

Can supermarkets help turn the tide on obesity?

A report from one year of the Collaboration for Healthier Lives in the UK (CHL UK)



Impact on Urban Health

The places that we grow up, live and work impact how healthy we are. Urban areas, like inner-city London, have some of the most extreme health outcomes. Alongside their vibrancy and diversity sit stark health inequalities.

At Impact on Urban Health, we want to change this. We believe that we can remove obstacles to good health, by making urban areas healthier places for everyone to live. From our home in the London boroughs of Lambeth and Southwark, we're focused on a few complex health issues that disproportionately impact people living in cities, and we work with local, national and international organisations, groups and individuals to tackle these. The partnership with Collaboration for Healthier Lives (CHL UK) is one part of a larger group of projects in our childhood obesity programme; which aims to tackle the inequality that exists for children and families in accessing nutritious diets.

Impact on Urban Health's local insights and relationships in the community have enabled CHL UK to run targeted interventions in Lambeth and Southwark, and use these areas as a testing ground for the most effective ideas. These two boroughs are in many ways typical of inner-city areas around the world, with significant inequalities between low-income and more affluent neighbourhoods. As a partner in the Collaboration for Healthier Lives, with a goal to share learnings for creating healthier food retail environments, Impact on Urban Health has partnered with CGF to produce this report.

W: urbanhealth.org.uk

T: [@ImpUrbanHealth](https://twitter.com/ImpUrbanHealth)

in [impact-on-urban-health](https://www.linkedin.com/company/impact-on-urban-health)

The Consumer Goods Forum

The Consumer Goods Forum ("CGF") is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serves the consumer goods industry worldwide. It brings together the CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format.

The CGF's Collaboration for Healthier Lives (CHL) Coalition is about making it easier for people around the world to adopt healthier lives for themselves and their families. It's about making healthier decisions easier and habitual for people in every community around the world. It is a global movement led by manufacturers, retailers, public health authorities and local communities, delivering local movements in communities worldwide. There are currently nine CHL initiatives running across 14 countries, including CHL UK.

W: tcgfhealthierlives.com

T: [@CGF_Health](https://twitter.com/CGF_Health)

f [TheConsumerGoodsForum](https://www.facebook.com/TheConsumerGoodsForum)

in [the-consumer-goods-forum](https://www.linkedin.com/company/the-consumer-goods-forum)



Contents

Foreword	6
Executive summary	8
Introduction	10
CHL UK participating companies	11
CHL UK collaborators, advisors and evaluators	11
The Collaboration for Healthier Lives Journey	12
Countries with CHL initiatives	12
CHL UK in numbers	14
Intervention tactics	16
The trials	18
Pricing and promotional trials	20
Price promotion fruit & vegetable trial	20
Price and family-focussed promotions for healthier purchases	22
Availability trial	24
Introducing a healthier version of a product	24
Editing choice across a category	26
Positioning trial	28
In-aisle positional changes	28
Store location and availability trial	30
Shelf labelling trial	32
Shelf labelling trial	32
Social feedback	34
Social norming	34
Other trials	36
Price promotion snacking trial	36
Promoting healthier children's lunch items	36
Advertising healthier yogurt alternatives	37
Promotion and in-store engagement for improved oral care	37
Change is on the horizon for the food sector	38
Conclusion	40

Foreword

Every child has the right to grow up accessing the things they need to be healthy. However, even in the UK, one of the world's most developed countries with a strong public health system, it's not always easy.

The COVID-19 pandemic has highlighted the link between good population health, and healthy weight in particular, with a thriving economy. The healthier and more resilient people are, the more they're able to work and shop, contributing to economic growth. The pandemic has highlighted the important role that food manufacturers and retailers can play in ensuring that all consumers have access to the food and non-food products they need to lead healthy lives.

In 2018, we came together as a collective with public health bodies, charities and academics to pioneer new ways of facing the health challenges of the nation. We aimed to apply what was known in theory through international evidence about what is effective to improve consumer diets, in a real-world practical setting. This report details the approach we took and preliminary results from the independent evaluation by the University of Oxford. They evaluated some of the interventions that have been tested so far by The Consumer Goods Forum (CGF) members in the London Boroughs of Lambeth and Southwark.

Looking back over our first year of Collaboration for Healthier Lives UK (CHL UK), we're certainly proud of what has been achieved. Our ambition for this initiative was to go much further than we can deliver as individual organisations and to deliver significant impact on the healthiness of shopping baskets. We can see that many of the interventions our members have run so far in Lambeth and Southwark have had a positive impact on individuals, and either a neutral or positive financial impact on business. There are also examples of interventions being rolled out nationwide.

But we were clear from the start that the challenges we had set ourselves were not ones

to which we could find quick, easy solutions. Achieving meaningful collaboration amongst diverse stakeholders, leading to real change in a retail environment is a complex process. We are gathering useful data and learnings which we are convinced will unlock new, creative ways of encouraging healthier lives.

An honest assessment of our first year is that whilst some initiatives have been scaled across the UK, we won't achieve the full potential of our unique collaboration unless we do more to incorporate health goals into the business planning process between and within manufacturers and retailers. These discussions are underway and greater regulation of the industry could help to set an even playing field.

So while we are proud of our first year, we are clear that this is just the beginning. We need to learn from the preliminary evaluation and adapt to a changing consumer. As co-chairs, we need to listen to the challenges that some CGF members have faced and make it easier for them to participate more fully.

We hope this report about our first year of collaboration will be thought-provoking reading. If your company is already a CHL UK member, we thank you for supporting this collaboration, and hope it will inspire you to go even further, faster. If your company is not, then we'd love to talk about you becoming more involved. Together, we can go further - and together, we can support healthier lives in the UK and beyond.

Richard Hall, VP and General Secretary UK & Ireland, Danone. CHL UK Co-Chair

Judith Robinson, Head of Health, Tesco and CHL UK Co-Chair. CHL UK Co-Chair



Executive summary

Retailers and manufacturers came together to improve the health of their consumers, a collaboration facilitated through their membership with The Consumer Goods Forum. They ran a series of trials over the course of a year, starting in Lambeth and Southwark but with a view to scale the interventions that worked.

Companies trialed a total of 34 interventions using a range of approaches to improve the healthiness of consumer baskets. In-store trials were prioritised and included changes to pricing and promotions, availability, choice architecture, shelf and nutritional labelling as well as social feedback techniques.

With support from Impact on Urban Health, the University of Oxford evaluated some of these trials (see table below). Together, they found that:

- Companies were able to influence the healthiness of consumer shopping baskets

- Impactful trials could be relatively simple and commercially sustainable
- Trials that both increase the purchase of healthier foods and decrease the purchase of less healthy foods are required to support healthier diets
- Trials using pricing and promotional tactics, increasing the availability of healthier options and some choice architecture trials have shown a significant and positive impact.

Results from successful trials have resulted in:

13%

more fruit and vegetables sold

72%

more low sugar beans sold

19%

fewer standard chips sold

22%

fewer packets of confectionary sold

Whilst there remains outstanding questions about these trials – including how long the improvements can be sustained – we can clearly see the potential for companies to improve consumer health and shape consumer demand














Not all trials were successful, and the analyses suggests that shelf labelling and social feedback tactics may not be as impactful unless paired with other changes. This collaboration has shown that when companies take responsibility for public health, and are more ambitious in their attempts to improve it, they can have a positive impact.

We’ve seen that good intentions aren’t enough when internal policies and priorities across departments don’t align to support consumer health. There is also great variation in efforts across the sector and more progressive companies are held back by an absence of regulation to level the playing field and mitigate commercial risk.

We’d like all companies to step-up a gear in their efforts to prioritise health. Companies should be working toward the goal of decoupling overall sales growth from the sale of unhealthy products. We believe companies should embrace transparency by disclosing and reporting their progress toward

this goal, setting time-bound targets that they can be held to account for achieving. To do this they'll need comprehensive health strategies that the whole business can align around. These health strategies can include joining the CHL UK (for those not already involved) and a focus on scaling those trials that were successful to a national level.

We're calling on the government to support the leaders within this sector with further targeted regulation. Stronger regulation would create a leveling-up across the sector and even the playing-field, making healthy food environments – and the healthy shopping baskets they create – the default position for any commercial organisation.

Tactic	Trial	Impact*	Learning
 Pricing and promotion	Promoting fresh fruit and vegetables (Tesco)	 13% net increase in sales	Price promotions that make healthier food more affordable can increase sales of these products.
	Price and child-focused promotions on healthier products (Sainsbury's)	 72% rise in sales of lower sugar beans and a 387% rise in sales of fruit	The use of family-friendly characters to incentivise and reward the purchase of healthier products, in combination with price promotions, can have a significant impact on sales.
 Availability	Healthier frozen chip alternative introduced (McCain)	 19% net decrease in sales of less healthy chip	Food companies can shape demand. Introducing healthier options in-store could possibly shift purchases toward healthier options as well as decreasing sales of the less healthy alternative.
	Introducing healthier biscuit options in place of less healthy ones (Sainsbury's)	 No significant impact	Switching less healthy biscuits for healthier ones could have a positive impact, though Sainsbury's data found switching into different categories occurred. Larger scale trials are needed.
 Positioning	Less healthy cereals moved out of eye-line (Sainsbury's)	 No significant impact	Positioning changes within aisles may need to be bolder and combine pricing and promotional tactics to increase prominence and have an impact.
	Chocolate confectionary moved out of prominent displays (Tesco)	 22% net reduction in purchases	Removing less healthy products from prominent displays can have a positive impact. Greater regulation to ensure parity across businesses could mitigate commercial risks for some interventions.
 Shelf and nutritional labelling	Shelf labels highlighting healthier soft drinks (Co-op)	 No significant impact	Shelf labels in isolation may not be enough to shift purchasing behaviour. The message within those labels can also be an important determining factor for whether they are impactful.
 Social feedback	Shelf labels using social feedback to nudge healthier options (Tesco)	 No impact (Independent analysis by charity partners)	Providing social feedback in itself may not be enough to shift purchasing. Other methods of providing this feedback that are more obvious than shelf labels may have been more effective.

Introduction

At Impact on Urban Health we believe all children have the right to a healthy, happy life. To have access to nutritious food, and opportunities to run and play no matter where they grow up. Evidence shows that many health conditions including childhood obesity are strongly linked to income inequality.¹ Income shapes our access to a nutritious diet. This is unacceptable. Where a child grows up should not limit their ability to be healthy.

In London, around 10 children in every year 6 classroom are overweight or obese, this increases as area-level incomes decrease.² This is higher than our peers in Paris, New York and Tokyo.³ Overweight children are highly likely to become overweight adults and develop associated long-term health conditions.⁴

It's little wonder when we're constantly flooded by invitations to eat junk food. Whether that be on TV, on social media, through fast food companies and their "school-kids deals" or when we walk into the supermarket and are bombarded with snacks on promotion. We all make hundreds of food-related decisions every day, most of these are habitual and are strongly influenced by cues in our external environment.⁵ Add to this a very constrained budget, alongside the stressors and trade-offs that come with living on a low income, and it's even harder to avoid the overwhelming incentives to eat unhealthy food.

We all need to play our part to turn the tide on obesity and support good population health – from NGOs and policy makers to retailers, manufacturers and caterers. For families on low incomes, 76% of food budgets are spent in supermarkets and a relatively few companies dominate this market.⁶ These stores determine the nutritional quality of people's food purchases, powerfully shaping their dietary habits and ultimately their health. How a manufacturer formulates or packages its products, how a supermarket promotes and displays these items – these are central factors influencing what people eat. We want to work with businesses operating in our boroughs to positively improve these environments for all.

This isn't only a moral argument but a business imperative. Investors are increasingly aware that companies going further on their Environmental, Social and Corporate Governance (ESG) commitments tend to fare better financially, providing enhanced long-term returns.⁷ Since the COVID-19 pandemic, the 'S' in ESG has gained greater attention.⁸ Investors are increasingly looking at companies' impact on society, and the health of their customers.⁹

The status quo is changing; companies that want to stay relevant and competitive must act now to ensure future growth is through the sale of increasingly healthy product portfolios. Change is possible. If all companies move together, in partnership, they can travel further in their journey to improve consumer health. We're encouraged by what has been achieved through by the CHL UK group and pleased to have strengthened the evidence in this area.

"As a collective, members of the CGF and their partners, are exploring, experimenting, innovating and evolving business models to support positive change, while sharing data and knowledge at scale, cross industry. Health is not a competitive advantage; it's a basic necessity. And, it's clear no company can solve this issue alone. Collaboration is needed at scale and across sectors if the consumer goods industry is to play the necessary role in the health and wellbeing of people."

Sharon Bligh, Healthier Lives Director,
The Consumer Goods Forum

The partners and stakeholders:

CHL UK Participating Companies



CHL UK Collaborators, Advisors and Evaluators



The Collaboration for Healthier Lives Journey

Collaboration for Healthier Lives is a global movement led by manufacturers, retailers, public health authorities and local communities, delivering local movements in communities worldwide. Led by The Consumers Goods Forum, there are currently nine CHL initiatives running across fourteen countries.

The main objective of CHL is to have a positive impact in three areas: supporting healthier behaviours, in-store and in communities; building on digital innovations and data sharing, to inspire new business models; and enabling healthy workforces, by implementing Employee Health & Wellbeing programmes.

The key performance indicators (KPIs) of the various CHL initiatives are to demonstrate progress towards healthier shopping baskets and improve wellbeing through access to healthier food and preventative services.

The approach in the UK

Collaboration for Healthier Lives in the UK has two specific goals: to make grocery shopping healthier (the food goal) and to increase access to health

products and services including oral care and tools to quit smoking (the non-food goal). The non-food goals include the 'Stay Well in the Winter' campaign of NHS. The group focused on trialing approaches from behavioral science, such as in-store nudges that make the healthier option more affordable and accessible.

Established in Spring 2018, CHL UK includes some of the UK's leading food retailers and manufacturers. Its focus is families living on lower incomes, bringing companies together to improve the healthiness of shopping baskets for those with less time and money to spend. The group also includes wider public health experts and stakeholders as seen on page 11.

CHL UK partners aim to balance the need for healthy, affordable interventions with the commercial necessities of a competitive sector.

Countries with CHL initiatives



We know the role inequality plays in driving poor health, so the group designs and tests initiatives that work particularly for those on the lowest incomes. The NGO, policy and academic collaborators are an important source of local insight, data and evidence, and key to holding the collaboration to account.

As a result of competition rules the group are unable to make and discuss detailed intervention plans with each other. Instead, the collaboration set themselves a framework for activity which included food and non-food related goals:

Food goals:

- Increase consumption of healthier categories¹⁰
- Enable switching into healthier alternatives
- Reduce calories from treat foods

Non-food goals:

- Improve oral care outcomes
- Reduce smoking prevalence

Drive the NHS's 'Stay Well This Winter' campaign "Healthier categories" were defined as fruit and vegetables or products within other categories that have lower calories / sugar / saturated fat or higher fibre than the alternative product.

Efforts have so far focused on improving health in the London boroughs of Lambeth and Southwark, a densely populated and diverse inner-city area with a population of c.600,000 people. This scope covered around 200 stores, with a focus on those situated in the areas of lower than average household income. This was an area large enough for a pilot to gather insights that had potential for scale. It was also small enough to be able to experiment and implement activity that was relevant to a specific context.

This approach also reduced commercial risk for companies by trialing things in a smaller area before rolling out more widely. There have been drawbacks to this geographic focus too, particularly for the companies with fewer stores in the boroughs. The intention is for successful trials to be expanded, and the collaboration means that retailers are able to share what worked and what didn't with one another.

To date, members have told us they've tested 34 interventions. The University of Oxford received data for a limited number of these and prioritised the analysis of longer and more ambitious trials. Impact on Urban

"As a co-chair, I am delighted with the progress CHL UK has made in the first year. Starting with Lambeth and Southwark has been challenging but the CHL-UK team have worked with public health and local experts to help shape the interventions that we've trialed. By sharing our data with academics and public health bodies we are showing our commitment to deepening the understanding of what works so that we can make quicker progress based on the evidence"

Judith Robinson, Head of Health for Product - Tesco

Health have partnered with the University of Oxford to analyse the results. This report will spotlight some of the trials, sharing learnings from this first phase of work. These insights form an important and growing evidence base that will inform the development of further interventions in South London and beyond. They demonstrate the impact retailers and manufacturers can have on health, when they make it a priority.

Following a busy first year, CHL UK's activity paused in Spring 2020 as companies grappled with the COVID-19 pandemic. Phase two of development began in Autumn 2020, building on the first year's learnings.

Over the next year, the coalition will look to include a sustainability goal and grow the number of partners involved. It will also aim to deepen the impact of the pilot, scaling initiatives that showed promise and increasing the data available on its impact. It's clear we need new thinking to put healthier food centre stage, and businesses and investors are waking up to their responsibility when it comes to health.

"We're pleased to be able to help CHL UK members to design impactful interventions based on local insights and evidence. We're interested in this work both to support local families in Lambeth and Southwark to live healthier lives but also to build a deeper understanding of what works in practice, with the aim of identifying which interventions are impactful, sustainable and scalable enough to be rolled out on a national or global scale."

Kieron Boyle, CEO, Impact on Urban Health

84%

of UK consumers believe that collaboration between retailers and manufacturers would make it easier to access as a healthier diet

76%

Families on low income in the UK spend up to 76% of their food budget on food from supermarkets

200+

There are more than 200 grocery stores in Lambeth and Southwark

120millionft²

is the combined retail footprint of the five retail members of CHL UK

91%

of parents think marketing tactics like the use of child-friendly characters on food and drink leads to their children requesting those products

34

intentions have been rolled out

12

Participating companies

5 Retailers
7 Manufacturers

13%

more packs of fruit and vegetables sold each week during the intervention

72%

more tins of lower sugar beans sold each week

387%

more packs of fruit sold each week

19%

fewer packs of standard variety chips sold, with an equivalent rise in healthier chip sales each week during the intervention

22%

fewer packs of Easter confectionary sold each week during the intervention



Intervention tactics

Of the 34 interventions trialled, many were designed based on behavioural science with a variety of tactics used to shift consumer purchasing. Below, the Behavioural Insights Team share six top tactics for making the healthier option easier.

Our food environment has changed dramatically in recent years; tempting, calorie-dense food is now easy to access from an array of stores and food outlets. On top of this, external cues and the design of our food environment act as prompts to eat, influencing what food we buy. As a result, our environment makes it incredibly easy to consume excess calories, driving an increase in childhood obesity in the UK.

Interventions often focus on information sharing and education. However, the behavioural science literature points to eating behaviours being largely automatic, that is we buy and eat food as an instinctive response to what is in front of us, with less conscious awareness than previously assumed. What is in front of us is influenced heavily by what is most accessible, available, and affordable in our environment. In other words, when it comes to eating we tend to go with the easiest option.

Our preference for the easy option is understandable; our increasingly complex and busy lives mean we have little available time or attention for everyday decision-making such as when and what to eat. For families on lower incomes, this is further exacerbated by the context in which they live. High cognitive strain, time pressure, financial worries and other stressors can lead to less healthy diets.¹¹ In addition, families on lower incomes often live in urban areas that are flooded with unhealthy food options.¹²

As the majority of food is consumed at home¹³, changes in retail settings could have a large impact on our eating behaviour. Importantly, these changes can be designed to help people shop more healthily while maintaining customer satisfaction and profitability. The focus could be on 'marginal choices' rather than expecting step changes in

behaviours; for example buying frozen yoghurt instead of ice cream. There is some evidence to indicate the following tactics can positively impact purchasing behaviour by making the healthier option easier. Some of these tactics were used by companies as part of the CHL UK trials.

Reformation & portion size

As they do not rely on individual knowledge or motivation, reformulation and portion size reduction are considered some of the most impactful approaches to achieving universally easier healthy choices. Evidence suggests that reformulation is often unnoticeable and that on the whole people support portion size reductions. No CHL UK trials have yet included reformulation or portion size changes, however some companies will be working on this individually. No companies who shared data with us ran portion sizing or reformulation trials.¹⁴

Pricing and promotions

Financial incentives, through pricing and promotions, can influence customer choice by attracting attention and making products more affordable.¹⁵ Therefore, price and volume promotions should be applied only to healthy products to support customer health. Non-financial promotions can also be effective. For example, influential messengers¹⁶, such as kids characters, or 'gamified' campaigns that involve collecting small incentives, such as cards or stickers¹⁷, could be used to encourage healthier choices. Tesco did a trial promoting fruit and vegetable which is detailed on page 20. Sainsbury's conducted a trial using Disney characters to promote healthier purchases which can be found on page 22.



“At Nestle we believe in unlocking the power of food to enhance lives. We strive to contribute to a healthier future with our products and to empower everyone to make healthier food and lifestyle choices. We know that there are huge health challenges across the world, and want to be part of the solution to those. We know these societal challenges will require collaboration to solve and that’s why we got involved with CHL UK, together with a strong sense of responsibility and the desire to constantly push the boundaries of what is possible.

I’m delighted to see that CHL UK’s work is already building new evidence around how we can achieve that goal of healthier lives, and look forward to seeing more successes in the coming years.”

Stefano Agostini, CEO Nestlé UK and Ireland

Availability

Shift the balance in favour of healthy options; increase the range of products to make the healthier option more available and accessible than the less healthy equivalents. McCain’s did this by introducing a healthier frozen chip range into Tesco stores as detailed on page 24 and Sainsbury’s edited their range of biscuits to provide fewer calories across the range e.g. through smaller portions as detailed on page 26.

Positioning

The environmental design under which decisions are made affects our choices.¹⁸ The positioning of products, such as at the end of aisles¹⁹ and close to checkouts²⁰ attracts our attention to this more convenient choice so these displays should be focused on healthy products. Similarly, the amount of shelf space a product is given influences sales, perhaps acting as a signal that the product is popular.^{21,22} Sainsbury’s tried this tactic in their cereal aisle on page 28 and Tesco trialled changes to the location of seasonal confectionery, more detail on this trial can be found on page 30.

Shelf labelling

Purely information provision tends to be more effective for those that can comprehend and pay attention to it.²³ However, labelling can be

effective more generally if it is easy to understand and attracts attention. Front-of-pack heuristics, such as traffic-light labelling, can be effective by simplifying information and using a colour-code.^{24, 25} Prompts on shelves can be timed to disrupt habitual choices; for example, placing “stop” signs on shelves displaying less healthy food.²⁶ The Co-op trialled the use of shelf labels to switch behaviour which can be found on page 32.

Social Feedback

People are strongly influenced by the behaviour of others, conforming to the ‘norm’, that is the values, actions, and expectations of a particular group or wider society.²⁷ Feedback on how your shopping differs from others, could influence food choices; for example, pointing out the popularity of certain healthy products. A similar approach was deployed by Tesco and their Charity Health Partners which is detailed on page 34.

The influences on eating behaviour are complex and multifaceted. Whilst any of the above evidence-based interventions could potentially be effective, in reality it is likely that a mix of the above will be needed across different food categories to be most effective. There is huge potential impact within retail settings; by designing environments with human behaviour in mind we can ensure the healthy choice is the easy choice.

The trials

The following case studies introduce some of the interventions the group has trialled over the last year. In each, we highlight the approach taken, the results, and broader learnings.

For the majority of these trials the University of Oxford have independently evaluated their impact against matched control stores and comparing the 2019 data to the same period in the previous year. The exception to this is with Tesco's social feedback trial which is independently analysed by the Tesco Charity Health Partnership.

Though we've grouped the trials according to the main tactic they used, many of the trials used a mixture of tactics and it isn't always clear which tactic caused the impact, or whether it was the combination that was necessary. It goes without saying that we'll continue to ask bigger questions of the companies in relation to this data – did the effects last? Were compensatory effects seen elsewhere in store? Were overall improvements in shopping baskets seen? Here we present some preliminary findings.



Pricing and promotional trials



Availability trial



Positioning trial



Shelf labelling trial



Social feedback

Price promotion fruit & vegetable trial

In this trial, Tesco price promoted fresh fruit and vegetables in a scheme called Fresh 3.

Why?

The inspiration for this intervention was a series of pen portraits developed for Impact on Urban Health, based on ethnographic research carried out with local families (see example to the right). They highlighted the reality of living on a low household income and how accessing healthier food can be challenging when less healthy options are more affordable and convenient. We wanted to try and rebalance this by reducing the cost of fruit and vegetables through price promotions.

What?

The promotion of fruit and vegetables included a scheme called Fresh 3 where, every two weeks, three different packs of fruit or vegetables could be purchased on special offer. In addition, Tesco introduced further Crop Flush promotions on in-season fruit that also supported growers whose excess crops might otherwise have gone to waste – helping to deliver against environmental and sustainability objectives.

Learnings

The Fresh 3 promotion on fruits and vegetables was successful from both an impact and a commercial perspective. It was therefore rolled out to Express stores nationally in November 2019. Fresh 3 trials have since been paused along with other promotions due to COVID-19 and the resulting need to simplify store layouts. Tesco are keeping the situation under review and plan to reintroduce offers on fruits and vegetables

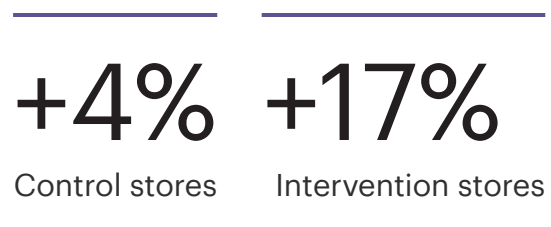
when possible. This trial is a great example of where promoting healthier options can be good for business as well as for consumer health. This is the kind of intervention we would like to see Collaboration for Healthier Lives members scaling across their stores.

Data and results

Over the intervention period (May to November 2019) and when compared to the same period in 2018, intervention stores sold a weekly average of 17% more sales of fruit / vegetables compared to control stores which increased sales by 4% from 2018. This is a statistically significant result representing a 13% net increase in sales from the previous year and when compared to control stores.

This increase in packs of promoted fruit and vegetables sold in intervention stores when compared to control stores equates to approximately 455 additional packs of fruits or vegetables sold per week across the 35 intervention stores.

% Change in sales of promoted fruit & vegetables during the intervention period (May – Nov 2019)



£ Pricing and Promotional Trials

This was the most popular category of trial, including pricing and alternative promotional models. These types of trials can be particularly persuasive in influencing or disrupting shopper habits.

Pen Portraits



Lela

Lela is a 24-year-old single mum with two sons aged two and five years old. They live in a one bedroom flat on an estate in Kennington. The flat is small and the kitchen is dark, contributing to a home environment that often feels stressful to Lela. This is exacerbated by her constant worrying about money and bills. Lela is currently training to be a delivery driver for a supermarket, but her main source of income for the last few months has been benefits. Her household income is currently under £15,000.



Price and family focussed promotions for healthier purchases

In this trial Sainsbury's used reward cards in combination with price incentives to encourage healthier purchases.

Why?

Sainsbury's thought incentives, including those targeted at families, could be used to increase healthier purchasing. There is evidence to indicate this may be true, including research in the Sustain (the food and farming charity) report Pester Power or Parent Power which shows that 91% of parents agreed that the use of family-friendly characters results in children asking for the product being promoted.

What?

In partnership with Disney, Sainsbury's was already giving away Disney Hero themed collectable cards to families for every £10 spent across its 1,400 UK stores. The Healthy Living team at Sainsbury's subsequently created an intervention designed to nudge families to buy certain healthier products on promotion, in exchange for additional free cards.

Sainsbury's worked with the British Nutrition Foundation to analyse data for groups on lower incomes to inform which products to promote in the trial – focusing on healthier categories like fruit and vegetables as well as healthier options within other food categories. Products chosen included breakfast cereals, oats, baked beans, fruit and some personal hygiene products. As well as partnering with Disney on this trial, Sainsbury's worked closely with suppliers to support the promotion. The intervention was rolled out in all stores nationwide, with Disney branding either on product packaging or shopper displays, over a six-week period between August and October 2019.

Data and results

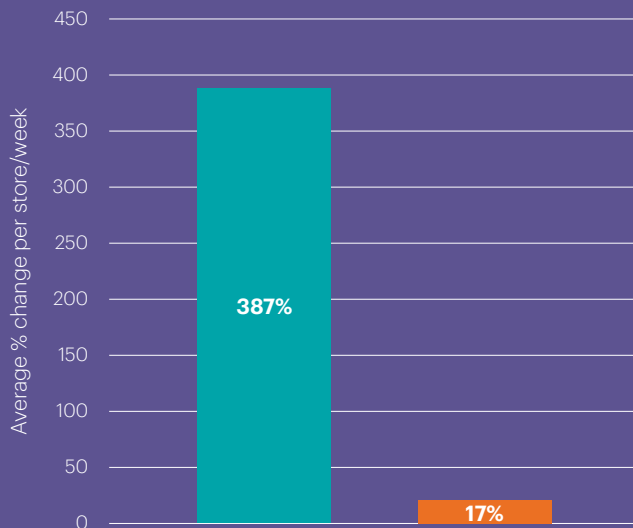
Over the intervention period (August to October 2019) and when compared to the same period in 2018, intervention stores sold a weekly average of 72% more tins of lower sugar beans and 387% more packs of fruit per store per week. Though the University of Oxford did not have control stores to compare this data with, the increase is statistically significant when compared to the previous year.

When analysing the weeks following the intervention there is no significant sustained increase in sales of lower sugar beans or fruit, compared to 2018 sales data.

Learnings

It's unclear from this trial to what extent the use of the Disney characters drove the increase in sales or whether this level of increase would have been seen as a result of the price promotions alone. Future trials could look at the use of children's characters to incentivise healthier purchasing on their own to see if they make a difference when not combined with a price promotion. Sustain, the food and farming charity, have previously highlighted issues with the use of children's characters on junk food in their Pester Power report. This trial shows how they could be used to improve children's diets instead. Consideration could also be given to how to sustain the healthier sales, repeat promotions on these products over a sustained period could help to permanently shift behaviour.

% Change in sales of promoted fruits (Aug – Oct 2019)

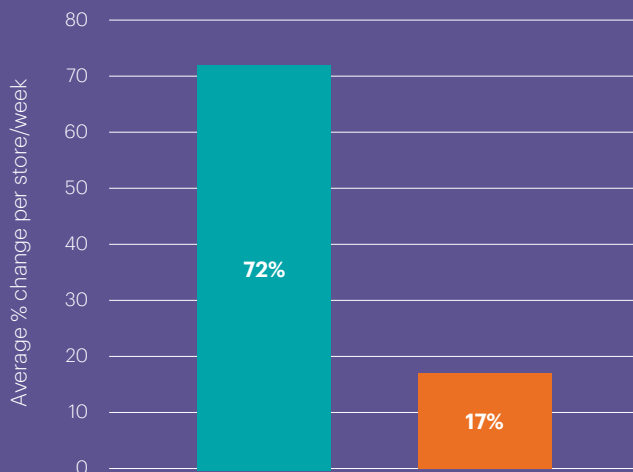


Unit Sales

Intervention

Post-intervention

% Change in sales of no-added sugar beans (Aug – Oct 2019)



Unit Sales

Intervention

Post-intervention



Introducing a healthier version of a product

In this trial McCain added a new range of frozen baked chip with a lower-fat content in 35 Tesco Express stores in Lambeth and Southwark.

Why?

At the start of 2019, frozen food firm McCain launched McCain Home Chips Lighter - an oven chip containing less than 4% fat. This is 53% less fat and 13% fewer calories per portion than their regular recipe. McCain trialed switching Tesco customers from the regular to the lower fat alternative.

What?

McCain added a healthier range of frozen chip alongside the standard variety as an additional alternative.

Learnings

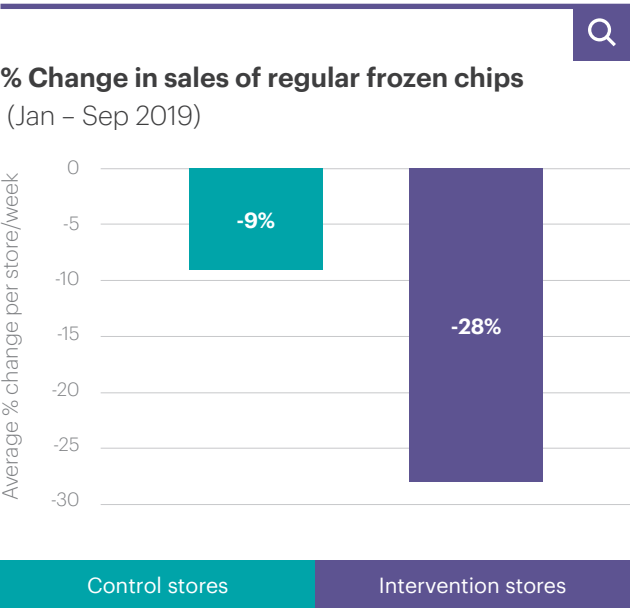
This intervention is a good case study to inspire other manufacturers to get involved in the CHL UK initiative. Simple, scalable changes to ranges in store can add up to make a significant difference to the healthiness of customer baskets, without affecting sales or margin. Though companies often argue they supply what consumers demand, this case study shows that retailers and manufacturers have a key role in shaping that demand too.

Data and Results

Over the intervention period (January to September 2019) and when compared to the same period in 2018, intervention stores sold an average 28% fewer packs of standard chips per store per week. This

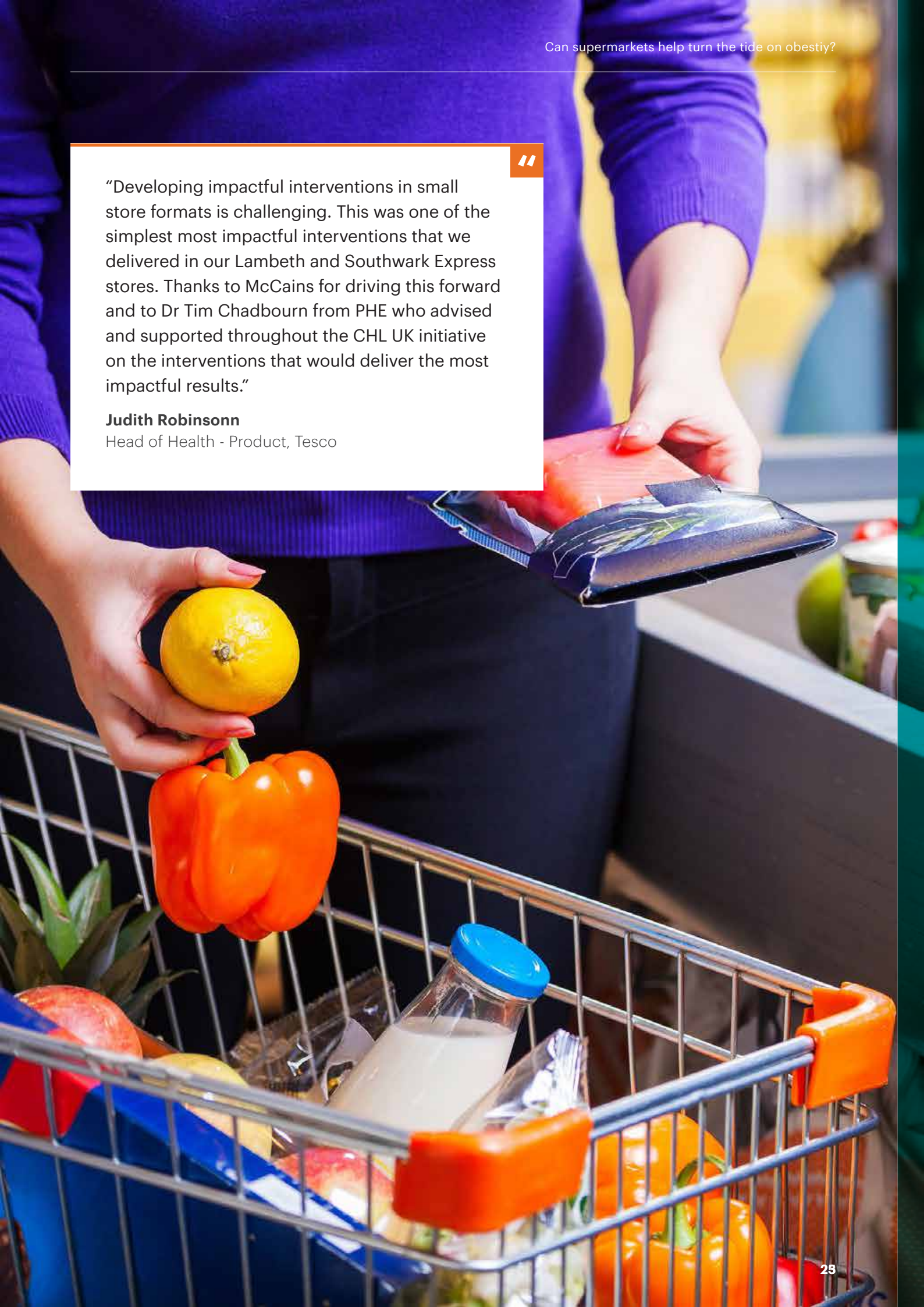
was 19% less when compared to control stores, a statistically significant difference. The intervention stores saw a similar equivalent uplift of the newly introduced lighter chips. Given there is a similar rise seen in the lighter chips this could indicate customer switching from the standard to the healthier version.

If switching behaviour has occurred this could equate to those customers saving a combined total of approximately 700kcal, 455g of fat and 70g of saturated fat from customer shopping baskets each week across the 35 stores. This trial was deemed a success from both an impact and commercial perspective.



ⓧ Availability Trials

Changing the availability of products can influence purchasing decisions and surface unidentified consumer demand.



“Developing impactful interventions in small store formats is challenging. This was one of the simplest most impactful interventions that we delivered in our Lambeth and Southwark Express stores. Thanks to McCains for driving this forward and to Dr Tim Chadborn from PHE who advised and supported throughout the CHL UK initiative on the interventions that would deliver the most impactful results.”

Judith Robinsonn

Head of Health - Product, Tesco

Editing choice across a category

In this trial Sainsbury’s changed the range of biscuits available, providing options with fewer calories per pack e.g biscuit things, mini biscuits and smaller pack sizes in place of larger pack sizes and higher calorie alternatives.

Why?

Following analysis of Nectar purchasing data, Sainsbury’s identified that one of the categories selling the highest number of calories was biscuits, and this category was particularly popular amongst customers with low household incomes. Sainsbury’s wanted to put choice editing theory to the test in the in-store environment, with the aim of reducing calories sold from this category.

What?

Sainsbury’s switched larger packs of biscuits with biscuits delivering fewer calories to test if increasing the availability of lower calorie packs nudged customers toward healthier options. They switched around 25% of the products in the range across 8 stores, for 12 weeks. They didn’t highlight any changes to the customer and didn’t receive any complaints.

Learnings

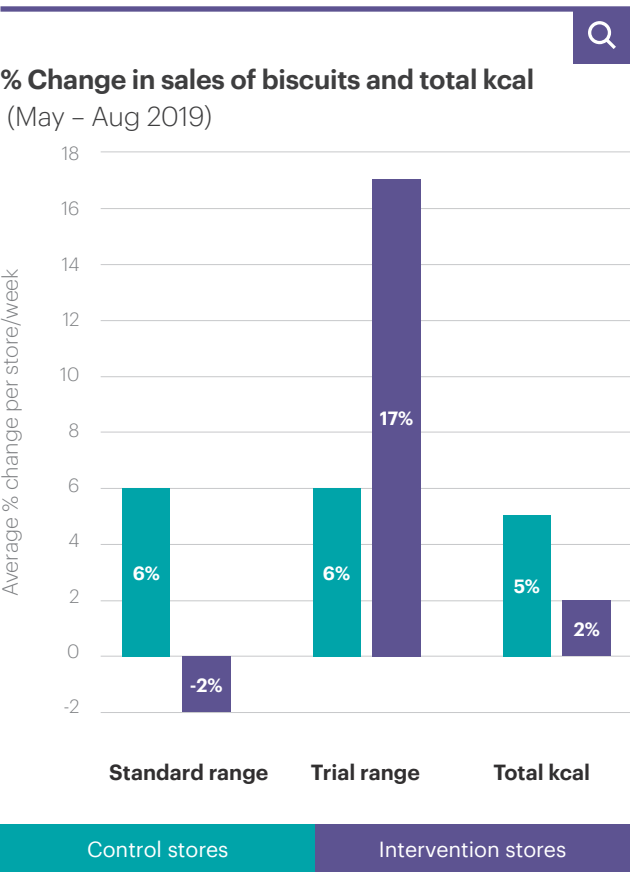
Choice editing a category to provide more lower calorie and fewer high calorie options could have a positive impact on health. Larger scale trials are needed to be certain of the health impact. As well as being ran across a larger number of stores, future analysis would benefit from looking at overall impact on shopping baskets, to ensure switching into different high sugar categories isn’t taking place.

Data and Results

Results from this trial were not statistically significant. The graph shows that over the intervention period (May-August 2019), and when compared to the same period in 2018, there was

a smaller increase in calories sold across the biscuit range in intervention stores compared to the control stores. Overall, compared to the same period in 2018, calories increased more in the control stores containing the standard biscuit range, compared with the intervention stores with the trial range.

Sainsbury’s report their data shows customers switching into other categories as a result of this trial and therefore there was no negative commercial impact. Future analysis is needed to look at whole basket data for all of these trials.





In-aisle positional changes

Sainsbury’s trialed moving the location of cereals within a shopping aisle so that the healthier ones were at eye-line and more of the less healthy alternatives were at the top of the shelf.

Why?

There have been increasing calls from the NGO sector and others for high sugar products to be removed from children’s eye-line. Changing the choice architecture in this way was believed to help reduce pester power faced by parents’ shopping with their children.

Nectar card basket analysis found that breakfast cereals were one of the most commonly purchased items among customers on lower incomes. This made it a priority category for nudging customers towards healthier options.

What?

Sainsbury’s ran an initiative to change the shelf position of high-fibre, low sugar cereals, moving them to eye-level, and placing higher sugar, lower fibre cereals on the top shelf of 7 stores in Lambeth and Southwark over a 12-week period.

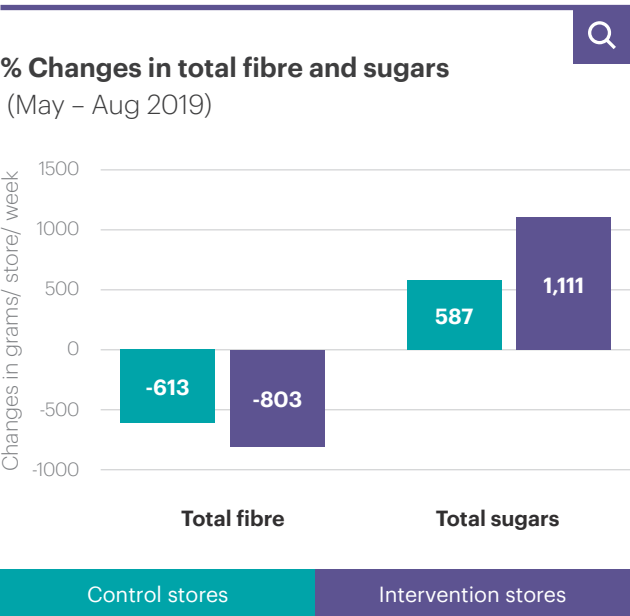
Data and results

These results are not statistically significant. The analysis shows that over the intervention period (May - August 2019) and when compared to the same period in 2018, intervention stores appeared to sell more of the less healthy cereals and less of the healthier cereals. This resulted in sugars increasing and fibre decreasing in intervention stores compared to the previous year.

More testing and analysis, including understanding what promotions were running during the trial period are recommended.

Learnings

Positional changes within aisle are always going to be relatively modest, so it is not unsurprising the analysis didn’t see significant results. We know that price is a key factor in determining purchasing, and that packaging showing kids characters which is often used on less healthy cereals can also encourage purchasing. It’s likely that modest positional changes aren’t enough to overcome these drivers.



Positioning Trial

Changing the amount and location of shelf space that a product is given can influence what shoppers buy by making certain products more visible and easier to access.



“This initiative is just one of many that Sainsbury’s has introduced, but by uncovering what works and what doesn’t, we are better able to prioritise retail efforts to those measures that have demonstrable impact in improving consumer health.”

Nilani Sritharan

Group Healthy Living Manager, Sainsbury’s



Store location and availability trial

Tesco trialed the removal of free standing promotional display units for Easter confectionery. This trial combined availability and choice architecture tactics.

Why?

The end-of-aisle and free standing promotional space is a key place to promote impulse purchases within the store environment. Tesco wanted to understand the impact of the location of less healthy products in stores.

What?

Tesco removed off fixture, free standing display units for Easter confectionery from 35 intervention stores for 3 weeks. Easter confectionery was still available in-store but in a less prominent area on-shelf, in-aisle.

Data and results

Over the intervention period (March - April 2019) and when compared to the same period in 2018, there was a reduction in sales of Easter confectionery in intervention stores of 24%. This difference represents a 22% net decrease in sales from the previous year when compared to control stores.

This was a statistically significant result equating to approximately 2450 fewer units of Easter confectionery sold each week across the 35 stores.

Learnings and next steps

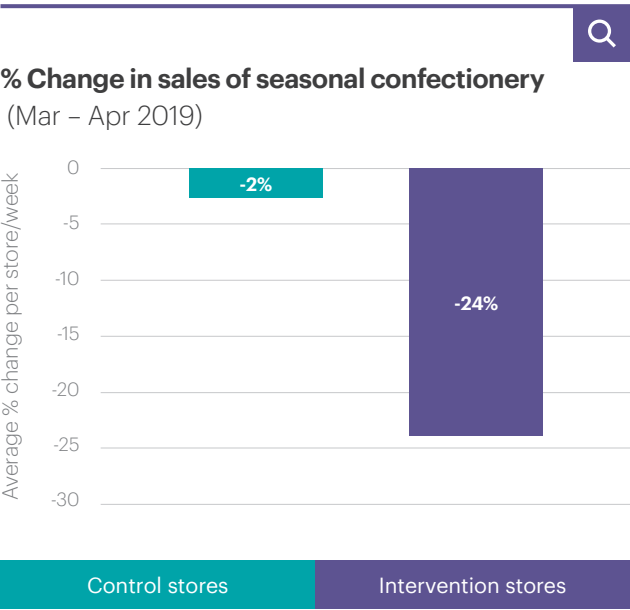
It was promising to see this intervention reduce the Easter confectionery being purchased. The data makes clear the power that retailers have to influence consumer purchasing for the better.

This was part of a wider trial across Tesco stores which saw less healthy items removed from prominent places in store, such as the end of aisles, and replaced with healthier options including beans, nuts, pulses and healthier baked crisps (see photos to the right).

Tesco were both reducing the accessibility of the less healthy items whilst promoting the healthier items. This dual approach meant that according to Tesco there was a negligible impact on sales overall at -0.6%. The University of Oxford are still hoping to be able to analyse this trial in its totality using basket and loyalty card data once they have it.

Tesco's own analysis indicates that for certain types of intervention stores the impact was more profound but saw a negative commercial impact. They found that the stores which were used most by families (the primary target for the trials) were less impacted commercially but still saw a significant benefit in terms of the healthiness of their sales.

This is where regulation can play a role, overcoming barriers to companies in scaling trials that are successful from an impact perspective but not from a commercial one. Regulation can ensure greater consistency between companies implementing initiatives and in doing so reducing the risk of individual companies losing market share as a result.





“We are delighted to have delivered an initiative with real impact on the healthiness of baskets and to be able to share these learnings with industry. There’s more work to do to understand what levers really work but this is a great start. The insight that Impact on Urban Health gave us at the outset was the inspiration for this intervention and I would like to thank them and Oxford University for leaning in and helping us to deliver an interesting and important case study.”

Judith Robinson
Head of Health – Product, Tesco



Shelf labelling trial

Co-op added shelf-labelling to sugar free drinks across 18 stores in Lambeth and Southwark, to highlight healthier options to shoppers.

Why?

Given the need to reduce sugar consumption across the UK, Co-op had been considering how to amplify lower sugar alternatives to customers. Joining CHL UK gave them access to rigorous independent evaluation and allowed them to target the intervention in a specific area.

What?

Over a six-week period in summer 2019, 'Good choice: Drink sugar free' shelf labels were placed around sugar-free drinks throughout the 18 stores.

Data and results

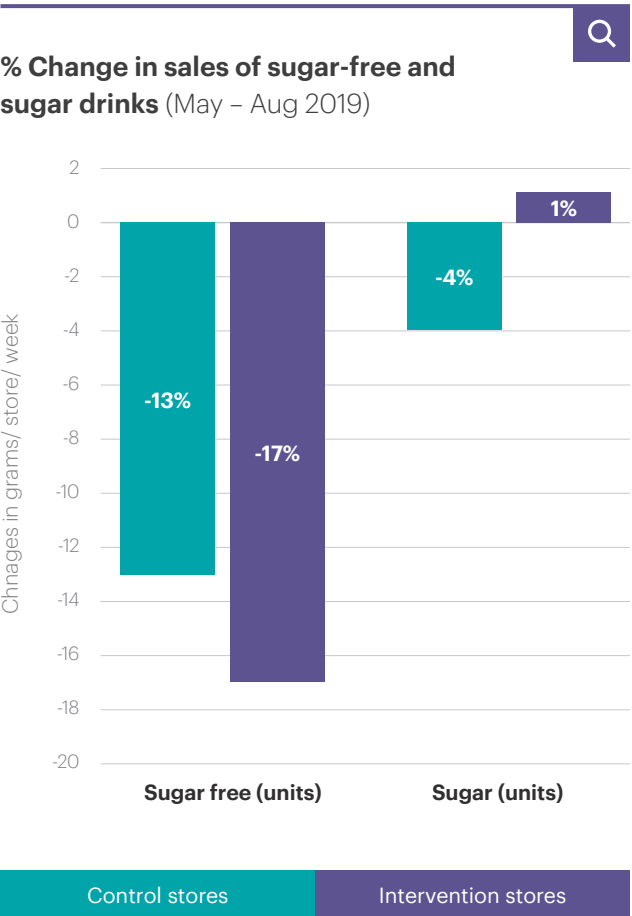
This data is not statistically significant. The graph shows that over the intervention period (May - August 2019), when compared to the same period in 2018 there are fewer sugar free drinks sold and more sugary drinks sold in intervention stores.

The data also shows a notable decrease in sales of sugar free drink sales in both intervention and control stores when compared to 2018. It would be interesting to explore what might have caused this in further analyses.

Learnings

Shelf labels alone haven't had a positive impact in this trial. Evidence suggests that calling out the health attributes of a food or drink product can

actually be off-putting to consumers who may infer negative assumptions about the taste of the product. It may be more effective to warn against the negative attributes of less healthy foods through shelf labelling. Retailers and manufacturers could also consider combining shelf labelling with a price discount or other incentives on healthier options to boost their impact.



Shelf Labelling Trial

Labelling can draw attention to particular products, disrupting automatic shopping habits.



^ Example of a Co-op shelf tab



“Healthy, sustainable behaviour change is high on Co-op’s agenda in order to help our customers eat and drink more healthily, so we were pleased to support the Collaboration for Healthier Lives UK initiative. As a responsible retailer we understand the role that we have to play in driving healthy choice and tackling obesity, and recognise that we can achieve so much more through collaboration with other retailers and manufacturers. We are reviewing the learnings from the project and we value the support from other members of the project to deliver healthy, easy choices for all our customers together.”

Michael Fletcher

Retail Chief Commercial Officer, Co-op



^ Example of a Co-op shelf tab

Social norming

This Tesco trial used 'social norming' messages to try and nudge shopper purchasing, working closely with the Tesco Health Charity Partnership, made up of Diabetes UK, British Heart Foundation and Cancer Research UK

Why?

Based on academic research showing that people are strongly influenced by those around them and a desire to do the 'normal' thing, social norming uses messages about what others are buying in an attempt to nudge shoppers toward healthier options.

What?

This trial assessed whether it is practical and feasible for the charity partners and Tesco to co-create, implement, and evaluate a social norms supermarket intervention. Messages placed on the shelf edge emphasised how many people buy healthier items such as whole wheat pasta or fruits and vegetables. These were displayed in 16 Tesco Express stores in London (Lambeth and Southwark) for three weeks - a further 13 stores were used as controls.

Behavioural science and nutrition experts at the partnering charities worked closely with Tesco to design the message content, and evaluation experts at the charities conducted the evaluation of the trial. Professor Suzanne Higgs (University of Birmingham) provided expert advice on social norm messages.

Data and results

Stores were checked regularly to see whether the messages were consistently visible and placed appropriately throughout the trial period.

Messages were displayed as intended 79% of the times they were checked. However, there were no increases in sales of the products targeted by the social norm messaging. The store checks revealed that express stores only stock small amounts of some of the target products (e.g. whole wheat pasta). During the trial, there were also price promotions on less healthy alternatives.

Learnings

The Tesco Health Charity Partnership successfully co-created, implemented and evaluated a social norms supermarket intervention. We don't know whether the trial lacked impact because customers did not notice the signs or the messages were not persuasive. Future trials similar to this one could include qualitative research to find out whether customers noticed the messaging.

The Partnership have conducted interviews with shoppers to better understand how the next round of messages could be enhanced. Future trials need to ensure healthier products targeted by social norm messages are available in large quantities and that there are no competing price promotions at the same time. The more retailers and manufacturers work together through the Collaboration for Healthier Lives, the more opportunity there is to share insights around health messaging. This would avoid the kinds of promotions that incentivise less healthy purchases.

Social Feedback

We are all influenced by the behaviours of people around us. Shoppers can be persuaded to make different purchases based on feedback of what their peers are doing. For this to work, shoppers need to read and care about the feedback being given, and be able to make the change i.e. alternative products need to be both affordable and available.



“Shopper marketing creates a link between brand and product at point of purchase and needs to inspire and excite as well as inform to be effective”

Dan Park, CEO, Veg Power



Little Helps for healthier living

Other trials

Unlike the others in this report, these do not have independent data analysis

Price promotion snacking trial

PepsiCo gave healthier snacks more prominence in 7 Sainsbury's stores, including a limited promotion making one million of these items available for just 1p.

"CHL is an important initiative for us to come together with peer companies, retailers and local organisations to devise, test and learn from interventions that help people make healthier choices".

Jason Richards, General Manager, PepsiCo, UK

Promoting healthier children's lunch items

M&S created a nutritionally balanced downloadable meal planner on the M&S website with five simple lunches for two children for under £15. This was paired with top tips for helping to encourage healthy eating with children in the home, and clear in-store signposting of meal planner items to help highlight options from the meal planner to customers.

"At Marks and Spencer we are constantly reviewing how we can inspire customers to live healthier lives. Using our existing strengths in innovation, quality, value and time-saving fresh food, we intend to make even more delicious nutritious food available to more families. CHL UK provides the opportunity to discuss best practice and the challenges of driving initiatives to improve healthy lives across the food industry."

Steve Rowe, CEO, Marks and Spencer

Advertising healthier yogurt alternatives

Alpro collaborated with Tesco to promote healthier yogurt alternatives through an advertising campaign aiming to encourage customers to switch into the healthier option. This reached over 1m consumers and company analysis found total sales of Alpro Dairy alternatives rose by 19% in Lambeth and Southwark stores during the trial.

"The results we've observed in the trials so far are encouraging; demonstrating that making a positive impact on health need not come at the expense of profitability. We need to share know-how and thus build understanding across the industry. Swapping in 'healthier' varieties, for example, can be a win-win for retailers and manufacturers alike. To make these new approaches viable for the long-term and at scale we need greater alignment on the health agenda across management in both retail and manufacturer organisations. Once retail buyers and manufacturer sales teams share health goals and talk the same language, we can hope to see greater impact."

James Pearson, Managing Director, Danone

Promotion and in-store engagement for improved oral care

Boots worked with supplier GSK to promote oral health products and hold supplier-funded in-store events during the UK's National Smile Month.

"As CHL UK has evolved, there's an increasing level of belief and alignment among its members. The conversations we're having are not about why we need to make these initiatives work - there's a consensus there - but about how we can make them reality."

Khaled Tawfik, Partner, Boston Consulting Group



Change is on the horizon for the food sector

Written by ShareAction

This year represents a historic test to the resilience of our food system. Putting measures in place to protect the health of employees and responding to rapid changes in supply and demand, are some of the major challenges food companies have had to face to maintain business continuity in the face of the COVID-19 pandemic.

It is clear that healthier and more resilient communities are needed to withstand this and other future health crises, and that the food industry has a role to play. This has never been more apparent to regulators and the public and we're pleased to see companies already taking action to improve health through the CHL UK. The pandemic has influenced a significant shift in the UK government's position. Targeting unhealthy food and drink products sits firmly at the centre of the updated obesity [strategy](#), with new marketing and sales restrictions on these products joining the existing array of fiscal and regulatory product reformulation measures. Given the overwhelming public support for intervention, additional policies in other areas, particularly labelling and reformulation, should not be ruled out.

The key question for retailers and manufacturers is therefore not when but how to best incorporate health considerations into future growth. In this context, initiatives such as the Collaboration for Healthier Lives provide an invaluable forum for industry to work together in developing and testing new ways to support consumers to access healthier options. It is also very encouraging that the results of many of this year's projects highlight that supporting consumer health can also be good for companies' pockets.

There are a number of remaining challenges for food companies that this forum could support including how these projects are scaled and expanded into new areas of action.

In this context, the index developed by the Access to Nutrition Initiative to evaluate nutrition-related commitments and practices of [food manufacturers](#) and [retailers](#) illustrates the whole range of interventions possible. For example, by improving the share of positive (i.e. fibre, fruit & vegetable content, etc) over negative (i.e. saturated fat, sugar, salt, etc) nutrients in their products, reducing portion sizes and using clear front-of-pack labelling; as well as using all their marketing and advertising tools to make healthier products more available, accessible and affordable.

Companies need to develop comprehensive strategies on nutrition and make these publicly available. As more questions are asked by regulators, their customers and their investors. This approach is championed by ShareAction's [Healthy Markets](#) initiative, led by a coalition of investors representing \$1tn of investments under management.

**Ignacio Vazquez, Senior Manager
Strategy and Research at ShareAction**



Conclusion

This first year has involved a group of organisations, who don't normally work together in this way, coming together around a shared mission to improve consumer health. This alone is powerful. It's given companies a forum for collaborating and sharing insights – a step toward accelerating progress in an area where progress is desperately needed. It has also started very practically testing solutions to the call for companies to play their role in tackling obesity.

Food companies, including retailers and manufacturers, have a crucial role to play in ensuring children and families can access healthy food. 76% of households' monthly food budgets are spent in supermarkets, so the decisions the corporate sector make around advertising, promotions and store design have a huge impact on public health.

Companies are beginning to take note of the changing status quo – the need to evolve their business models to both support consumer health and maintain their competitive advantage. This is not an insurmountable challenge, but a challenge none-the-less, where companies' growth models are based on selling more. We're in a transitional phase, and collaboration - within companies, across industries and across sectors – is key to progress.

Collaboration within companies toward health goals has been a particular challenge in this work. Despite genuine commitment and extended efforts from company representatives joining the group, many struggled to get buy-in and investment from across their business to deploy trials effectively. Internal teams that have differing and sometimes conflicting objectives has meant fewer trials have been implemented than first planned and those that have been implemented may have been reduced in scope from their original ambition. This same issue made it harder to access data in the format needed to run independent analyses.

Investors are increasingly calling for companies to mitigate the risks of regulation by being ahead of the game when it comes to health. Companies should view health as a business imperative, and as a first step, develop and disclose health strategies that cut-across the whole business using the ATNI index. Aligning the objectives of all company departments behind this goal would make it easier to trial and scale interventions. Senior leadership, as well as Communications, Sales, Marketing, Store Operations and Nutrition teams all need to be aligned and engaged to improve health and this isn't currently the case.

The University of Oxford received data for a limited number of trials, including some that have been bolder than others. Not all of them have been successful, but those which were tended to be those based on behavioural insights and previous research which promised success. It's likely that the impact of interventions also varies across different store formats and shopper missions. Not all interventions will work all of the time, in all stores. Those that do work can be relatively simple solutions. Of those that worked, the analysis shows modest impact when deployed in isolation or when implemented in just a handful of stores. To generate a step-change impact, multiple interventions will be needed at any one time, and they need to be both sustained and scaled. To support healthier, balanced diets, both interventions which increase purchasing of healthier options and those that decrease purchasing of less healthy options are required.

The trials were collaboratively designed with input from private, public and charitable sector partners. This brought together insights about the lived experience of families on lower incomes, academic evidence and behavioural science about what works, and a private sector understanding of what can practically be implemented at scale from a business perspective. This cross-sector approach helped move the collaboration toward solutions that work for impact as well as meeting business needs. Private-public / NGO partnerships are a useful tool for accelerating progress.

Some of the trials that were successful from an impact perspective were deemed financially risky

"At Sainsbury's we want to help our customers to live well and we recognise that living well starts with eating well. We take our responsibility to help our customers eat healthily, seriously, and this includes investing in research to unlock ways to make it easier to choose healthier options in store. The Collaboration for Healthier Lives Initiative is an integral step towards building the evidence for in-store interventions. We believe the learnings from these trials will underline the importance of cross-sector collaboration between supermarkets, manufacturers, Government and academia."

Judith Batchelar, Director of Sainsbury's Brand.

from a business perspective. Regulation is an effective tool to de-risk these types of interventions by ensuring all companies act together, reducing the likelihood that customers will shop elsewhere and first-moving businesses will lose market share. As highlighted in this recent CGF report, targeted regulatory interventions are seen by businesses themselves as a tool to help accelerate and scale transformation efforts.

Whilst progress has been made during the first year of trials, the industry as a whole still isn't doing all they can to support the good health of their consumers. These interventions represent a small fraction of what could be done. Many more interventions like this are needed to turn the tide on obesity and other health-related challenges, and these need to be deployed at scale. This collaboration managed to make significant positive impacts despite the internal and external barriers they faced. It demonstrates how much more could be possible.

"Our members are stepping up to the challenge, but we know we can't do this alone. We ask governments and local authorities to join us. We need to come together if we are to drive impact and sustainable change at scale."

Wai-Chan Chan

Managing Director, The Consumer Good Forum

Next steps

In phase two of CHL UK the group aims to grow and expand. Grow in its membership, in the number of trials deployed and scaled, in its geographic reach and its goals to incorporate sustainability. It will continue to focus on reaching those on lowest incomes and at greatest risk of ill-health, designing interventions that don't exclude anyone. We'd like to see companies within CHL UK committing to scale the trials that worked.

Based on analysis from the first round of trials we think companies designing new trials in the future should:

- Be bold with trial designs, as more extensive trials which build from the evidence base are more likely to work
- Pricing and promotional trials seem to show particular promise based on the trials analysed so these tactics are recommended
- Consider the location of positional trials which may work better if done in more prominent places in store
- If trialing shelf labels do so in conjunction with other tactics and ensure labels are not only informative but creative and aspirational

- Seek buy-in and alignment from commercial colleagues earlier on, with support from a senior sponsor
- Consider trials that minimise the burden on in-store staff to operationalise them
- Agree how these trials will be analysed up-front, what data will be needed in what format, and work toward data sharing agreements early on

As the UK group continue their progress, so too will CHL initiatives around the world.

We hope this report has helped to share the progress and successes of the UK collaboration, as well as a reflect on where there's been real challenges and how these might be overcome by the industry and by others.

For companies reading this report who have not yet joined the collaboration or looked at how they themselves can support the health of their consumers, we urge you to get involved. Healthy people – customers and staff – are good for thriving economies, the stability of businesses and longer-term profit. No longer can health be side-lined; the tide has changed and businesses are in a window of opportunity.

“We know there's much more to do and I would encourage all CGF members to get involved and strengthen the collaboration, driving us forward with renewed impetus. Together we can deliver the change that is needed.”

Jason Tarry, CEO, Tesco






Endnotes

- 1** Marmot, M. Fair society, healthy lives: the Marmot Review: strategic review of health inequalities in England post-2010. (2010) ISBN 9780956487001
- 2** PHE (2019) 'National Child Measurement Programme, England 2018/19 School Year'. Accessed 30.09.2020
- 3** London Health Commission, Global City, Comparisons, Overview, September 2016
- 4** Worldwide trends in body-mass index, underweight, overweight, and obesity from 1975 to 2016: a pooled analysis of 2416 population-based measurements studies in 128.9 million children, adolescents, and adults. The Lancet, Vol 390 December 16, 2017:2627
- 5** Cohen DA, Farley TA. Eating as an automatic behavior. Prev Chronic Dis 2008;5(1). http://www.cdc.gov/pcd/issues/2008/jan/07_0046.htm. Accessed 30.09.2020.
- 6** Impact on Urban Health (2019) 'Healthy Returns report'. Accessed 30.09.2020
- 7** Financial Times (2018) Companies with strong ESG scores outperform, study finds. Accessed 30.09.2020
- 8** Invesco (2020) 'Tackling inequality through ESG and active ownership'. Accessed 30.09.2020
- 9** Kantar (2019) 'Eat, drink and be healthy'. Accessed 30.09.2020
- 10** Healthier categories are defined based on the NHS' Eatwell Guide
- 11** Zimmerman & Shimoga (2014). The effects of food advertising and cognitive load on food choices. BMC Public Health, 14(1), 342
- 12** Fast food outlets: density by local authority in England. (2017) Public Health England
- 13** Based on ONS Family Spending in the UK April 2018 to March 2019
- 14** Willemijn et al. (2010) Portion size: a qualitative study of consumers' attitudes toward point-of-purchase interventions aimed at portion size, Health Education Research, Volume 25, Issue 1
- 15** Sugar Reduction: The evidence for action (2015) Public Health England
- 16** Dolan et al. (2010). MINDSPACE: Influencing Behaviour through Public Policy.
- 17** Belot, M., James, J., & Nolen, P. (2016). Incentives and children's dietary choices: A field experiment in primary schools. Journal of health economics, 50, 213-229.
- 18** Thaler et al. (2014). Choice architecture. In E. Shafir (Ed.), The Behavioural Foundations of Public Policy. 428-439. Achorn International.
- 19** Nakamura et al. (2014) Sales impact of displaying alcoholic and non-alcoholic beverages in end-of-aisle locations: An observational study. Social Science & Medicine, 108:100, 68-73
- 20** Cohen & Babey (2012). Candy at the cash register—a risk factor for obesity and chronic disease. New England Journal of Medicine, 367(15), 1381-1383.
- 21** Farley et al. (2009). Measuring the food environment: shelf space of fruits, vegetables, and snack foods in stores. Journal of Urban Health, 86(5), 672-682

- 22** Van Kleef et al. (2012). Healthy snacks at the checkout counter: A lab and field study on the impact of shelf arrangement and assortment structure on consumer choices. *BMC Public Health*, 12(1), 1072.
- 23** Beauchamp et al. (2014). The effect of obesity prevention interventions according to socioeconomic position: a systematic review. *Obesity reviews*, 15(7), 541-554.
- 24** Egnell et al. (2018). Objective Understanding of Front-of-Package Nutrition Labels: An International Comparative Experimental Study across 12 Countries. *Nutrients*, 10(10), 1542.
- 25** Storcksdieck genannt Bonsmann et al. (2020) Front-of-pack nutrition labelling schemes: a comprehensive review, EUR 29811 EN, Luxembourg, Publications Office of the European Union
- 26** The Behavioural Insights Team Update Report 2016-17
- 27** Behavioural Insights Team, (2014). EAST: Four simple ways to apply behavioural insights. Behavioural Insight Team

A young woman with light brown hair tied back, wearing a black quilted jacket, is looking down at her left wrist. She is standing in a grocery store aisle, with shelves of produce visible in the background. The shelves contain various items, including bags of oranges and other fruits. The lighting is bright and even.

Impact on Urban Health
Francis House
9 King's Head Yard
London SE1 1NA

urbanhealth.org.uk
[@ImpUrbanHealth](https://www.instagram.com/ImpUrbanHealth)

Impact
on **Urban**
Health