

Harnessing the Power of Supermarkets to Help Reverse Childhood Obesity

Public Health and Supermarket Experts Explore Grocery Store Marketing Practices to Promote Healthier and Lower-Calorie Foods



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ABOUT THE ROBERT WOOD JOHNSON FOUNDATION

The Robert Wood Johnson Foundation focuses on the pressing health and health care issues facing our country. As the nation's largest philanthropy devoted exclusively to improving the health and health care of all Americans, the Foundation works with a diverse group of organizations and individuals to identify solutions and achieve comprehensive, meaningful and timely change. In 2007, the Foundation committed \$500 million toward its goal of reversing the childhood obesity epidemic by 2015. This is the largest commitment any foundation has made to the issue.

For more than 35 years the Foundation has brought experience, commitment and a rigorous, balanced approach to the problems that affect the health and health care of those it serves. When it comes to helping Americans lead healthier lives and get the care they need, the Foundation expects to make a difference in your lifetime.

For more information, visit www.rwjf.org.

ABOUT THE FOOD TRUST

The Food Trust was established in 1992 to develop a stable food supply in underserved communities, educate youth and families about healthy eating, and improve the connection between urban and agricultural communities. The agency's mission is to ensure everyone has access to affordable, nutritious food. The Trust employs a comprehensive approach that integrates nutrition education with increased availability of affordable, healthy food.

The Food Trust has become a regional and national leader in developing new strategies to prevent childhood obesity and other diet-related diseases through innovative programs to increase access to fresh food and provide nutrition education in underserved communities.

For more information, visit www.thefoodtrust.org.

Responding to Converging Challenges and Seizing Opportunities

On June 24–25, 2010, more than 60 public health leaders, food retailers, food manufacturers, consumer product designers and marketers met in Philadelphia for a groundbreaking conference to discuss how to make it easier for parents, caregivers and youths to select and purchase healthier foods, including those with fewer excess calories, in grocery stores. Co-hosted by the Robert Wood Johnson Foundation (RWJF) and The Food Trust, this meeting was the first to address the vital role supermarkets play in providing access to healthy affordable foods in all communities, and the unique role they can play in reversing childhood obesity in lower-income and multi-ethnic communities.

THE CHILDHOOD OBESITY EPIDEMIC

Over the past four decades, the obesity rate has more than quadrupled for children ages 6 to 11 and more than tripled for adolescents ages 12 to 19.^{1,2} Obese children are at increased risk for serious health problems including heart disease, type 2 diabetes and asthma.^{3,4,5} If we don't reverse the epidemic, the current generation of young people could be the first generation in U.S. history to live sicker and die younger than their parents' generation.⁶

FOOD DESERTS

Childhood obesity has increased in all segments of the population and significantly more in lower-income, multi-ethnic communities and neighborhoods.⁷ Many of these communities are located in so-called food deserts, urban neighborhoods and rural towns without ready access to healthy affordable food.⁸ A recent report by The Food Trust and Policy Link shows that more than 23 million Americans live in food deserts and are at greater risk for obesity and obesity-related diseases.⁹



WHY GROCERY STORES?

Traditional full-service supermarkets and grocery stores have a unique role to play in helping to reverse the childhood obesity epidemic. Full-service supermarkets and grocery stores offer a large variety of healthier foods compared with convenience stores and other retail food outlets. There is growing evidence that children and adults living more than a mile from a full-service grocery store are less likely to consume a healthy diet and more likely to be obese. Almost 60 percent of all U.S. shoppers identify a full-service supermarket as where they spend the majority of their grocery budget, and more than 90 percent of U.S. shoppers from households with children report shopping at a grocery store in the past three months, half of the time accompanied by their children.¹⁰ Among adolescents, the presence of supermarkets appears to be protective against becoming overweight while the presence of convenience stores is positively associated with being overweight.¹¹ These findings place grocery stores center stage in national efforts to prevent childhood obesity.

WHY NOW?

Many forces are converging to make this a watershed moment for supermarkets to step forward in providing leadership and innovation in marketing healthier products with fewer excess calories for children and their families:

- The First Lady's Let's Move initiative and the White House Task Force on Childhood Obesity have raised awareness about the need for broad and public-private (or cross-sector) efforts to reverse the childhood obesity epidemic, including calling for the end of food deserts within seven years.¹²

In 2004, the Pennsylvania Fresh Food Financing Initiative pioneered a statewide program offering grants and loans to supermarket developers to build stores in underserved communities. Pennsylvania's initiative has provided the model for the federal Healthy Food Financing Initiative proposed in 2010 and similar programs under development in 15 other states.

- Recent government studies have more clearly defined the types of foods and beverages that children should consume more of, as well as the foods they should consume less of, in order to achieve a healthy energy balance and body weight. These studies indicate that children should eat more fruits and vegetables, whole grains, fish, lean meat and low-fat dairy products, and fewer foods and beverages with excess and discretionary calories from solid fats and added sugars.¹³
- Manufacturers are reformulating many pre-processed foods and beverages to remove excess calories from the marketplace and especially from children's diets. In 2010, the Healthy Weight Commitment Foundation (HWCF) announced a pledge to reduce annual calories by 1.5 trillion by the end of 2015, and to maintain that change over time.¹⁴ HWCF members will achieve their calorie reduction goal by developing lower-calorie options, changing recipes to lower the calorie content of current products, and/or reducing portion sizes of existing single-serve products.



- Retailers across the country are responding by changing their product offerings, in-store environments and marketing practices to make healthy choices more accessible, affordable and appealing. Examples range from Kroger's and Hannaford's in-store nutrition scoring systems to Hy-Vee's decision to hire dietitians to help shoppers select healthier foods.¹⁵ In 2011, Walmart announced a commitment to build more inner-city stores to reduce food deserts, market better-for-you products, make healthier products more affordable, and reduce levels of trans-fats, sugars and sodium in its store-brand products.¹⁶

A national poll by the Food Marketing Institute and Catalina Marketing found that managing or losing weight was the top health concern among grocery shoppers in 2010 and that 66 percent said they were looking for ways to improve their health and wellness by making healthy food choices. Only 50 percent said that their primary supermarket helped them make such choices, and only 35 percent of parents reported getting help to make healthy choices for their children.¹⁷ Moreover, shifts in youths' food experiences as a result of the 2004 national school wellness policies, thousands of state and local school food initiatives, and the recently enacted Healthy, Hunger-Free Kids Act, are likely to change youths' eating norms and preferences.

- The Dietary Guidelines for Americans that were updated in 2010; implementation of the new federal menu labeling law; forthcoming nutrition standards for food marketing to youths from the U.S. Centers for Disease Control and Prevention, the Food and Drug Administration (FDA) and the U.S. Department of Agriculture; and FDA-recommended front-of-pack labeling guidelines, along with new digital in-store food rating tools and pre-shopping couponing, offer new tools to inform consumers and are creating a unique opportunity for change.

Key Meeting Themes

The three main goals of the meeting, called *Harnessing the Power of Supermarkets to Help Reverse Childhood Obesity*, were to:

1. **CONNECT:** Link leading grocery retailers, manufacturers, marketers, consumer product design experts, and public health researchers to jointly explore strategies with high potential to promote healthier diets for children and their families, especially those in lower-income households, or in racial and ethnic populations at greatest risk for childhood obesity.
2. **CO-CREATE:** Generate and combine ideas from all of these sectors to share and brainstorm innovative marketing strategies that help consumers make healthier choices and meet retailers' and manufacturers' business goals.
3. **CONTINUE:** Promote collaboration between food retailers and manufacturers, to maximize the understanding, impact and spread of promising marketing approaches that encourage healthy eating.

Throughout the meeting, participants worked to find “win-win-win” solutions for consumers, retailers and manufacturers, and to pursue the following guidelines for proposed strategies:

- Marketing strategies to encourage healthy eating must improve the bottom line, or at least be revenue neutral, for food retailers and manufacturers.
- Public health researchers and food retailers and manufacturers should work together to study how grocery store environments and marketing strategies affect shoppers' purchases and preferences.

Case studies and research synopses presented by meeting participants described marketing innovations designed to encourage healthy eating, especially for children and families, and improve customer satisfaction and the bottom line for food retailers and manufacturers. This summary highlights some of these innovations. For more information about the meeting, please contact Stephanie Weiss at sweiss@thefoodtrust.org.

Food industry analyst Hank Cardello, who took part in the meeting, concluded his column in *The Atlantic* on June 30, 2010 by noting: “Ultimately, the real question to engage supermarkets is: can they make more money promoting better-for-you foods? Right now those answers are undetermined. It will take a few adventurous supermarket chains to serve as ‘pilots’ to assess what can work.”¹⁸ A number of RWJF and Food Trust pilot studies inspired by this meeting were launched in 2010 to help answer this question.

Participants

With thanks to the following individuals who participated in the June 24-25 meeting in Philadelphia, Pa., and whose collective ideas are shared in this report.

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Why Grocery Stores Matter: A Public Health Perspective

Today, many of our communities are unhealthy—dominated by fast food, with few full-service grocery stores that stock affordable healthy foods, and few safe accessible places to play or even walk. As a result of these environments, children eat poorly and aren't active enough. Only 2 percent of children ages 2 to 19 meet the federal government's recommendations for a healthy diet,¹⁹ and only 25 percent get even 30 of the recommended 60 minutes of moderate physical activity five days a week.²⁰ As a result, more than 23 million children and adolescents in the United States—nearly one in three young people—are either obese or overweight, putting them at higher risk for serious, even life-threatening health problems.^{21,22}

If we don't reverse the epidemic, the current generation of young people could be the first in U.S. history to live sicker and die younger than their parents' generation.²³ A recent study in the journal *Pediatrics* estimated that U.S. children and adolescents overall experienced an “energy gap,” a surplus of calories consumed over those expended, of roughly 110 to 165 calories per day on average between 1988 to 2002. This resulted in an excess 10 pounds of body weight for adolescents, one pound per year on average.²⁴ Grocery stores have a powerful role to play in helping to close this energy gap.

Bringing full-service grocery stores to food deserts in rural and urban communities can give underserved communities equitable access to healthy affordable foods, including fresh produce, whole grains, fish and lean meats. Inspired by Pennsylvania's innovative Fresh Food Financing Initiative in 2004, 13 additional states and one city are pursuing fresh food financing programs. New York, Louisiana, Illinois and the city of New Orleans have already replicated Pennsylvania's model. With support from RWJF, The Food Trust is working to apply this model in Arizona, Georgia, Maryland, Massachusetts, New Jersey, Tennessee, Texas, Mississippi and Minnesota. In addition, The Food Trust is implementing the model in Colorado, with support from the Colorado Health Foundation. These efforts to attract full-service stores could help to rebalance the food offerings in underserved communities, many of which are dominated by fast-food outlets and poorly stocked convenience stores and bodegas.

The marketing tactics and strategies employed inside these and other grocery stores also can help tip the balance of family purchases in a healthier direction, towards more nutritious foods with fewer excess calories. This meeting was convened to explore how best to harness grocers' considerable marketing and merchandising power to begin shifting consumers' food and beverage purchases in ways that would help to close the youth energy gap.

“Grocery stores are uniquely positioned—in the sweet spot between manufacturers and consumers—to market nutritious products to increase their appeal and affordability, and perhaps de-emphasize those products that are not nutritious.”

James Marks, M.D., M.P.H.,
Senior Vice President
and Health Group Director,
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Grocery Store Strategies and Innovations for Obesity Prevention

There are many factors that influence what consumers buy, including store atmospherics, branding, in-store marketing and out-of-store shopper marketing, such as coupons and advertisements. About 60 percent of purchase decisions are made in the store or are unplanned. Supermarket layout, in-store activities, the atmosphere of the supermarket, and individual factors such as the consumer's familiarity with the store also influence consumer behavior. As outlined by Barbara Kahn, Corinna Hawkes, Mary Story, Karen Glanz, Michael Bader and Jennifer Harris, these types of tactics are representative of the "four P's" of marketing—product, placement, price and promotion.

About 60 percent of purchase decisions are made in the store or are unplanned.

Table 1: The Four P's of Marketing

PRODUCT	<ul style="list-style-type: none"> ▪ Product mix ▪ Quality and variety ▪ Nutrition composition ▪ Packaging (e.g. package design/color, illustrations, targeting specific groups, front-of-pack labeling, menu labeling, portion size)
PLACEMENT	<ul style="list-style-type: none"> ▪ Location of products ▪ General store lay out ▪ Check-out aisles ▪ End-of-aisle (end-cap) displays ▪ Quantity of facings/shelf space and store layout ▪ Eye-level (children's, women's, men's)
PRICE	<ul style="list-style-type: none"> ▪ Coupons ▪ Specials ▪ Differential prices ▪ Private label/store brands
PROMOTION	<ul style="list-style-type: none"> ▪ In-store and out-of-store shopper marketing ▪ Single and cross-brand promotions ▪ Item and shelf tagging ▪ Storewide nutrition guidance systems and educational programs ▪ Use of loyalty card feedback to guide healthier purchases ▪ In-store product sampling

Annually, supermarkets are a \$560 billion industry in the United States. The competitive nature of this industry requires that it constantly adapt to trends and changing consumer preferences, and gives it a unique leadership role in addressing the childhood obesity epidemic.

- The Food Marketing Institute's 2009 report, *U.S. Grocery Shopper Trends*, highlights several developments that underscore the food retailing industry's leadership role in promoting healthier purchases. In response to the recession, more people are cooking and eating at home and price has become an even more important driver of the grocery choices people are making. Sixty-nine percent of adult shoppers, particularly in lower-income communities, reported spending more time browsing grocery flyers and clipping coupons before they shop, and comparing unit prices, locating sales specials and selecting private brand products once in the store.²⁵

The recession has not curbed shoppers' interest in healthy products and efforts to eat better. Eighty-nine percent of Americans reported being somewhat or very concerned about the nutritional content of the foods they purchase. In addition, 46 percent to 58 percent of shoppers polled reported regularly scanning their purchases for the following ingredients: trans fat, saturated fat, total fat, calories, salt/sodium, sugar and whole grains. Similarly, locally grown food, food safety and sustainability were at the top of many consumers' minds.²⁶

- From 2008 to 2009, shoppers in households with children increased their purchases of fresh produce.²⁷

At the meeting, Sharon Glass, group vice president for Catalina Marketing Services, presented advance findings from the July 2010 Catalina Marketing Corporation report *Helping Shoppers Overcome Barriers to Choosing Healthful Foods*.²⁸ This report, based on a 2009–10 national survey of adult U.S. shoppers, found that:

- Seventy-two percent of grocery shoppers acknowledged that their local supermarket stocked a wide variety of healthful foods.
- Sixty-six percent said they were looking for ways to improve their health and wellness by making healthy choices when shopping for groceries, but only half agreed that the supermarket where they shop most often helps them do so.
- Shoppers' top-rated health concern, endorsed by 74 percent of respondents, was "managing or losing weight."
- Only 25 percent rated the staff in their local grocery store to be knowledgeable about nutrition.
- Only 35 percent of shoppers with children reported that the supermarket where they shopped most often helped them make healthy choices for their children.



Glass presented additional findings indicating that customers want programs that help them shop for healthy products, reward them for purchasing healthy options, and provide ideas for easy-to-prepare healthy meals. Customers said they preferred that information be conveyed in simple, easy-to-understand formats delivered to them directly or clearly displayed in the store. Their top preferences were for:

- coupons for healthy foods;
- shelf-labels that identify healthy products;
- in-store product sampling or tasting;
- healthy meal ideas and recipes; and
- reward programs for purchasing healthy products.

“If we give them simple nudges and simple solutions, we can get them there a step at a time,” said Glass.

Drawing from the 2009 Grocery Manufacturers Association report, *Shopper Marketing 3.0: Unleashing the Next Wave of Value*, Brian Lynch, director of Sales and Sales Promotion for Grocery Manufacturers Association, described the growing use of so-called “shopper marketing.”²⁹ He described individually-targeted shopper marketing—understanding how one’s target consumers behave as shoppers in different channels and formats—as one of the fastest growing areas in the food retail marketing budget, accounting for about 21 percent of the budget for manufacturers and 26 percent for retailers. Programs and promotions targeting shoppers in the store are second only to interactive and Web marketing and are frequently used instead of traditional marketing channels, such as television, print and radio. Shopper marketing tactics can be applied to the promotion of healthy products.

Lynch outlined three major strategies used by manufacturers and retailers to influence consumers along the path to purchase:

- **AT HOME:** Paid media (e.g., television, magazines and online), relationship marketing (e.g., emails and text messaging), search before you buy (e.g., coupons, manufacturers’ websites and online reviews) and product placement.
- **ON-THE-GO:** 3G mobile networks (apps), out-of-home (e.g., billboards) and interactive vending machines (offering discounts and promotions).
- **IN-STORE:** Shelf signage, in-store coupons, video displays, interactive media (e.g., shopping carts, scanning devices and kiosks), sampling programs and other prominent displays (e.g., end of aisle).

He stressed that effective shopper marketing can influence shoppers to think beyond price, with the strongest in-store influences being product benefits on the package (34%) and signage on the shelf (29%).

Building on Lynch’s presentation, Herb Sorensen, Scientific Advisor for TNS Retail & Shopper Practice and author of the book *Inside the Mind of the Shopper: The Science of Retailing* shared data showing that half of all trips to the supermarket result in the purchase of five or fewer products, and that shoppers are not very good at finding those five items.³⁰ Instead, they filter out the 39,995 items they don’t want, said Sorensen. The biggest problem in selling anything is breaking through the clutter.

Sorensen made a simple recommendation for solving this problem—select a few nutritious foods from the 1,000 top selling items and focus on selling more of them. The 1,000 top-selling items contribute 33 percent of total store sales. The purpose of the other 39,900 items is to attract shoppers to the store.

The first step, Sorensen said, is to figure out what to sell the shopper, and to limit the offer to one or a few items that will sell in large quantities. “Offer” does not mean a blizzard of tags on the shelf. It must be visually distinct, using shape, color and images. The next step is to create a brand for the top nutritional items, with a logo printed on the designated nutritional items. It could be modeled on the Jif brand, with its sticker: “#1 choice of choosy moms.” “If you do this on a national basis, all manufacturers should have something on this list,” said Sorensen. “If you want a ‘win-win’, that’s the way you get it.”

Marsh supermarkets created “Project 18 Approved” shelf tags to identify nutritious products for Indiana’s youths. The project is named for celebrity sponsor Peyton Manning, number 18 on the Indianapolis Colts. The supermarkets are selling up to 25 percent more of these items. Project 18 also includes a healthy eating curriculum followed by supermarket tours focusing on healthy foods. Sorensen suggested implementing a similar program nationally and creating a weekly “Healthy Foods Index,” similar to the Dow Jones Index, based on sales of the items on the list. He expects the media to be interested in the Healthy Foods Index, and that they may report it every week. As times goes by, some items would be dropped and some would be added. Brands could compete to make the index, and supermarket chains would compete to get the highest scores by selling the most nutritious items. “They will make a lot more money selling nutritious items,” said Sorensen.



Healthy Food Retail Innovations: Case Studies

Several meeting participants presented case studies about programs designed to promote healthy eating and healthy food and beverage choices by families and children in a variety of communities. All of the programs involved using one or more of the four P's—product, placement, price and promotion—to market healthier foods to children and their families. In Philadelphia, for example, an independent grocer has taken the initiative to create several in-store programs and to track their impact on sales and profits. In Baldwin Park, Calif., a community program is mobilizing youths to encourage store owners to move healthy items from the back of the store to the front. Additionally, a national supermarket chain has created an innovative shopping guidance program that helps consumers identify the most nutritious options for their families.

The following case studies, introduced by Cathy Polley, vice president for Pharmacy/Health & Wellness of the Food Marketing Institute and Mary Sophos, senior vice president of the Grocery Manufacturers Association, illustrate innovative marketing efforts taking place in grocery stores and supermarkets across the country. Together they show that “win-win-win” solutions are possible when the interests of consumers, retailers and manufactures converge. In most of these case studies, researchers were involved to provide guidance on how to shape programs and measure their impact.





CASE STUDY: PHILADELPHIA SUPERMARKET CHAIN PROMOTES HEALTHY FOODS AND CREATES KIDS CORNER

Perspectives from Carly Spross, Marketing Director, The Fresh Grocer

The Fresh Grocer is an independent supermarket chain with nine supermarkets in the Philadelphia area, primarily in areas that were previously food deserts. Strategies to improve these communities include:

- Kids Corner! Smart Snacks for Healthy Kids;
- healthy eating and nutrition studies;
- healthy supermarket tours; and
- value-produce aisles.

Kids Corner! Smart Snacks for Healthy Kids, inspired by First Lady Michelle Obama’s initiative to reduce childhood obesity, promotes healthy eating by dedicating a section of the store to kid-friendly signs and healthy snacks, such as fruits, vegetables, granola, and a healthy box lunch (yogurt, a piece of fruit, a small 100% fruit drink or bottled water and half a sandwich or half a wrap for \$3.99). The Fresh Grocer sells about 500 healthy lunch boxes per store per week, compared with approximately five of the old unhealthy lunch boxes. “If you do it right, you can be profitable,” said Spross.

The Fresh Grocer is working with The Food Trust and the University of Pennsylvania and Temple University’s Center for Obesity Research and Education to study sales patterns and identify ways to shift shoppers’ behavior toward buying healthier foods, such as 2% milk instead of whole milk. The Fresh Grocer also is working on a healthy eating study with the Einstein Center for Urban Health Policy & Research.

Clinical dietitians and nutritionists lead free tours of the supermarket for many nonprofit organizations and community groups. Participants receive bottled water, gift cards and healthy snacks like fresh fruit smoothies and 100-calorie trail mix. After the tours, participants purchase more from the store, said Spross—“probably because they were more familiar with the store.”

The value-produce aisle, which accounts for 25 percent of total produce sales, offers popular produce items, such as apples, green beans and tomatoes, in pre-weighed, priced bags. “This is very helpful for people who may not ever have shopped for produce before,” said Spross. “Once they start buying the value produce, they shop our entire produce department.”

CASE STUDY: HANNAFORD SUPERMARKETS HELPS CUSTOMERS FIND HEALTHY FOODS

Perspectives from Julie Greene, Director of Healthy Living, Hannaford Supermarkets

Hannaford Supermarkets wanted to differentiate itself from competitors and increase customer loyalty by providing a value-added service that simplified shopping for nutritious foods. The supermarket's research showed that customers were very confused by available information and wanted to be able to identify more nutritious products.

Hannaford Supermarkets formed a scientific advisory board, which evaluated every item in the store and created Guiding Stars® to label nutritious products as good (one star), better (two stars) and best (three stars). A product's score is debited for trans fat, saturated fat, cholesterol, added sodium and added sugar. It is credited for vitamins, minerals, dietary fiber and whole grains. The labels are placed on shelf tags where they are easy to see.

Guiding Stars® is now being licensed for use in supermarkets, on food packages, at www.hannaford.com, on YouTube, in an iPhone app, in college dining halls, in school cafeterias, and as part of other innovative health and wellness programs.



Hannaford Supermarkets worked with the nutrition faculty at the University of North Carolina to develop the licensing program and then partnered with other organizations to spread the word.

Key partners included:

- FoodPlay Interactive Children's Theater, which performs in schools and integrated Guiding Stars® into its script;
- The Field Trip Factory, which helps educate shoppers through Healthy Store Tours;
- Catalina Marketing Services, which helped integrate Guiding Stars® throughout the store (for example, with healthy messages on prescription print-outs); and
- The Health Behavior Rewards program at General Dynamics, which integrated Guiding Stars® into its Health Passport.

The consumer awareness rating for Guiding Stars® was 81 percent: "exceptionally high," said Greene. Of consumers who were aware of the program, 49 percent used Guiding Stars® at least "fairly often." Twenty-three percent of consumers using Guiding Stars® increased their shopping at Hannaford Supermarkets. "People have said we make it easier for them to buy healthy foods," said Greene.

Greene also advised, "keeping it real," that is, not trying to make certain products look more nutritious than they are. "Manufacturers are really smart. Let's try to engage them in improving the health of all of our communities," she said.

CASE STUDY: INDUSTRY PARTNERSHIP CREATES IN-STORE RESOURCE FOR CONSUMERS

Perspectives from Alison Krester, Executive Director, American Council for Fitness and Nutrition & Kevin Sidell, Vice President of Innovation, MatchPoint Marketing

When the new dietary guidelines were released in 2005, there was no budget for promotion. The Grocery Manufacturers Association, where Krester worked at the time, and the Food Marketing Institute and MatchPoint Marketing created Take a Peak into MyPyramid, the largest effort ever to promote the dietary guidelines in-store and at the point of purchase.

The goal was to promote foods and beverages that, based on MyPyramid, are critical for a healthy diet. *Take a Peak* established nutritional criteria for choosing appropriate foods to promote. These foods and beverages must:

- make a meaningful contribution to reaching the total daily amount required within the five food groups based on a 2,000-calorie diet, and
- limit specific components (saturated fat, trans fat, cholesterol and sodium).

Eligible beverages are 100% fruit and vegetable juice; non-fat, low-fat, and reduced-fat milk and beverages with less than or 20 calories per labeled serving (e.g., water, unsweetened iced tea, diet soft drinks and powdered drink mixes).



MatchPoint Marketing used an integrated shopper marketing process focused on the path to purchase to develop *Take a Peak into MyPyramid*. Strategies focused on:

- fulfilling the need of the shopper to live and eat healthier;
- enabling shoppers to plan purchases around meal ideas and recommendations for the daily number of servings of different foods;
- providing offers at the right time and places to impact sales; and
- providing sample menus to encourage consumption.

The campaign included educational booklets about MyPyramid and specific healthy food groups (e.g., grains and vegetables) with coupons customized for different grocery stores and menus that used simple, small changes to improve diet quality. It was designed to create a “win-win-win” for shoppers, retailers and manufacturers.



The campaign results included:

- sales of featured products coming in at full revenue (there were no other pricing discounts);
- stronger sales growth for products that had advertising support similar or equal to the previous year; and
- one retailer achieved \$7.7 million in sales for partner brands during a single promotional window in January 2007.

The keys to the campaign’s success included:

- messaging all along the path to purchase;
- retailer commitment to deliver the program;
- high-quality, high-profile brands to lead the charge;
- customization of the program to exist within existing retailer platforms; and
- leveraging the program to create year-long opportunities for continued impressions.

The campaign also included a menu modeling process, designed to show how small, gradual changes in food choices at the grocery store facilitated by transitional menus could bring consumers closer to meeting the goals of MyPyramid.³¹ Results demonstrated that simple changes improve diet quality—average scores on the Healthy Eating Index increased from 40.6 to 93.5.



CASE STUDY: THE CALIFORNIA ENDOWMENT'S FOOD RETAIL INNOVATIONS

Perspectives from Marion Standish, Director, Community Health, The California Endowment and Sarah Samuels, President, Samuels & Associates

With funding from the California Endowment, Samuels & Associates is evaluating the Endowment's six-year, multi-million dollar Healthy Eating, Active Communities program to help six lower-income communities reshape their food and physical activity environments to improve children's health. Schools, community groups and health departments are collaborating to create an environment for youth that seamlessly supports healthy eating throughout the day—at school, after school, in the neighborhood and at home.³² California has adopted nutrition standards for products sold in schools, and many Healthy Eating, Active Communities are partnering with neighborhood stores to adopt these same standards.

Healthy Eating, Active Communities has actively engaged young people, who have been a powerful voice for change. Young people have assessed their local markets and used data to inform the community, store owners and civic leaders about necessary changes. They have created healthy food displays including creative, kid-friendly “Kid Healthy Choices” signs.

The evaluation of the program has shown the following changes in the amount of advertising for healthy foods and beverages inside and outside of neighborhood stores between 2007 and 2009:

- Inside small neighborhood stores, the proportion of advertisements for healthy products increased from 15 percent to 46 percent of all food and beverage advertisements (statistically significant).

- Conversely, outside of neighborhood stores, the proportion of advertisements for healthy food and beverages decreased from 52 percent to 29 percent of all food and beverage advertisements (not statistically significant).

In Shasta County, youth worked with Walmart to develop three healthy checkout aisles stocked with snacks that meet California’s nutrition standards for products sold in school. They also developed a logo to identify these snack items as “Kid Healthy Choices.”

Students in south Los Angeles produced a video, “Where’s My 5?” showing how difficult it was to find fruits and vegetables in their community. This enabled them to engage community partners and work with several corner stores to provide healthier choices at the checkout stand.

Samuels reported the following accomplishments and challenges:

Accomplishments included:

- high levels of community/youth mobilization;
- improved access to, and promotion of, healthy foods and beverages in retail outlets throughout California; and
- a three-fold increase in the proportion of healthy ads inside stores during the study period.

Challenges included:

- store owners often perceiving healthy items as unprofitable;
- food/beverage companies supplying merchants with free signage to promote unhealthy products; and
- small stores lacking refrigeration for perishable items (healthy items are likelier to be perishable than shelf-stable items).

“We can see that communities can get engaged and organized around trying to make these changes. Youth engagement is key.”

Sarah Samuels
President, Samuels &
Associates



CASE STUDY: YOUTHS IN BALDWIN PARK, CALIFORNIA, ADVOCATE FOR CHANGES IN CORNER AND CHAIN STORES

Perspectives from Rosa Soto, Regional Director, California Center for Public Health Advocacy (CCPHA) and Project Director, Healthy Kids, Healthy Communities (HKHC) project in Baldwin Park

Baldwin Park, a small suburb 14 miles northeast of Los Angeles, is a lower-income community with close to 100,000 people, many of whom are foreign-born and native Spanish-speakers. Baldwin Park is part of the California Endowment's Healthy Eating, Active Communities program and RWJF's national program, *Healthy Kids, Healthy Communities*, which is helping dozens of communities across the country reshape their environments and prevent childhood obesity through policy and environmental changes that promote healthy eating and active living.

The corner stores that children see on their way to and from school are saturated with marketing for products high in sugar, salt and sodium. Baldwin Park developed a local grassroots advocacy model that mobilized the community to gather data and community perspectives in order to advocate for increased access to healthy food and less marketing of unhealthy food.

Residents, including youths, audited all of the corner stores and chain stores. Using disposable cameras, youths captured marketing practices for foods and beverages. Residents and youths developed a strong outreach effort to inform local store owners about city ordinances that limit advertising in windows for candy, junk food, cigarettes and beer. Youths created a "Healthy Selection" logo to identify healthy snacks and beverages that complied with state nutrition standards. "Smart and Final" stores, schools and some corner stores used this logo.

Some findings from the audits showed:

- The overwhelming presence of soda, candy, chips and beer in all stores strategically placed at entry points, while fruit, vegetables, water and milk were placed in the back:
 - Eighty percent of products displayed near the register were sweetened drinks, cookies, cakes, candies, chips, etc.
 - Ninety-three percent of stores had some type of advertisement inside and outside the store.
 - The majority of stores had product advertisements on equipment (e.g., freezers and vending machines).
- A pervasive influence of unhealthy marketing including excessive use of soda and alcohol signs, banners and promotions around the inside and outside of stores, as well as a lack of healthy food promotions and signage in produce areas.

Based on these data, Baldwin Park residents developed strategies to work with store owners to increase the availability and promotion of healthy foods. In corner stores, they helped ensure the availability of healthy food, and design floor plans and signage to promote access to fruits and vegetables. They also will select two corner stores for a complete redesign, assisted by a consultant and community members. Residents helped the larger chain-stores create healthy floor plans, which included moving sodas to the back of the store and healthy foods to the front.

Co-Creating Change



Visual Recording Graphic by Martha McGinnis – June 2010

SELECTED BIG-PICTURE RECOMMENDATIONS

From June 24–25, 2010, meeting participants representing grocers, food retailers, manufacturers, consumer product designers, marketers and public health leaders, offered a variety of recommendations about the role that supermarkets, grocery stores and even corner stores can play in helping to address the childhood obesity epidemic.

Some of the big-picture recommendations included:

- Making the connection between healthy diets and healthy profits. Consumer demand for healthy products is growing and many manufacturers are shifting their product portfolios in a healthier direction, while retailers are developing innovative ways to sell these products. The time is ripe to build on and connect these efforts.
- Making the healthy and lower-calorie choice the easy choice, especially for those food and beverage products disproportionately consumed by children and adolescents.
- Developing a rating system to identify family-friendly stores that meet minimum defined standards for healthy youth-oriented marketing practices.
- Creating cross-sector partnerships to develop, evaluate and spread practical marketing innovations with high potential to make healthy foods more appealing and available, such as replacing candy and snacks from check-out aisles with healthier products, and creating brands for fresh fruit and vegetables.
- Engaging youth and community residents in developing healthy and profitable in-store and shopper marketing strategies.
- Devoting more resources to understanding how to alter the path to purchase among lower-income and multicultural shoppers, including those living in rural and urban food deserts.

SELECTED BRAINSTORMING RESULTS

Facilitated brainstorming sessions led by Chris Waugh and Caroline Flagiello of IDEO, identified many ideas for designing grocery store environments to promote the purchase and consumption of healthier food and beverage products, such as those high in nutrients and low in excess calories from solid fats and added sugar. They focused on soliciting feedback about products consumed disproportionately by children and adolescents.

Results of this brainstorming session included suggestions to:

Redesign Shopping Carts

Make shopping for healthy foods easier by designing MyPyramid shopping carts and bags that show how much of the cart or bag should be filled with foods from each category. “People are always shocked when they realize how many fruits and vegetables they are supposed to be eating,” said the representative of the group who developed this concept. “These shopping carts would provide visual cues.”

Involve Children as Researchers

Use young people to collect information about store design and how to market healthier products. Children can be instruments for change, influencing their friends, their parents, grocery stores and manufacturers.

Redesign Supermarkets to Create an Interactive Experience

Move away from aisles. Instead, create a “lunch zone” and a “dinner zone,” places where meals come together through education about meal preparation.

Provide In-Store Training, Using the “Apple” Model

The Apple stores provide knowledgeable staff who can educate customers about the products in an accessible, hands-on way. “That also helps the selling process,” said the representative of the group who developed this concept, which could be applied in grocery stores to educate people about healthy eating.

Establish Partnerships with Marketing Research Companies

Expand access to the data sets that retailers and manufacturers use to track sales to create a new surveillance system of the food stream. “We’ll know where we are, whether sales are trending in a healthier or unhealthier direction,” said RWJF’s Tracy Orleans, who presented this concept.

Put existing loyalty card and similar data systems to new uses

Use these datasets to assess the nutritional and caloric value of products sold in individual retail stores and/or specific chains, and purchased by individual families, to assess, report and give families feedback how well sales and purchases match federal diet guidelines.

SELECTED RESEARCH RECOMMENDATIONS

This meeting highlighted the need for more collaborative research between the public health and food marketing sectors. Karen Glanz and Michael Bader from the University of Pennsylvania gave an overview of research needs and gaps, and led a discussion of promising research directions. A selection of the research recommendations that emerged from the meeting are listed below:

- Develop standard measures of the four P's (product, price, place and promotion) for healthy in-store food marketing (e.g., healthy index environment measure, market basket).
- Utilize industry marketing databases, including those used for loyalty card programs, to assess marketing effects.
- Address significant research gaps, such as:
 - the effect of in-store marketing on children;
 - front-of-pack labeling methods;
 - preferences of racially and ethnically diverse groups;
 - disparities in children's exposure to in-store and store-window marketing of unhealthy foods;
 - shoppers' behavior/health in real-life settings;
 - public data describing and evaluating store-wide nutrition labeling systems like Hannaford's Guiding Stars® system;
 - menu labeling for supermarket-prepared foods; and
 - healthy marketing effects on consumer and retailer outcomes.

Develop objective measures of success in harnessing the power of supermarkets to encourage healthy eating (e.g., sales of healthy food, the Healthy Eating Index applied to foods sold or stocked or body mass index measurements).

- Use new marketing research analytics to develop key performance indicators (e.g., return on strategic objective with a nutritional component), and integrate social media and digital media messaging.
- Consider research on these product categories:
 - children's food and beverage products with a known role in promoting or preventing excess weight gain;
 - products whose nutritional content varies within the category (e.g., cereals, milk products, snack foods and beverages), and how to sell fewer unhealthy foods and more healthy foods without reducing overall sales in a particular sector; and
 - healthy alternatives to high-fat and/or high-sugar products disproportionately consumed by children and adolescents (e.g., whole milk, grain desserts, dairy desserts, fruit drinks, soda, pizza).
- Explore the use of "virtual" stores to study shopper behavior and marketing effects.
- Conduct small-scale experiments/studies in real-world retail settings (vs. analogue settings) to assess varied marketing effects and fill key knowledge gaps.

CONNECT, CO-CREATE, CONTINUE

In keeping with the themes of this meeting, participants are continuing to connect and co-create innovative grocery marketing strategies that can help reverse the childhood obesity epidemic while simultaneously meeting the business goals of retailers and manufacturers.

The ideas and relationships formed at the meeting have resulted in several developments that may enable food manufacturers and retailers take action to prevent childhood obesity. Below are some examples:

- RWJF solicited and funded several pilot studies led by The Food Trust, the University of Pennsylvania, and Temple University's Center for Obesity Research and Education. These efforts are addressing many of the research recommendations above.
- The Food Marketing Institute invited several representatives from RWJF, The Food Trust and the California Endowment to participate its April 2011 Health and Wellness annual meeting. They will present a panel called "In-store Marketing Innovations to Reverse Childhood Obesity."
- The California Endowment has added healthy in-store marketing practices to other key qualifications for loans for California's new Healthy Food Financing Initiative (modeled after Pennsylvania's Fresh Food Financing Initiative).
- RWJF's *Healthy Eating Research* program, directed by Mary Story, is soliciting proposals for studies evaluating the effects of improved access and marketing (price, product, placement and promotion) of healthy foods and beverages in retail food stores, especially in food deserts. This program regularly solicits competitive proposals for small- and larger-scale studies and rapid response pilot projects to identify and evaluate changes to food environments, policies and marketing practices in multiple community settings, including grocery stores, supermarkets, corner stores and bodegas. Please check www.healthyeatingresearch.org for more information.

RWJF and The Food Trust teamed up to develop this report and a companion video about the real-world impact that in-store marketing innovations are making in Philadelphia's food deserts. To view, download or share a copy of the report and video, visit the RWJF or The Food Trust website.

www.rwjf.org
www.thefoodtrust.org

Endnotes

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