from individual stores. The format of the data varied by store and was dependent on the local record keeping mechanism. Obtaining this data was challenging and required substantial effort from RSMs and less data was obtained than initially expected. An important consideration for future work will be scoping out how best to access this information without excessive burden on RSMs and retailers.

Results for Development Stores

Table 1 shows anonymised sales figures for participating Development Stores before the project commenced and at two points after. Data is presented to indicate the highest fruit and vegetable sales post intervention[2] and the sales at around 6 months post intervention[3]. Data is also presented on total sales from each store. Percentage change in sales is then calculated.

[2] This time point varied from stores to store and was not necessarily immediately post project launch.
[3] This represents an average as precise dates of data collection varied from store to store.

Table 1: Sales data for Development Stores before and after intervention

Store	Category	Pre sales (£)	Highest post sales (£)	% change	Post sales at approx 6 months (£)	% change
A	Total sales	9,410.00	n/a		10,075	7
	Fruit & veg	23.00	109.00	374	67.00	191
B	Total sales	14,065	n/a		14,000	-0.4
	Fruit & veg	25.00	150.00	500	132.00	428
C	Total sales	20,742.00	n/a		23,862.00	15
	Fruit & veg	442.00	873.00	97	746.00	69
D	Total sales	27,697.00	n/a		29,143.00	5.2
	Fruit & veg	598.00	1,186.00	98	852.00	42
E	Total sales	29,026.00	n/a		26,779.00	-7
	Fruit & veg	622.00	789.00	27	735.00	18
F	Total sales	12,434.00	n/a		13,568.00	9.1
	Fruit & veg	509.00	896.00	76	896.00	76
G	Total sales	18,026.00	n/a		16,934.00	-6
	Fruit & veg	50.00	63.00	26	53.00	6
H	Total sales	13,869.00	n/a		16, 186.00	16.7
	Fruit & veg	63.00	140.00	122	140.00	122
I	Total sales	19,385.00		n/a	23,701.00	22
	Fruit & veg	270.00	384	42	287.01	6
J	Total sales	30,336.00	n/a		37,981.00	25
	Fruit & veg	2,182.00	5,958.00	173	3,099.00	42
K	Total sales	13,325.00	n/a		15,689.00	17
	Fruit & veg	60.00	240	300	204.00	240
L	Total sales	18,522.00	n/a		20,575.00	11
	Fruit & veg	31.00	265	754	180.00	480

The data shows substantial inter-store variation however all stores experienced an increase in fruit and vegetable sales throughout the follow-up period. Increases in fruit and vegetable sales at around 6 months range from 6%-480% with an average increase of 143%. Three stores experienced an increase in sales despite a decrease in overall sales.

The diversity of results is likely to be due to a number of factors including precise make up of customer base, the extent to which retail managers and others promoted the programme within the local community and a range of store characteristics.

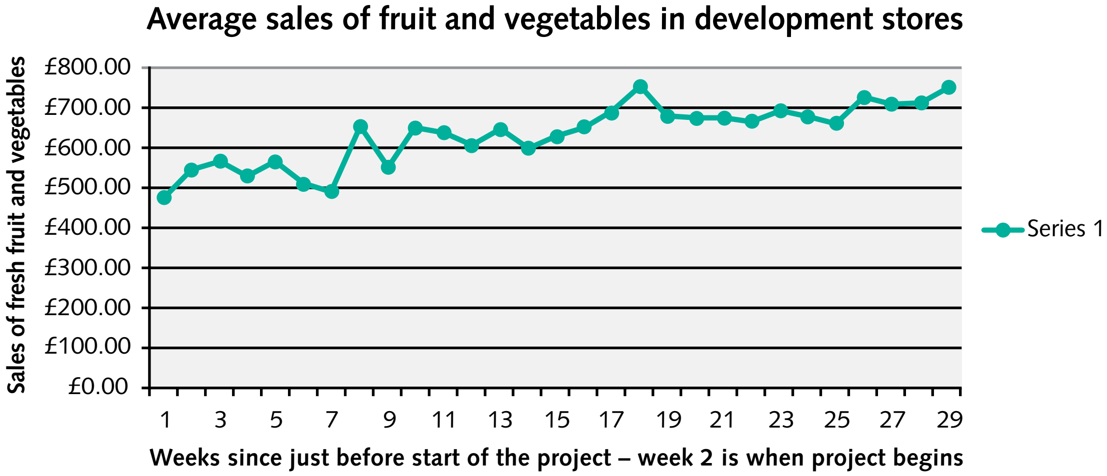
Figure 1 shows average weekly sales data across all participating stores and how this varied over the full monitoring period.

Not withstanding weekly fluctuations in sales the resulting trend suggests the increase in sales took the form of a gradual and continuing uplift in sales over time. Weeks 5-8 cover the Christmas period which could explain the large variation in sales due to changes in regular spending patterns. It is possible that the spike in sales around week 18 could be as a result of 'Breakfast for Life' promotional activities in stores.

Results for Roll-out stores

Table 2 shows anonymised sales figures for participating Roll-out Stores before the project commenced and at two points after. Data is presented to indicate the highest fruit and vegetable sales post intervention[4] and the sales for a particular week around 2-3 months post intervention[5]. Data is also presented on total sales from each store. Percentage change in sales is then calculated.

Figure 1



[4] This time point varied from stores to store and was not necessarily immediately post project launch

[5] This represents an average as precise dates of data collection varied from store to store and was related to the time the store joined the programme.

Table 2: Sales data for Roll-out Stores before and after intervention

Store	Category	Pre sales (£)	Highest post sales (£)	% change	Post sales at approx 2-3 months (£)	% change
A	Total sales	16,100.00	n/a		16,480.00	2.3
	Fruit & veg	110.00	115.00	4.5	109.00	-0.9
B	Total sales	9,333.00	n/a		9,854.00	5.6
	Fruit & veg	147.00	218	48	163.00	11
C	Total sales	14,744.00	n/a		15,079.00	6.5
	Fruit & veg	152.00	187.00	23	183.00	20
D	Total sales	13,780.00	n/a		13,528.00	-1.8
	Fruit & veg	60.00	75.00	25	75.00	25
E	Total sales	14,100.00	n/a		14,500.00	2.8
	Fruit & veg	70.00	185	164	185.00	164
F	Total sales	33,100.00	n/a		37,399.00	13
	Fruit & veg	1,319.00	1,818	38	1,818.00	38
G	Total sales	29,205.00	n/a		29,770.00	2
	Fruit & veg	722.00	870.00	20	870.00	20
H	Total sales	12,084.00	n/a		16,392.00	35
	Fruit & veg	405.00	566.00	40	557.00	37
I	Total sales	21,083.00	n/a		22,539.900	7
	Fruit & veg	327.00	424.00	30	316.00	-3.0
J	Total sales	19,608.00	n/a		17,930.00	-8.2
	Fruit & veg	316.00	316.00	0	305.00	-3.5

Table 2: Sales data for Roll-out Stores before and after intervention (continued)

Store	Category	Pre sales (£)	Highest post sales (£)	% change	Post sales at approx 2-3 months (£)	% change
K	Total sales	26,326.00	n/a		26,803.00	1.8
	Fruit & veg	570.00	688.00	20.7	621.00	8.9
L	Total sales	13,602.00	n/a		14,167.00	4.15
	Fruit & veg	66.00	87.00	33	87.00	33
M	Total sales	20,951.00	n/a		21,134.00	0.9
	Fruit & veg	110.00	198.00	80	183.00	66
N	Total sales	18,347.00	n/a		18,671.00	1.7
	Fruit & veg	175.00	208.00	18.8	208.00	18.8
O	Total sales	15,225.00	n/a		13,936.00	-8.6
	Fruit & veg	33.00	50	51	44.00	33
P	Total sales	19,958.00	n/a		20,618.00	3.3
	Fruit & veg	202.00	248	23	248.00	23
Q	Total sales	21,348.00	n/a		23,914.00	13
	Fruit & veg	235.00	275.00	17	235.00	0

The data shows substantial inter-store variation however the majority experienced an increase in fruit and vegetable sales over the longer term. Final sales increases ranged from 11%-164%. Two stores experienced an increase in fruit and vegetable sales despite a decrease in total sales. Three stores experienced a reduction in fruit and vegetable sales and one store no increase in sales. Only one of these 4 stores also experienced a reduction in total sales. The average increase in fruit and vegetable sales was 13.5%. As for the Development Stores the diversity of results is likely to be due to a number of factors.

Conclusions

The number of stores investigated is small and inter-store variation large. However, it is possible to draw a number of general conclusions.

> All Development Stores experienced a rise in fruit and vegetable sales, which appear to be sustained over several months, suggesting this is an effective intervention for increasing the purchase of fruit and vegetables. Increases in final fruit and vegetable sales ranged from 6%-480% with an average increase of 143%.

> The majority of Roll-out Stores experienced some increase in fruit and vegetable sales although the pattern was less consistent and the rise generally smaller than for Development Stores.

> The data suggests that investing in fruit and vegetables is profitable for participating retailers

> It is possible that wider impacts of the intervention on shoppers' perception of the store helped the convenience stores be seen more as a mini supermarket rather than just somewhere to get milk and newspapers.

> Sales increases tended to be steady and to continue over time and it is notable that this increase had not significantly slowed 6 months after the Development Store launches.

Annex D is a report from Jigsaw Research who were commissioned to evaluate the sustainability of behaviour change as a result of the pilot phase of the programme *(Convenience Stores C4L Report of Findings_Jigsaw_Annex D.pdf).*

Annex E is a report from Synovate who were commissioned to undertake a comparative evaluation of the development and roll-out stores in the pilot phase of the programme *(Convenience Stores C4L Final Debrief_Synovate_Annex E.pdf).*

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