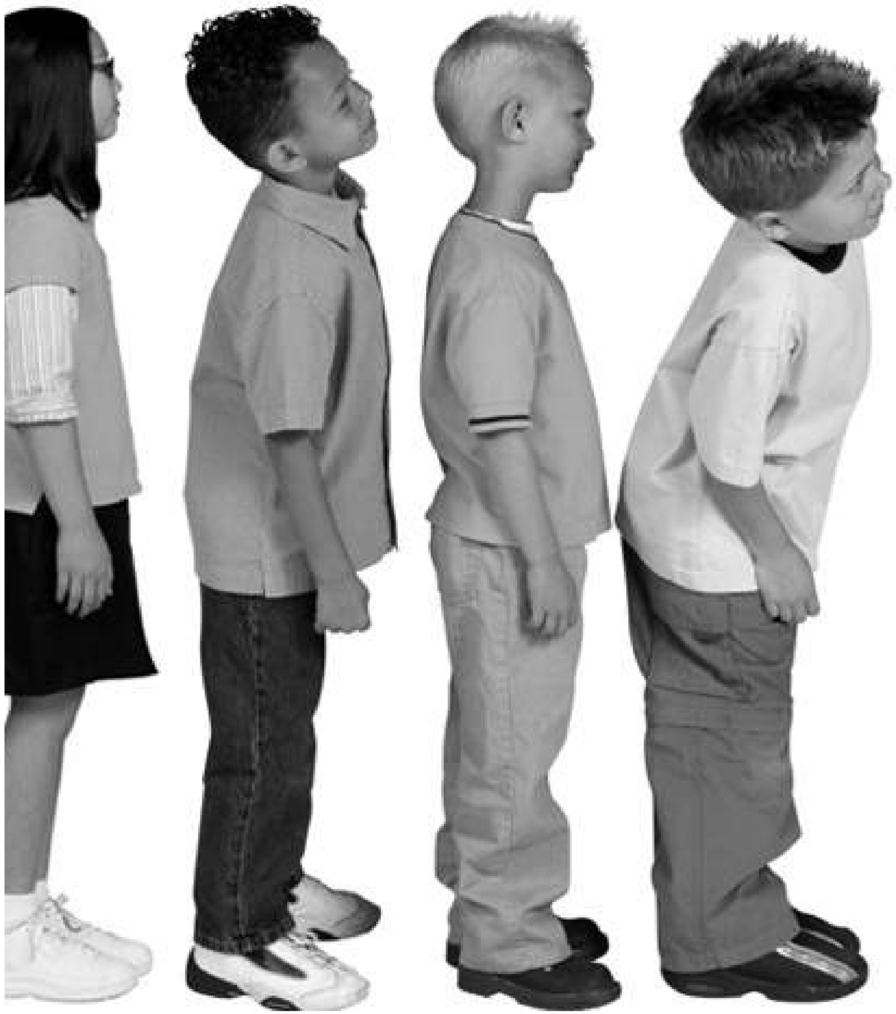


Convenience Stores Change4Life

Prepared for: **Department of Health**
COI

Date: **15th September 2009**

Project number: **09 0979**

Version **Final Debrief**

DH INFORMATION READER BOX

Policy	Estates
HR / Workforce	Commissioning
Management	IM & T
Planning /	Finance
Clinical	Social Care / Partnership Working

Document Purpose	For Information
Gateway Reference	14770
Title	Convenience Stores Change4Life - Final debrief by Synovate (Annex E of main Evaluation Report - see cross ref. below)
Author	Synovate
Publication Date	15 Sep 2009
Target Audience	PCT CEs, Directors of PH, Local Authority CEs, Communications Leads, Convenience Store Sector, Food Industry, PCT obesity leads
Circulation List	
Description	The Change4Life Convenience Stores project is to promote the purchase of fresh fruit and vegetables in deprived areas. The pilot phase was carried out in the North East of England. Synovate were commissioned to undertake a comparative evaluation of the development and roll-out stores in the pilot phase of the programme . This document is Annex E to the main Evaluation Report.
Cross Ref	Change4Life Convenience Stores Evaluation Report
Superseded Docs	n/a
Action Required	n/a
Timing	**n/a**
Contact Details	Cross-Government Obesity Programme 7th floor, South Wing, Wellington House 133-155 Waterloo Road SE1 8UG
For Recipient's Use	

Contents

Background, Objectives and Methodology

Programme objectives

- The Convenience Stores Change4Life programme is a partnership initiative between the Association of Convenience Stores and the Department of Health which aims to increase the availability of healthy options in convenience stores, initially focusing on fresh fruit and vegetables.

- The programme has several objectives, those of greatest pertinence to this research being:
  - 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 signposting within retail stores facilitating the Change4Life brand

- The programme prioritises convenience stores in more deprived locations, where access to fruit and vegetables is more limited and key health indices are lower; thus the programme has the specific aim to reduce existing health inequalities.

- More broadly, the Convenience Stores Change4Life programme sits within the Government's Healthy Weight: Healthy Lives strategy, which aims to reduce obesity levels in children to 2000 levels by 2020.

- The North East region was been selected as the location for Phase 1 of the Convenience Stores Change4Life programme and an initial pilot across 12 development stores has been implemented.

Impact evaluation objectives

- To measure the impact of the initiative (over and above mass media campaign and its fulfilment materials) in **development stores** vs **roll-out stores** vs **control stores** in terms of:
  - Awareness of the need to buy and eat fruit and veg
  - Motivation to buy and eat fruit and veg (encourage family to eat it)
  - Attitudes to the wider Change4Life campaign
  - Actually buying and eating more fruit and veg (claimed c.f. actual behaviour change)
  - Improving perceptions of convenience stores locally
- To provide evidence to support promotion of the scheme to retailers / facilitate roll out
- To explore the role of **barriers to purchase and consumption** both qualitatively and quantitatively in this context (esp. knowledge and skills)

Quantitative methodology - overview

- **Face-to-face** interviews at the exit of the store.
- **2,298 interviews** overall, split according to the following design:

Post Development Research
(6th July to 17th July + 8th to 10th August)

Effect of POS material

Development stores	Roll out stores	Control stores
249 interviews **3** stores	**398** interviews **6** stores	**410** interviews **6** stores
427 interviews **6** stores	**405** interviews **6** stores	**396** interviews **6** stores

Development stores

Roll out stores

Control stores

Effect of Ad Campaign (and Seasonality)

Pre Development Research
(11th June to 21st June)

Quantitative methodology - establishing comparability

- Quota management:
  - Random sampling at “Pre” stage
  - Quotas set according to Pre stage results for the “Post” stage.

- We have identified that some of the key components influencing willingness to buy fresh fruits & vegetables were **gender**, **age**, **revenue** and **how the convenience store is used** (top-up, main store …).

- We have **weighted** the data so each “cell” (type of store x stage) has exactly the same profile on these critical variables to allow apple to apple comparison!

Qualitative methodology

- In addition to the quantitative phase, we conducted 26 one-on-one qualitative interviews with customers across a range of development, rollout and control stores

- Interviews lasted approximately 90 minutes and were structured as follows
  1. General discussion of diet, lifestyle and food shopping behaviour
  2. Accompanied shop in local convenience store
  3. Evaluation of in-store initiative and wider awareness of and attitude to the Change4Life campaign

Executive Summary

Executive summary

- **The Change4Life initiative in the Convenience store is facing a strong challenge as these outlets are not used nor really considered for buying fresh fruits & vegetables:**
  - Supermarkets are the clear preferred channel
  - F&V are not really “impulse” purchases in convenience stores
  - The image of convenience stores is weak on F&V, both in terms of price and quality
  - Although some movements are identified, this remains true for all configuration (development / roll-out / control) and stage (pre/post) of the research

- **Under such conditions, the initiative shows encouraging trends to promote the consumption of fruits & vegetables, but under clear conditions:**
  - The impact is mainly significant in Development stores and where the equipment is clearly displayed.
  - The new equipments and advertising material clearly improve the image of the stores on F&V
  - However, this is true where the stores already enjoy a good reputation (more likely to be motivated by the initiative?).
  - Finally, there is little evidence of the initiative having an impact over actual behaviours.

- **The combined effect with the overall C4L campaign can hence support the necessity to educate:**
  - Awareness of the C4L campaign is increasing in development stores, with a particular benefit in terms of improving the specificity of this awareness (eat more fruits & vegetables!).
  - However, there is still a long way to go as guidelines are known (5 a day), but not really followed (3 a day!) and there is a strong lack of clarity regarding what counts as a portion (what type of F&V and what portion size)

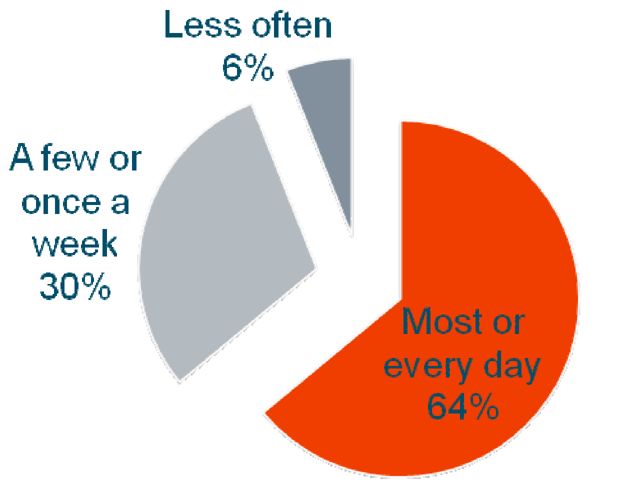
- **The Convenience Stores C4L is more likely to have a real influence over behaviours if the investment is significant enough at the store level (Development stores), considering the environment and barriers that needs to be overcome. Changing behaviours will take time in these areas, and only with the ongoing support of the media campaign.**

Convenience stores are often neither used nor considered to buy fresh fruits & vegetables

- The key findings in this section are applicable to both pre and post stages, for all stores lay-out (development, roll-out or control)

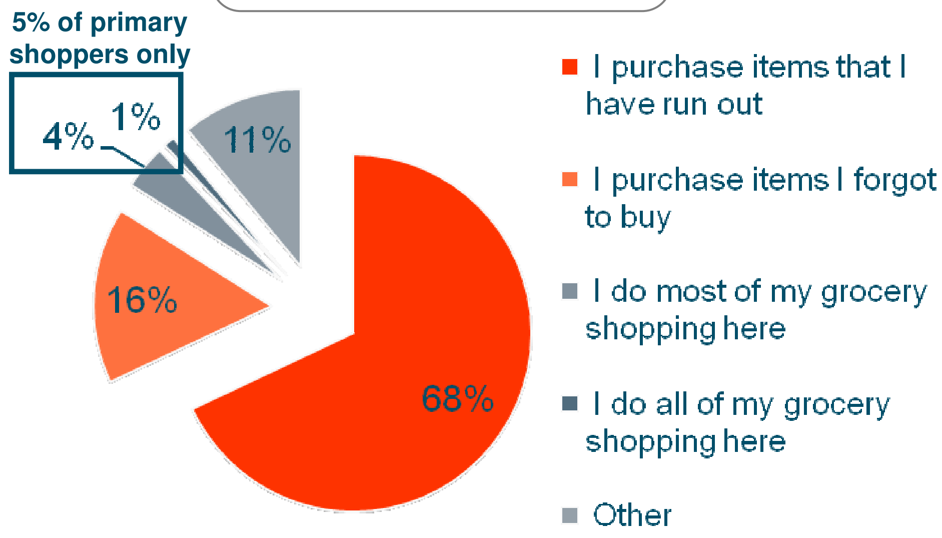
Convenience stores are used with a high frequency, almost a routine … but for top-ups almost exclusively

Usage of convenience stores is frequent



S3. How often do you visit this convenience store?

But mainly for top-ups / not for main grocery shopping

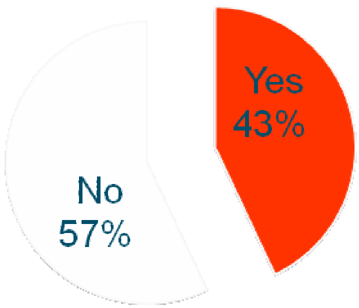


Q1. Which of the following best describe your use of this convenience store?

N=2,298 (all stores / Pre+Post stages)

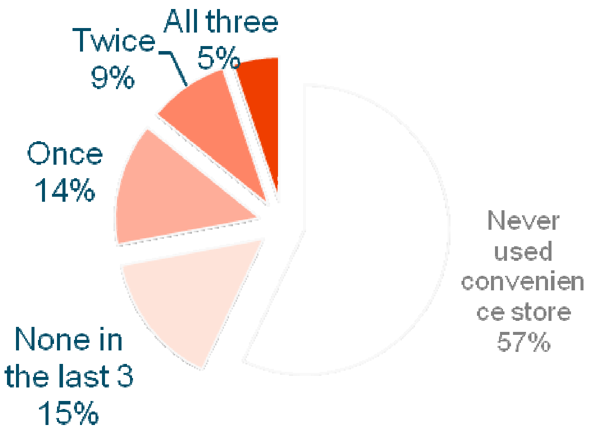
Fruit & Veg are purchased occasionally in convenience stores … if on the shopping list!

A fair part of the customers have bought F&V in the past



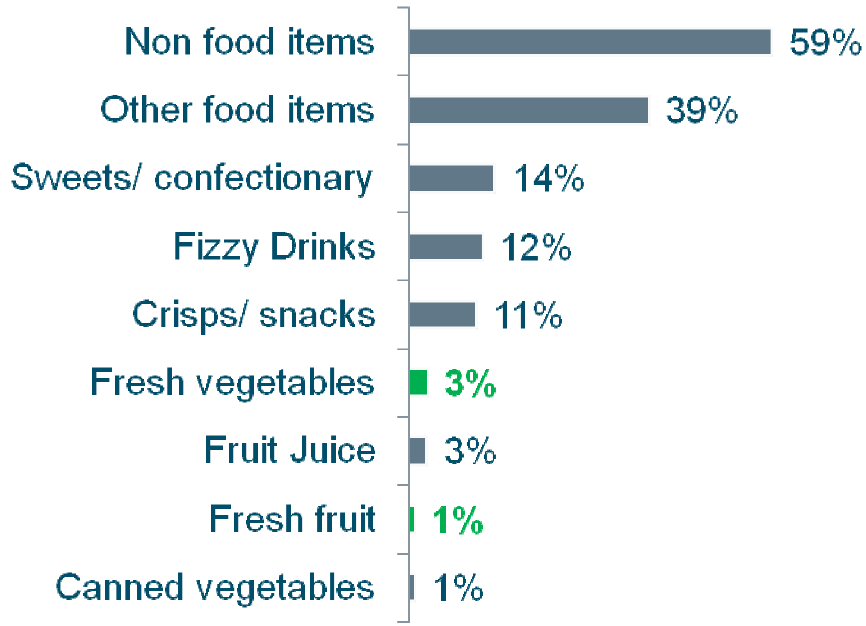
Q6. Have you ever purchased fresh fruit or fresh vegetables from this convenience store?

But purchase of F&V in convenience stores is occasional



Q7. Thinking back to the last 3 times you bought fruit or vegetables, how many of these occasions were purchased from this store?

And F&V have been hardly bought on this last occasion



Q2. What, if anything, have you bought in the store today?

N=2,298 (all stores / Pre+Post stages)

Looking at the basket, “fresh fruit & veg” are mostly potatoes!

Fresh F&V on this occasion:

4%

… but only

2%

Actual fresh F&V

.. and **2% potatoes!**

Detail of fresh F&V bought
(among buyers – n=96)

72% vegs

Potatoes	38%
Carrots	12%
Broccoli	9%
Onions	9%
Cabbage	8%
Mushrooms	7%
Cauliflower	5%
Tomatoes	3%
Lettuce	3%
Cucumber	1%

18% fruits

Bananas	13%
Oranges	3%
Apples	2%
Pears	1%
Plums	1%

Q2. What, if anything, have you bought in the store today?

Q2a. Specifically, what types of fresh fruit & vegetables have you purchased today and how many of each have you purchased?

N=2,298 (all stores / Pre+Post stages)

Only 1 in 10 customers has at least 1 unplanned purchase … and this is very rarely fruit or veg, which are not bought under impulse (compared to sweets or crisps!)

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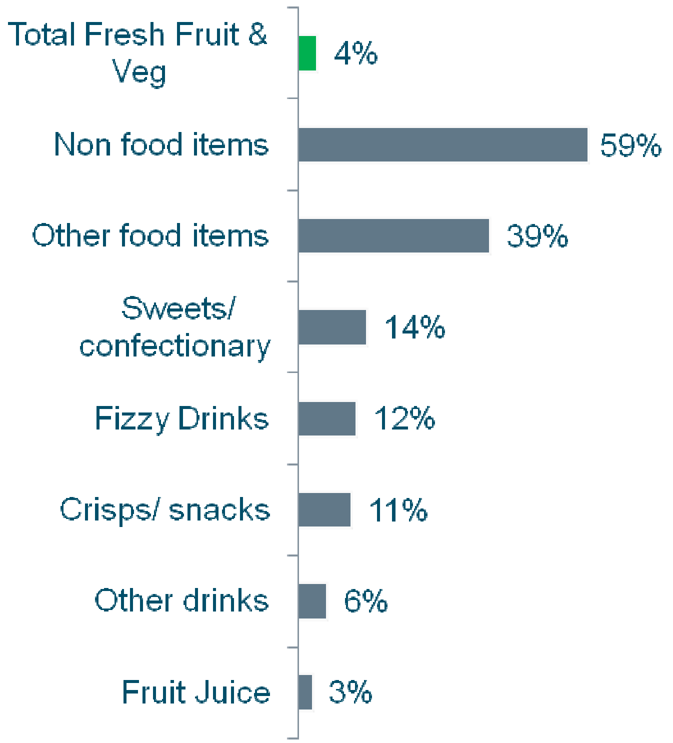
Product bought on this occasion

Q2. What, if anything, have you bought in the store today?
N=2,298 (all stores / Pre+Post stages)

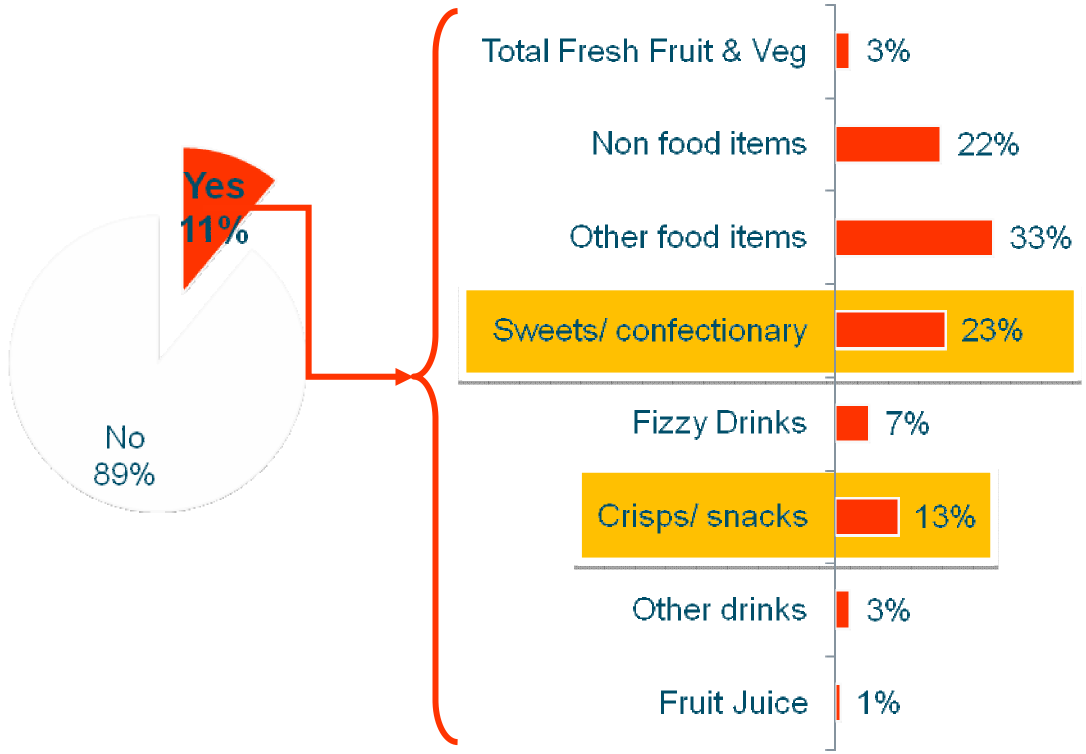


1 out of 10 customer claims he had some unplanned purchase

Q4. Of the items you bought at the Convenience Store today, were there any items that that you had not planned to purchase before you entered the store? n=2,298

… but not Fruits or Vegetables

Q4a. Which items did you decide to purchase after you arrived at the store?
N=228 shoppers with unplanned purchase
(all stores / Pre+Post stages)



Convenience stores are still considered for (top-up / emergency) purchase of fruits & vegetables, but are simply not positioned as a preferred outlet

Buying F&V in convenience stores is rejected only by a minimal share of the shoppers

6%

vegetables

6%

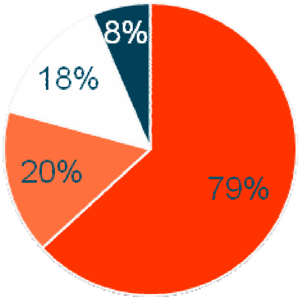
fruits

(7% rejection for fresh fruits or fresh vegetables)

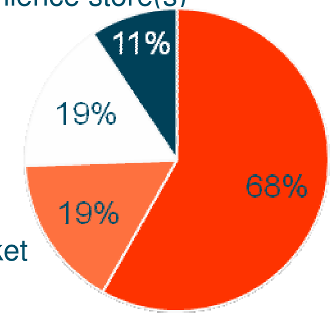
QX. Are there any types of products you would you not think of buying from this store?
N=2,298 (all stores / Pre+Post stages)

But supermarkets stay the preferred purchase outlet

For V&G buyers (1/month or more often) but not in Convenience Stores (n=1,642)



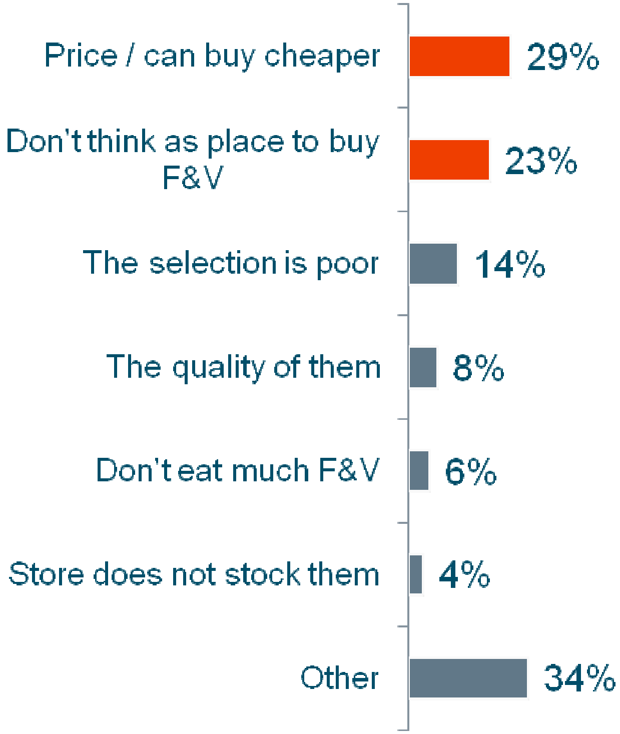
For V&G buyers (1/month or more often) that have used the Convenience Stores (n=362)



Q7bi/Q7bii. Where / Where else do you buy your fruit and vegetables?

Convenience stores are not perceived as being competitive in terms of quality and price

Convenience stores are less because of price … or positioning



Q7a. Why do you not purchase fruit and vegetables from this store?
N=1,962 (all stores / Pre+Post stages)

Convenience store are clearly performing less on F&V compared to other food products (quality and price)

Q8. Thinking about the store in general, please use the scale on this card, and tell me how you would rate this store on each of the following
N=2,298 (all stores / Pre+Post stages)

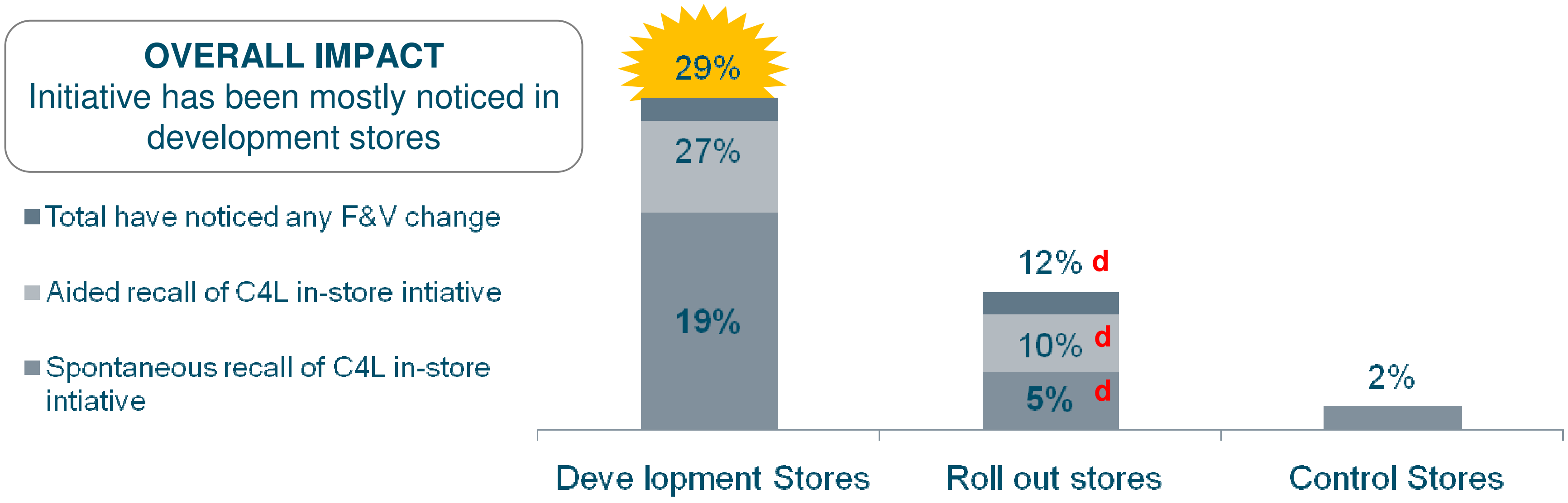
Can the Change4Life initiative at the POS overcome the weaknesses of the Convenience Stores?

Awareness and Impact on Perceptions

- The Change4Life campaign has been noticed in Development stores mainly, with a positive impact in terms of perception of the Fruits & Vegetables offering

The initiative has been noticed primarily, if not only, in the development stores

OVERALL IMPACT
Initiative has been mostly noticed in development stores



Changes spontaneously noticed in the store are linked to the new equipments and C4L campaign, but the overall impact is limited, particularly in roll-out stores

	Development	Roll-out
There is now a very obvious display for fruit and vegetables	**9%**	1%
The Change4Life campaign materials / signage	**5%**	2%
There is now a chiller cabinet for fruit and vegetables	**4%**	-%
The fruit and vegetables look more appealing than before	3%	1%
There is a wider choice of fruit and vegetables than before	2%	1%
There is a promotion encouraging us to eat more fruit and vegetables	1%	1%

Q14a. From your visit to the store today, please tell me a list of things that caught your eye, with respect to the store layout and the variety of food being offered?
Q15. During your visit to the convenience store, did you notice any promotions in the store?
Q16. And still thinking about when you were in the store just now, did you see any promotion around the Change4Life campaign?

Post stage / Development stores – n= 252 / Roll-out stores – n=398 / Control stores – n=410

Prominent placement of display cabinets has been critical to the success of the programme so far

- In the qualitative phase, participants tended to notice the increased availability of fruit and veg in their convenience store in development stores, where **displays which were more prominently positioned**
- Many customers were unaware of Change4Life presence when display cabinets were less prominent in stores
- The **size of display cabinets is <u>not</u> critical** to attracting customers' attention, provided they are **well positioned** in store
- However, smaller displays may contain a narrower selection of produce, which may impact on consumers' engagement with the C4Life campaign

From the qualitative research, awareness of the Change4Life marketing materials in store has so far been low in many stores

There is a 'wallpaper effect' as shoppers are bombarded with offers and information in store

To cope with this, they look specifically for offers which will save them money…

…and tend to ignore branding communications, *unless these are extremely prominent*

Change4Life was most successful where store owners promoted the campaign in more than one area of their store

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The most impactful areas for branded displays are…

Just inside the entrance
Attracts customers' attention before they've had the chance to consider alternative snacks

By the till
Increased dwell time whilst queuing + 'money in hand' at point of sale means many customers are tempted to pick up a 'treat for me'

The initiative clearly had a significant impact over the overall perception of the fruits & vegetables section of the store.
Development stores benefit more than the other ones from the initiatives. Control stores had an overall worse perception than roll-out and Development.

	Development		Roll-out		Control	
	Average opinion* score (post stage)	Gap Post-Pre scores	Average opinion* score (post stage)	Gap Post-Pre scores	Average opinion* score (post stage)	Gap Post-Pre scores
Stocking the fruit and vegetables that I want to buy	3.4	0.3	2.9	0.1	2.6	-0.1
Displaying the fruit and vegetables in an appealing way	3.6	0.3	3.0	0.2	2.6	-0.2
A good range of fruit and vegetables	3.3	0.3	2.8	0.1	2.5	-0.2
The quality of the fruit and vegetables displayed.	3.7	0.2	3.1	0.2	2.7	-0.2
The fruit and vegetable display was hard to miss	3.5	0.2	3.0	0.2	2.5	-0.5
As a place to shop for fruit and vegetables	3.3	0.1	2.8	0.0	2.6	0.0
A fair price for all fruit and vegetables	3.5	0.0	3.1	0.3	2.6	-0.3
As a place to shop for food in general	4.1	-0.1	3.8	-0.1	3.6	0.2
A fair price for all food products	3.7	-0.1	3.5	0.2	3.0	0.0
The store has the interest of consumers at heart	4.4	-0.1	4.0	-0.1	3.6	0.0
I trust the store to sell good quality food	4.2	-0.2	4.0	0.1	3.7	0.1

All mean scores statistically different with Development (vs Roll-out and Control) stores and Roll-out stores (vs Development and Control)

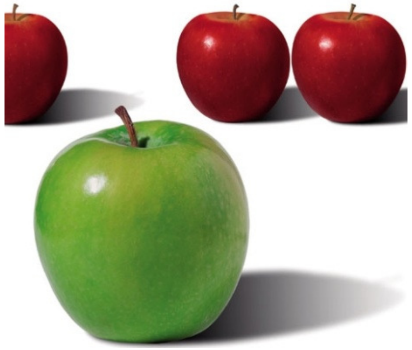
Q8. Thinking about the store in general, please use the scale on this card, and tell me how you would rate this store on each of the following

Post stage / Development stores – n= 252 / Roll-out stores – n=398 / Control stores – n=410

*: 1=Poor / 5=Excellent

A well implemented in-store campaign benefits store owners as well as Change4Life



Improved range and quality of fruit and veg drives sales	Chance to integrate into the community (e.g. links with schools)	Enhanced reputation as happy customers spread the word	Competitive advantage over rival stores

Can the Change4Life initiative at the POS overcome the weaknesses of the Convenience Stores?

Influence of existing store reputation

- The initiative is more likely to have an impact in a store that already enjoys a favourable reputation

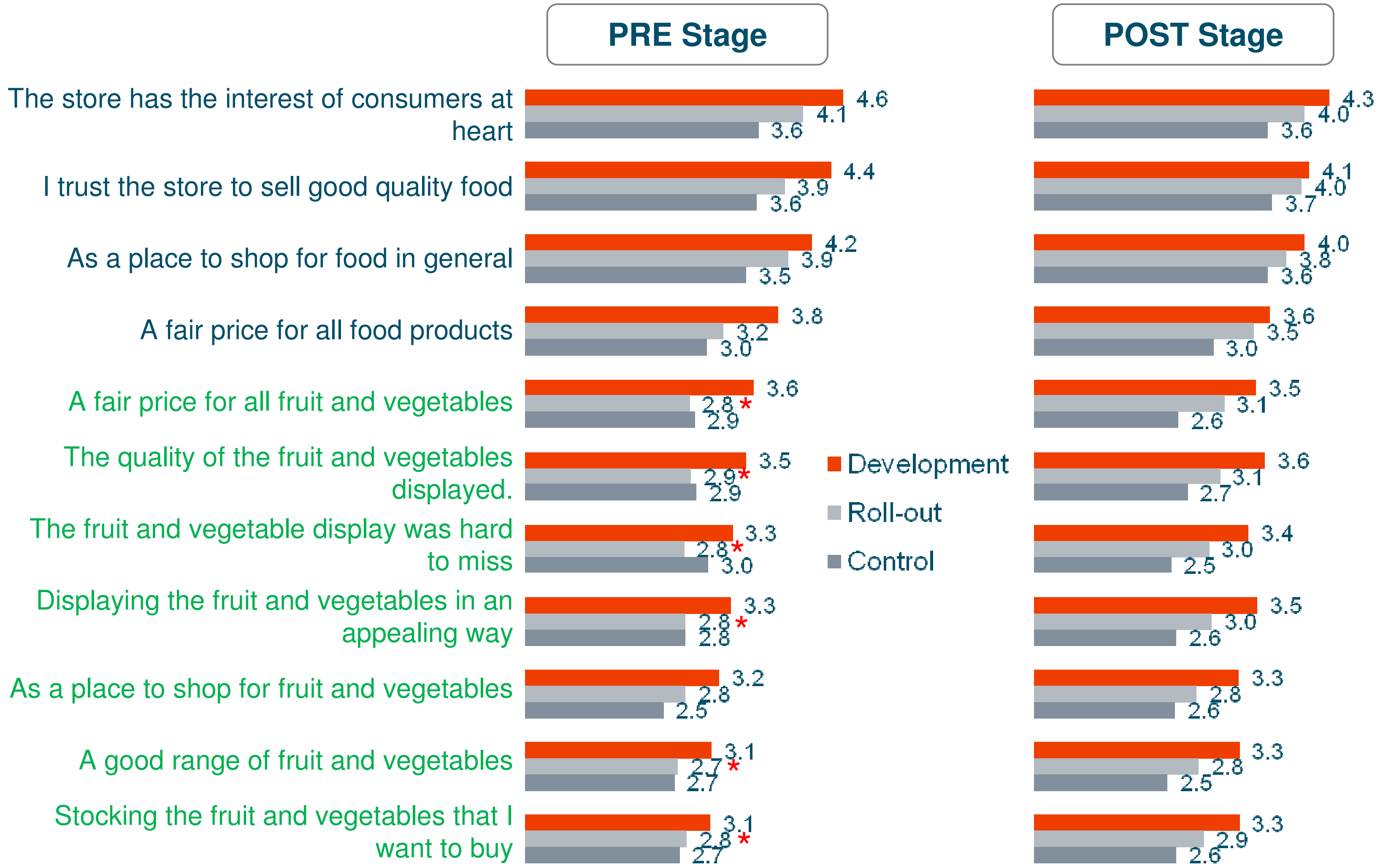
The Change4Life campaign is most successful in stores which already enjoy a good reputation

Successful store owners manage their reputation by…

Offering a friendly service

Keeping their store clean and attractive

Customers from the Development stores already had a better image of their store than the roll-out and control stores. This is likely to be a sign that owners more sensitive about the image of their store will be more willing to be part of the initiative.



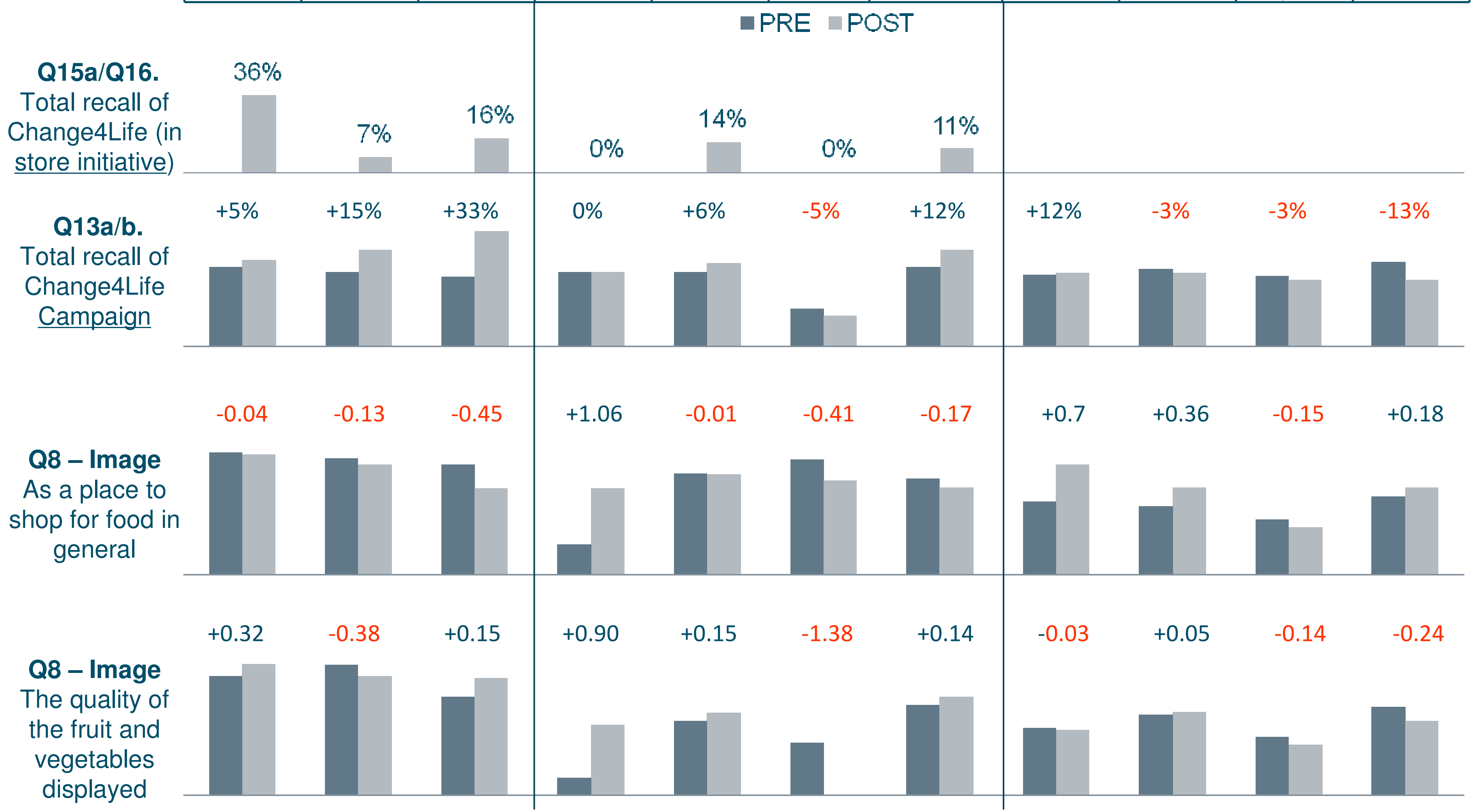
All mean scores statistically different with Development (vs Roll-out and Control) stores and Roll-out stores (vs Development and Control) except stars (*) symbols

Q8. Thinking about the store in general, please use the scale on this card, and tell me how you would rate this store on each of the following

Post stage / Development stores – n= 252 / Roll-out stores – n=398 / Control stores – n=410

The initiative show a fair level of consistency within each type of store, although the impact of the initiative at the POS may vary (and so the impact in terms of image)

Development stores			Roll-out stores				Control Stores			
Store 2	Store 13	Store 15	Store 4	Store 5	Store 6	Store 10	Store 1	Store 3	Store 9	Store 12
CostCutter Mr Gill	*Booker* Border Reiver	*Landmark* Turton Stores	*Landmark* Atwal	*Costcutter* B & B Varriach	*Booker* Broadway	*Nisa* North East Convenience	*Costcutter* Mr Hussain	*Londis* Gerry Chahal	*Landmark* Lifestyle Express	*Spar* Chapel House



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Quality *and* quantity of produce are central to the success of the campaign

Change4Life branding will only drive sales of fruit and veg if…

Produce is in good condition

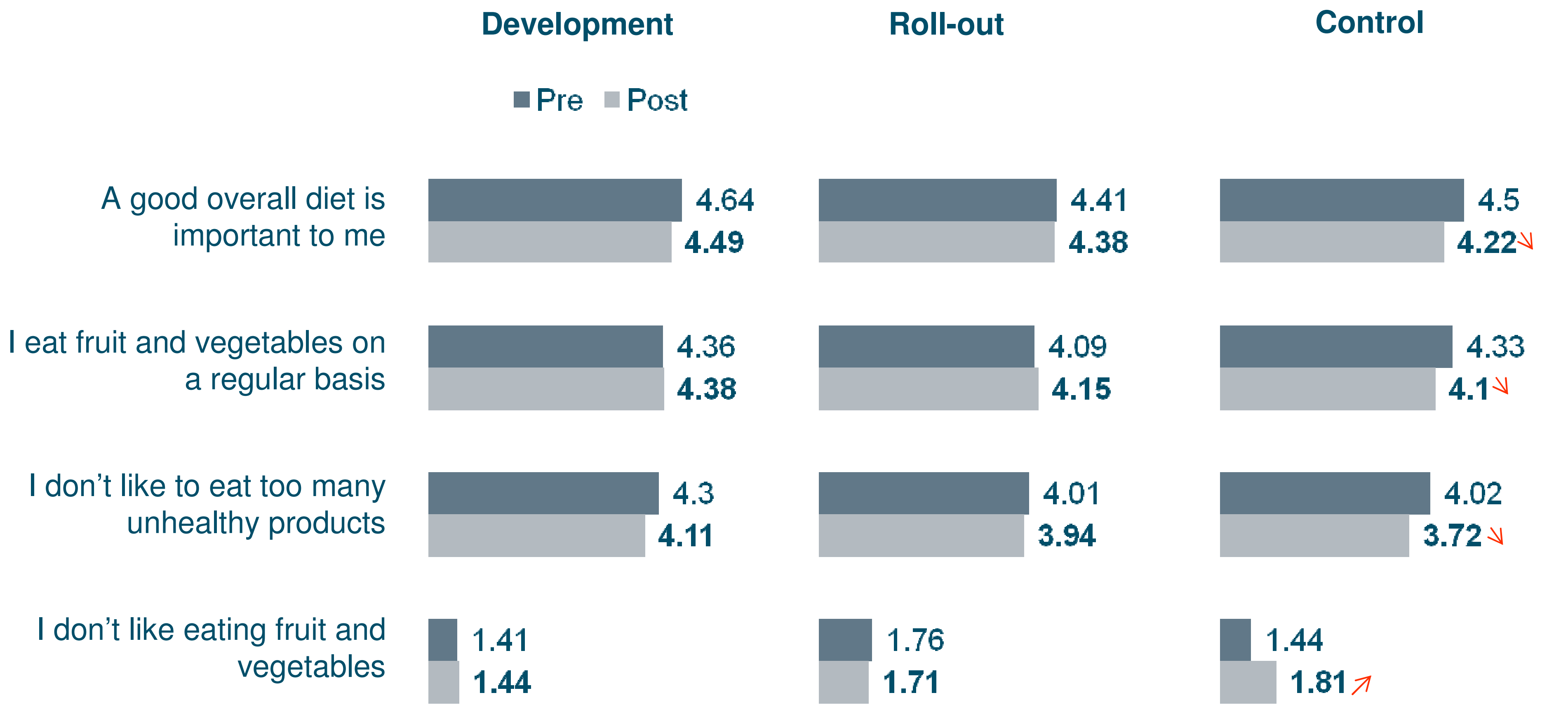
Shelves are regularly replenished and well presented

Can the Change4Life initiative at the POS overcome the weaknesses of the Convenience Stores?

Impact on consumer behaviours

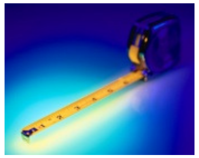
- There is no clear impact of the initiative on actual behaviours

Attitudes towards healthy eating have not significantly changed at the post wave

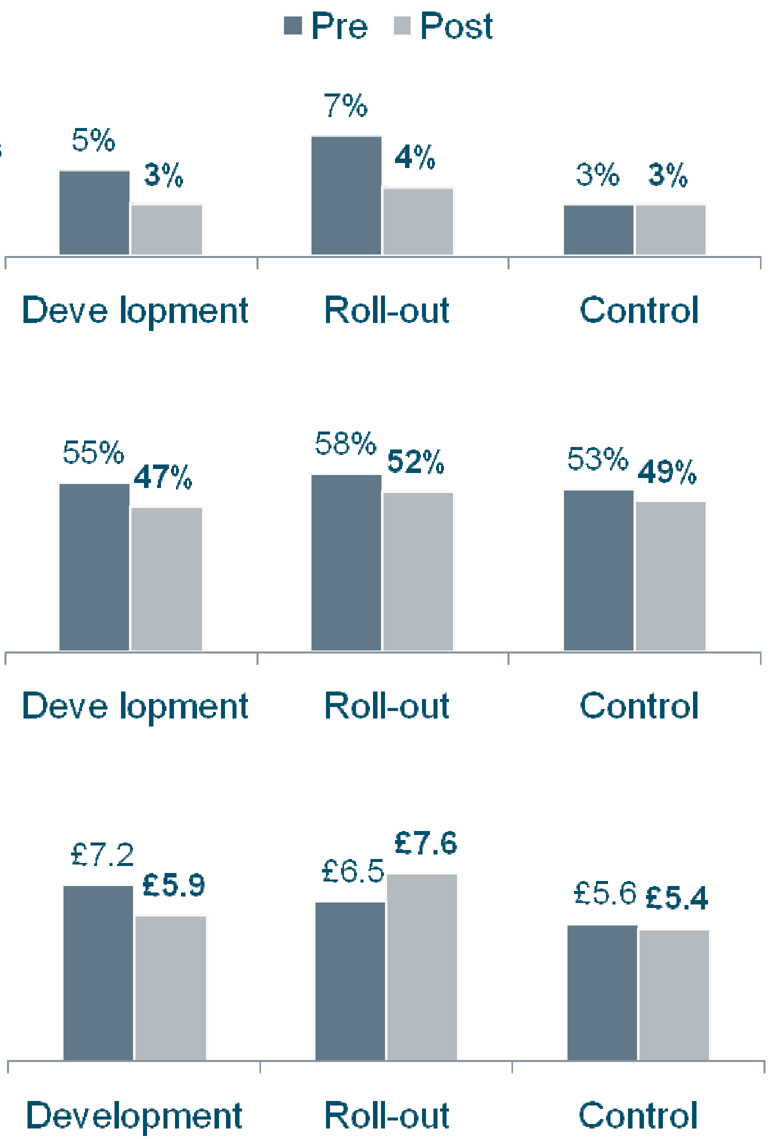


Q11. For each of the following statements, please say how much you agree or disagree with the statement using a 5 point scale. Please say 1 if you completely disagree and 5 if you completely agree

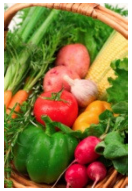
Pre and Post stage: Development stores – n= 427/252 ; Roll-out stores – n=405/398 ; Control stores – n=396/410



There is no measured effect of the campaign and/or the type of store over actual consumer behaviour



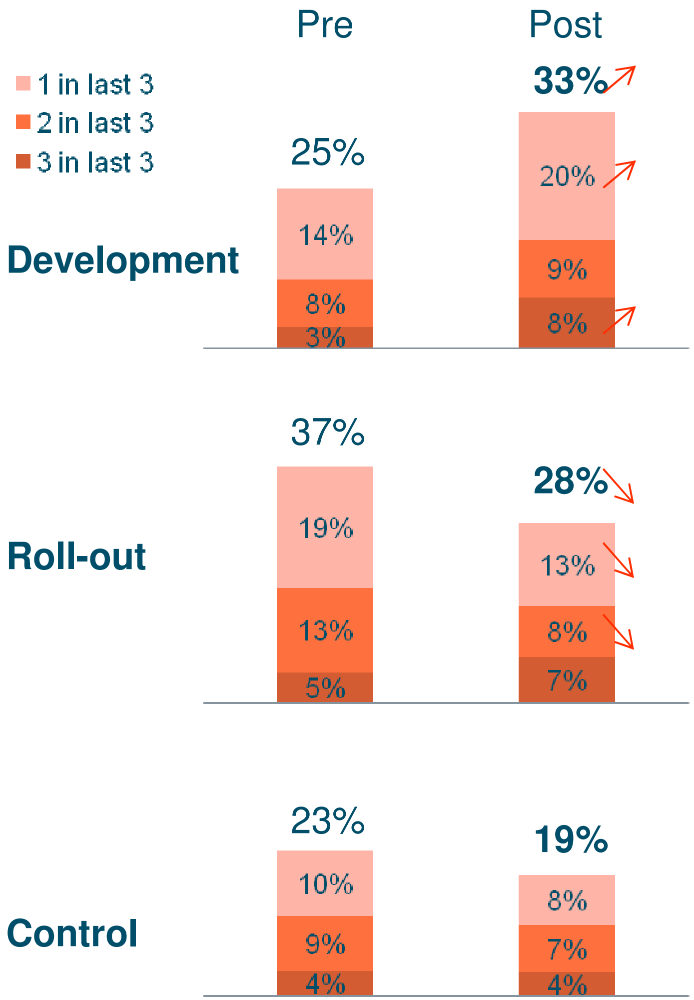
Have bought Fruits & Vegetables on that occasion
(% Yes)



% That are buying F&V more than once a week

Average Amount Spent on that occasion
(in GBP)

Have bought F&V at the convenience store out of the 3 last occasions



Pre and Post stage: Development stores – n= 427/252 ; Roll-out stores – n=405/398 ; Control stores – n=396/410

In the qualitative research, customers suggested they were only likely to buy more fruit and veg from their convenience on limited occasions

Increased purchase of fruit and veg would take the form of…

Top-ups	Some said they would buy extra fruit and veg from their local store if they ran out between main shops

OR

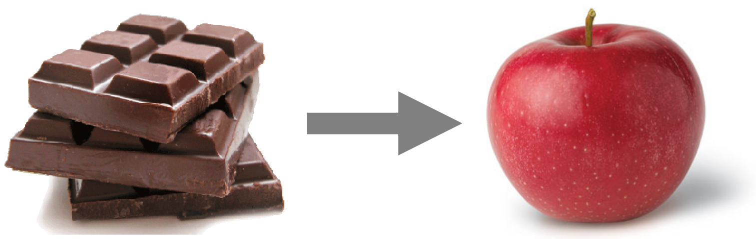
Impulse buys	Some claimed they might pick up a piece of fruit as a snack or vegetables for a meal if the display caught their eye and the produce looked appetising

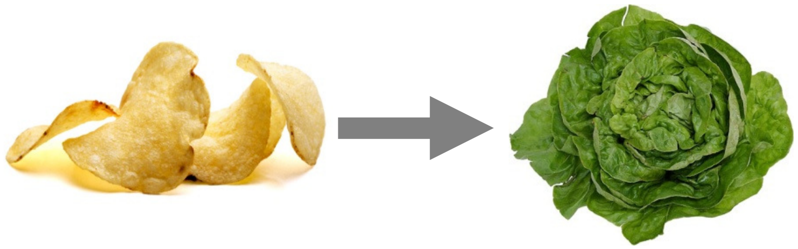
BUT NOT

Main weekly shops	Many consumers think that supermarkets would still be cheaper and offer a better range of fruit and veg than participating convenience stores

Only a few development store customers from the qualitative research have started buying slightly more fruit and veg as a result of C4Life activities in their local store

Some development store customers claimed they had started to substitute fruit and veg for the less healthy snacks they would usually buy,





e.g. One participant's child had asked their mother for an apple instead of chocolate when they saw the Change4Life display, after learning about 'healthy snack time' at school

One participant had purchased salad with her sandwich during her lunch break, rather than crisps after noticing the new chiller in the back of the store

Overcoming the weaknesses of the Convenience Stores?

Influence of the Change4Life Campaign

- Coupling the Change4Life Campaign with the in-store initiative shows some interesting effects

There is only moderate awareness of the Change4Life message

There is some awareness of Change4Life endorsed community initiatives

Recollection of the TV ads tends to be vague

Other campaigns already deliver a similar message, so Change4Life lacks stand-out

There is some awareness of Change4Life endorsed community initiatives

- A few participants recalled local initiatives involving Change4Life when prompted

Change4Life in schools and nurseries

'Healthy snack time' lessons, trip to local store to learn more about fruit and veg

Change4Life in the workplace

Advice about healthy eating during the night shift

Swim4Life

Posters encouraging kids to swim more regularly at the local leisure centre

Recollection of the TV ads tends to be vague

The adverts are popular when recalled, but the cartoon visuals suggest to many that the campaign is aimed solely at children or parents of children

✓

'It's about eating more healthily'

✓

'It's about giving kids less food'

✗

Little recall of active lifestyle message

Other campaigns already deliver a similar message

- 5-a-day
  - Simple message is easy to recall
  - A consistent message for nearly a decade

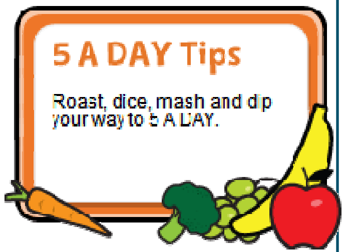
Just Eat More
(fruit & veg)

- Jamie Oliver
  - Accessible personality for kids and adults
  - Leads by example – proves healthy living is easy

However, the key messages of Change4Life are understood - the emphasis on eating fruit & vegetables is stronger in development stores where the interaction with POS material seems to have additional impact

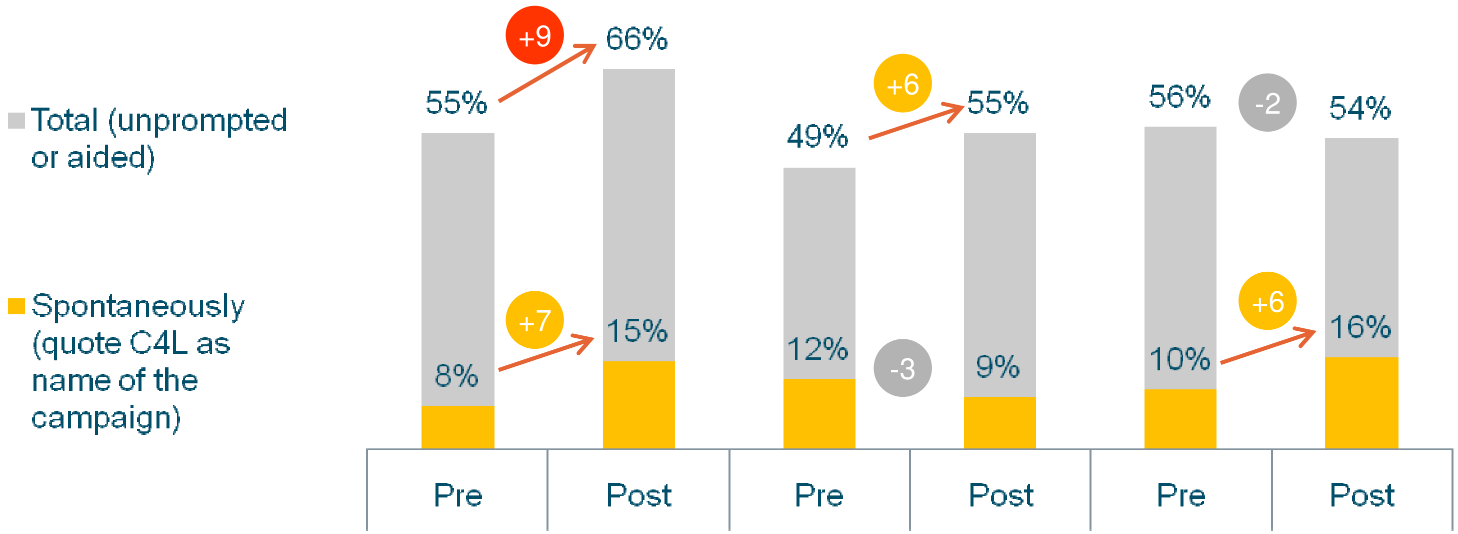
what the Change4Life campaign is about?

	Development		Roll out		Control	
	Pre	Post	Pre	Post	Pre	Post
Promoting **healthy eating**	63%	55% ↘	68%	57% ↘	55%	67% ↗
Promoting being **more active** / taking more exercise	27%	39% ↗	32%	26%	38%	37%
Eating **five portions** of fruit and vegetables a day	22%	16%	11%	13%	22%	8% ↘
Promoting the **eating of fresh fruit and vegetables**	20%	**20%**	11%	11%	17%	9% ↘



Q13c. Can you tell me what the Change4Life campaign is about?
Pre and Post stage - All respondents aware of Change4Life campaign:
Development stores – n= 225/251 ; Roll-out stores – n=200/206 ; Control stores – n=228/207

Encouragingly, the Change4Life programme does seem to benefit from the synergy / interaction with the POS initiative: while the (prompted) awareness is correct and improves overall between pre and post stages, the increase is even more significant in the development stores



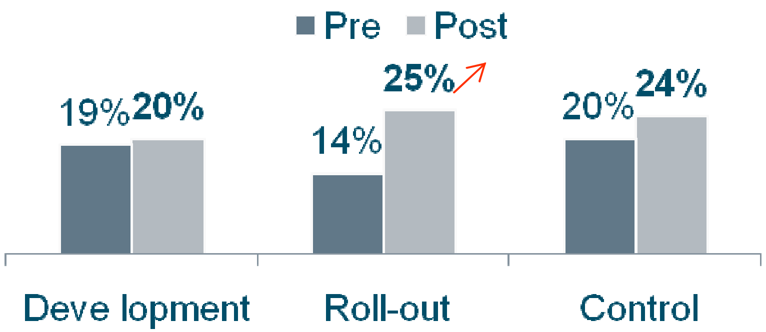
Q13. Are you aware of any campaigns at the moment to encourage a healthier lifestyle? Please think about television, newspapers, posters outside (including bus stops) etc. Q13a. Can you remember the name of the campaign? Q13b. Have you heard of the Change4Life campaign?

Pre and Post stage: Development stores – n= 427/252 ; Roll-out stores – n=405/398 ; Control stores – n=396/410

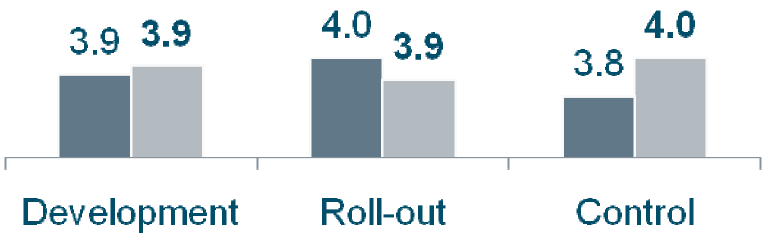
Customers claim that their attitude is progressively changing (and not influenced by the type of store). However, the expected impact over their behaviour is not improving (trend slightly more favourable in development stores).

CLAIMED IMPACT OF THE CAMPAIGN ON KEY ATTITUDES AND BEHAVIOUR

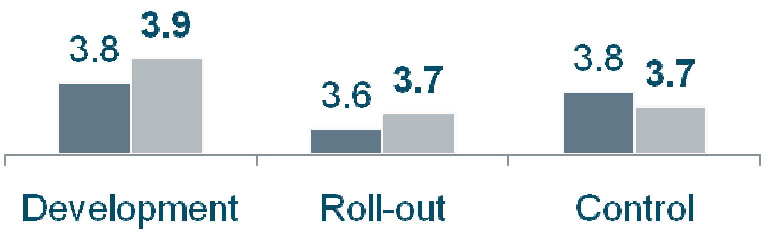
Caused changes in **attitude towards healthy eating**
(in % of "yes")



Made think seriously about **eating more healthily**
(in mean score on 5 points agreement scale)



Made think seriously about **being more physically active**
(in mean score on 5 points agreement scale)



Q13d. Has the Change4Life campaign that you are aware of caused any changes in your attitude towards healthy eating?
Q13e. Please say how much you agree or disagree with these statement using a 5 point scale. Please say 1 if you completely disagree and 5 if you completely agree:Change4Life has made me think seriously about eating more healthily

Aware of the campaign pre and post

The guidelines are known, but not put into practice - the campaign or the type of store have not led to any significant improvement between Pre and Post stages

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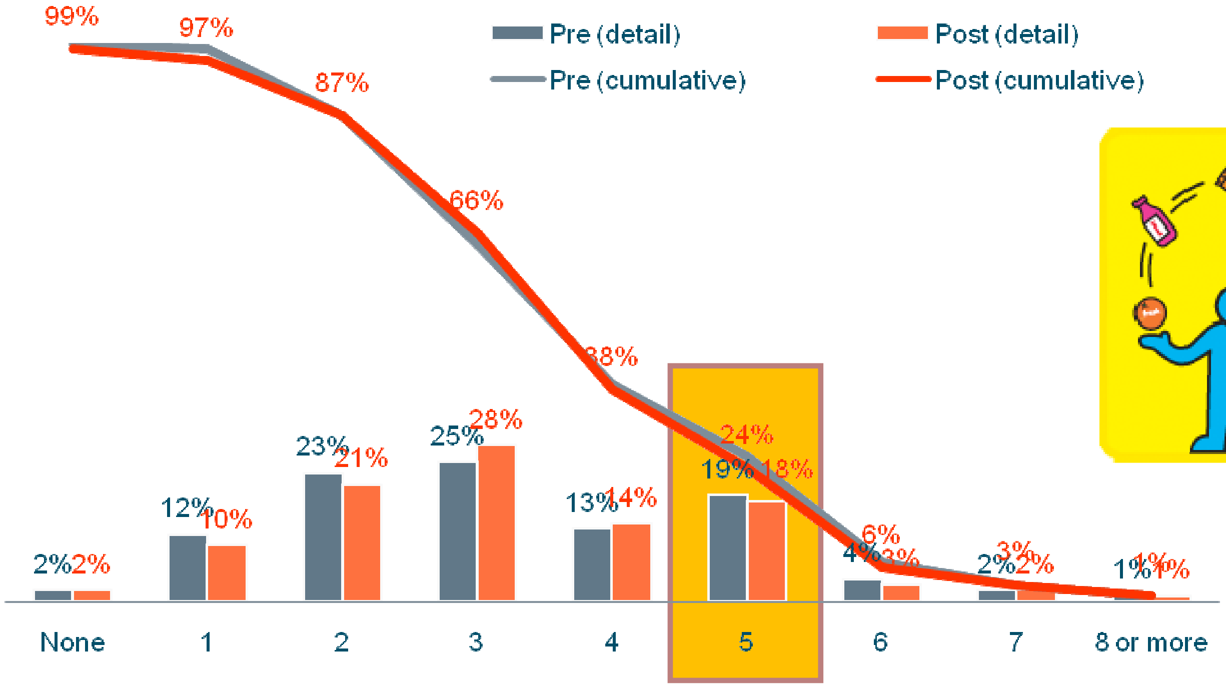
Research reinvented

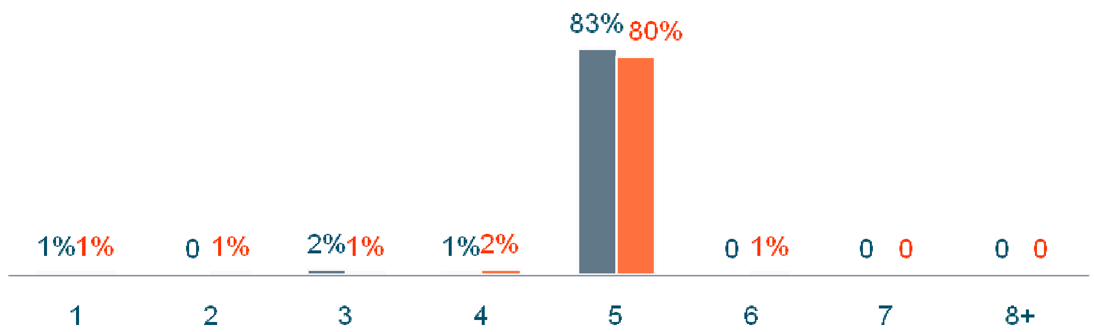
1 customer out of 4 claim he eats at least 5 portions a day

Q9b. Realistically, how many portions of fruit and vegetables do you eat in a typical day?



… although they are quite aware of the recommendation

Q10. How many portions of fruit and vegetables do you think it is recommended people eat each day, as part of healthy eating guidelines?



Total Pre stage (1,228) and Post Stage (1,143)

There are two consumer attitudes which are hindering the success of the campaign

‘I already **know** it!’

‘I already **do** it!’

However, underlying these responses are a number of popular misconceptions about what ‘healthy eating’ actually means…

‘I already know it – enough already!’

Nobody disputes the validity of the healthy living message

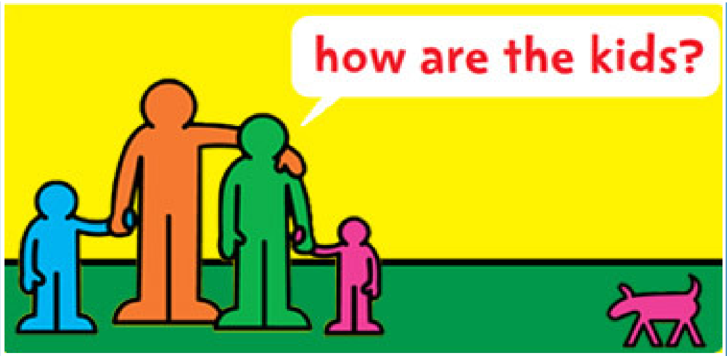
BUT

- **Many think they’ve heard it all before**
- **Some find the look and tone of the campaign a little patronising**
- **They say they know what they *should* be doing to stay healthy, even if their current lifestyle falls short of this**
- **Some struggle to find ways to keep their family healthy *and happy* at mealtimes**

‘I already do it – so I don’t need any more help!’

Others feel satisfied that their current diet is healthy enough…

“It’s for people who don’t know about healthy eating”



“It’s for parents and their children”

…therefore they think the campaign is not aimed at them

The qualitative research revealed a number of popular misconceptions about what 'healthy eating' actually means

'Two or three portions of fruit or veg per day is plenty'

'Tinned and frozen fruit and veg is less healthy than fresh'

'Vegetables in ready meals are just as nutritious as fresh'

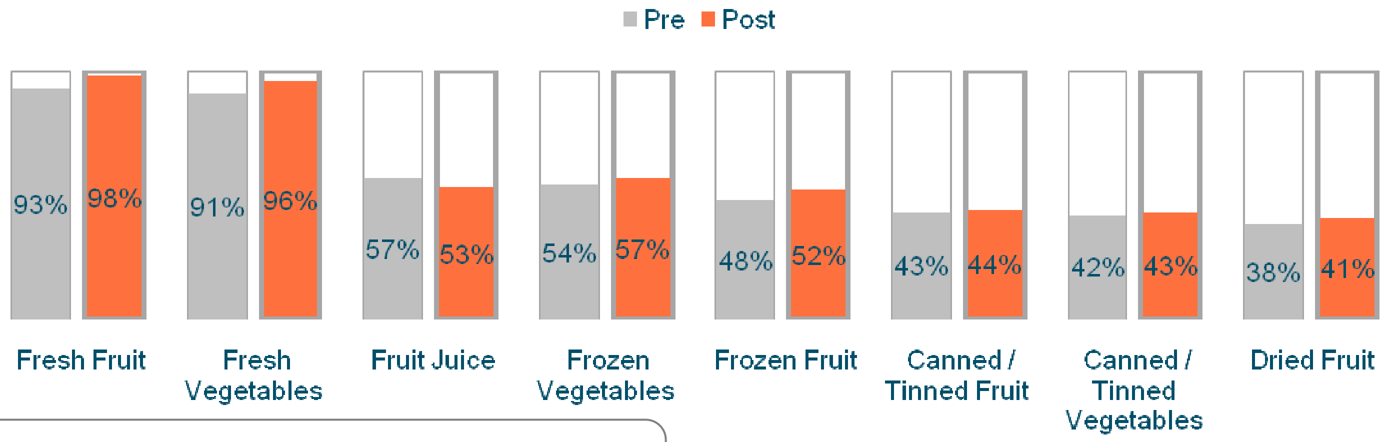
'Potatoes count as part of my 5-a-day'

Change4Life still has an important role to play in dispelling these myths and ultimately increasing fruit and veg consumption among both 'Already knowers' and 'Already doers'

A portion is still only a piece of fresh fruit or veg for most customers - increasing awareness of other forms of portions is a challenge and has not changed between both waves (or per store)

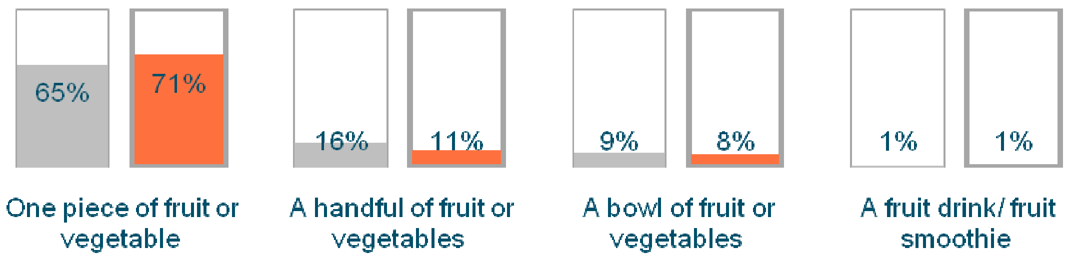
1 customer out of 2 does not know that “5 a day” covers more than fresh F&V

Q10c. And please tell me which of the following you think count towards the guidelines for the consumption of fruit and vegetables?



And the actual definition of a portion is reduced to a piece of fruit / vegetable

Q10b. Please tell me what you believe constitutes a portion of fruit and vegetables?



Total Pre stage (1,228) and Post Stage (1,143)

Recommendations

Best practice guidance for ConvenienceStores4Life

1. Prominent displays are essential
    - Displays should be positioned just inside the entrance or right by the till (ideally both)
    - Posters must be extremely prominent in order to cut through the 'wallpaper effect'

2. Produce is at least as important as branding – it needs to be fresh, high quality and varied

3. Residually well-performing stores are most likely to make a success of the campaign – store owners can enhance their own reputation by keeping their stores clean and tidy, and offering a friendly service

People are still unsure of how to change their current behaviour

Therefore there is a role for the Change4Life campaign to…

Highlight new ways of preparing the fruit and vegetables consumers already eat

Demonstrate the value of trying new varieties of fruit and veg, and how to prepare them

Change4Life can educate people about new ways of preparing the fruit and veg consumers already eat

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Research reinvented

FRUIT

- **Fruit is considered a healthy snack rather than something which can be integrated into meals**
- **Some people find that the fruit they do buy goes to waste, because they never get around to eating it**
- **If consumers know how to make the most of the fruit they currently buy, they will be more likely to buy *more* fruit in future**

VEG

- **Many people eat a narrow range of vegetables**
- **Their preparation methods are often limited to boiling or steaming**
- **To these people, 'eating more veg' means eating *more of the same vegetables***
- **They struggle to do this because they don't know how else to incorporate vegetables into their meals**

Change4Life can promote the value of trying new varieties of fruit and veg, and how to prepare them

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Some people shy away from buying new varieties of fruit and veg

They are unaware of the benefits of a BROAD fruit and veg diet and see no need to branch out

They are unsure how to prepare more unusual fruit and veg and would rather not waste time/money

They are worried they and their family won't like what they buy

Change4Life needs to…

Educate people that all fruit and veg is not the same and offers varying nutritional benefits

Demonstrate simple, appetising ways of preparing more unusual fruit and veg

Appendix

List of stores used in the research

Brand	Store name	Store#	Adress
Coscutter	Mr Hussain	Store 1	107 Edgemoor Road, **Darlington**, Co. **Durham** DL1 4QE
Londis	Gerry Chahal	Store 3	84 - 85 High Street, **Willington**, Co **Durham**, DL15 0PE
Landmark	Lifestyle Express	Store 9	18 The Burnside, **West Denton**, **Newcastle Upon Tyne**, NE5 5BS
Spar	Spar, Chapel House	Store 12	The Shopping Centre, **Chapel House**, **Newcastle**. NE5 1DT
Nisa	Thomas Food Market	Store 14	264 Norton Road Stockton on Tees, **Cleveland** TS20 2BX
Booker	Walker Convenience	Store 16	497 Welbeck road, **Walker**, **Newcastle upon Tyne**, NE6 3AA
	Development Stores		
Coscutter	Mr Gill	Store 2	21, Railway Terrace, **South Hylton**, **Sunderland**, Tyne & Wear. SR4 0PY
Booker	Border Reiver	Store 13	**Otterburn**, **Newcastle upon Tyne** NE19 1NP
Landmark	Turton Stores	Store 15	26 Turton Road, **Yarm, Stockton on Tees** TS15 9DL
	Rollout Stores		
Landmark	Atwal	Store 4	7 Ellison Street, **Hebburn**, **Tyne & Wear**, NE31 1PP
Coscutter	B & B Varriach	Store 5	39-41 Chatham Road, **Hartlepool**, TS24 8QG
Booker	Broadway	Store 6	Broadway circle, **Blyth, Northumberland**, NE24 2PG
Londis	Lax Sundavadre	Store 8	12 Aution Stile, **Bearpark**, Co **Durham**, DH7 7DB
Nisa	North East Convenience	Store 10	194-200 **Park Road Stanley** Co **Durham** DH9 7AL
Spar	Spar	Store 11	The Shopping Centre, **Chapel House**, **Newcastle**. NE5 1DT

Quantitative sample profile

Male	38%
Female	62%
16-25	20%
26-34	15%
35-44	16%
45-54	15%
55-64	15%
65+	19%

Just myself	22%
Husband/ wife/ partner/ parents	61%
Children under 2 years	9%
Children 2-6 years	16%
Children 7-11 years	12%
Children 12 - 16 years	13%
Other male 17 years +	15%
Other female 17 years +	12%

C6. Who lives in your household with you?

Up to £10,000	21%
£10,001-£15,000	11%
£15,001- £20,000	7%
£20,001 – £25,000	4%
£25,001 – £30,000	4%
£30,001 - £35,000	3%
£35,001 - £40,000	1%
£40,001 - £45,000	1%
£45,001 - £50,000	1%
£50,001 - £55,000	-%
£55,001 - £60,000	1%
Refused	25%
Don't know	22%

C5. What is your annual household income before tax?

Qualitative sample profile

- Fieldwork was undertaken between June 29th – July 8th in the following locations:

Development		Rollout			Control		
South Hylton	South Shields	Bearpark	Stanley	Blyth	Willington	Newcastle	Yarm
5	4	3	3	2	2	3	4

Pen portrait: Layla, 38, empty nester

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Research reinvented

- Layla admits their family doesn’t really eat a huge variety of fruits and vegetables and tend to stick to what they know
- Layla has recently been getting to know her neighbours through a neighbourhood dinner club. At the last dinner, Layla was confronted with a vegetable dish she had never tried before – baked courgettes. Layla was convinced she would not like the dish, even though she had never tried them before. After mustering up the courage, she decided to be brave and try the courgettes. To her surprise she loved them!
- The next time Layla was at the supermarket she saw some courgettes, but hesitated to buy them as she had no idea what to do with them
- At first, Layla was too shy to ask her neighbour for the recipe, but eventually she did it, and cooked courgettes as part of her supper. They turned out great!
- Now, Layla jumps at the chance to try new fruits and vegetables, and loves learning new recipes!

Pen portrait: Shona, 55, married

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Research reinvented

- Shona lives with her husband and doesn't drive or work, but she looks after her 2-year-old granddaughter while her daughter is at work.
- Shona feels they eat quite healthily and always have a well stocked fruit bowl of apples, oranges to snack on throughout the week
- Recently, Shona discovered a new fruit which was pre-cut and ready to eat in a mixed fruit salad from the supermarket. She really enjoyed the taste but didn't know what it was called. It was green in colour, had a white centre and small black seeds.
- She kept an eye out in the produce section the next few times she went shopping but could never find the mysterious new fruit
- It was quite some time before Shona realised this new fruit she had liked was a kiwi. The reason she could never find this new fruit in the supermarket was because she had never seen it whole. She had no idea that a bright green fruit had brown, fuzzy skin!

Pen portrait: Ian, 34, unemployed

- Ian is an electrician by trade, but currently unemployed
- He's a recovering alcoholic and this shapes his diet to a large extent
  - He eats lots of pasties, pies, takeaways and chocolate
  - He lost lots of wait when he was drinking, and his doctor advised him to eat lots of sugary food to stave off his alcohol cravings
  - He gets through a bag of sugar every two days, because he drinks so much coffee and takes at least four or five sugars in each one
  - He knows he doesn't eat well, but he's just happy not to be drinking any more
- He likes cooking, but he's not sure how to cook some things, such as fish, which he really likes
- He lives with two other people and they always have fruit in a bowl in the kitchen, but most of the time it never gets eaten
  - Ian thinks this is because it's not where they spend most of their time – it would be better to have the fruit in the living room, so they could snack on it while they're hanging out or watching TV

A Development store success story: Carol, 47, mother of 11 year old son

- Carol visits her local convenience store daily to buy milk and cigarettes, and also if she has run out of potatoes or tomatoes for dinner
- She has been going to this store for years, and talks to the owner ‘Bill’ on every visit. She loves Bill and her local store and prefers it to the other two convenience stores up the road. She feels Bill really takes pride in his store and keeps it bright fresh and clean. Whenever he has run out of something, he will always look out the back to double check. He is always changing things around, improving the lighting, shelving, and product range.
- Recently, Carol has noticed Bill has started stocking more fresh fruit and veg in his store. He has a new brightly coloured display just as you walk in by the door, and a big new chiller at the back of the store. There is a lot more choice than there used to be and everything looks really fresh. Carol thinks it will be really handy top up her fruit and veg at Bill’s in between weekly shops
- Carol thinks it is great that Bill is stocking more fruit and vegetables. She thinks he is a responsible business owner who is trying to encourage people to live a more healthy lifestyle.

A Rollout store failing to make an impact: Stephen, 53

- Stephen lives by himself and works as a fraud investigator
- He tries to eat well and exercises regularly – he is a keen golfer
- He's conscious to get his five-a-day and likes snacking on fruit
- He goes to the supermarket for most of his shopping and just uses the local store for the occasional emergency top-up
- Stephen hasn't noticed anything different about the store since the rollout, and in fact wasn't even aware the store sold any fruit of veg
- The display is tucked away in the back corner of the store and is not a cabinet customers would walk past unless they made a deliberate detour
- Although he thinks it's good to know he could pick up fruit and veg at the local store if he forgot to buy it at the supermarket, prior to the interview he had seen no evidence of their being a good range of veg, and assumed it would be more expensive anyway