March 2024

EVALUATION OF THE LAMBETH SCHOOL SUPERZONES CONVENIENCE STORE PROJECT

BRIGHTPURPOSE

EVALUATION REPORT

SUPPORTED BY

MAYOR OF LONDON

Impact on Urban Health

CONTENTS

EXECUTIVE SUMMARY

The Lambeth School Superzones Convenience Store Project aimed to create a healthier food environment for children by:

- Talking with children to understand their purchasing behaviours in convenience stores and the factors that influence their purchasing decisions
- Working with convenience stores close to schools to stock and promote healthier alternatives within their store

The project was co-funded by the Greater London Authority (GLA), and the charity Impact on Urban Health and delivered by Rice Marketing – a marketing agency specialising in local retail.

The project built on previous work with convenience stores and wholesales in Southwark, supported by the Mayor of London's Good Food Retail programme and Impact on Urban Health.

The aim of the evaluation was to look at how effective the project was at increasing the range of healthier options in convenience stores and the impact this had on stores and consumers, especially school aged children. The evaluation measured key changes, such as the increase in healthier options across different categories of food and stores, and other changes stores made to highlight healthier options. It also gathered qualitative data from the store owners on how the experience influenced their approach to stocking healthier options.

Insight from children

As part of the project, Rice Marketing engaged with Holy Trinity Primary School, Ashmole Primary School, and the GLA's Lynk Up Crew, carrying out focus groups and insight-gathering activities with 49 children related to their use of convenience stores and their awareness and perceptions of healthier food options.

The delivery model

Ten convenience stores were selected to participate in the project, split evenly between the Brixton Hill and Oval school Superzones.

Each store received the following offer of support:

- Store visits – visits from Rice Marketing to build relationships and to ensure recommended changes were tailored to the layout and offer of each individual store
- 100 Lines Framework – a framework of around 100 healthier option products known as best sellers, with personalised category recommendations from Rice Marketing
- Stock drop – a selection of free healthier option stock with a retail value of £149 delivered directly to the stores
- Recognition – acknowledgment of their role as one of only ten convenience stores across the borough chosen and committed to creating a healthier food environment
- Healthy Start guidance – an introduction to the Healthy Start scheme in its new form, including informational leaflets and a promotional window sticker

Results

All ten convenience store owners who participated in the project increased the number of healthier lines they stocked within their stores, increasing their offer by an average of 12-13 products per store. Figure 2 in section 3 breaks down the increases in healthier lines made per store.

The greatest improvements were made in the crisps and snacking, and soft drinks categories.

In addition:

- Four store owners moved healthier alternative lines to more prominent locations within their stores
- Four store owners added healthier snacking options by the checkout or till
- Eight stores now display a healthy start sticker in their window

We do not have detailed sales data about which products children (and adults) bought from the new lines, but nine of the ten store owners reported an increase in sales of healthier lines across the project and none reported a decline in sales, nor a negative impact on profits.

What worked?

The success of the model relied on its ability to reduce the perceived risk of stocking and promoting healthier option lines for store owners. Establishing strong relationships with store owners helped to build their trust in the advice provided, and their belief that the healthier lines would be profitable.

The inclusion of the stock drop, delivered with no additional effort from store owners, positively impacted their commitment to the project. It also allowed store owners to try stocking a greater number of healthier option lines for a lower cost than if they had to purchase all the stock themselves.

The group of store owners who participated in this project were interested in doing what was best for the communities they serve. It is believed this contributed to their openness to incorporating and promoting lines within their stores that could help their customers make healthier food choices.

What drives children's purchasing decisions?

Through their insight gathering activities with children, Rice Marketing mapped the ways in which children in the borough typically used convenience stores:

- After-school hunger – looking for something filling, like granola bars or fruit
- Weekend treats – where taste is the main driver
- Topping up supplies – portable options to eat later

They also identified that when children shop in convenience stores, they tend to pick up products that are close-at-hand, buying on 'auto-pilot' as opposed to searching throughout the store for alternatives.

Our conversations with store owners and school leaders as part of the evaluation supported these findings and revealed a number of additional influences on children's purchasing behaviours described below.

Children's purchasing decisions are driven by quantity and price. Their perception of value is getting a lot for their money, and therefore, they often purchase the lowest priced sweets and snacks so they can have more than one different item.

Packaging and marketing influence the likelihood that children will be open to trying a healthier line.

Like adults, children prefer purchase price-marked products over those without price-marks. This highlights the importance of stores offering price-marked healthier options if aiming to encourage a switch from less healthy products.

The future

All store owners who participated in the project planned to continue with the changes made to their stores, five at the same level and five expanding on the progress made. Owners were interested in continuing their commitment to creating a healthier food environment within their stores. However, they indicated that to do so they required further evidence-based advice and guidance.

Creating a healthier food environment for children will require an effort from all areas of the community that they interact with. Schools, families, retailers and food outlets all have a responsibility to create an environment that helps children to make healthier choices. Opportunities to work across these key stakeholder groups and link convenience store project activity with other food-related activities in the borough would be beneficial to the overall vision.

Scaling up the current model would require a clear understanding of:

- The aspects of the existing model that are essential to achieve similar results
- The appropriate level of input required from industry experts to support local delivery

1 INTRODUCTION

Background

The London Food Strategy recognises that convenience stores have a crucial role to play in increasing access to healthy food. Independent convenience stores perform a vital role in meeting the needs of local communities, particularly for families in low-income areas.

The Mayor of London's Healthy Place, Healthy Weight Mission and the School Superzones initiative, support children's health and enable healthy behaviours using local authority powers and place shaping potential. A range of interventions, including work to improve the retail environment, aim to create healthier places where children and young people live, shop, learn and play.

Impact on Urban Health's children's health and food programme aims to improve the spaces in which children and families spend their time, in order to make healthy and nutritious food more convenient and affordable. Through this workstream they invest in a number of projects that work towards meeting that goal.

This project builds on the learning from previous work with convenience stores in Southwark and with wholesalers supported by the Mayor's Good Food Retail programme and Impact on Urban Health. The work was delivered by Rice Marketing – a marketing agency specialising in local retail. The project emphasised that small and simple changes can have a significant impact on purchasing behaviour.

The Lambeth School Superzones Convenience Store Project

This project explored children and young people's purchasing behaviour and how stores and wholesalers can drive the uptake of healthier products. The project ran from spring 2022 to the end of 2023 and received joint funding of £64,000 from the GLA and Impact on Urban Health. The focus was on ten stores that children frequented within the Lambeth School Superzones.

This project built on the work with convenience stores in Southwark. This phase aimed to develop a lens through which to focus the model on children. The purpose of the project was to create a healthier food environment for children by:

- Talking with children to understand what influences their purchasing behaviours in convenience stores
- Working with convenience stores close to schools, to stock and promote healthier alternatives within their store

The project was based in Lambeth, focusing on two school Superzone areas: Brixton Hill and Oval. The schools in each Superzone area are shown below.

Oval/Vauxhall Superzone	Brixton Hill Superzone
Ashmole Primary School	Trinity Academy Secondary School
Henry Fawcett Primary School	Holy Trinity CE Primary School
Vauxhall Primary School	
St Anne's Catholic Primary School	
St Mark's Church of England Primary School	
Lilian Baylis Technology School	
Archbishop Sumner Church of England Primary School	

The evaluation

The GLA and Impact on Urban Health commissioned Brightpurpose to evaluate the project. The purpose of the evaluation was to answer the following questions:

1. How do children and young people use convenience stores?
2. How can we continue to drive engagement with wholesalers and suppliers?
3. What does it take to get healthier lines stocked in convenience stores?
4. What impact does stocking healthier lines have on convenience store sales and profits?
5. How sustainable are the changes supported by the project and why?
6. What can we learn about how to support and facilitate the introduction of healthier lines into convenience stores?
7. What are the core components of the model to enable delivery at scale?
8. How well does the project align with local council priorities?

9. What are the opportunities for further alignment with work funded by Impact on Urban Health and the GLA?

Evaluation methods and data sources

We used the following evaluation methods and data sources:

- Observational visits by the evaluation team to each participating store, once at the midpoint of the project and again after the project had ended
- Semi-structured interviews with participating store owners and managers (12), at the end of the project
- Semi-structured interviews with key stakeholders (3) from Lambeth Council and Superzone primary schools
- Semi-structured interviews with the project delivery partner, Rice Marketing
- Analysis of baseline and post-project data collected by Rice Marketing from each participating convenience store containing initial perceptions, barriers and impact
- Analysis of stock data collected by Rice Marketing at baseline, mid-way, and post-project, validated by Brightpurpose during observational visits
- Analysis of focus groups with children and school staff carried out by Rice Marketing
- Desk review of relevant reports and documents (see Appendix 1)

Limitations of the evaluation

Receipts and sales data

The evaluation aimed to understand the impact of stocking healthier lines on sales and profits. However, electronic point of sale data (EPoS) was not available from participating stores; of the ten stores participating in the project, only one used electronic point of sale for any reason other than generating receipts.

Absence of wider stakeholder perspective

The report does not include the perspectives of Wholesalers or the Association of Convenience Stores (ACS) when considering the current context for convenience stores and the purchasing patterns of healthier lines by store owners. Bestway

Wholesale was heavily involved in the Good Food Wholesale and Retail Pilot, and now has a strategic priority around promoting healthier options to their customer base of independent retailers. They remain supportive of the work, but were unable to participate in interviews during this evaluation. The ACS is also a key supporter of the project and member of the steering group, but again they were unable to participate in interview during the evaluation.

Short timescale

Due to timescale for this evaluation, data on how store owners sustained the changes or made further improvements to their healthier option ranges beyond the end of the project was not available.

2 PROJECT IMPLEMENTATION

Insight gathering with children

To begin the project, Rice Marketing engaged with schools to arrange focus groups and insight-gathering activities with children. They explored how children use convenience stores, their awareness and perceptions of healthier food options.

They spoke with:

- Holy Trinity Primary School – 15 children in Year 6 at the school
- Ashmole Primary School – 14 children in Year 6 at the school
- Lynk Up Crew (LUC) – 20 children aged between 5 and 15 that participate in the GLA Peer Outreach programme

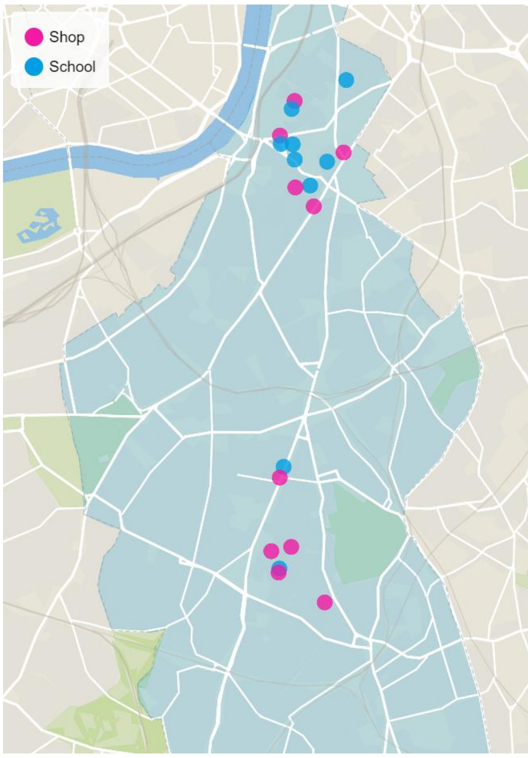
Selecting stores

Rice Marketing identified ten convenience stores to participate in the project across Lambeth, split evenly between the two Superzones in Brixton Hill and Oval.

To participate in the project a convenience store had to meet the following criteria:

- Food Hygiene rating of 3 or above from the Food Standards Agency
- Layout accessible to customers
- In close proximity to a school within a Superzone, or on a popular walking route to a school within a Superzone
- Child-friendly environment and popular with school children

Figure 1 – Map showing locations of the ten stores and schools in Oval and Brixton Hill Superzones



Support offered to stores by Rice Marketing

Store visits

Rice Marketing visited participating stores to understand the stores better. Rice Marketing visited each store at least four times during the project (excluding the stock drop) to build the relationship. They also engaged with store owners over the phone at times, if they visited when the owner wasn't in. Through these conversations Rice Marketing were able to determine what changes a store might benefit from and then tailor their recommendations to the store owner's concerns and priorities.

100 Lines Framework

Stores were provided with the 100 Lines Framework (see Appendix 2) containing a selection of around 100 lines that were known best sellers in the healthier options market. The framework originated from:

- Healthier Eating category criteria from Change4Life
- Greenwich Healthy basket: 39 lines identified as being key to families cooking healthily and cheaply at home
- The 100 Lines Framework used in the successful pilot trial in Southwark with Bestway
- Healthy Range criteria as described by the Greater London Authority Healthy Catering Commitment scheme
- The Nutrient Profiling Model developed by the Food Standards Agency
- The Full Time Meals campaign led by Marcus Rashford and Tom Kerridge, backed by the Food Foundation

The framework was updated to reflect the purposes of this project, specifically in relation to the categories most purchased by children. Rice Marketing provided store owners with personalised category recommendations from within the framework, and then left a marked-up copy of the framework for them for reference.

Stock drop

Each store was offered a selection of free healthier stock with a retail value of £149 as an incentive. The stock was delivered directly to each store by Rice Marketing in the final two weeks of the project.

The stock drop was devised as an incentive to encourage the continued efforts of the stores participating in the project.

Opportunity for recognition

Each store involved in the project was one of only ten convenience stores across the borough to be chosen and to have committed to creating a healthier food environment for their customers. Participation was presented as an opportunity to be a pioneer for this new approach, and that Lambeth Council may seek to work with them beyond this project, as champions of healthier retail.

Healthy Start guidance

Stores were introduced to the Healthy Start scheme in its new form. Rice Marketing explained the changes to the scheme and the opportunities for convenience stores. Rice Marketing gave leaflets to the stores to show other members of staff and a sticker promoting the scheme to be placed in the shop window.

3 RESULTS

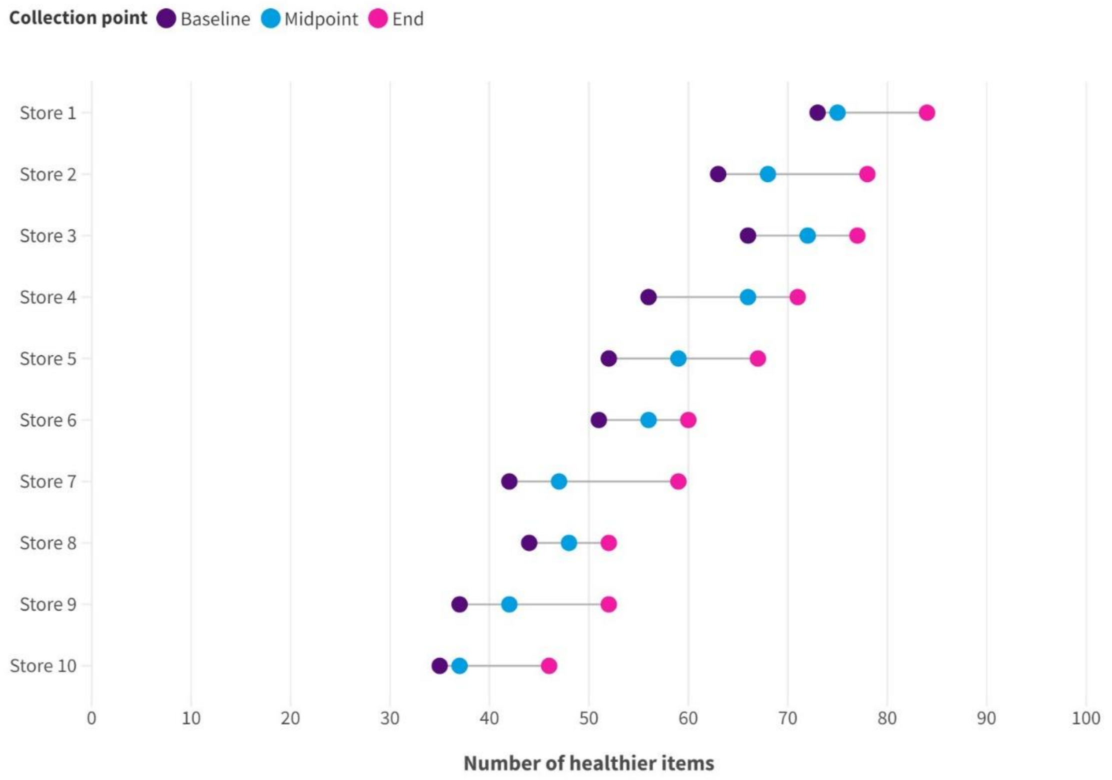
Are convenience stores stocking additional healthier lines?

The aim of this project was to encourage and enable convenience stores to offer a wider range of healthier products on their shelves, rather than reducing their stock of unhealthier products. Overall, all shops increased the number of healthier lines they stocked across the course of the project. There were increases in the number of healthier lines stocked in all stores by the midway data collection point, and further increases for all ten by the end of the project.

On average, the shops increased their total stock of healthier lines by 12.7 items. The number of products added to a store ranged from 8 to 17, with 15 products the most common number of additional lines added.

At the start of the project, all shops already stocked some of the suggested healthier alternatives in the 100 Lines Framework. Stores ranged from having 35 to 73 healthier products already stocked. The number of healthier lines stocked by the end of the project ranged between 46 and 84, with an average of 65 products from the 100 Lines Framework stocked per store at conclusion.

Figure 2 – All shops increased their stock of healthier items between the baseline and end of the project, although all shops started with over 30 items from the 100 Lines Framework



The number of added products in the first phase of the project were similar to numbers added in the second phase of the project, although there were slightly more products added in the second phase of the project. Between the baseline and midpoint, the average increase was 5.1, with increases ranging between 2 and 10. Between the midpoint and final data collection, the average increase was 7.6, with increases ranging between 4 and 12. The stock drop took place towards the end of the second phase of the project, which may have contributed to the higher increases between the middle and endpoint of the project, although the numbers are not drastically different. The difference might also reflect the ongoing relationship between the store owners and Rice Marketing, so that as trust and familiarity developed, retailers felt more confident to make changes based on their advice.

The stores which started the project already stocking higher numbers of products from the 100 Lines Framework tended to be the larger stores with more space on the shelves, and the smaller stores tended to stock fewer items at the start of the project. Despite the difference in size of store, the numbers of added products were similar across all shops, with no significant differences between small and large shops. Although this means that smaller shops were able to make a greater proportional increase in their healthier offer than large shops were, it also shows that there is scope for improvement for all shops, no matter what size they are or their starting point.

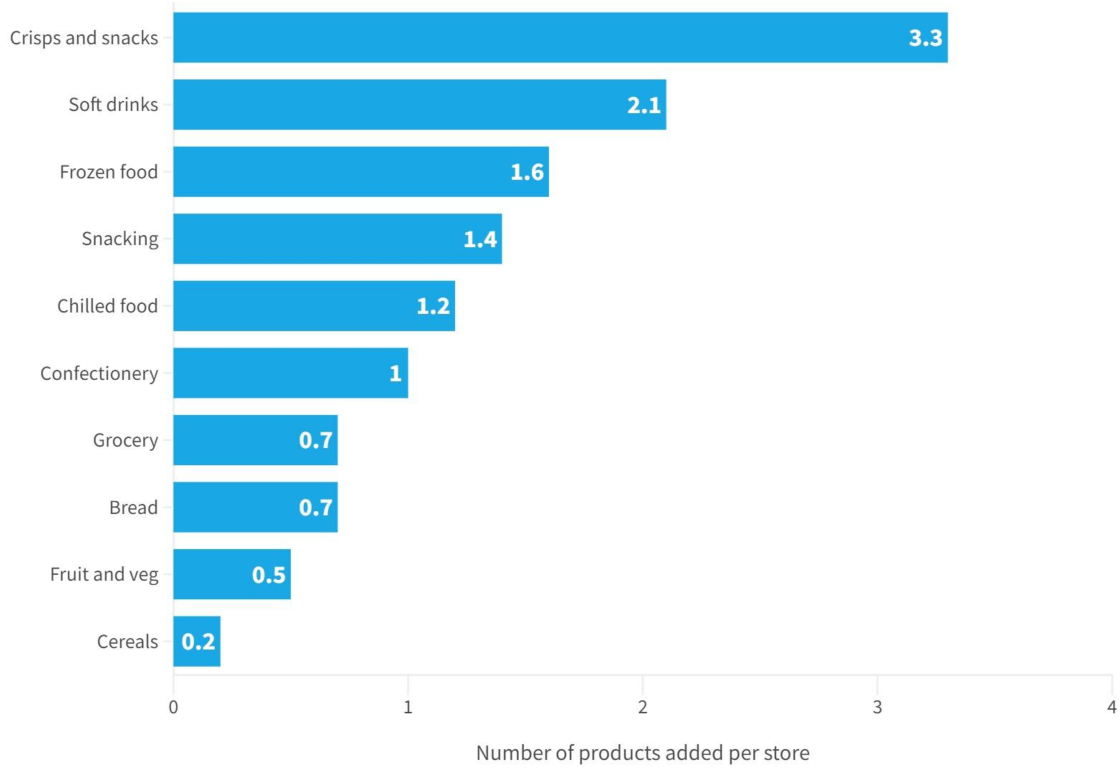
There were no notable differences in the results between Oval and Brixton Hill. Neither had significantly different baseline or endpoint stock to the other, and increases were spread evenly across both locations.

What are convenience stores now stocking as a result of the project?

Category level

Healthier lines were added to stores from all categories in the framework. The category which saw the most products added from the 100 Lines Framework was Crisps and Snacks (see Figure 3). Of the 17 healthier alternatives in this category, stores on average stocked 4.4 items from this category at baseline. There was an average increase of 3.3 items per store, so stores stocked an average of 7.7 healthier alternatives in this category by the end of the project. As this is one of the largest categories in the 100 Lines Framework, there was more space to make additions in this category than those containing fewer items.

Figure 3 – 'Crisps and snacks' and 'Soft drinks' were the categories in which stores most frequently expanded their range of healthier products



The category from the 100 Lines Framework which was most stocked at the start of the project was Soft Drinks. Nine out of ten shops already stocked 20 of the 22 items in the category at the start of the project, with just one shop stocking 18 out of 22. Stores were therefore limited in how many products they could add from this category, but they still increased their stock by an average of 2.1, ending with an average stock of 21.9, almost fully stocked by all shops. All shops made increases in this category, despite the category being already well stocked, helped by the stock drop. All shops added the two low sugar Fruit Shoots included in the stock drop, and the shop which had 18 products also added 0% lemonade.

Other categories which retailers commonly added to were Frozen Food, Snacking, and Chilled Food. Of the 5 items in the Frozen category, stores started with an average stock of 3.3 items, and added 1.6 more items across the project, ending with an average of 4.9 items out of 5.

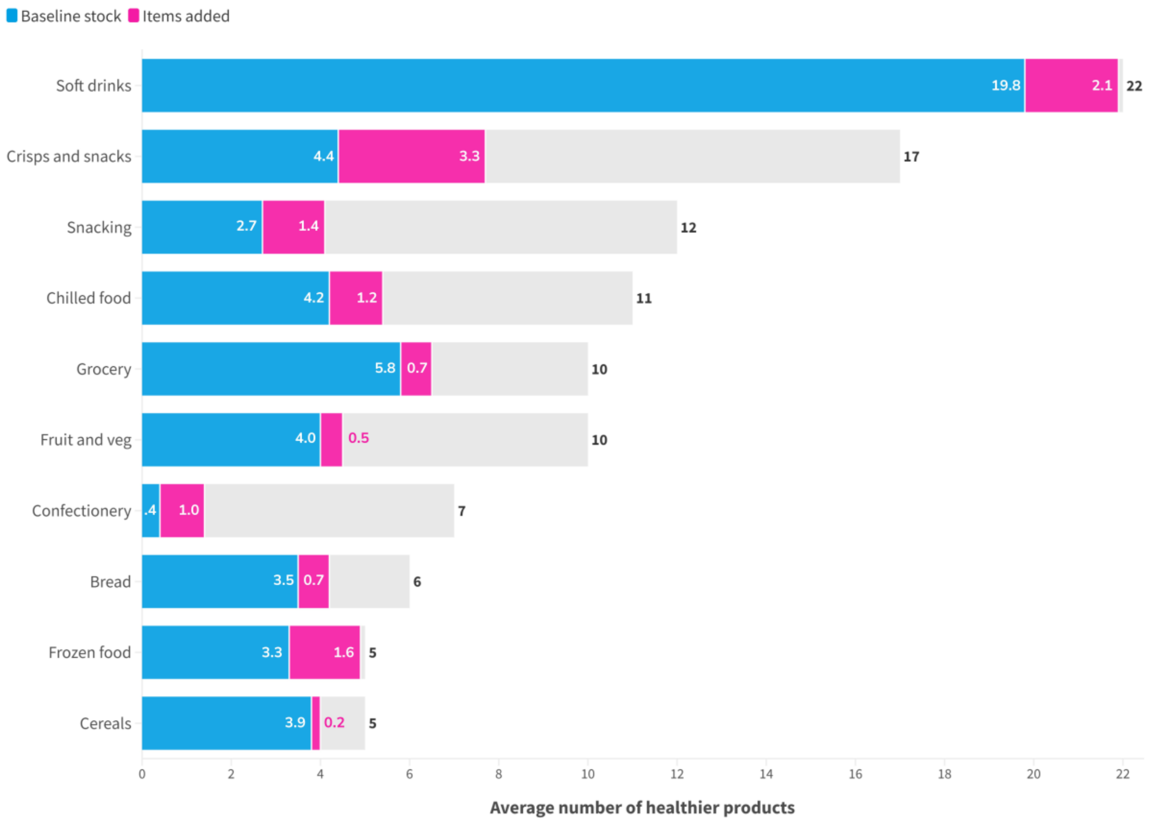
Of the 12 items in the Snacking category, stores stocked an average of 2.7 at the start and added an average of 1.4 items by the end of the project, resulting in an average of 4.1 items out of 12.

In the Chilled category, stores started with an average stock of 4.2 items of the total 11 items, and on average stocked an additional 1.2 by the end of the project, meaning an average endpoint of 5.4 items.

The categories in the 100 Lines Framework vary a lot in the number of items they contain. Looking at percentages is therefore misleading and can be difficult to compare directly to each other. However, from the results we can see that there were changes in all categories, which was not necessarily linked to how well stocked they were at the beginning. Even the categories which started out highly saturated with not much room for movement still increased.

The graph below shows each category and the average baseline, additional items, and remaining scope for increases in that category of the framework.

Figure 4 – Stores added healthier stock across all categories, and there is scope for further growth in most categories



Product level

At baseline data collection, there were already 23 products from the 100 Lines Framework stocked in each of the ten stores. The majority of these (18 products) were in the soft drinks category. In addition, all ten stores also stocked the following:

- Wholemeal sliced bread
- Semi-skimmed milk
- Wotsits
- Canned fruit in juice
- Canned tomatoes

Furthermore, nine out of ten shops already stocked the following 11 products from the framework:

- Oats
- Weetabix
- Soya milk
- Frozen vegetables
- Natural nuts
- 50:50 bread
- Frozen oven chips
- Canned vegetables in water
- Pulses in water/dried
- 0% lemonade
- Coke Zero 1.5l

Table 1 below shows the most popular healthier lines added to stores during the project. A high proportion of these products were products included in the stock drop. The most popular additions not included in the stock drop were oat milk, wholemeal tortillas, Pop Chips, and Transformasnacks.

Table 1 – The most commonly added healthier lines

Category	Item	Number of stores that added item across project	Number of stores now stocking	Stock drop?
Soft drinks	Fruit Shoot Blackcurrant	10	10	Yes
Soft drinks	Fruit Shoot Orange	10	10	Yes
Confectionery	Werther's Original sugar free	8	10	Yes
Crisps and snacks	Baked crisps	7	8	Yes
Chilled food	Oat milk	6	9	No
Crisps and snacks	No Salt Plantain Chips	6	10	Yes
Frozen food	Jacket potatoes	6	10	Yes
Frozen food	Green Cuisine veggie fingers	5	10	Yes
Bread	Wholemeal tortillas	4	6	No
Crisps and snacks	Pop Chips	4	5	No
Crisps and snacks	Transformasnacks	4	10	No

There were some items which had an overall increase in the number of shops stocking them, despite fluctuations in which stores stocked them over time. Conversely, two items had fewer shops stocking them at the end of the project compared to the baseline at the start. Table 2 shows these products.

Table 2 – Products which were stocked in an increased number of shops by the end of the project

Category	Item	Number of stores stocking at baseline	Number of stores stocking at midpoint	Number of stores stocking at end	Overall change
Snacking	Eat Natural bars	5	4	8	3
Crisps and snacks	Twiglets	6	8	7	1
Grocery	Pulses in water/dried	8	9	8	0
Cereals	Low sugar muesli	7	6	6	-1
Grocery	Tuna in spring water	5	5	4	-1

These changes may reflect stock turnover, which is typical in convenience stores between deliveries and visits to the cash and carry.

Some of the healthier lines were adopted by a large proportion of stores, such as oat milk, wholemeal tortillas and the stock drop items[1]. Beyond these core items, store owners varied in the lines they chose to add. In total there were 29 healthier products added by only one out of the ten stores participating in the project. This suggests that product choices were individual to each store, and that having a large variety of healthier options to choose from and recommend was beneficial.

Across the 100 Lines Framework there were 14 healthier option lines that no stores stock (before or by the end of the project). Four of these came from the Confectionery category, three each from Crisps and Snacks, Snacking, and Chilled, and one from the Bread category.

See Appendix 3 for full list of items and stock across the project.

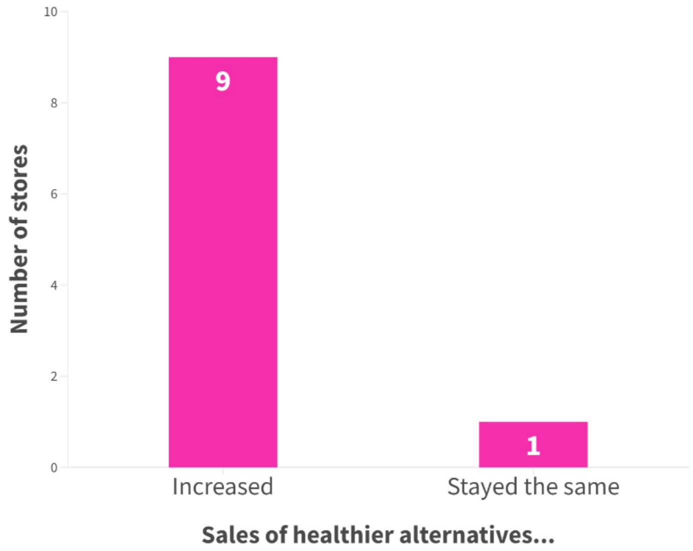
What impact has stocking healthier lines had on sales and profits?

Nine out of ten store owners reported that sales of healthier alternatives increased, and for the remaining store they stayed the same (see Figure 5). In

[1] Some stores had already added items that then appeared in the stock drop. The stock drop could not be tailored to individual stores' existing stock.

feedback from store owners collected by Rice Marketing, none of the store owners reported a decline in sales, nor did they notice a negative impact on profits as a result of adding healthier lines.

Figure 5 – Nine out of ten retailers said sales of healthier lines had increased during the project



Healthier lines that store owners say have sold well:

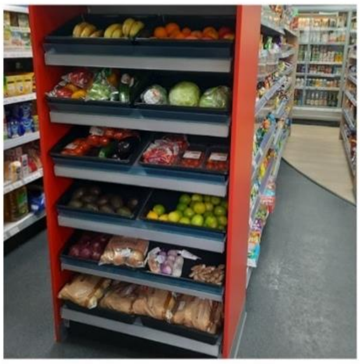
- Low sugar Fruit Shoots
- No salt plantain chips
- Baked Walkers crisps
- Green Cuisine Veggie Fingers
- Frozen jacket potatoes
- Frozen vegetables

We heard that it may take some time for customers to notice new products and store owners hope that sales of these lines will increase when they do.

What other changes did convenience stores make as part of the project?

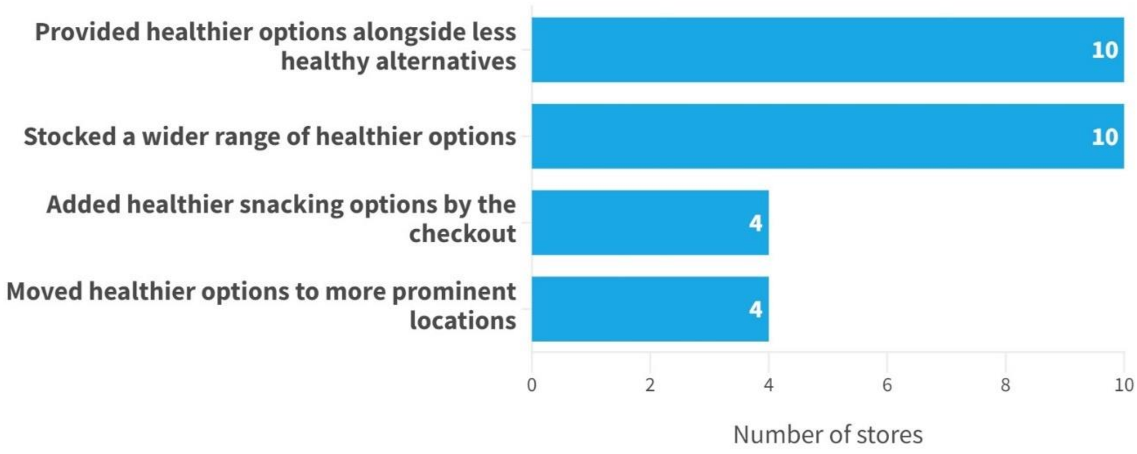
Figure 6 overleaf sets out the other changes that stores made as a result of the project. Rice Marketing identified that all stores would benefit from stocking a wider range of healthier options, as highlighted in the framework data, all stores now do. They also identified that all stores would benefit from providing healthier options alongside less healthy alternatives. Products from the framework are now integrated across the shelves in all ten stores, ensuring customers are provided with the option to pick up the healthier alternative instead when shopping in each area of the store.

On 1 October 2022, The Food (Promotion and Placement (England)) Regulations 2021 introduced restrictions on the promotions and placement of foods and drinks that are high in fat, salt or sugar (HFSS) or ‘less healthy’ in retail stores. The legislation only applies to businesses with more than 50 employees, making most convenience stores exempt. However, Rice Marketing identified that five of the ten convenience stores participating in this project would benefit from moving healthier lines to more prominent locations. Of these, four store owners had done so by the end of the project.



They suggested to eight store owners that their store would benefit from adding healthier snacking options by the checkout or till. Four of the eight had made this change by the end of the project. Chocolates and sweets were still consistently present at checkouts and tills. However, in stores with larger shelves or longer checkouts store owners were able to rearrange the layout to ensure healthier options such as Nak’d bars or Eat Natural bars were clearly visible within the selection.

Figure 6 – All shops added more healthier items and stocked them alongside less healthy alternatives; some shops also improved visibility of healthier options



Of the ten stores that participated in the project, all planned to continue with the changes they had made to their stores, five at the same level and five expanding further on the progress they had made.

Healthy Start

At the start of the project, none of the stores advertised the Healthy Start scheme, and owners did not know that they could accept Healthy Start. Rice Marketing explained the scheme as part of their work with each store, and eight of the ten stores now display the Healthy Start sticker in their windows. In the short timeframe of the evaluation, only one store owner reported customers commenting or asking about the Healthy Start sticker, but we anticipate it will take time for customers to notice.

4 WHAT HAVE WE LEARNED?

How do children use convenience stores?

Through Rice Marketing’s engagement with children in the borough to inform the project design, they identified three main scenarios where children will visit a convenience store:

- After-school hunger – looking for something filling
- Weekend treats – where taste is the main driver
- Topping up supplies – portable options to eat later

They also identified the opportunities to encourage a healthier choice that each of these motivations create. For the child looking for something after school, granola bars and fruit could be promoted as filling options. For the child looking for a weekend treat, raising awareness of tasty alternatives to popular snacks could encourage them to make a switch. For the child topping up supplies for themselves or other family members, education on healthy snack options such as rice cakes, nuts and flavoured waters could help.

During our interviews, convenience store owners reported that children are not spending a lot of money in-store, and they had noticed the amount had decreased in recent months. They suspect this may be due to a decrease in the disposable income of parents and carers, making pocket money for children less likely.

This has implications for in-store purchasing decisions. We heard from store owners and staff that children already tended to purchase the lowest priced sweets and snacks, and favour products under £1 such as chews and crisps. This, alongside our conversations with school leaders, highlighted the importance of stocking low-cost heathier options to enable children to try out healthy alternatives and to encourage a switch from unhealthy to healthier options.

We also heard that quantity is important for children’s value perceptions. They don’t want to spend all their money on one item. They are also reluctant to try new things if they aren’t sure they will like them. Although nutritionally better value for money, healthier snacking options are seen as a more expensive choice and therefore limit the number of products children can purchase for their money. This discourages purchasing of healthier alternative snacks.

Additionally, store owners told us that children are more likely to pick up items where the price is clearly visible so they can work out how many products they can get for their money and make decisions based on that.

What does it take to get healthier lines stocked in convenience stores?

Reducing risk

Stocking and promoting new products in store were seen as a risk by store owners, especially in the case of healthier options, as their unhealthier counterparts sell well. Store owners told us they needed to be sure that new lines will sell and that any changes they make to their store won't harm profits.

Access to expert advice, in this case from Rice Marketing on what changes to make, was critical in minimising the perceived risk of participating in the project. Rice Marketing were able to provide information on healthier options that were proven to be best sellers, building the confidence store owners had in trying these lines. We heard expertise in any topics relating to successfully making a profit in convenience stores would be welcomed by store owners who were open to learning more about what works when creating a healthier food environment. This advice and guidance could be seen to provide a potential competitive advantage against other stores in the area.

In the absence of expert advice, store owners thought that strong evidence around sales and profits would be needed to convince them to stock additional healthier option lines. They would need to see a more detailed breakdown of wholesalers pricing, profit margins, and rates of sale for the healthier lines to feel confident in taking the risk to stock them.

Trust and relationships

The evaluation report for the previous Good Food Wholesale and Retail Pilot identified trust as a critical success factor – this report can be found by clicking on this link: Evaluation Report. Findings from this project support this; store owners trusted Rice Marketing and trusted that their advice was based on evidence, and therefore felt comfortable enough to introduce new healthier lines. After initial conversations with Rice Marketing all 10 store owners reported having a positive attitude toward stocking/promoting healthier options aimed at school children.

In this project, the level of engagement with convenience stores from the Rice Marketing team was greater than in the previous pilot, with a smaller cohort of stores to focus on. Rice Marketing dedicated time to getting to know the store owners, understanding the owners' priorities, and ensuring owners were committed to the project's goal. Owners appreciated this, and it coincided with stronger relationships and a higher average number of healthier lines added to stores in this project (13 per store) than previously (9 per store). We also noticed a higher level of interest in and commitment to the subject of healthier choices when we interviewed store owners, which is attributed to the deeper engagement by Rice Marketing.

Serving the community

Although some retailers interpreted the agenda as specific to sugar-reduction, generally there was a good understanding of the aim of the work. Most store owners and managers in this cohort explicitly referred to their desire to 'do better' for their communities as motivation to make changes within their stores.

A store owner, who himself has been diagnosed with type 2 diabetes, explained the diagnosis had made him more aware of the risks of food-related ill-health, and made him determined to offer more healthy options to his community.

Being involved in the project helped store owners and managers translate their desire to do better for their community into specific actions targeted at healthier food options. By follow-up time, most store owners and managers described their wish to help their communities make healthier food choices.

Stock drop

The inclusion of the stock drop proved to be successful in discouraging drop-out through the project and further minimising perceived risk. The benefits of the stock drop for store owners were as follows:

- Store owners were able to trial a small selection of the products in the 100 Lines Framework without taking on any of the risk associated with purchasing new lines
- The free stock offset the cost of trialling other suggested lines from the framework that were not included in the stock drop, as they were receiving products for free that they may have purchased otherwise
- The stock drop was delivered to stores directly, which maximised the number of stores that received the incentive

Nine of the ten stores in this project accepted the free stock. The store owner who declined the stock did so because he had recently moved to a new symbol group, and was concerned about accepting stock from a different wholesaler. In the previous Good Food Wholesale and Retail project, store owners had to collect free incentive stock from the wholesaler themselves. Only 35% of store owners did so.

The stock drop sustained the project's momentum in store. As store owners knew they would be receiving stock at a later date as part of their participation in the project, they remained engaged in the project and carried out the changes suggested by Rice Marketing early. As shown in the results, stores had already added an average of five new healthier lines by the midway data collection point, more than a month before the stock drop was delivered. Following the drop, many of the retailers expressed surprise at how well the products from the stock drop were selling, especially the low sugar Fruit Shoots and the no salt plantain chips.

Will the changes last?

As mentioned previously, there was a desire from project store owners to help their communities make healthier choices. However, they were uncertain whether customers would make a switch from unhealthy products. One owner commented, "people will choose to buy whatever they want to buy, we can't stop them or change their minds".

It was clear that if the newly stocked healthier alternative lines do not sell at a rate that the owner is happy with then they will not repurchase. What constituted a slow line differed depending on the store but a healthier alternative product's performance against unhealthier products in their category was deemed a good way to tell. For example:

- Fanta Classic vs Fanta Sugar Free – Fanta Sugar Free was not selling as quickly in one store as standard Fanta and therefore the store won't restock
- Hummus chips vs Walkers – Hummus chips were selling faster than McCoys in one store, encouraging the owner to stock a greater variety of flavours

However, anecdotally we heard sales of the healthier lines introduced as part of the project were either steady or good. Consequently, store owners had no plans to remove any of the healthier ranges they had introduced and would maintain the changes they had made.

Most store owners were interested in making further changes to encourage healthier choices within their stores. However, none of the owners we spoke with were sure what direction or actions they should take to do so. They appeared open to further advice and guidance, provided this was evidence based, but will need input on what their next steps should be so that momentum is not lost.

Practical learning about creating a healthier food environment

Competition and 'temptation'

A challenge specific to a densely populated area such as Lambeth is that there are many convenience options. This means that people do not have to travel far to access an unhealthy food option if that's what they prefer. Competition plays a large role in owners' decision-making processes; if they do not stock the products their customers are asking for, then the customers can go elsewhere.

Additionally, people also must work hard to avoid, and not be tempted by, an unhealthy food option. We heard the decision-making process behind selecting something for dinner can become almost instinctive, with typically unhealthy takeaway options in close proximity across the Superzones.

Product visibility and location

School leaders felt this temptation extended to convenience stores. They felt typically it was unhealthy products that stores placed in prominent locations. This is supported by findings of the focus groups carried out by Rice Marketing; children felt healthier options were less clearly available and sweets and crisps were the prominent products instore.

As described in the results section, four of the ten convenience stores moved healthier lines to more prominent locations as part of the project. Similarly, four stores added healthier snacking options by the checkout. These changes were perceived by school leaders to have the most potential influence on children's purchasing decisions. They felt having healthier alternatives visible and located at checkout was likely to make the choice to pick them up more instinctive for children.

Children and adults shop differently

The question on how best to highlight healthier options raised different considerations for different consumer groups. All 10 stores in this project positioned their healthier alternative lines alongside their unhealthy equivalents. This was intended to make the switch to healthier alternatives easier for customers, with healthier options convenient to pick up when customers are shopping in each category. For adults, this makes sense as they are more likely to shop for multiple products across multiple categories. Having healthier alternatives integrated with the unhealthier options makes it easier for those customers to spot a healthier alternative and decide to switch.

However, we heard from school leaders that being able to identify and locate a section in a store specifically for healthier choices may be more helpful from a child's perspective. Specifically, school leaders told us that primary school children are being taught in schools about healthy eating, but they worry when they shop in stores that they don't know where to look for a healthier snack.

> **"The convenience store (I go to) they sell it (healthy food), but they don't really put out the healthy stuff as much as they do the sweets and crisps, so it was pretty hard to tell which is healthy. So, it's very kind of hard, to search for the healthy stuff, but with the sweets and chocolate they put that as soon as you walk in."**
>
> Year 6 child, from Rice Marketing focus groups

Packaging and marketing

Rice Marketing found that product packaging influenced children's decision making and was especially effective in getting them to try something new. However, from the perspective of schools and convenience stores there were very few healthier alternative lines designed with children in mind. What constituted a healthier option to the sweets and confectionary products children were purchasing was mostly unknown by school leaders and store owners. Both were more able to suggest switches to a healthier alternative in the snacking or crisp category than direct children to a healthier alternative in the confectionary category of similar price and type.

In addition, marketing of healthier snacking options was seen as being targeted towards an older audience. Low-sugar Fruit Shoots were arguably the most child focused healthier line in the framework and, as highlighted in the results section, shop owners were particularly impressed with how quickly they were selling, with children and parents the main customers. This suggests that healthier lines targeted at children will sell, but there is still more to be done to identify them and incorporate them into stores.

"More variety! There are so many different types of chocolate or crisps but only one pack of a healthy one!"

Year 6 child, from Rice Marketing focus groups

Price-marking

The majority of products included in the project stock-drop were price-marked. Store owners expressed a preference for price-marked products. They said these products are popular with customers, who trust that they offer value for money. This suggests that price-marking healthier lines may enhance their appeal to customers, including children.

The impact of wider context

Supporting local priorities in Lambeth

The Convenience Store Project aligns very well with Lambeth Council and the Mayor's School Superzone priorities. Lambeth Council sees food as a critical issue for the Borough, which is reflected in a wide range of activities to support a healthier food environment. Lambeth was awarded Food Flagship borough status by the GLA in 2014, the Council is signed up to the Plant Based Treaty and is committed to circular food procurement. It also uses the Veg Power campaign to promote vegetable consumption to children.

Both School Superzone areas prioritise the food and drink environment as a key part of their aims and objectives, as listed below:

- Active Travel: To increase physical activity of children and their families by shaping the environment to encourage more active travel
- Air Quality: To raise awareness and mitigate the negative impact of poor air quality for school children
- Food and drink environment: Increasing the range of healthier options to help make healthier choices the easier choices
- Community Safety and Tobacco and Alcohol: To take a targeted intelligence-led approach to minimise the risk of alcohol, tobacco, vapes and knives on the safety and wellbeing of school children

We understand that local councillors are very active in their wards, and there are opportunities in the future for them to support and encourage local convenience stores in their efforts to improve the availability of healthier options. There are also opportunities to connect the Convenience Store Project and participating stores to other food-related activities in the borough, thereby reinforcing their involvement and commitment.

Although this project was integrated into the Lambeth School Superzone areas, there are School Superzones in other boroughs that are also working with convenience stores. The GLA and Impact on Urban Health are keen to use the learning from this project to understand what works and how it can be made sustainable. The work is also applicable to areas beyond London and the Association of Convenience Stores is supporting this work.

Eating at home, at school and on the street

The school leaders we interviewed reflected that children usually eat what their families eat, and that many families don't necessarily eat healthier options at home. They recognised that most families want to do what's best for their children but may not know how. In one of the schools, Lambeth Council is trying to address this by hosting health workshops for parents and carers.

In the school year 2023-24, the Mayor funded free school lunches for all primary school children in state-funded schools and it was recently announced that this will continue for the 2024–25 school year. One of the school leaders reported a 34% increase in uptake since this was introduced. This maximises the opportunity to support families with a nutritious lunch for their children.

Both school leaders interviewed said packed lunches varied in perceived nutritional content, with some students bringing in hot homemade meals in flasks whilst others' lunchboxes contained mainly processed products. The school leaders said they and colleagues suspect the more processed packed lunches are favoured by families with less time, and that they may view multipack processed options as an easier and quicker way to provide their children with lunches they'll enjoy.

The school leaders interviewed were most concerned about what children eat outside of school and the home. They highlighted chicken shops and kebab shops as amongst the most harmful influences, with unhealthy but filling products available at cheap prices in close proximity.

One school leader we spoke with suggested that closer relationships between schools and convenience stores in the area could positively impact the health of the children. They also suggested promoting healthier items as a 'healthy tuck shop' within the store, as an opportunity for school children to try healthier options, and potential incentives or discounts for children purchasing healthier options in store. Whether this would be feasible in terms of cost and time for store owners would need to be explored, but closer relationships would be a good starting point.

Alignment with work funded by Impact on Urban Health

Impact on Urban Health's Children's Health and Food programme focuses on improving children's health in three settings: homes, schools and streets.

Whilst this project intervenes in the street setting, it is clear from our findings that all three settings are mutually interdependent and therefore can be mutually reinforcing. This is strongest at the intersection between food and eating patterns at home and what children choose to buy on the street on the way to and from school. Our feedback from school leaders and store owners suggests that a combined approach, which supports families to eat well and ensures easy and visible access to healthier choices in stores, could encourage more uptake of healthier options in convenience stores.

Considerations for scale-up

Driving engagement with wholesalers and suppliers

Store owners use a variety of wholesalers to buy their stock, and most use more than one. The most commonly used wholesalers are shown below.

Figure 7 – Dhamecha, Booker and Bestway were the three most used wholesalers

Bestway has made health a strategic priority as a result of its involvement in the Good Food Retail Wholesale Project, and sees health as a key part of its offer to retailers and the communities they serve.

Bestway's Managing Director was recently elected Chair of the Council of Members at the Federation of Wholesale Distributors, and this presents an opportunity to open a conversation about an industry-wide commitment to health.

In terms of engaging suppliers, the route is probably through wholesaler data, which demonstrates increased sales of healthier options to store owners.

Understanding sales and profitability

We were unable to secure accurate sales data from store owners and had to rely on what they told us. Some stores have Electronic Point of Sale (EPoS) systems, but they are not used to their full potential as stock management systems. We do not underestimate the accuracy of most store owners 'mental stock control system', as they have a very deep knowledge of their stores' daily operation. However, to convince others, some measure of sales and profitability are required.

For this short evaluation, we relied on feedback from store owners and managers about whether the new products were selling and whether they were likely to replenish when sold out. Given that these are low margin commercial operations, it is reasonable to assume that owners will not restock unless an item is profitable. Longer term, they indicated they would remove items that don't sell within two months, so this could be tested in a longer-term evaluation. If a product is on the shelf after a year, it is reasonable to assume that the product is selling and profitable.

It should also be possible to work with a wholesaler who is committed to the project, to gather distribution data for the healthier lines and see how it changes over time. This would give an indication of which lines are selling and how fast. Again, we can assume that products which are selling are profitable.

Capacity

There will come a point in scaling up the project where the capacity of Rice Marketing is insufficient to meet demand. The skills and experience they bring to the project are niche and not easily replicable. It will be important to work out what aspects of the work could be taught and delegated, so that Rice Marketing's time and expertise is focused on the aspects where they can add most value.

5 CONCLUSIONS

Our evaluation of the Lambeth School Superzone Convenience Store Project shows that **it is possible to increase access to healthier options in independent convenience stores**. Once they are on the shelves, healthier products sell.

Feedback from stores suggests they will sustain the changes. However, given the short evaluation timeframe we can't be sure of this.

Furthermore, **half of the participating store owners would like to increase their range** in future but would need further advice about which products to focus on next.

Critical success factors

Our findings reinforce the three critical success factors identified in the evaluation of Good Food Wholesale and Retail Project Phase 1:

- Trust
- Making it easy
- A whole system approach

This evaluation has revealed more detail on how each of these three factors contribute to success.

Trust

Rice Marketing's deeper engagement with a small number of stores in this project has revealed the value of longer-term relationship building with store owners and managers. Over consecutive visits, the team :

- Built store owners' understanding of the project and the potential value of stocking healthier options
- Offered expert category and location advice
- Provided tailored recommendations for healthier options to stock

This kind of expert advice is an incentive in itself, and something most of the store owners couldn't access otherwise.

Ultimately this **trust-building and advice has built store owners' commitment to expanding their ranges,** reflected in more lines being added in this project than in the original pilot.

Making it easy

The project has provided stores with **a practical, evidence-based tool** (the 100 Lines Framework) to help them understand what constitutes a healthier option and decide what to stock. Our findings indicate that store owners and managers find the paper handout version easier to work with and remember to use than versions sent to their mobile devices.

The Rice Marketing team's expert advice has also supported store owners to think about where they **locate healthier options, to make it easier for children to find and choose** healthier options.

Finally, the stock drop provided a well-timed and **well-executed incentive to reward participation and offset any perceived risk**. Delivering the stock made it easy for store owners to benefit. Delivering it so far into the project meant that store owners had already seen a positive result from stocking healthier lines before they received the extra stock.

A whole system approach

Our findings have highlighted the systemic nature of improving any single part of the food environment. Not only does it need suppliers, wholesalers and retailers to each play their part, but food consumption in the street setting is heavily influenced by the school and home settings.

Scaling

There is an understandable desire to scale this model, to ensure as many people as possible can benefit from improved access to healthier choices in their local convenience store. It is a matter of equity and aligns with the Mayor's priorities for building a healthier city. This work also has relevance well beyond London.

The scope for scaling in its current form is limited by the availability of expert organisations in the sector that are able to provide the support that the current model relies upon. As appetite grows for a scaled model, there are two aspects that will need further consideration and exploration:

- Increasing capacity whilst maintaining quality
- Fidelity to the model

Increasing capacity whilst maintaining quality

There will be a need to increase delivery capacity, whilst not diluting the expertise and experience that sits at the heart of the model. This will require consideration of two things:

- The parts of the model for which Rice Marketing’s expertise and experience are critical
- The parts of the model for which local partners could be trained to deliver, supported by a toolkit, mentoring and a community of practice

Fidelity to the model

Scaling up any innovation would usually include an assessment of which aspects of the model are essential to achieve similar results, and what can be flexed to suit different local or cultural contexts. This could be included in future evaluations and would help inform how to increase local capacity.

APPENDIX 1 – DESK REVIEW SOURCES

GLA Convenience Stores Project - Phase 1 Report, Rice Marketing (2022)

GLA Peer Outreach – Lynk Up Crew (LUC) Report, Rice Marketing (2023). The Lynk Up Crew is a group of young Londoners aged 7-15, who meet monthly to address the issues young Londoners face and contribute to shaping policy.

Good Food Wholesale and Retail Pilot – Evaluation Report, Brightpurpose (2022)

Healthy eating insight-gathering - worksheet data, Rice Marketing (2023)

How Children Use Convenience Stores – Emerging Findings from Holy Trinity School, Tulse Hill, Rice Marketing (2023)

Online research into School Superzones

Online research into Lambeth Council's approaches to Health and Wellbeing

Putting Health at the Heart of Convenience – Lessons from the Good Food Retail and Wholesale pilot, Impact on Urban Health (2022)

School Superzone Application Forms (Holy Trinity and Oval), GLA (2023)

APPENDIX 2 – 100 LINES FRAMEWORK

Figure 8 – Original 100 Lines Framework as created by Rice Marketing

Category	Details	Recommended Products				
Soft Drinks (20)	no sugar/ low sugar/flavoured water. Across all categories, RTD and dilutables	still water 500 ml	sparking water 500ml	coke zero 330ml	diet coke 330 ml	pepsi max 330 ml
		still water 1ltr	sparking water 1ltr	coke zero 500ml	diet coke 500 ml	pepsi max 500 ml
		NAS fruit water	fruit juice 250ml	coke zero 1.5l	diet coke 1.5l	pepsi max 1.5l
		NAS squash	fruit juice 1l	Ribena rtd NAS	0% lemonade	0% mixers
Confectionery (5)	Sugar free, reduced sugar	Werthers Original sugar free	Free From Fellows	Sugar free Halls	Sugar free Frutella	Sugar free Haribo
Crisps & Snacks (15)	baked crisps, popcorn, singles and sharing, smaller pack sizes, mulitpacks	Walkers oven bakes	Sunbites	Twiglets	Snackajacks	Natural popcorn
		Pombears	Walkers French Fries	Pop Chips	Eat Real Hummus Chips	GW Ringo Puffs
		Transformasnacks	Wotsits	Jacobs Crinklies	No Salt Plantain Chips	Baked Pretzels
Bread(5)	wholemeal variants of mainstream lines	wholemeal sliced bread	50:50 sliced bread	wholemeal pitta	wholemeal tortillas	rye bread
Cereals (5)	no/low sugar wholegrain	porridge oats	weetabix	low sugar muesli	shredded wheat	bran flakes
Shacking (15)	healthier bars, natural nuts, rice cakes, ryvita	Ryvita	Kallo rice cakes	Natural nuts	Eat Natural bars	Graze snacks
		Nak'd bars	Natural fruit & seeds	Grenade bars	Monkey nuts	
Grocery (10)	low fat variants, low salt/sugar, wholegrain	light mayonnaise	canned veg in water	tuna in spring water	reduced sug. & salt ketchup	reduced sug. & salt beans
		pulses in water/dried	brown rice	wholegrain pasta	canned fruit in juice	canned tomatoes
Fruit & Veg (10)	key range - stable, long life	apples	bananas	grapes	berries	easy peel citrus
		onions	potatoes	salad leaves	cucumber	tomatoes
Chilled Foods (10)	low fat variants, non dairy alternatives	semi skimmed milk	0% natural yogurt	reduced fat spread	soya milk	Dairylea Light - cheese triangles/ spread/slices
		reduced fat cheddar cheese	reduced fat cream cheese	alpro yogurts	oat milk	0% sugar actimel
Frozen Foods (5)	lower fat and vegetables	oven chips	linda mccartney sausages	jacket potatoes	frozen peas	frozen mix veg

[2]

[2] Framework shown as designed at the beginning of the project. Data for a number of additional products was collected and is included in appendix 2 as a result of previous framework versions and new products identified.

APPENDIX 3 – STOCK BREAKDOWN

Table 1 – 100 Lines Framework showing how many stores were stocking each item at the data collection points across the project, from baseline to the endpoint

Category	Product	No. of convenience stores stocking (0-10)		
		Baseline	Midpoint	End
Bread	50:50 sliced bread	9	9	9
Bread	Rye bread	7	7	7
Bread	Wholemeal bagels	0	0	0
Bread	Wholemeal pitta	7	9	10
Bread	Wholemeal sliced bread	10	10	10
Bread	Wholemeal tortillas	2	4	6
Cereals	Bran flakes	7	7	7
Cereals	Low sugar muesli	7	6	6
Cereals	Porridge oats	9	10	10
Cereals	Shredded Wheat	6	6	7
Cereals	Weetabix	9	10	10
Chilled food	0% natural yoghurt	5	6	6
Chilled food	0% sugar Actimel	0	0	0
Chilled food	Alpro yogurts	5	6	6
Chilled food	Cottage cheese	0	0	0
Chilled food	Dairylea Light - cheese triangles/spread/slices	0	0	0
Chilled food	Oat milk	3	8	9
Chilled food	Reduced fat cheddar cheese	2	2	3
Chilled food	Reduced fat cream cheese	5	6	6
Chilled food	Reduced fat spread	3	4	4
Chilled food	Semi skimmed milk	10	10	10

Category	Product	No. of convenience stores stocking (0-10)		
		Baseline	Midpoint	End
Chilled food	Soya milk	9	10	10
Confectionery	Free From Fellows	0	1	1
Confectionery	Mars/Snickers low calorie bars	0	0	0
Confectionery	Sugar free Fruittella	0	0	0
Confectionery	Sugar free Halls	2	3	3
Confectionery	Sugar free Haribo	0	0	0
Confectionery	Sugar free Sula	0	0	0
Confectionery	Werther's Original sugar free	2	2	10
Crisps and snacks	Baked crisps	1	1	8
Crisps and snacks	Baked Pretzels	4	5	5
Crisps and snacks	Dorito Dippers - Hint of salt	0	0	0
Crisps and snacks	Eat Real Hummus Chips	4	7	7
Crisps and snacks	Jacobs Crinklies	4	5	5
Crisps and snacks	Natural popcorn	0	0	1
Crisps and snacks	No Salt Plantain Chips	4	5	10
Crisps and snacks	Pombears	1	2	3
Crisps and snacks	Pop Chips	1	4	5
Crisps and snacks	Propercorn Popcorn	1	1	1
Crisps and snacks	Snackajacks	0	0	0
Crisps and snacks	Sunbites	0	0	0
Crisps and snacks	Transformasnacks	6	6	10
Crisps and snacks	Twiglets	6	8	7
Crisps and snacks	Walkers French Fries	2	3	4
Crisps and snacks	Walkers Oven Bakes	0	0	1

Category	Product	No. of convenience stores stocking (0-10)		
		Baseline	Midpoint	End
Crisps and snacks	Wotsits	10	10	10
Frozen food	Green Cuisine veggie fingers	5	6	10
Frozen food	Frozen mix vegetables	9	9	10
Frozen food	Frozen peas	7	8	9
Frozen food	Jacket potatoes	4	6	10
Frozen food	Oven chips	8	10	10
Fruit and vegetables	Apples	4	5	5
Fruit and vegetables	Bananas	6	6	7
Fruit and vegetables	Berries	2	3	3
Fruit and vegetables	Cucumbers	3	3	3
Fruit and vegetables	Easy peel citrus	4	4	5
Fruit and vegetables	Grapes	2	2	2
Fruit and vegetables	Onions	6	7	7
Fruit and vegetables	Potatoes	6	6	6
Fruit and vegetables	Salad leaves	3	3	3
Fruit and vegetables	Tomatoes	4	4	4
Grocery	Brown rice	5	6	6
Grocery	Canned fruit in juice	10	10	10
Grocery	Canned tomatoes	10	10	10

Category	Product	No. of convenience stores stocking (0-10)		
		Baseline	Midpoint	End
Grocery	Canned vegetables in water	8	8	10
Grocery	Light mayonnaise	6	7	7
Grocery	Pulses in water/dried	8	9	8
Grocery	Reduced sugar and salt beans	2	3	3
Grocery	Reduced sugar and salt ketchup	2	4	5
Grocery	Tuna in spring water	5	5	4
Grocery	Wholegrain pasta	2	2	2
Snacking	Eat Natural bars	5	4	8
Snacking	Fruit and nut mix	0	0	0
Snacking	Graze snacks	2	2	2
Snacking	Grenade bars - Chocolate Chip Cookie Dough	0	0	0
Snacking	Grenade bars - Peanut Butter	0	1	2
Snacking	Grenade bars - White Chocolate Cookie	0	0	0
Snacking	Kallo rice cakes	5	5	5
Snacking	Monkey nuts	0	0	1
Snacking	Nak'd bars	1	2	4
Snacking	Natural fruit and seeds	1	4	4
Snacking	Natural nuts	9	10	10
Snacking	Ryvita	4	5	5
Soft drinks	0% lemonade	9	9	10
Soft drinks	0% mixers	10	10	10
Soft drinks	Coke Zero 1.5l	9	9	9

Category	Product	No. of convenience stores stocking (0-10)		
		Baseline	Midpoint	End
Soft drinks	Coke Zero 330ml	10	10	10
Soft drinks	Coke Zero 500ml	10	10	10
Soft drinks	Diet Coke 1.5l	10	10	10
Soft drinks	Diet Coke 330ml	10	10	10
Soft drinks	Diet Coke 500ml	10	10	10
Soft drinks	Fruit juice 1l	10	10	10
Soft drinks	Fruit juice 250ml	10	10	10
Soft drinks	Fruit Shoot Blackcurrant	0	0	10
Soft Drinks	Fruit Shoot Orange	0	0	10
Soft drinks	NAS fruit water	10	10	10
Soft drinks	NAS squash	10	10	10
Soft drinks	Pepsi Max 1.5l	10	10	10
Soft drinks	Pepsi Max 330ml	10	10	10
Soft drinks	Pepsi Max 500ml	10	10	10
Soft drinks	Ribena RTD NAS	10	10	10
Soft drinks	Sparkling water 1ltr	10	10	10
Soft drinks	Sparkling water 500ml	10	10	10
Soft drinks	Still water 1ltr	10	10	10
Soft drinks	Still water 500ml	10	10	10

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