



Collaboration for Healthier Lives

*Repository for building
impactful initiatives*

2023

Executive Summary



Background and Purpose:

Non-communicable diseases, such as malnutrition, high blood pressure, or obesity, affect millions of people around the world and are **partly attributed to unsustainable consumption habits**. In the age of information and with an increasingly health-aware population, businesses have the incredible opportunity to directly impact global health habits by a) encouraging consumers to make **better consumption choices** and b) offering them **better, healthier options**.

Since its inception three years ago, the **Collaboration for Healthier Lives (CHL) Coalition of Action**, a CEO-led initiative of The Consumer Goods Forum (CGF), has launched over 70 local programs across a dozen countries, which included more than **800 individual initiatives**, with the objective of **gathering manufacturers, retailers, public health authorities, academia, and NGO partners to nudge consumers towards healthier habits**.

CHL partnered with CGF member, Bain & Co., to **identify key learnings from its global initiatives** and provide a **prescriptive view on how businesses can establish and execute impactful initiatives**.

Results and Analysis:

Through a qualitative review of CHL's iconic initiatives and summarisation of academic research, including that on tactics for influencing consumer behaviour, our analyses suggested that:

- **Regulation is the most influential mechanism to deeply modify consumption habits**, as it forces all stakeholders to implement change at the same rhythm and scale;
- Several CHL initiatives have relied on **choice architecture tactics** and **consumer education**, which may **not** be the most effective ways to reach consumers.
- **The most interventionist tactics (e.g., rewards, self-identification) are often the most effective** when it comes to nudging consumers towards healthier habits and ensuring they are long-lasting;
- **Mixing tactics** and skewing towards higher-order tactics (e.g., **price incentives**, personalization), have proven to be **particularly effective**.

Conclusions and Results:

It is recommended that CHL Co-Chairs and members systematically use diverse behaviour-changing tactics, which include **rewards and self-identification**, in their pilots.

Whilst laying out the right tactics is essential to ensure the success of an initiative, **design and process are also critical**. As such, we recommend that **initiatives should be:**

- Designed in a **collaborative way between all stakeholders**, but **retailer-led** as retailers are the gateway to consumers;
- **Sponsored by top management** and **resourced with the right roles** (e.g., commercial teams, PMO) to ensure seamless execution and delivery;
- Managed with **sufficient time** and **relying on cost-sharing** between manufacturers and retailers, for **maximum collaboration**;
- Continuously measured and improved through a **test-and-learn approach**;
- **Launched digitally** to start and scale quickly, and progressively **expanded to omnichannel** for maximum reach.

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Project Context and Purpose of this Report

The Coalition for Healthier Lives (CHL) and Bain & Co. developed a repository containing behavioural insights and transversal learnings from local CHL initiatives and pilots.



Sourced by academic literature, member self-assessments and interviews, the aim is to provide insight and guidance on how to effectively construct and scale impactful initiatives that enhance consumer health and wellbeing.

This repository covers the following items:

01

A Global Case for Living Healthier Lives

A view on the global health issues affecting the world's population

02

The Role of CHL at The Consumer Goods Forum

Details on the role and purpose of the coalition in enhancing consumer health

03

Key Learnings on Enhancing Consumer Health

What it takes to truly improve consumer health and how to implement change

04

Overview of Global Initiatives

An analysis of various pilots and initiatives launched by members of local CHL coalitions

05

CHL Case Studies

Understanding the process, value and results of CHL initiatives

06

Join CHL

Overview of membership benefits and how to be a part of the coalition

Empowering Consumers Towards Healthier Lives

Introduction to the Collaboration for Healthier Lives

Key Learnings for Enhancing Consumers' Health

Inventory and Assessment of Impact of CHL Initiatives

Detailed Case Studies of Recent Initiatives

Join CHL

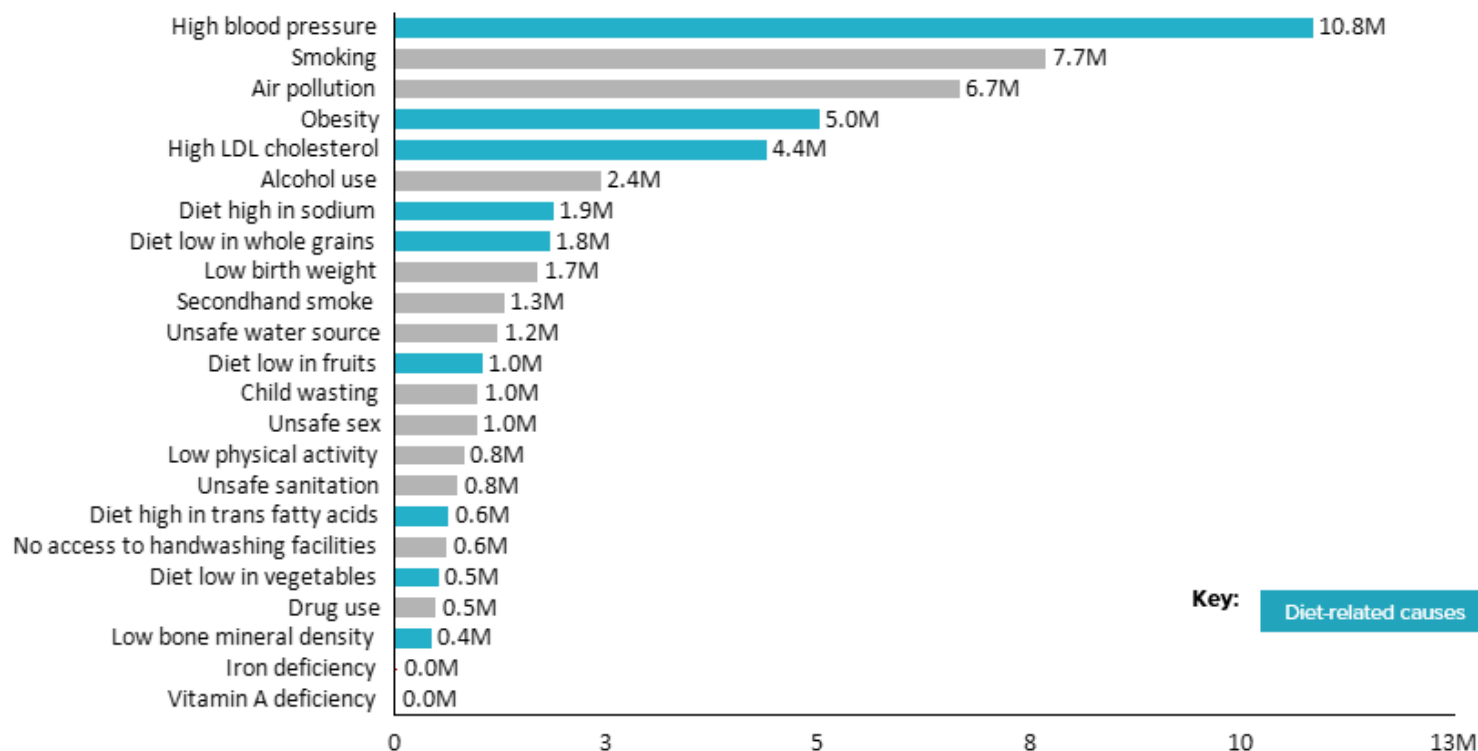
EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

Non-communicable diseases are responsible for millions of deaths each year and are recognized as a major public health challenge.



Non-communicable diseases (NCDs) continue to be amongst the major causes of death around the world

Total annual number of deaths globally by risk factor, measured across all age groups and both sexes (World, 2019)



Governments fail to meet NCD mortality reduction targets

- NCDs are recognized by the Agenda for Sustainable Development adopted by the United Nations (UN) in 2015 as a **major public health challenge**
- 176 UN members-states committed to the Sustainable Development Goals (SDGs) including the **reduction by one third of premature mortality from NCDs**
- However, **the probability of dying from one of the four major NCDs:** cardiovascular disease, cancer, diabetes or chronic respiratory disease between 30-70 years of age **decreased a mere 1%**, from 19% in 2010 to 18% in 2016

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

These diseases primarily result from exposure to four modifiable lifestyle behaviors: smoking, unhealthy diets, alcohol use and physical inactivity.



Tobacco

- **Tobacco users** represented **22.3%** of the global population in 2020
 - **36.7%** of men
 - **7.8%** of women



Unhealthy diets

- Worldwide **obesity has nearly tripled** since 1975, as **globalization** and **urbanization** have made processed foods rich in refined starches, sugar, salt, and unhealthy fats, affordable and easily accessible




Alcohol


- In 2018, global **alcohol consumption** amounted to **6.2 liters of pure alcohol** per person aged 15 and older, influenced by various **societal factors** such as economic development, culture, and social norms





Physical inactivity

- **Urbanization** and the shift from agricultural to service-based economies have led to more **sedentary lifestyles** and a **lack of physical activity**

- 
- Tobacco accounts for over **8M deaths** every year (including from the effects of exposure to second-hand smoke)

- 
- Overweight and obesity and their associated diet-related NCDs are contributing to **4M deaths** globally

- 
- More than half of the **3M annual deaths** attributable to alcohol use are from NCDs, including cancer

- 
- **830,000 deaths** annually can be attributed to insufficient physical activity

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

Although widely recognized by health organizations, lifestyle behaviors responsible for NCDs¹ have little public awareness.



	WHO	United Nations	IHME ²	NCD Alliance	National Library of Medicine (USA)
	“Modifiable behaviors, such as tobacco use, physical inactivity, unhealthy diet and the harmful use of alcohol , all increase the risk of NCDs.”	“Lifestyle diseases share risk factors similar to prolonged exposure to three modifiable lifestyle behaviors - smoking, unhealthy diet, and physical inactivity. ”	“In addition to traditional NCD risk factors, like tobacco smoking , high blood pressure, and unhealthful diet , nontraditional risk factors like air pollution and unhealthful alcohol consumption also play a role.”	“The global NCD epidemic can be significantly reduced if we take action now to address its drivers such as tobacco use, harmful use of alcohol, poor diet and physical inactivity. ”	“Research linking clinical and lifestyle risk factors to increased risk of NCDs is now well established with examples of confirmed risk factors, including smoking, physical inactivity, obesity and hypertension. ”
	✓	✓	✓	✓	✓
	✓	✓	✓	✓	✓
	✓		✓	✓	
	✓	✓		✓	✓

“Despite the well-known benefits of a healthy lifestyle, only a small proportion of adults follow such a routine; in fact, the numbers are declining. Unfortunately, there is very little public awareness of the association between health and lifestyle.” - [United Nations](#)

Note: (1) NCDs: Non-communicable diseases; (2) IHME: Institute for Health Metrics and Evaluation | Source: WHO, United Nations, IHME, NCD Alliance, National Library of Medicine

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

To support people switching towards healthier consumption, manufacturers and retailers need to provide healthier options and choices that encourage better consumer behavior.



- Optimize the **quality of products** through **reformulation** and **innovation** (e.g., use of natural ingredients instead of synthetic)
- Drive **system-wide transformation** by helping retailers and manufacturers **measure and manage** their impacts
- Develop **science-based solutions** to optimize plant production of healthy products
- Increase demand for **sustainable and healthy products**



Better options



- **Understand consumers drivers** to identify actions to shift behaviors towards healthier options



Better choices

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

Consuming habits are the results of choices that are driven by individual, social and material factors.



Individual drivers

- Prioritization of **taste/enjoyment, cost, variety, convenience and health**
- Being influenced by:
 - **Conscious motivators:** awareness, values and attitudes, preferences and tastes
 - **Non-conscious motivators:** habit, emotions, heuristics, cognitive biases



Social drivers

- Innate tendencies for **cooperation and conformity** under the influence of **peer groups** and **social norms**
- One's perception of normality, socially constructed through the lenses of **stereotypes** and **associations**



Material drivers

- Sensitivity to **contextual factors** which include:
 - Pricing, taxes and subsidies
 - Hassle and convenience
 - Government policy
 - Choice architecture
 - Time
 - Mass media

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

As a result, different categories of consumers will each have their own purchasing behaviors.



SORTED BY INCOME

LOW LEVELS OF INCOME



- **5 to 17-year-old children living at home;** ~34% live in poverty* vs. 22% of overall population



- Unhealthy diets **high in sugar** and **low in fruit/veg**; high in protein



- **Very low-income people** in single person households; either **young adults (18-24)** or **75+**



- Diets **high in sugar** but **low in fruit/veg** and **very low in protein**



- **Lower income**, education, and % in work than average; all ages



- Diets **low in healthy food** (fruit/veg, fish) but also **low sugar and alcohol**; high red meat intake

MEDIUM-HIGH LEVELS OF INCOME



- Older **empty-nesters**, many retired; **high education levels** and med-high income



- Varied diets **high in fruit/veg and fish**, but also **high alcohol**; meeting the most Eatwell recommendations

HIGH LEVELS OF INCOME



- Young adults (18-24) who **often still live at home** and are full-time students.



- Low-variety diets **high in unhealthy sugar and salt**; low fruit, vegetable and protein intake



- **25 to 44-year-old working people** with kids at home and high levels of income and education



- Healthy, varied diets with **high fruit/veg and fish and low sugar**, but high in calories and fat

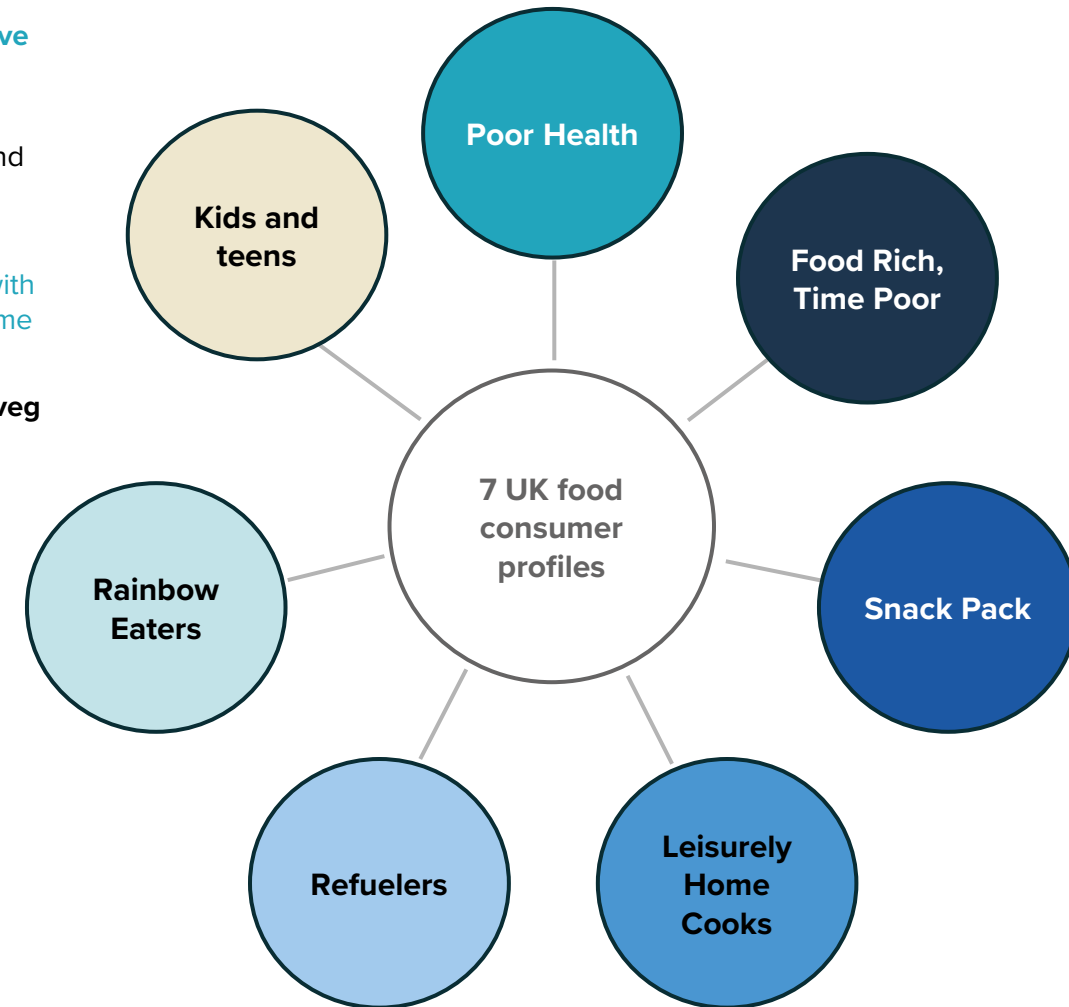


- Married, middle-aged (40-64) with **high levels of education and income**, and high % in work



- Diets **high in meat, salt and alcohol** and low in fruit/veg and fish; some dieting

ILLUSTRATIVE – UK DIET EXAMPLES



EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

However, a variety of tactics can be used to influence consumers and guide them to change their behavior.



Families of tactics

1	Empowerment	Provide consumers with the knowledge and skills needed to make healthier choices (Ex: Offer the opportunity to track their consumption to reach specific goals).
2	Rewards	Incentivize consumers to make healthier choices by leveraging the brain's cognitive bias towards choices that activate the reward circuitry (Ex: Encouragement of healthy consumption or discouragement of non-compliance).
3	Choice architecture	Redesign the environment in which consumers make choices in order to nudge them towards healthier options (Ex: Reduce the availability of unhealthy options).
4	Facilitation	Simplify the decision-making process by providing clear and concise information about products (example: highlight health benefits or eliminate sources of distractions by other products).
5	Self-identification	Make personalized recommendations for healthier products based on a consumer's individual preferences or past behaviors (example: provide products that are appealing and relevant to the consumer).

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

Empowering consumers to change their own habits through education or goal setting can be a powerful tool.



1 Empowerment

Goal setting

Encourage people to choose a specific result to achieve.

Self-monitoring or tracking

Urge people to measure their behavior over time.

Behavioral activation

Pair behavior performance with either monitoring tools or goal-setting.

Feedback

Provide qualitative or quantitative information about a behavior's performance.

Increase of self-efficacy

Affirm people's belief that they can succeed.

Education or information

Provide consumers with more resources or training.

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

In order to encourage better behaviour, rewarding customers with incentives is a tactic deployed to help consumers achieve a goal.



1 Empowerment

2 Rewards

Habit formation

Train a person to associate a behavior with a given cue, often by introducing rewards or punishment.

Financial incentives

Give monetary rewards for performing a certain behavior.

Gamification

Leverage mechanics associated with games.

Clawback incentives

Takeaway a reward (e.g., due to non-compliance) rather than accruing it for successful performance.

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

Change the choice architecture by removing certain options or changing the purchasing environment.



1 Empowerment

Active choice

Remove default options and increase the prominence of other available options.

2 Rewards

Smart defaults

Define a smart, pre-selected option to eliminate consumer non-choice.

3 Choice architecture

Increase salience

Make a choice more obvious among the others.

Environmental restructuring

Modify the physical environment influence other's behavior.

Behavior substitution

Eliminate a problematic behavior by replacing it with a healthier one.

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

By facilitating healthier behavior options, it is possible for organizations and companies to support change.



1 Empowerment

Check-list

Provide a list of tasks to help others remember to complete those tasks.

2 Rewards

Reminders, cues or prompts

Call attention to a behavior with a timely message.

3 Choice architecture

Rules of thumb

Simplify a message to a practical, approximate way of doing or measuring something in order to reduce cognitive load of behavior modification.

4 Facilitation

Reduction of cognitive load

Make it easier to do something.

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

More advanced tactics such as personalization and identity priming can help customers better understand how they consume.



1 Empowerment

Personalization

Offer a unique experience that is dependent on specific data from the individual.

2 Rewards

Identity priming

Attempt to influence an individual's behavior by highlighting their membership in a particular group.

3 Choice architecture

4 Facilitation

5 Self-identification

EMPOWERING CONSUMERS TOWARDS HEALTHIER LIVES

The five categories of tactics can be utilized in the three sectors below and through CHL initiatives, manufacturers and retailers have a central role to play in influencing healthier behavior change.



Public institutions


- Policy-makers
- Regulators
- Public procurement



Industry

- Producers

- Manufacturers
- Retailers

Focus of this document 

CHL initiatives put the responsibility of healthier consumption on manufacturers and retailers



Civil society

- Campaigners
- Educators
- Consumers

CHAPTER

Empowering Consumers Towards Healthier Lives

Introduction to the Collaboration for Healthier Lives (CHL) Coalition of Action

Key Learnings for Enhancing Consumers' Health

Inventory and Assessment of Impact of CHL Initiatives [June 2021 – June 2023]

Detailed Case Studies of Recent Initiatives

Join CHL

INTRODUCTION TO CHL

Where does the Collaboration for Healthier Lives (CHL) fit in at the CGF¹?



CGF Global Statistics:



400
Members



€4.6 Trillion
In combined sales



70
Countries



1,500
Executives involved

Note: (1) The Consumer Goods Forum | Source: CGF

INTRODUCTION TO THE CHL

CHL is built to empower people to lead healthier and more sustainable lives while creating shared value for business and communities.



WE ARE A CEO-LED COALITION

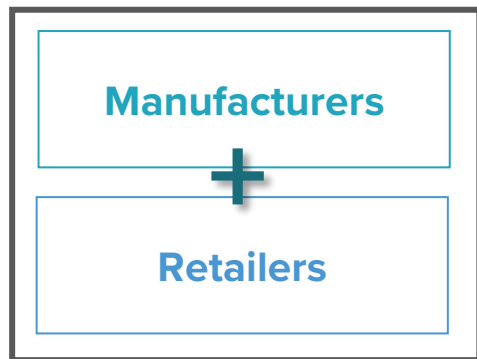
Across manufacturers and retailers collaborating for healthier and more sustainable communities

THAT IS UNIQUELY CONSUMER-FOCUSED

To positively influence consumer behavior through localized interventions

WHILE ALSO LEVERAGING COMMON PURPOSE

To share learnings and collaborate across geographies and organizations to catalyze global change



In collaboration with external stakeholders

FOR



BETTER OPTIONS

*Improving the **accessibility** of healthier and more sustainable products for **consumers***



BETTER CHOICES

*Influencing **consumer behavior** to encourage and enable healthier, more sustainable **habits***

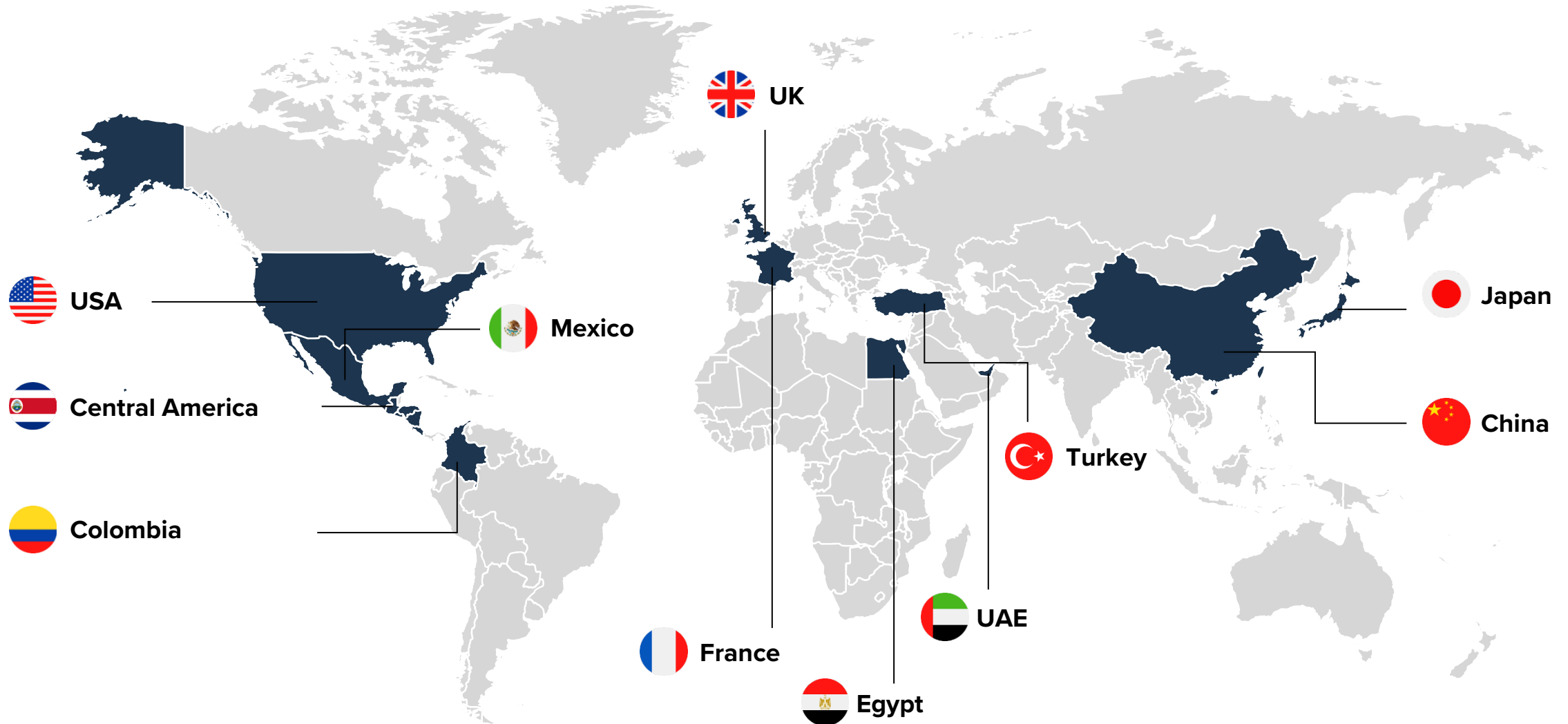


BETTER COMMUNITIES

*Empowering our **employees' health and wellbeing***

INTRODUCTION TO CHL

To date, CHL works to have collective impact in 11 markets.



Note: Central America includes Costa Rica, El Salvador, Honduras, Guatemala, Mexico and Nicaragua
Source: CHL: <https://www.theconsumergoodsforum.com/health-wellness/healthier-lives/key-projects/chl-local-initiatives/>

INTRODUCTION TO CHL

CHL has built partnerships with 40+ manufacturers and retailers.



Empowering Consumers Towards Healthier Lives

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KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

Key findings to launch more successful initiatives in the future



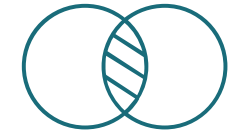
Launch pilots **led by committed retailers** that engage **supportive manufacturers**.



Combine **financial incentives** (e.g., consumer promotions) with other effective behavior-changing tactics, especially other types of **rewards and self-identification** (e.g., gamification, personalization).



Go digital to quickly start and scale, and eventually, create an **omnichannel experience for maximum reach**.



Share data, expertise and costs with all involved stakeholders.

KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

The main characteristics of an initiative that drives significant consumer behavior shifts are:



Leverage market insights

Understand the context and build your pilot based on **in-depth market knowledge**, including **market maturity**, **regulation**, as well as **consumer habits** and **preferences**.



Customize and target operations

Leverage **big data** and **consumer information** to design **targeted pilots** tailored to your **capabilities**, **resources** and **objectives**.



Combine channels and tactics

Maximize **consumer reach** by adopting an **omnichannel strategy** (or at least a **digital strategy**) where feasible.

Use a **mix of tactics**, including **rewards** (especially financial incentives) **and/or self-identification**, to educate consumers and foster **tangible, long-lasting change**.



Continuously improve and integrate processes

Test, iterate, refine and enhance initiatives based on **consumer feedback**, to implement the most impactful pilots into your **standard business processes**.



“Each market is different; regulation is a big contextual factor to look into.”



“The retailer under study would have valuable consumer insights to provide.”



“As manufacturers, our main job is to understand the consumers.”



“We used big data to create targeted communication and offers, resulting in a substantial reach.”



“Using promotions is a fundamental rule, and the combination of recipes and promotions works very well.”



“We have turned our “healthy shelves” initiative into an e-commerce pilot in order to expand our reach.”



“The objective of the first pilot phase is to achieve quick wins and identify one or two key success factors.”



“We have a test and learn approach and track quantitative and qualitative insights based on quick iterations.”

KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

Initiatives that are successful and mutually beneficial have the following components:



Retailer-driven, sponsored by top management

Launch pilots led by **committed retailers** with broad reach that engage **supportive manufacturers**, with strong **top management buy-in**.



Collaborative and mutually beneficial

Take inspiration from other **successful pilots**

Prioritize **cost-effective** pilots based on **potential impact and feasibility**, ensuring transparent **data, expertise** and **cost-sharing**.

Align objectives to support both retailer and manufacturer **business strategies**, including **economic success**.



Actively managed with sufficient resources

Nominate a **project lead** with **enough resources and time** to coordinate the pilot, who can foster **internal collaboration**.

Ensure **accountabilities** are **clearly defined** before the start.



Diligently supervised and steadily refined

Align on the **KPIs to track**, use a test-and-learn approach, and **adjust** pilots continuously.

Set a deadline and decide whether **to scale or stop** the initiative.



“The willingness must come from the retailer; manufacturers will follow to keep the business going.”



“We need more support from top management to allocate more resources.”



“All stakeholders were aligned as there were clear consumer and business benefits.”



“Sharing data was an issue; retailers were very protective.”



“Cost-sharing is what makes the difference.”



“It really takes time to coordinate the project internally with cross-functional teams.”



“If you sign up, we expect you to have people join the taskforce and set aside an available budget.”



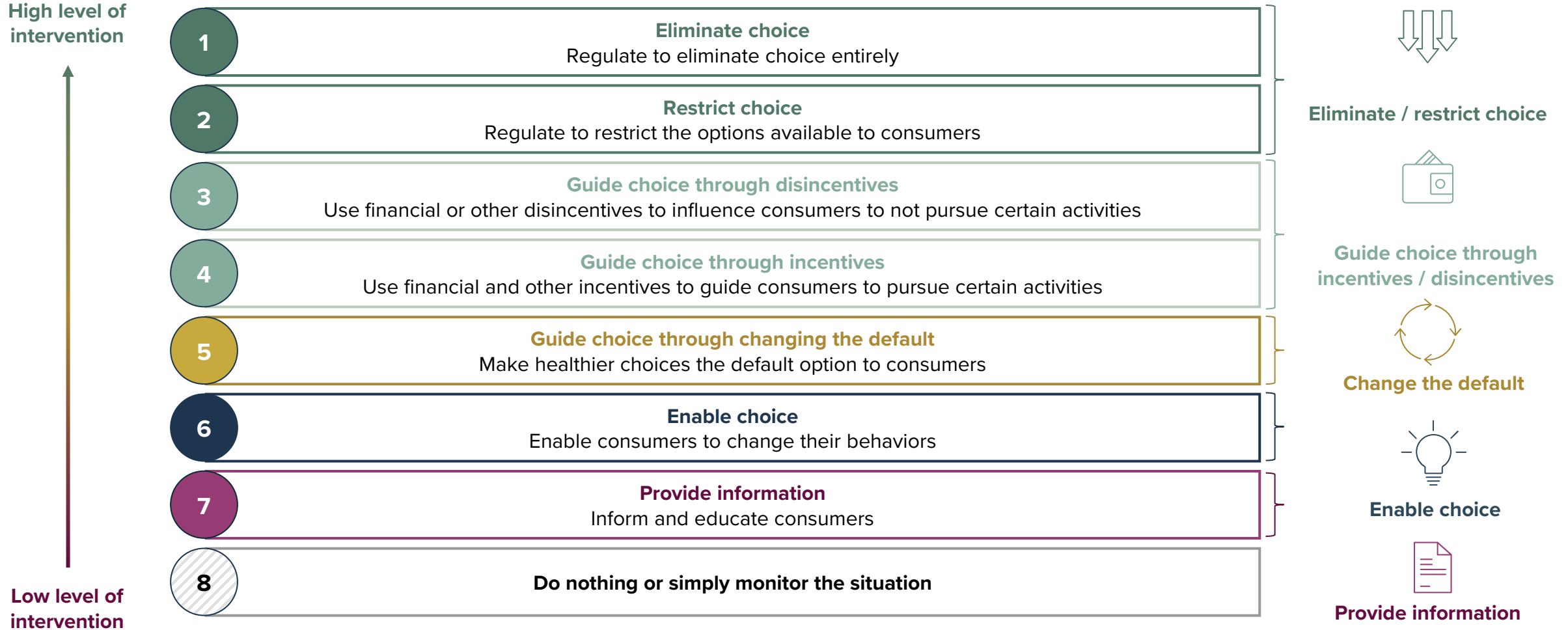
“What is not measured doesn’t exist.”



“We will keep the pilot for two months; check the numbers and see how it evolves.”

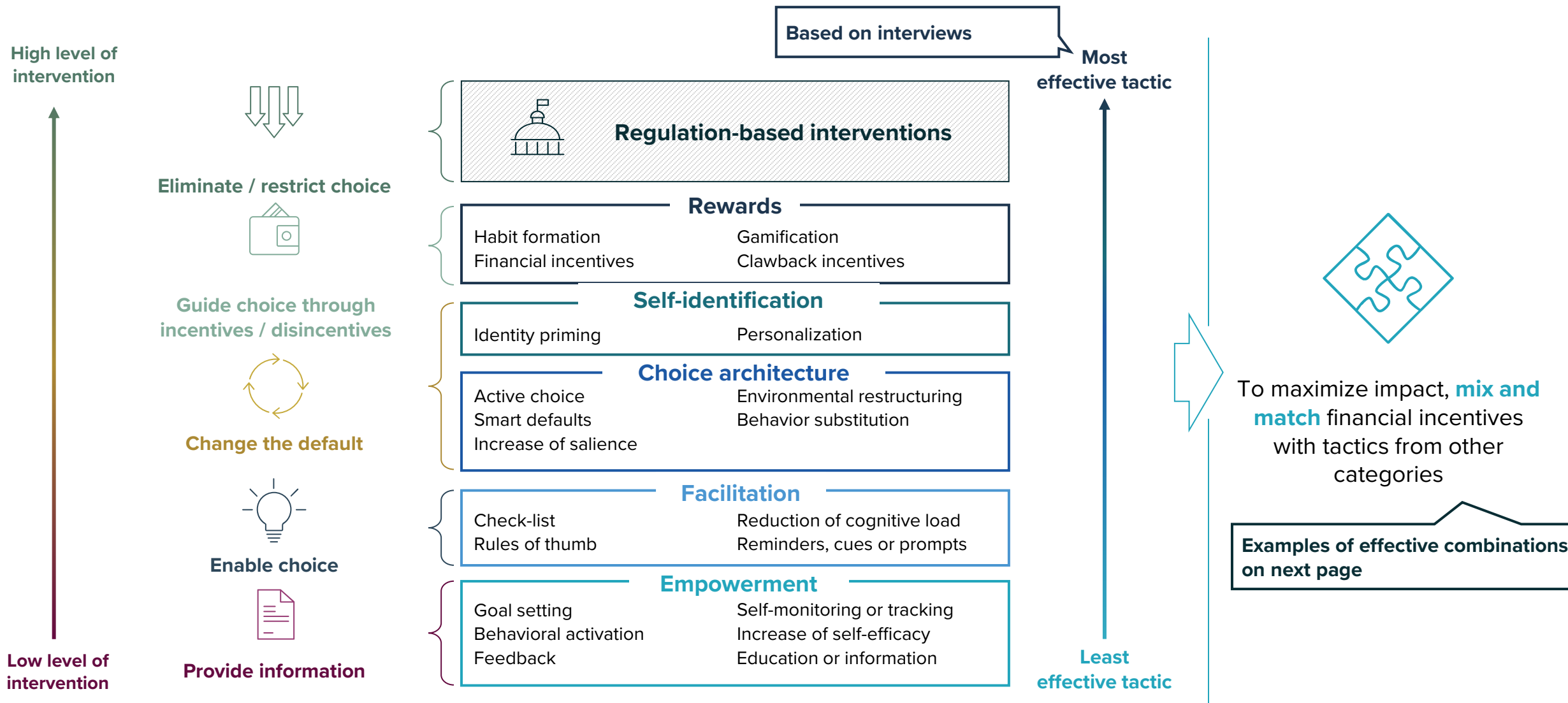
KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

Research shows several levels of interventions can be used to orientate consumer behavior, from monitoring the situation to eliminating choice.



KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

Tactics involving a higher degree of intervention are more effective and their impact is enhanced when several tactics are combined.



KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

Successful CHL pilots combine several tactics from different categories and often include financial incentives.



EXAMPLES - ILLUSTRATIVE



- Financial incentives**
Discounts on plant-based products
- Personalization**
Targeted communication and personalized offers
- Self-monitoring or tracking**
Diet-monitoring app
- Education**
Engaging educational videos

+ Other tactics
e.g., environmental restructuring, reminders, cues or prompts



- Financial incentives**
Discounts on products featured in healthy and veggie recipes
- Increase of salience**
Recognizable marketing campaign
- Reminders, cues or prompts**
Pop-ups with healthy recipes
- Education**
Healthy recipes and tutorials



- Personalization**
Personalized search results
- Active choice**
Healthy products as top results
- Increase of salience**
Highlight of healthy products
- Reduce cognitive load**
Healthy products on top without the consumer noticing



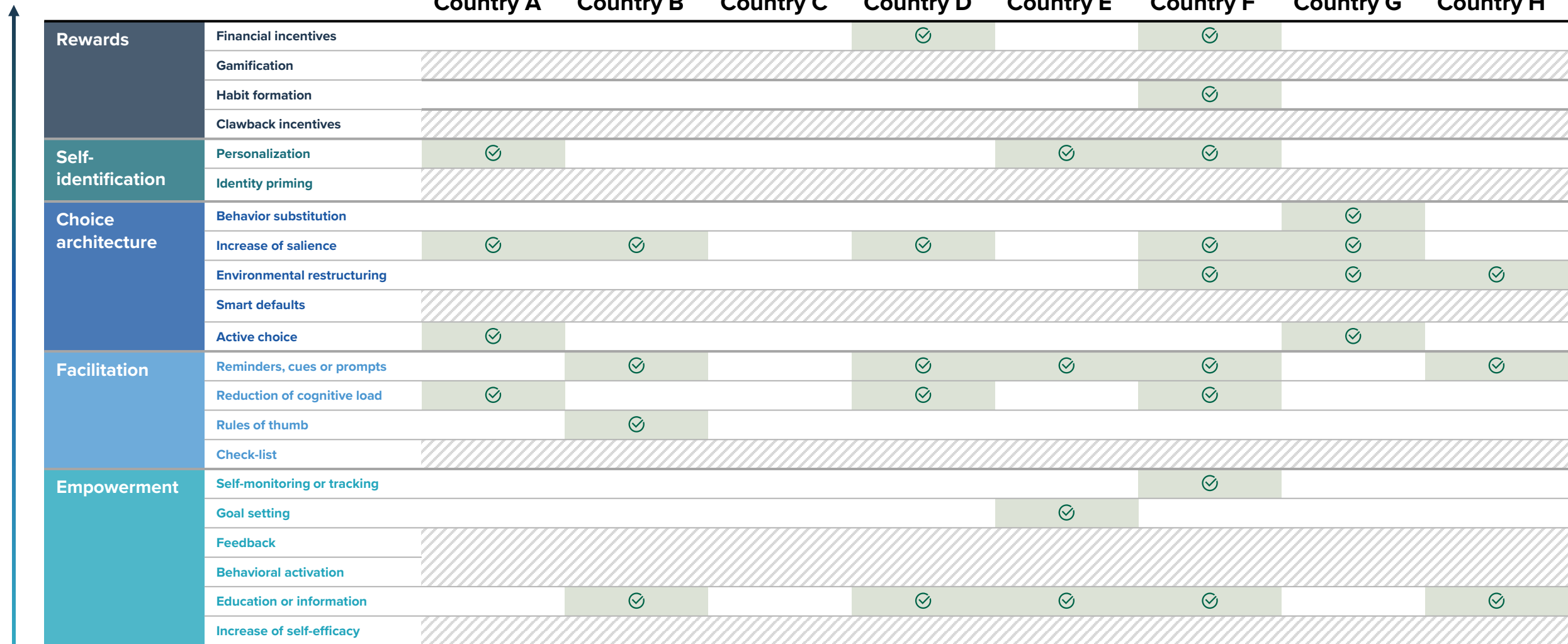
Source: [Collaboration for Healthier Lives](#), Bain analysis

KEY LEARNINGS FOR ENHANCING CONSUMER HEALTH

Past initiatives have not leveraged all possible tactics; the more successful ones have used a high number of tactics, including rewards.



Most effective tactic



Least effective tactic

CHAPTER

Empowering Consumers Towards Healthier Lives

Introduction to the Collaboration for Healthier Lives Coalition of Action (CHL)

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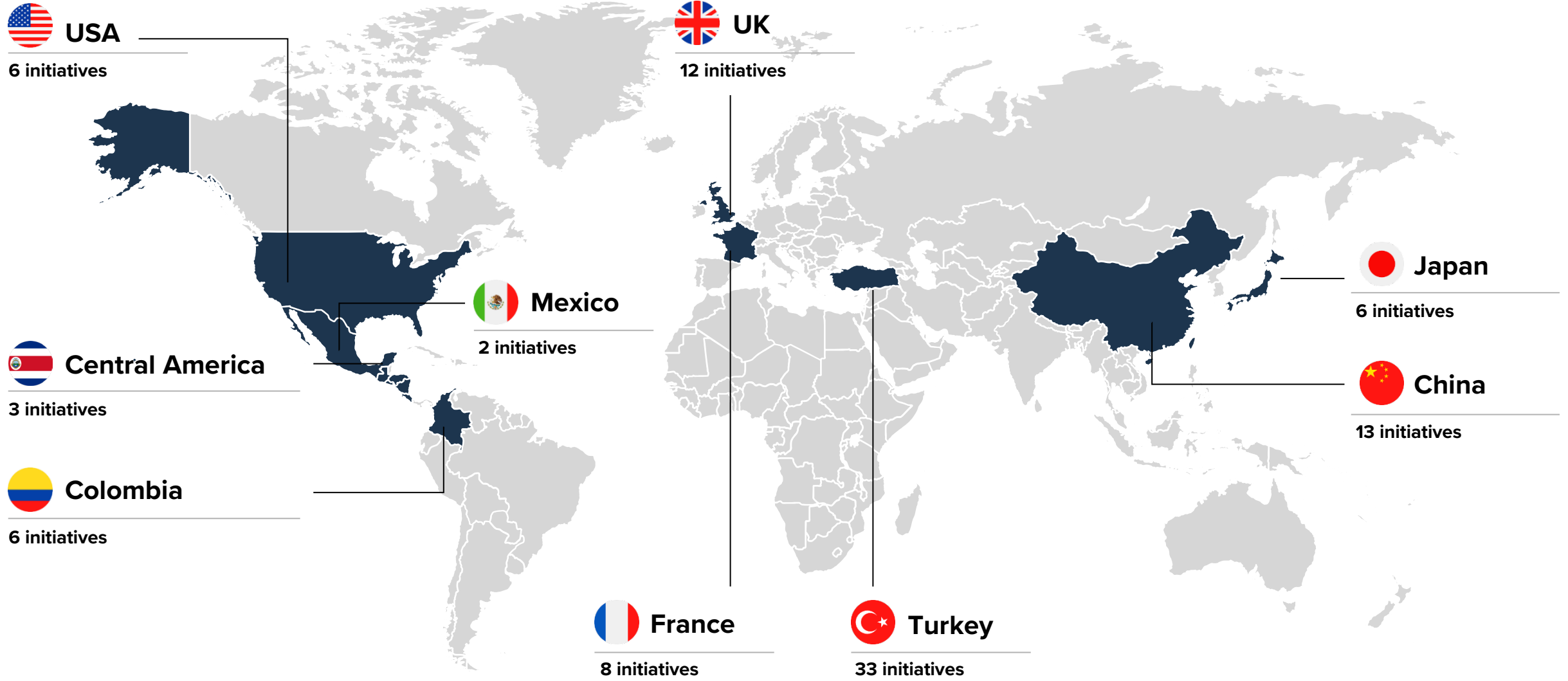
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INVENTORY & ASSESSMENT OF IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

A total of 80 Collaboration for Healthier Lives initiatives have been surveyed, representing more than 800 interventions across the world.



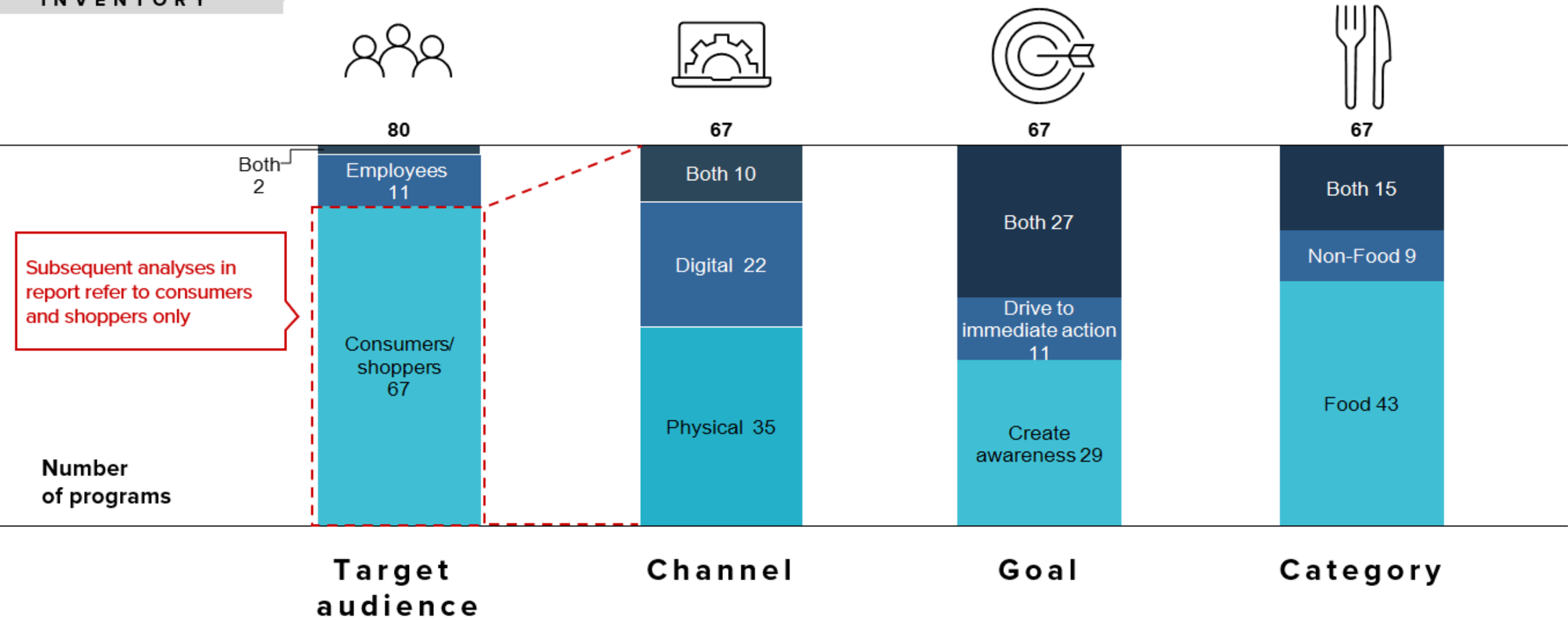
Note: Central America includes Costa Rica, El Salvador, Honduras, Guatemala, and Nicaragua | Source: Collaboration for Healthier Lives

INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

These initiatives were primarily targeted at consumers and shoppers and deployed in-store.



INVENTORY



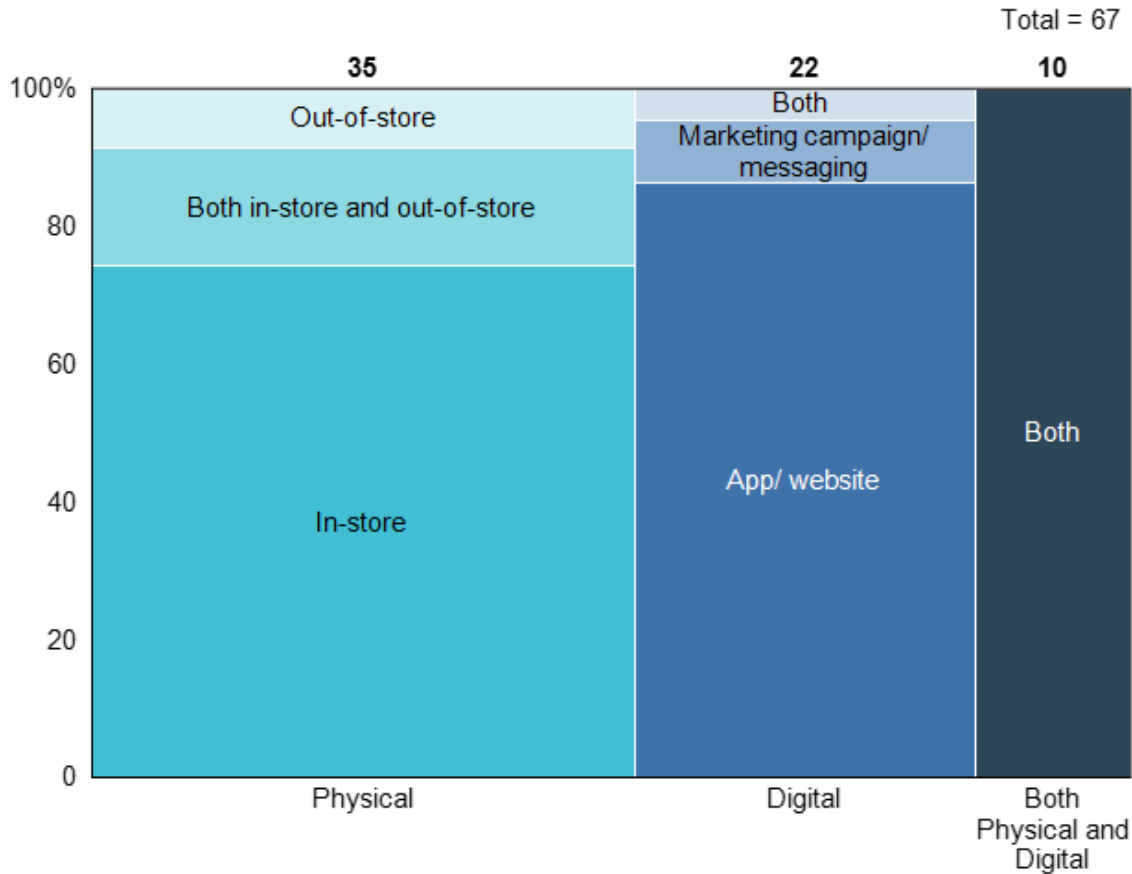
INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

A variety of formats (in-store only to fully digital activation) were used in initiatives and their objectives ranged from creating awareness to driving immediate action.

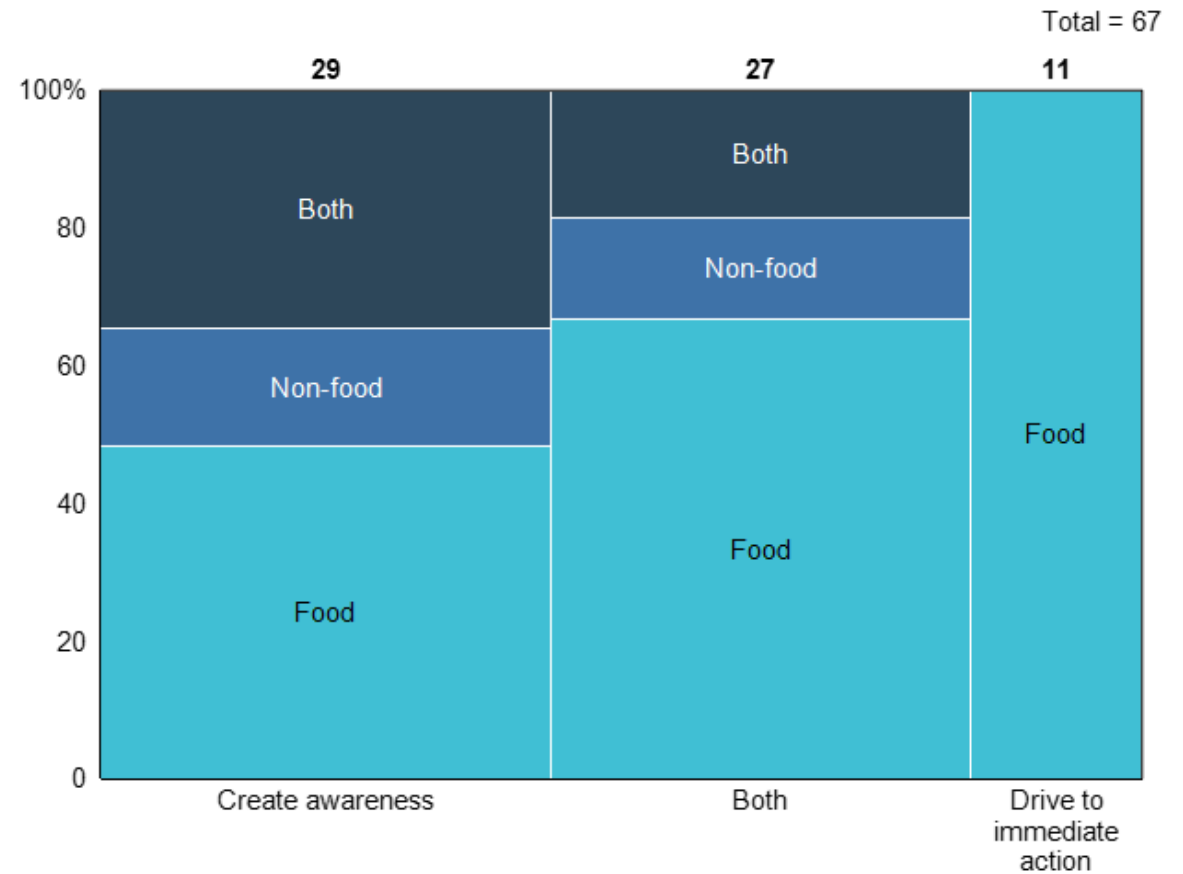


OVERVIEW OF INITIATIVES

Breakdown by channel and delivery mode



Breakdown by goal and category



INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

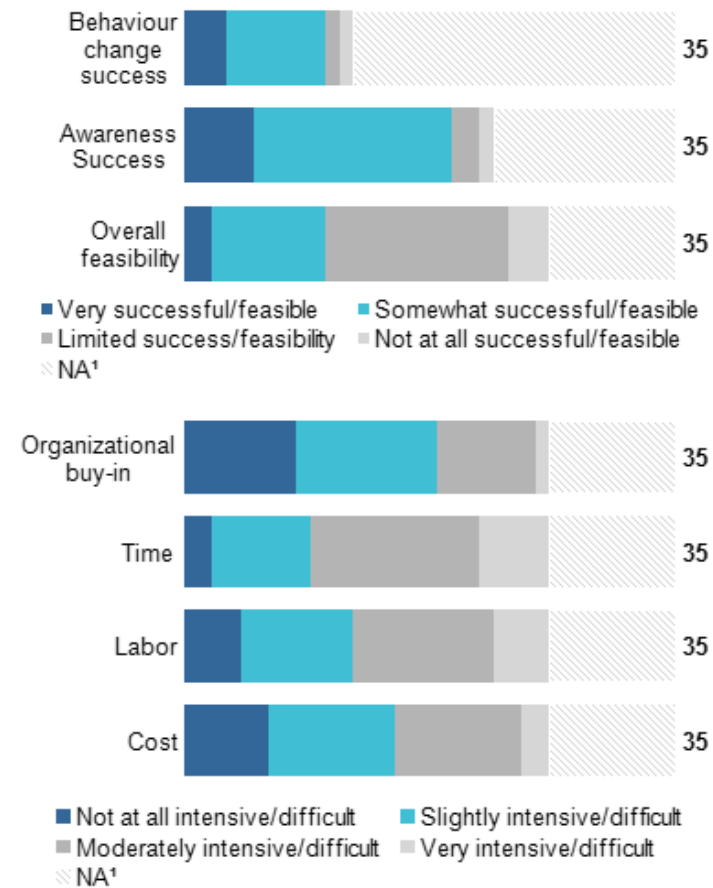
Digital initiatives or both digital and physical, are more successful than physical only initiatives. Additionally, digital initiatives are the easiest to implement.



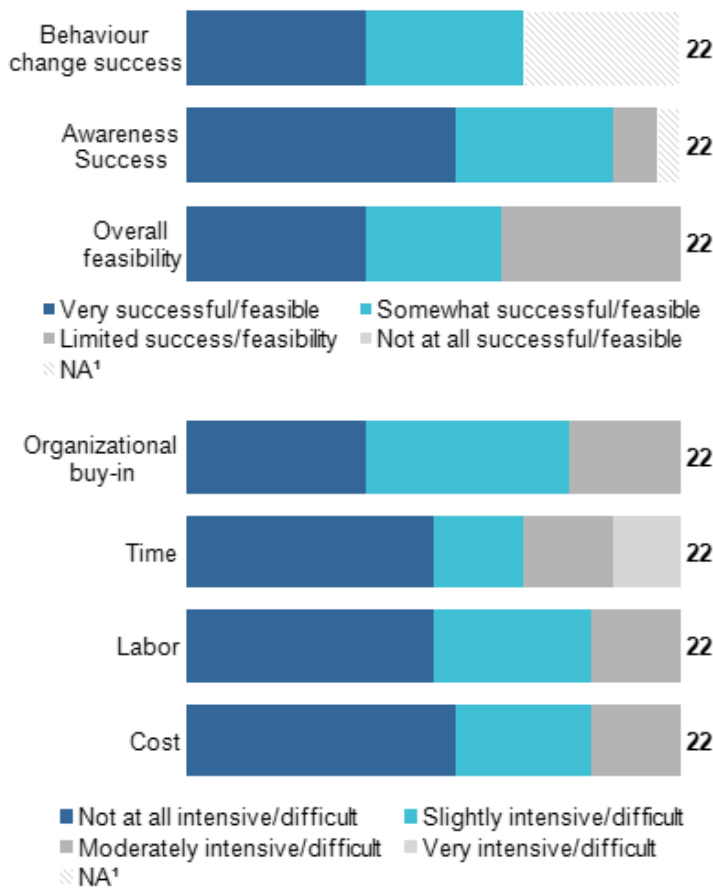
CHANNEL



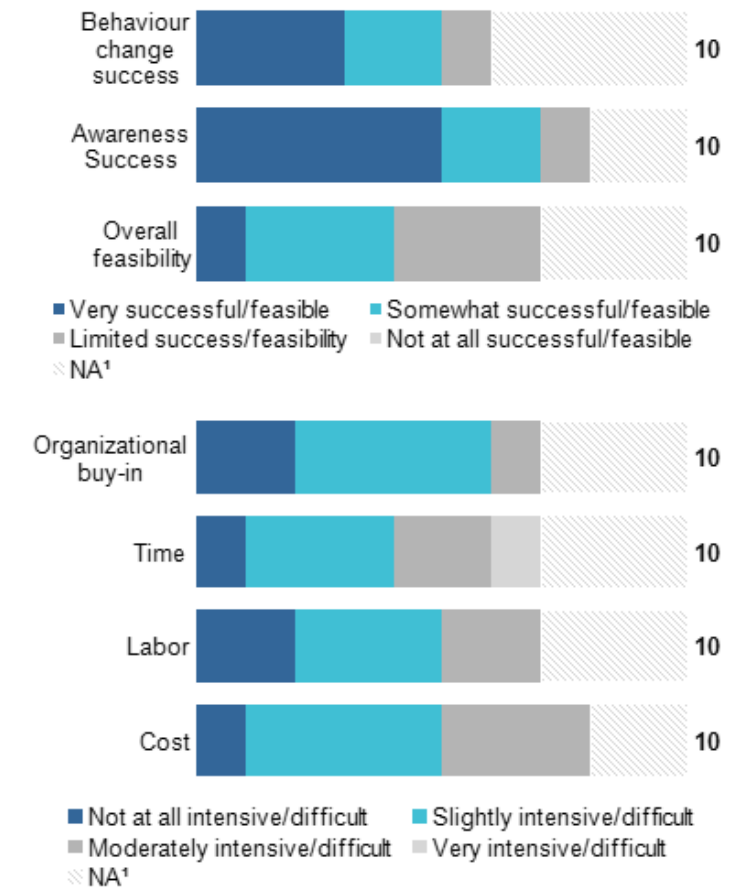
Physical only



Digital only



Both physical and digital



Note: (1) NA includes initiatives for which the result has not been measured nor submitted; relative implementation feasibility based on country co-lead's self-assessment; excludes programs targeted at employees or to both employees and consumers (N=13)

INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

Initiatives designed with the double objective of creating awareness and driving consumers to immediate actions are considered the most successful ones.

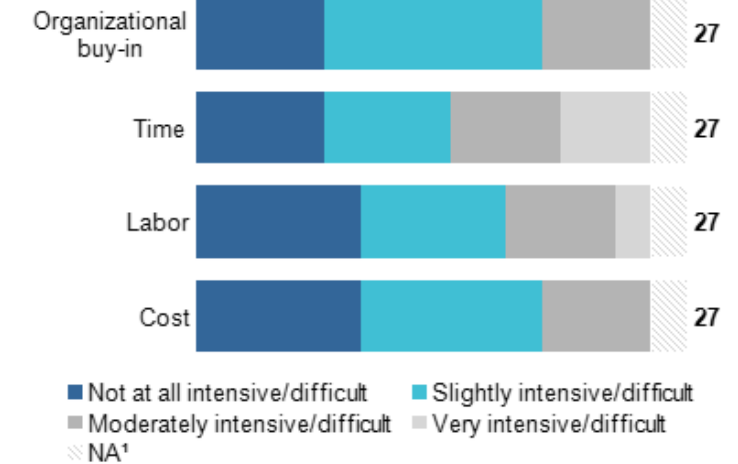
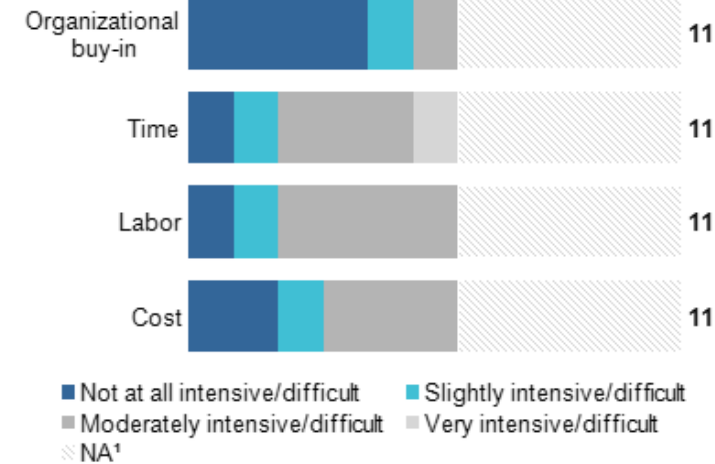
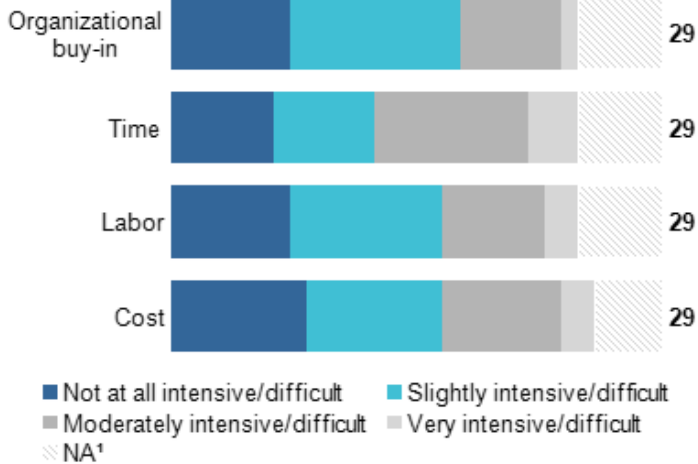
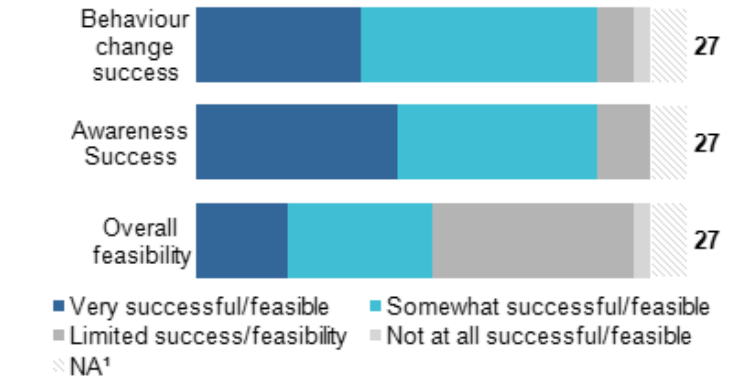
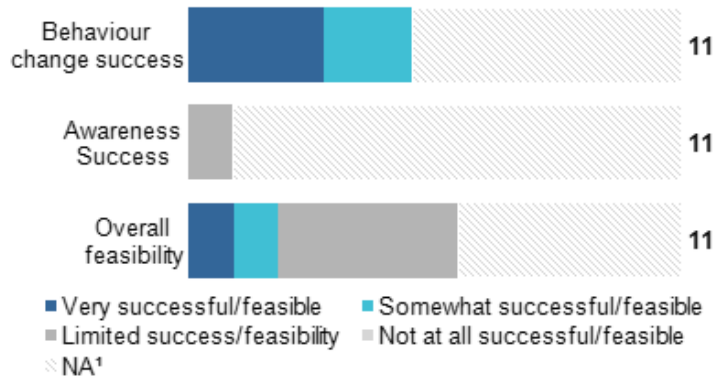
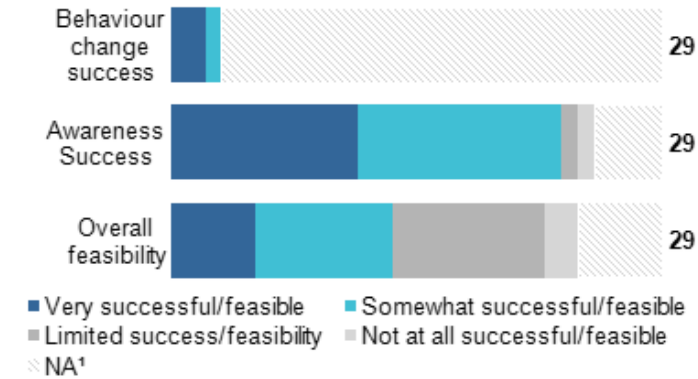


GOAL

Create awareness only

Drive to immediate action only

Both



Note: (1) NA includes initiatives for which the result has not been measured nor submitted; relative implementation feasibility based on country co-lead's self-assessment; excludes programs targeted at employees or to both employees and consumers (N=13)
Source: Collaboration for Healthier Lives, Bain & Company

INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

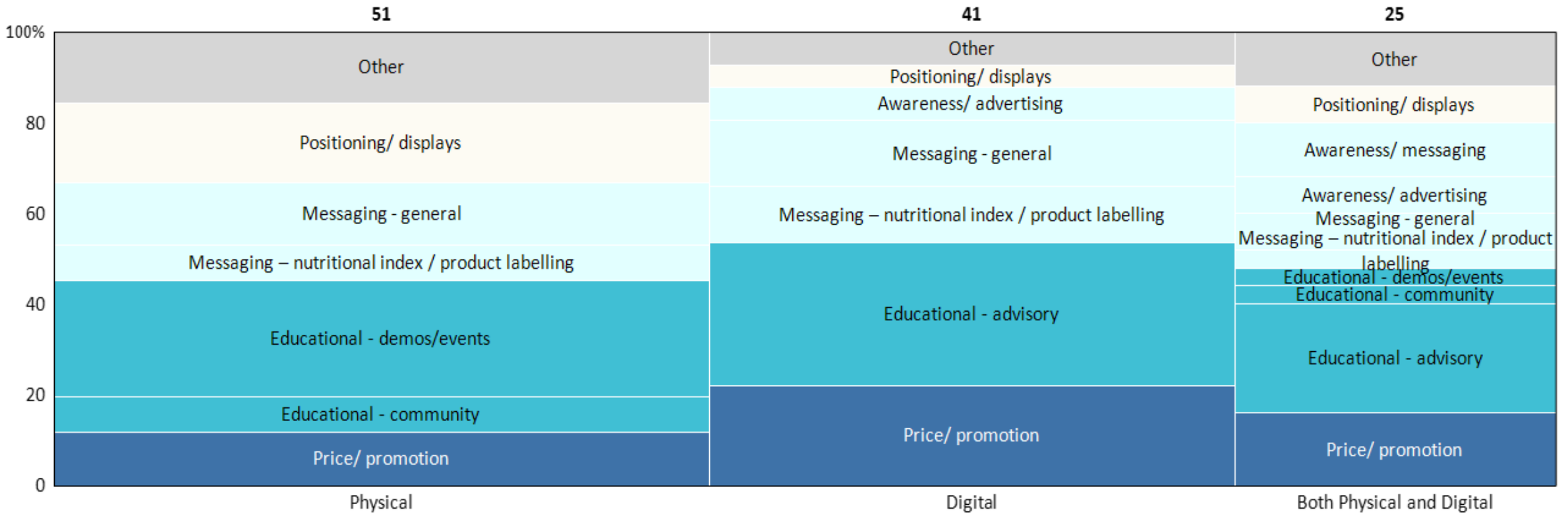
All 67 consumer-oriented initiatives used up to 3 activation types, depending on their channel



Breakdown of activation types by channel

Each initiative identified up to 3 activation types

Total = 117



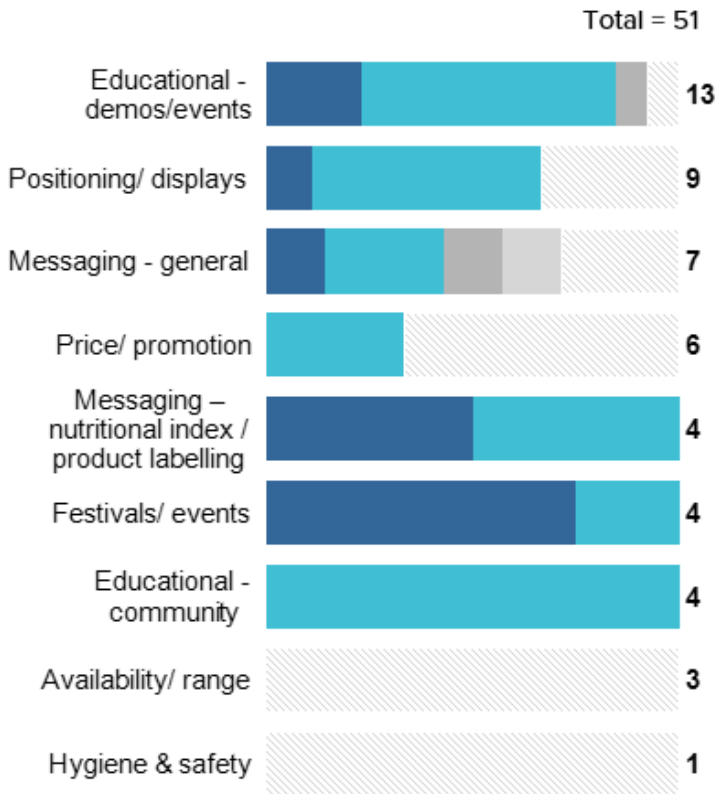
INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

To ensure awareness success, activation types should be selected based on their success in the channel chosen for the initiative.

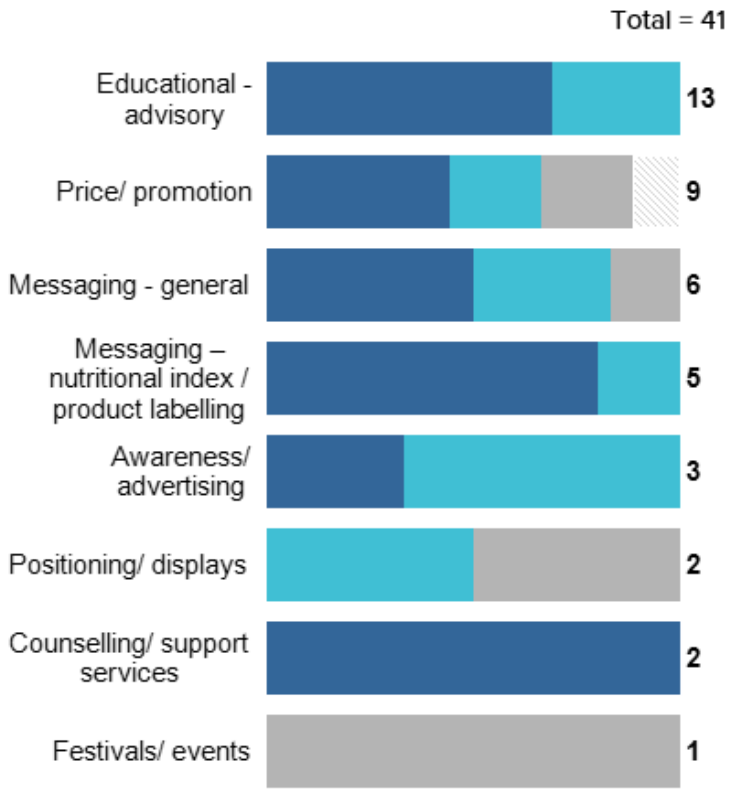


A W A R E N E S S S U C C E S S

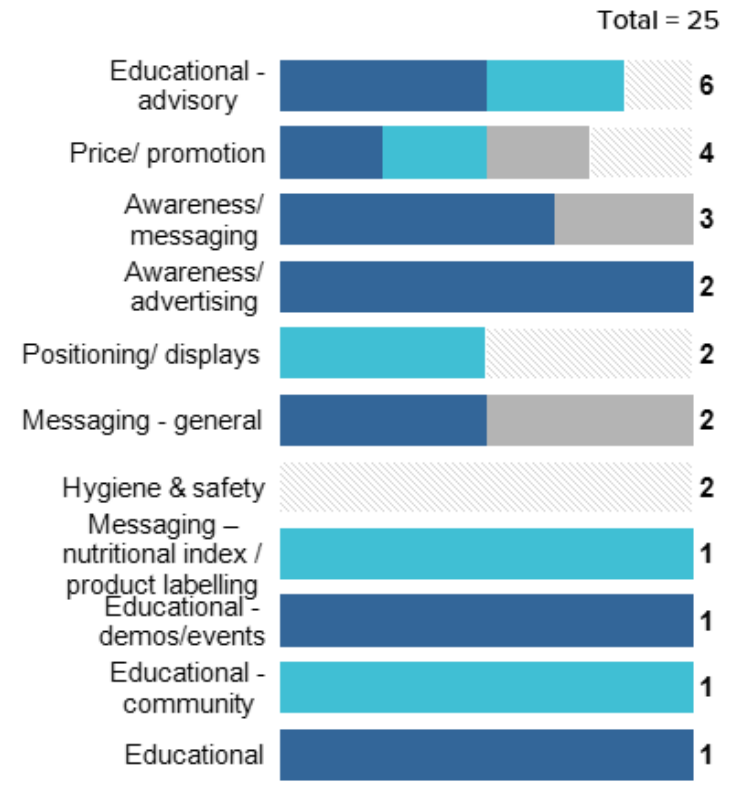
Physical



Digital



Both Physical and Digital



Note: (†) NA includes initiatives for which the result has not been measured nor submitted; relative implementation feasibility based on country co-lead's self-assessment; excludes programs targeted at employees or to both employees and consumers (N=13)
Source: Collaboration for Healthier Lives, Bain & Company

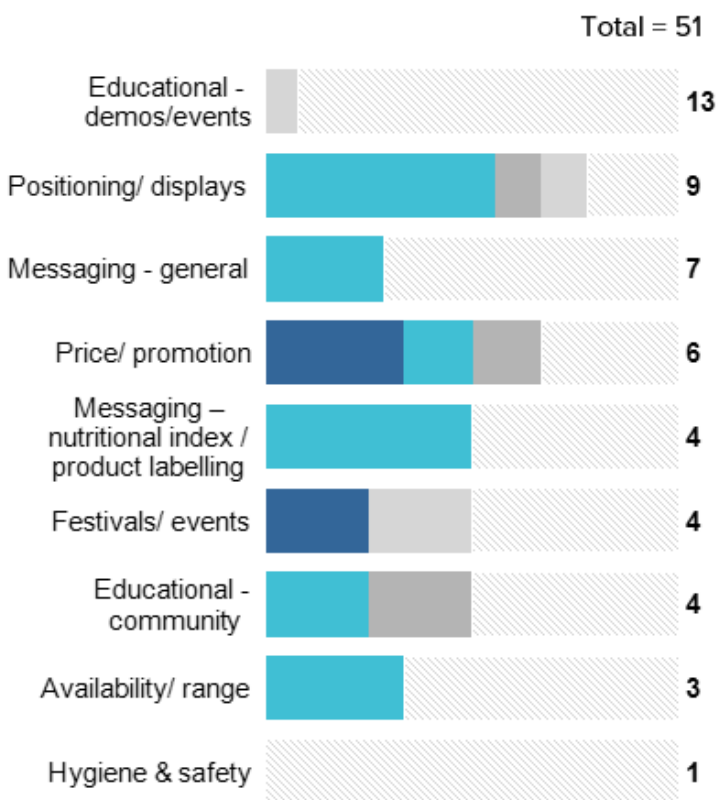
INVENTORY AND IMPACT OF CHL INITIATIVES [June 2021 – June 2023]

To ensure behavior change success, activation types should be selected based on their success in the channel chosen for the initiative.

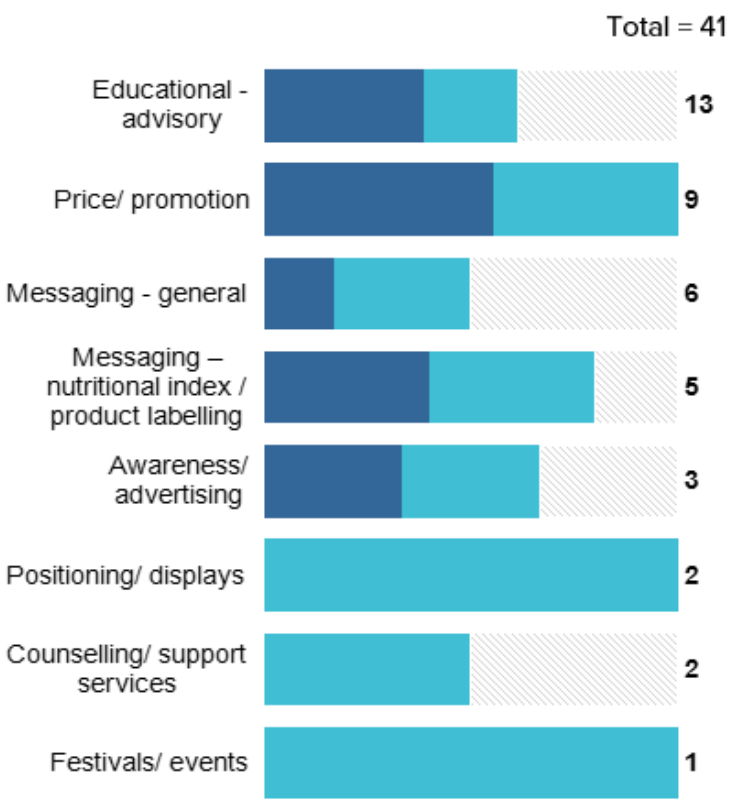


BEHAVIOR CHANGE SUCCESS

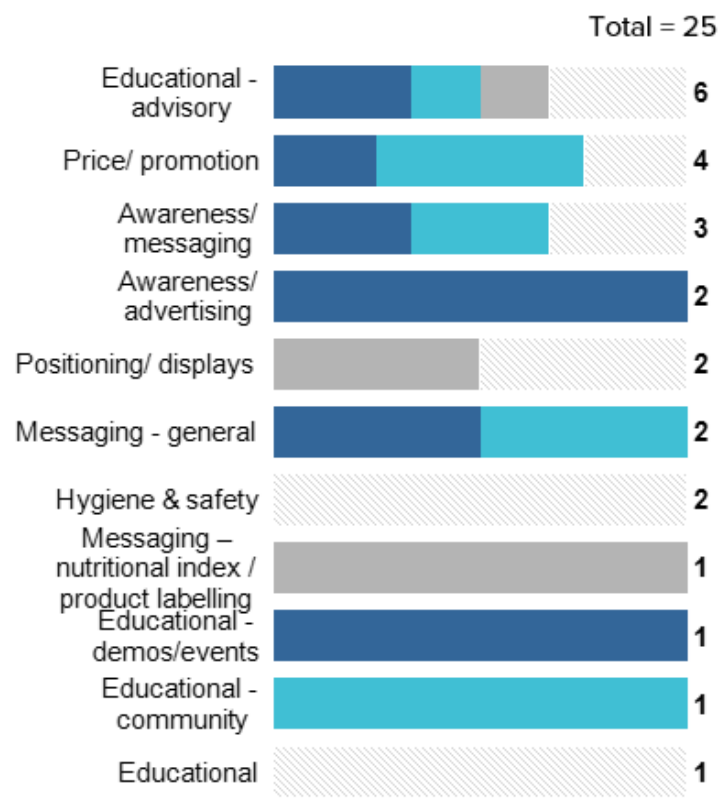
Physical



Digital



Both Physical and Digital



Key Very successful Somewhat successful Limited success Not successful at all NA

CHAPTER

Empowering Consumers Towards Healthier Lives

Introduction to the Collaboration for Healthier Lives Coalition of Action (CHL)

Key Learnings for Enhancing Consumers' Health

Inventory and Assessment of Impact of CHL Initiatives [June 2021 – June 2023]













Detailed Case Studies of Recent Initiatives

Join CHL

DETAILED CASE STUDIES OF RECENT INITIATIVES

Thought process required to design a new initiative.






ILLUSTRATIVE – PILOT DESIGN UNDER DISCUSSION

1 Overall strategy	 <p>What are the main health concerns connected to diet in our country?</p>	 <p>What is our overall strategy?</p>	 <p>How do we involve top management?</p>	 <p>Who could we co-chair with?</p>
2 Pilot design	 <p>Which consumer demographic should be targeted?</p>	 <p>How do we define a healthy product?</p>	 <p>Which SKUs should we include in the pilot?</p>	 <p>Which tactics should we use to optimize impact?</p>
3 Scope & KPIs	 <p>How do we scale the project?</p>	 <p>What is the geographical scope and timeline?</p>	 <p>How do we measure success?</p>	 <p>Should we extend into other product categories?</p>

DETAILED CASE STUDIES OF RECENT INITIATIVES

To dive deep, a series of qualitative interviews were conducted with the leads of the initiatives that were launched in various countries.



	Country	Initiative	Latest Activities Analyzed
	China	Healthier & Smart Diets	Optimize SEO to push healthier products on the top of search results on the e-commerce platform
	Colombia	Se Siente Bien	Showcase healthier products with attractive images and comprehensive information about their nutritional benefits on the online marketplace
	Egypt / UAE	Choose Better	Design phase of an initiative in Egypt and UAE
	France	On S'Y Met Le Meilleur du Végétal	Promote of healthier recipes to consumers both online and in-store Scale up the adoption of flexitarian diets across France in 2023
	Mexico	Ponte Bien	Inform consumers through social media activations . Foster a culture of wellbeing among employees
	Turkey	Migros Wellbeing Journey	Promote plant-based products and recipes as part of a healthier and sustainable diet for everyone
	UK	Empowering Healthier & More Sustainable Choices	Evolution of CHL's role in the context of adaptation to new regulations on HFSS¹ products
	USA	Walmart Wellness Initiative	Empowering consumer choice in stores and at community events – focus on the most vulnerable

Note: (1) HFSS: High in fat, sugar and salt

DETAILED CASE STUDIES OF RECENT INITIATIVES

Following the success of the in-store “Healthy Shelves” initiative, CHL China aimed to reach a wider audience by adapting this concept to e-commerce.



Context



The Chinese Government launched “**Healthy China 2030**”, an ambitious plan aiming to reform the country’s health system. It is also designed to **enhance national health literacy** through campaigns such as the “**Nutrition Week**” and the “**China National Healthy Lifestyle Month**”

Companies & brands involved:

Objectives



- CHL China members previously implemented the “**Healthy Shelves**” initiative, where healthier products were highlighted and placed in **specific sections** in stores; in 2022, a similar pilot was kicked-off **online** to **reach more consumers**
- The objective of this phase was to **increase online sales of identified healthy products** (especially dairy and beverage) using **SEO optimization** to move these products to the **top of search results** for online shoppers

Design principles



- The program **launched in June 2022** and is **running to date**
- The first pilot was initiated by **online retailers Taobao and Tmall**, both part of the **Alibaba Group**, and by several manufacturers
- The pilot was designed for **Chinese consumers who shop online**; it is fully **digital** and consists of an **enhanced reference of products with nutritional benefits** in consumer search results on Alibaba's e-commerce platforms
- A budget was **secured upfront by Alibaba**, requiring no financial investment from the manufacturers

Deployed tactics



Active choice	Increase of salience	Reduce cognitive load	Personalization
Display healthier products as the top choices	Make the choice of healthier products more obvious	Make it easier for consumers to choose healthy products by showing them in top results	Show different results to each customer based on their initial search on the website

DETAILED CASE STUDIES OF RECENT INITIATIVES

Alibaba took lead the initiative by engaging manufacturers and building an optimized SEO strategy with them



CHINA

Approach and execution

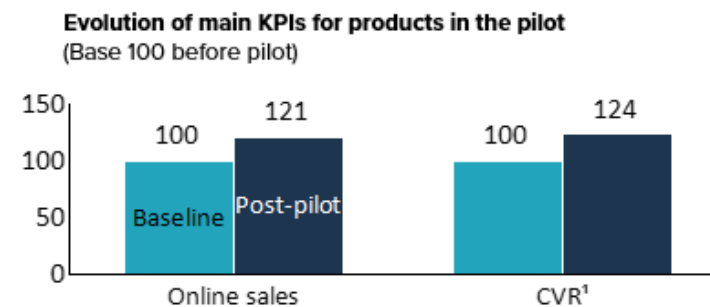


- Both Alibaba and manufacturers shared **broad consensus and alignment** around the objectives of the pilot, as they all recognized the **benefits for consumers** and anticipated **positive effects on the business**.
- Alibaba provided the necessary **e-commerce expertise** and **resources** to **optimize the SEO** of healthy products on its website.
- Along with the manufacturers who joined the program, they identified the **main keywords for nutrition criteria** that drive **consumer searches** (e.g., high calcium, high protein). For each product, up to three keywords were identified, so that the healthiest products would be placed **at the top of the search results**.

Measures of success



- **CEOs of Alibaba and involved manufacturers** considered the **pilot successful** and are willing to extend it to **other product categories** (e.g., skin & oral care, housing care), while **other manufacturers** (e.g., P&G, PepsiCo) have committed to join the pilot by the end of 2023.
- **Further analysis** is required to measure the effects on **consumer choices** and to **compare with retailer-led in-store activations and promotions**.



Challenges



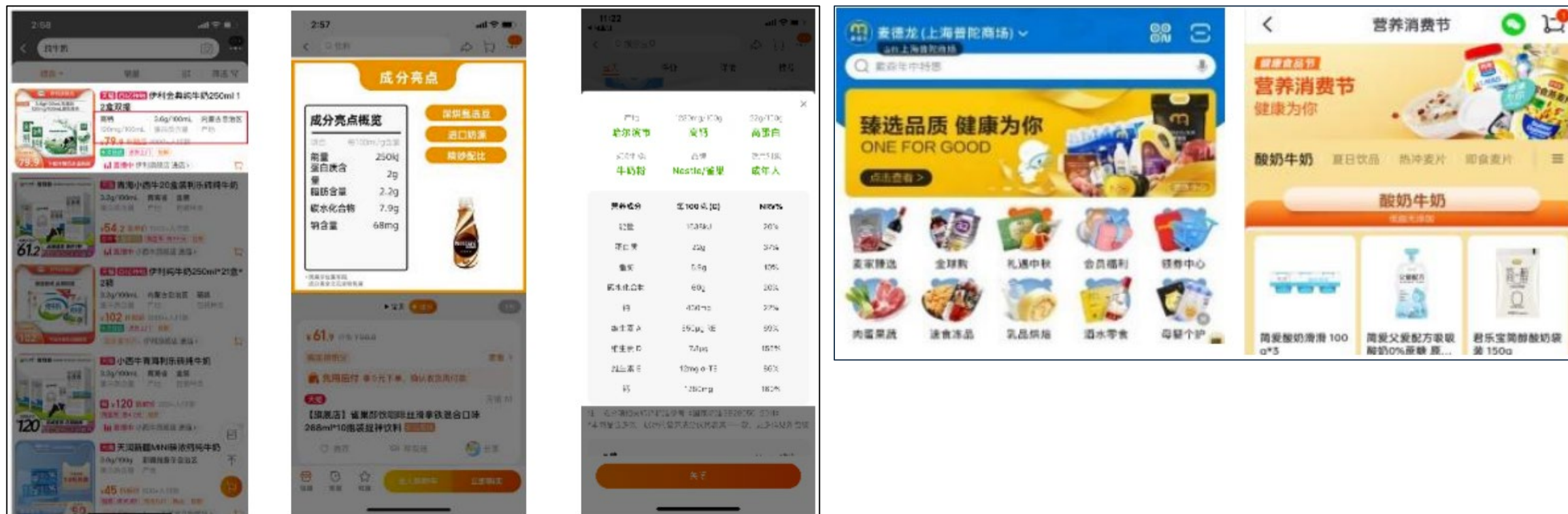
- Knowledge of **consumer behavior** remains limited; further **consumer research is needed** (e.g., consumers' profile, time spent per web page, nature of search) to **enhance the list of products and keywords** for optimal results.
- **Data was prepared manually** (e.g., selection of keywords to use) and preparation took **longer than expected**.
- Many ideas come from **sales or supply teams**, but **project leaders do not have enough time** to implement them all.
- Despite relative success, companies lacked **top management support** to allocate **more resources** and project scale.

DETAILED CASE STUDIES OF RECENT INITIATIVES

When consumers search for specific keywords on the Alibaba apps, healthy products appear at the top of their search results.



Pilot illustrations



Source: Bain interviews with local companies involved in CHL initiatives

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: Promoting healthier options in top search results facilitates better choices among consumers and healthier product formulation



CHINA



Key Learnings for Driving Significant Shift in Consumer Behavior

- **Retailers** that **pioneer initiatives** that promote **better choices**, can encourage **manufacturers** to develop **better options by sharing and incorporating consumer insights** into their strategies.
- Pilots should be **tailored to local consumers purchasing habits** and where relevant, **prioritize digital initiatives** for maximum impact and limited cost.
- To achieve **sustainable behavior change**, a pilot should leverage consumers' level of knowledge about their health: an optimized search engine will only yield positive results for consumers' searches in healthy product categories.
- **Subtle environmental change** is effective: when exposed to healthier options, consumers tend to buy them.

Going one step further

- Deploy a **substitution strategy** that directs the consumer to healthier product categories.
- Display a **nutritional benefits score** for the total basket and **reward** consumers for their healthy choices through **promotions or gamification**.
- Introduce **clawback incentives** such as a “-5%” promotion for a basket with sugar, fat or salt content below a certain threshold.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: Leveraging your own expertise and obtaining the required support and resources are crucial to success



CHINA



Key Learnings for Ensuring a Thriving Collaboration

- **Secure a budget** and anticipate the **need for resources** in order to avoid unnecessary delays and **lack of commitment**.
- **Engage top management** to ensure there are sufficient resources for scaling the project.
- **Allocate a dedicated team** to lead the project and coordinate with cross-functional stakeholders.
- **Leverage your own business expertise** (e.g., SEO) in your initiatives.
- When successful, share **sales and consumer impact KPIs** to encourage **other manufacturers to join** and inspire **other initiatives**.

Going one step further

- Link **consumer and product knowledge** to exploit synergies (e.g., for keywords identification)

DETAILED CASE STUDIES OF RECENT INITIATIVES

In the context of a new regulation, Grupo Éxito launched a pilot to boost sales of healthy products through the front-labeling of nutritional benefits.



Context



In December 2022, Colombia's Ministry of Health issued **regulations** for the **amount, size and shape of front-of pack labels** for products **with excessive fat, sugar or salt content**, forcing manufacturers to either reformulate or label them.



Companies & brands involved:

Objectives



- After launching several educational initiatives (e.g., in-store messaging, advertising) to raise awareness about healthy habits (e.g., drinking more water, exercising more), Grupo Exito wanted to trigger **measurable change in the consumption of healthy products** by providing **additional information on the nutritional benefits** of a selection of products on their online marketplace.

Design principles



- **Grupo Éxito** implemented a pilot focusing on **7 products** with the objective of expanding the strategy to **boost sales** of healthy products, inspired by the Healthier & Smart Diets initiative (CHL China).
- A series of **non-reformulated products** from Taea (private label of the retailer) enriched their packaging with **clear front-labelling nutrition information**, and updated **photos of recipes** which feature the products on the e-commerce site.
- Product photos have been **displayed on the online store** along with **additional information** on product **health benefits**.

Deployed tactics



Education or Information	Increase salience	Rule of thumb	Reminders, cues or prompts
Empower consumers with more knowledge of products' nutritional information and health benefits.	Improve products' attractiveness with a set of eye-catching pictures.	Reduce the cognitive load of complying with a healthier behavior via simple and evocative pictograms.	Draw attention to the nutritional benefits through timely information previous to purchasing.

DETAILED CASE STUDIES OF RECENT INITIATIVES

The pilot was inspired another successful CHL initiative and led by a project manager, with the help of marketing and commercial teams.



COLOMBIA

Approach and execution

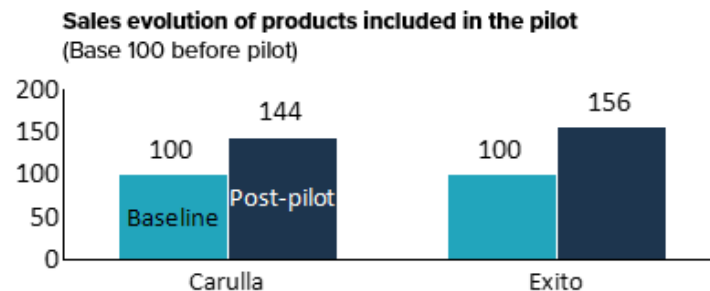


- Grupo Exito took inspiration from the [Healthier & Smart Diets initiative \(CHL China\)](#) with the possibility of increasing sales of healthy products by highlighting them on the e-commerce website, while in compliance with the new regulation.
- A project lead was appointed at Grupo Exito to coordinate the pilot.
- Seven fresh (e.g., fish) and non-fresh products (e.g., Greek yogurt) were selected to test with the commercial team; the marketing team produced updated pictures and descriptions for each product for both in-store and on the website (no additional marketing or advertising efforts were made in relation to these products).
- Large-scale, already in place operations, such as the “healthy zones” (specific in-store zones dedicated to healthy products) and “healthy days” (Mondays and Tuesdays with selected promotions), continued to be maintained past the pilot end date.

Measures of success



- The main KPI is increase in sales (in accordance with the marketing team); sales data is adjusted to price variation effect in order to better reflect any increase in consumption of healthy products during the pilot.
- Continuation of the pilot is to be re-considered after two months; in case of success, it will be extended to additional product references, categories and suppliers.



Challenges



- The launch of the pilot took longer than expected due to the lack of available resources for the scale of the project.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Product front-labeling, appealing photos and recipes have been used by Grupo Exito in the pilot.



Pilot illustrations

Información nutricional (100 g): Calorías 162, Grasa total 8,2 g, Grasa saturada 1,3 g, Grasa Monoinsaturada 4,0 g, Grasa Poliinsaturada 2,6 g, Omega-3 1,1 g, Grasa trans 0 mg, Colesterol 40 mg, Carbohidratos totales 0 g, Fibra dietaria 0 g, Azúcares totales 0 g, Azúcares añadidos 0 g, Proteína 22 g, Sodio 57 mg, Vitamina A 2,0 µg ER, Vitamina D 2,2 µg, Hierro 5,3 mg, Calcio 7,2 mg y Zinc 0,29 mg

Información nutricional (porción): Tamaño de la porción: 1 fracción (55 g)

Número de porciones por envase: 3 porciones Aprox. Calorías 89, Grasa total 4,5 g, Grasa saturada 0,7 g, Grasa Monoinsaturada 2,2 g, Grasa Poliinsaturada 2,6 g, Omega-3 0,6 g, Grasa trans 0 mg, Colesterol 22 mg, Carbohidratos totales 0 g, Fibra dietaria 0 g, Azúcares totales 0 g, Azúcares añadidos 0 g, Proteína 12 g, Sodio 31 mg, Vitamina A 1,1 µg ER, Vitamina D 1,2 µg, Hierro 2,9 mg, Calcio 4,0 mg y Zinc 0,16 mg.

100% NATURAL

- SIN SAL AÑADIDA
- EXCELENTE FUENTE DE GRASAS MONOINSATURADAS
- EXCELENTE FUENTE DE PROTEÍNA
- BUENA FUENTE DE OMEGA 3
- MAGRO



SIN AZÚCARES AÑADIDOS

- LIBRE DE GRASA
- EXCELENTE FUENTE DE PROTEÍNA
- BUENA FUENTE DE CALCIO



Beneficios

- *Excelente fuente de proteína La proteína además de contribuir a la formación y mantenimiento de tejidos del cuerpo como huesos, piel y músculos, ayuda al adecuado funcionamiento del sistema inmune.
- *Excelente fuente de omega 3 El omega 3 es un nutriente esencial, lo que significa que debemos obtenerlo de los alimentos. Un adecuado consumo de este nutriente contribuye a la función normal del corazón, además durante el embarazo, su ingesta ayuda al desarrollo normal del cerebro y de los ojos del bebe.
- *Buena fuente de vitamina D Vitamina que contribuye a la adecuada función del sistema inmune y al mantenimiento normal de huesos y dientes.
- *Buena fuente de hierro mineral involucrado en la función cognitiva y en la formación normal de hemoglobina y los glóbulos rojos.

Información nutricional (100 g): Calorías 66, Grasa total 0 g, Grasa monoinsaturada 0 g, Grasa poliinsaturada 0 g, Grasa saturada 0 g, Grasa trans 0 mg, Colesterol 8,2 mg, Carbohidratos totales 8,5 g, Fibra dietaria 0 g, Azúcares totales 1,5 g, Azúcares añadidos 0 g, Proteína 7,8 g, Sodio 39 mg, Vitamina A 90 µg ER, Vitamina D 0 µg, Hierro 0,07 mg, Calcio 166 mg y Zinc 0,53 mg.

Información nutricional (porción): Tamaño de la porción: 1/3 del vaso (150 g) Número de porciones por envase: 3. Calorías 99, Grasa total 0 g, Grasa monoinsaturada 0 g, Grasa poliinsaturada 0 g, Grasa saturada 0 g, Grasa trans 0 mg, Colesterol 12,2 mg, Carbohidratos totales 13 g, Fibra dietaria 0 g, Azúcares totales 2,3 g, Azúcares añadidos 0 g, Proteína 12 g, Sodio 59 mg, Vitamina A 135 µg ER, Vitamina D 0 µg, Hierro 0,11 mg, Calcio 249 mg y Zinc 0,80 mg.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: A digital approach, combined with clear and straightforward messaging, can yield rapid, measurable, and scalable outcomes



Key Learnings for Shifting Consumer Behavior

- On a large scale, **regulation** can **accelerate the launch of strategies**.
- A **digital approach** drives fast, measurable and scalable results and provides the consumer opportunities for **personalization**.
- **While educational pilots** based on **clear and simple messages** are a **useful first step**, they remain **insufficient to trigger long-lasting consumer behavior change**.

Going one step further

- **Products selected for the pilot** should be based on data analysis and consumer insights.
- Gradually introduce **additional tactics** (e.g., rewards, promotions) to enable **individual measurement** of tactic effectiveness.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: Defining clear accountabilities, engaging top management is essential to avoid challenges during pilot implementation



Key Learnings for a Successful Collaboration

- **Take inspiration** from other initiatives and **adapt** them to local needs, context, consumers, skills and resources.
- **Engage top management of stakeholders** to ensure enough **resources** (e.g., dedicated team) are allocated for the project.
- Establish **clear KPIs and a timeline** to decide when to **scale up or discontinue** a pilot : do not run an underperforming pilot for an extended time period.
- In the beginning, limit the initiative to a **few private label products** and collect **feedback and KPI data** before **onboarding more manufacturers**.
- Prepare a **dedicated budget** and design pilots that **are low cost** so they can be **scaled and sustained** in the **long-term**.

Going one step further

- Manufacturers must have an **adequate production capacity** to meet increased demand incurred by the pilot.
- Search for tools to **automate tasks** and minimize the investment in **time and resources**, making the initiative easier to sustain.

DETAILED CASE STUDIES OF RECENT INITIATIVES

“Choose Better” Initiative: Currently in the design phase



Context



In 2021, the UAE **amended the color-coded nutritional labeling** requirement, initially set to become mandatory in 2022. Anticipating its legal enforcement, Carrefour **proactively opted to implement change.**

Companies involved:

كارفور Carrefour Nestlé

Objectives



- The pilot is scheduled to launch in the **UAE and Egypt in late 2023.**
- CHL aims to increase the consumption of **fruits and vegetables** by **young people** in Egypt and the UAE.
- The initial focus will be to achieve **short-term, quick wins** in order to build support for the business case for **long-term pilots and resources.**
- The pilot design and governance are still **under construction** by the retailer and **may evolve** over time.
- It is anticipated to be an **education and navigation program** focused on **fruits and vegetables.**
- The pilot is to be conducted both **online and in-store** and may combine **several tactics**, including education, rewards, increased salience of healthy products and behavior substitution.
- The **success of the pilot** is expected to be measured based on the **increase in sales** of fruits and vegetables, levels of **consumer acquisition** in the loyalty program and **user engagement rate** of the website.

Design principles

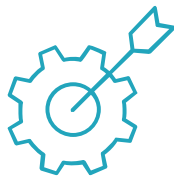


DETAILED CASE STUDIES OF RECENT INITIATIVES

1. Overall strategy | Egypt & UAE plan to launch an education and navigation program to urge the consumption of fruits and vegetables

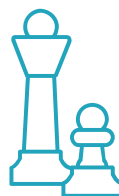


ILLUSTRATIVE – PILOT DESIGN UNDER DISCUSSION



What are the main health concerns connected to diet in our country?

- In the UAE, **82%** of teenagers do not meet the recommendations of eating more than **5 fruits and vegetables per day**



What is our overall strategy?

- **MAF Carrefour** aims to become the **retailer of choice** and to **inform consumers** about what a **better choice** is
- The selected strategy should take the form of an **education and navigation program, both** in-store and online



How do we involve top management?

- A **long-term health & wellbeing strategy** is currently under construction which involves top management
- The **success of the first CHL phase** (focused on fruits and vegetables) will **support the approval** of the following phases



Who could we co-chair with?

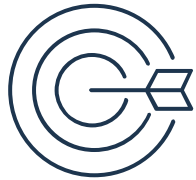
- **Nestlé** was selected as main supplier due to **past collaboration** and its **engagement for health**

DETAILED CASE STUDIES OF RECENT INITIATIVES

2. Pilot design | The first pilot aims to blend different tactics, specifically applied to fruits and vegetables, in order to reach all consumers



ILLUSTRATIVE – PILOT DESIGN UNDER DISCUSSION



Which consumer demographic should be targeted?

- The pilot is intended to target all consumers, with a particular emphasis on the **younger population (children, teenagers, and young adults)**



How do we define a healthy product?

- A **clear roadmap** has been established for **alignment on definitions** and to **classify the portfolio of products sold** on an internal “health scale”
- The next step is to **collect product information** and create **product categories**



Which SKUs should we include in the project?

- The pilot will focus on **fruits and vegetables** in the first phase, before expanding to **other products**



Which tactics should we use to optimize impact?

- The pilot will likely combine **various tactics**:
 - **Education** with in-store marketing campaigns
 - **Increased salience** of healthy options on the app
 - **Suggestion of healthier product alternatives** at the checkout
- In the medium term, it may be completed by:
 - **Rewards** for healthier choices via the loyalty program

DETAILED CASE STUDIES OF RECENT INITIATIVES

3. Scope & KPIs | Clear KPIs have been established but sizing and scope of the pilot are yet to be defined



ILLUSTRATIVE – PILOT DESIGN UNDER DISCUSSION



How do we scale the project?

- Additional **costs and revenue** incurred by the pilot are being **forecasted** in order to provide **an estimate of resources** required to launch and sustain the pilot



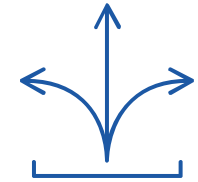
What is the geographical scope and timeline?

- The pilot will be launched both **online and in-stores** in Egypt and the UAE, in September
- The **stores involved** haven't been selected yet
- The **duration** hasn't been decided yet



How do we measure success?

- Several **KPIs** are likely to be assessed:
 - **Increase in sales** of fruits and vegetables and **consumer participation** in the loyalty program
 - **Consumer acquisition**
 - Online **user engagement rates**
 - Before and after **surveys** for qualitative assessment



Should we extend into other product categories?

- If successful, the pilot may be extended to include **personal care products**
 - Future pilot would be more oriented towards **sustainability**, rather than health
 - “Better for the planet” promotion features would include **vegan, organic, chemical-free, recyclable, reusable, refillable, water positive** (still hypothetical at this stage)

DETAILED CASE STUDIES OF RECENT INITIATIVES

Drawing on the lessons learned from various initiatives launched since 2019, CHL France initiated the hybrid campaign “*Lundi c’est Veggie*”¹



Context



In 2019, CHL France launched “**healthy bundles**”, a series of initiatives aiming to foster consumers to opt for healthy products. The third, most recent phase, focused on **plant-based recipes** under the name “*Lundi c’est Veggie*”, took place in **2022**.



Objectives



- Implement the **successful concept of “healthy bundles”** on a **national scale**, in order to promote **healthier behaviors** and maintain regular **business performance**.
- Encourage **healthier and more sustainable diets** through a new approach centered around **plant-based recipes**.

Design principles



- The pilot was **launched digitally** in 2022 and in **two stores** located in the city of Lyon; in May 2023 it re- launched as “Le Meilleur Vegetal”, and is preparing to launch in Belgium and Italy.
- Co-developed by **Carrefour and Danone** in partnership with five other manufacturers, including **Bonduelle, Barilla, NS Nutrition, HappyVore and Unilever**.
- Showcased **partners’ products that are rated Nutriscore A or B,**² and **rated veggie recipes** with tutorials by **chefs on the “750g” website** to Carrefour consumers, with **promotions** on the featured products from the recipes.
- The **budget** was **estimated upstream** and **refined with quotes** before sharing a **maximum range** with the partners, who all **shared the costs**.

Deployed tactics



Education or Information	Financial incentives	Reminders, cues or prompts	Increase salience	Reduction of cognitive load
Taught consumers to cook healthy and vegetarian meals using recipes and tutorials.	Offered promotions on products featured in healthy and veggie recipes.	Used internet pop-ups to draw attention to healthy recipes and featured products.	Gave added visibility to healthier choices through a recognizable marketing campaign.	Made it easier to purchase products that are used in healthy recipes.

Note: (1) “Monday it’s Veggie”; (2) Carrefour experts ensure that the recipes have a Nutriscore of A or B, but the featured products may display higher Nutriscores | Source: Bain interviews with local companies involved in CHL initiatives

DETAILED CASE STUDIES OF RECENT INITIATIVES

Carrefour and Danone work together on a weekly basis to ensure the success of the pilot and onboard new manufacturers.



FRANCE

Approach and execution



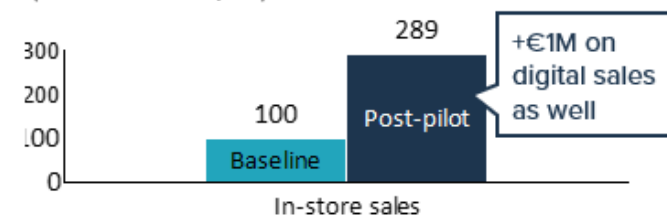
- Having collaborated on CHL projects for three years, Carrefour and Danone have established a comprehensive process, which include weekly steering committee meetings (15-25mn long), in order to conduct and monitor various initiatives.
- In response to the COVID-19 lockdown and to rapidly achieve a wide reach, they launched a digital initiative at national scale.
- Signed contracts with three chefs from the 750g website, collaborated with agencies to develop social media content, and engaged with voluntary manufacturers to develop healthy vegetarian recipes from their products.
- Collaboratively estimated and communicated a budget to be shared between all partners and identified relevant KPIs.

Measures of success



- The success of the initiative was measured using two categories of KPIs:
 - Increase in sales: of Nutriscore A or B products compared to the three previous baskets recorded for loyalty consumers, and the purchase of at least one product from the recipes.
 - Consumer engagement: the number of clicks on banners or voluntary web searches
 - The pilot was awarded the Sirius Award for being “innovative, collaborative and business-oriented”, and positively cited by “Action Climat” in their on French retailers.

Average evolution of the sales of Nutriscore A and B products compared to consumers' previous baskets (Base 100 before pilot)



Challenges



- Several iterations required:
 - Difficult impact measurement for initiatives that involve placing healthy products at checkout points.
 - Consumer confusion when typical retail codes are disrupted, such as displaying all ingredients of a recipe on a single shelf.
 - Necessity to display recipes in a timely manner to ensure that purchasing behavior is not only promotion-driven.
- Creating everything from scratch, convincing collaborators to take on tasks outside their usual scope and integrating the pilot into standard processes.
- Top management engagement required substantial efforts due to the relatively small importance of pilots in business strategy.

DETAILED CASE STUDIES OF RECENT INITIATIVES

When shopping on the Carrefour e-commerce platform, consumers are presented with pop-ups featuring tutorials on healthy, vegetarian recipes.



FRANCE

Illustration from the Initiative

LE LUNDI C'EST VEGGIE
MAIS AUSSI LE MARDI, MERCREDI, ...
DÉCOUVREZ NOS DÉLICIEUSES RECETTES VÉGÉTARIENNES

ON S'Y MET LET'S DO IT
Empower healthier people globally

Digital (nationwide) Healthy Bundles
1.7m people reached
58,000 people connected
1.02m€ additional net sales
12% sales Nutrition A (compared with total category sales)

In-store pilots (Lyon)
189% sales increase
+70% consumers who engaged with the operation increased basket

Key Learnings
Increased awareness of engagement and eating behavior change
Increased recurrence of purchases and more sustainable food choices
In-store activation helps consumers to get beyond taste preconceptions

Lead: DANONE x Carrefour
DANONE ONE PLANET. ONE HEALTH

Others: SAVENCIA FROMAGE & DAIRY, alpro, Fleury Michon, Barilla, Bonduelle, Unilever, nutrition & santé

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: To maximize impact on consumer's behavior, successful initiatives should be repeated on a regular basis



FRANCE



Key learnings for shifting consumer behavior

- To achieve **maximize impact**, retailers and manufacturers should agree on **repeating pilots** as a standard, processed collaboration (e.g., every 6-8 weeks) to create permanent change in consumer behavior.
- Initiatives deployed in **both digital and physical channels** are most effective for maximum reach.
 - Online channels alone provide **scalability and impact**.
 - **High-volume physical stores** should not be neglected due to the high share of customers still purchasing in-store.
- **Retailers' willingness** is key to creating pilots since they are in the position to **gather manufacturers** and **empower initiatives**.
- Besides **regulation, pricing and incentives** are the best ways to obtain **tangible results; combining promotions with other tactics** drives **behavior change**.
- **In-store demonstrations** and **tastings** are highly appreciated by consumers and help **initiate a change in consumer behavior** by breaking **preconceived notions** about certain products.
- Launching **successful pilots** may encourage companies with similar markets in other countries to **replicate them** or find inspiration.

Going one step further

- As a retailer, **unify collaborating manufacturers** around a **recurring initiative** that promotes the consumption of healthier products.
- Include **recurring initiatives** in internal processes to ensure **fluidity and collaboration** from all participants.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: Finding the right people who embrace the initiative, can dedicate time to it and advocate for it is key for a successful collaboration



FRANCE



Key learnings for successful collaboration

- Assemble a **highly motivated team** with **experience** that can effectively **advocate for the initiative** with senior management and stakeholders.
- Schedule **regular check-ins between partners** to facilitate open communication, address issues promptly, and ensure the **project stays on track**.
- Establish **budgets and principles upfront** and **share costs between partners** to ensure **mutual benefits** and smooth **project implementation**.
- Define **KPIs early on** to help measure **progress and success**, identify areas for improvement, and **adjust the strategy accordingly**.
- Even if pilots are not successful at first, **incorporate lessons learned** to reach **success in the long run**.
- **Once the processes are in place**, pilots can be quickly **scaled up**.

Going one step further

- Utilize the **fundamentals of physical and online retail** to boost sales (offer the right **product, at the right time, in the right place**).

DETAILED CASE STUDIES OF RECENT INITIATIVES

CHL Mexico's "Ponte Bien" was an educational initiative designed to target obesity



Context



In 2020, the Mexican Government enacted a new regulation in 3 phases, requiring **warning front labels and statements** on products exceeding calorie, sodium, fat, and sugar limits, and restricting the use of **characters, graphics, or images** promoting consumption to **children**.

Zoom on next page

Companies involved:



Objectives



- In 2019, Grupo Bimbo, along with **10 other manufacturers** and CHL, launched the "Mexico Ponte Bien" campaign to **educate the population about nutrition, physical activity and hygiene**.

Design principles and outcome



- A series of **workshops and animations**, among others, were held in 10 stores to raise **consumer awareness** about healthier behaviors, before being halted due to a **lack of committed retailer** and a **shift of focus** towards complying with the **new regulation** (Official Mexican Standards 051).
- As **in-store pilots are on hold**, "Mexico Ponte Bien" initiatives have now shifted towards **social media activations** and **employee wellbeing** (not covered in this document).
 - An agency was hired to develop **paid posts and ads** for the "Mexico Ponte Bien" website and their **brand's social media** channels (e.g., Facebook and Instagram). An outreach of **~1M people per month** was achieved.
 - However, when **paid promotions** were discontinued, the outreach of social media posts **declined to 5,000 people** monthly.

Tactics deployed





Reminders, cues or prompts	Personalization	Education or Information	Goal setting
Communicate about healthy practices on everyday channels such as social media.	Offer personalized medical check-ups to employees and adapt the wellness strategy to local needs.	Empower consumers and employees with more knowledge of products' nutritional information and health benefits.	Urge people to understand the health issues associated with obesity and avoid it.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Pre-packaged food products and non-alcoholic beverages sold in Mexico must comply with the Official Mexican Standards 051.



Overview of Standards 051	Scope of regulation		Projected impact
 <ul style="list-style-type: none"> The Front-of-Pack Labeling (FOPL) system known as “Guideline Daily Amounts” (GDA) has been replaced with a mandatory warning label system for calories, added sugar, saturated fat, trans fat, and sodium. <ul style="list-style-type: none"> Implemented in October 2020, this regulation aimed to improve consumer information on packaging. Introduced increasingly strict thresholds for energy and nutrients of concern over a five-year period. As of July 2021, it included regulation of advertising aimed at children and the use of Health and Nutrition Claims (HNCs) on less healthy food and drink products. 	<h3>WHICH PRODUCTS</h3> <p>All national or foreign manufactured pre-packaged food products and non-alcoholic beverages to be sold in Mexico.</p>	<h3>WHEN</h3> <p>Phase 1: Oct. 2020¹ - Sept. 2023 Phase 2: Oct. 2023 - Sept. 2025 Phase 3: On and after Oct. 2025</p>	 <ul style="list-style-type: none"> Ultra-processed products exceeding thresholds currently account for 30% of the population's total dietary calories. Products featuring HNCs are 75% more likely to be selected by consumers compared to those without health claims. Once Phase 3 is implemented, approximately 40% of total products and 50% of ultra-processed food products will have to stop displaying HNCs, limiting impact on consumer health.
<h3>WHAT</h3> <ul style="list-style-type: none"> Manufacturers determine which nutrients exceed the recommended thresholds in each phase and warn the consumers with new FOP icons. Products that contain “non-nutritive” sweeteners and caffeine must include warning statements on their labels (e.g., “Contains caffeine — children should avoid”). Child characters, animations, cartoons, celebrities, athletes, or pets are not permitted on products with one or more sweetener warning labels. Any ingredients or additives that may cause hypersensitivity, intolerance, or allergies, such as cereal containing gluten, peanuts, soy, milk products, and dairy derivatives, must be listed on the front of package. If the product is covered by a wrapper, all relevant information must be included on it, unless the container label is easily visible through the wrapper. The label should display the name, title, or company name and the tax address of the individual responsible for the product. 			

DETAILED CASE STUDIES OF RECENT INITIATIVES

Most food and beverage products sold in Mexico are affected by the New Mexican Regulation for Front-of-Package Nutrition Label.



Nutrient thresholds will become increasingly strict...



	Energy (kcal)	Sugars	Saturated Fats	Trans Fats	Sodium
100g solid products and 100mg liquid products					
Phase 1¹ 10/2020 ² - 09/2023	≥ 275 kcal total (solid product) ≥ 70 kcal total or ≥ 10 kcal added sugars (liquid product)	≥ 10% total kcal from added sugars Exemption for beverages with <10 kcal added sugars	≥ 10% total kcal from saturated fats	≥ 1% total kcal from trans fats	≥ 350 mg (solid product) Calorie free beverages: ≥ 45 mg
Phase 2¹ 10/2023 - 09/2025	≥ 275 kcal total (solid product) ≥ 70 kcal total or ≥ 8 kcal added sugars (liquid product)	≥ 10% of total kcal from added sugars	≥ 10% of total kcal from saturated fats	≥ 1% of total kcal from trans fats	≥ 1 mg of sodium per kcal or ≥ 300mg Calorie free beverages: ≥ 45 mg
Phase 3³ On and after 10/2025	≥ 275 kcal total (solid product) ≥ 70 kcal total or ≥ 8 kcal added sugars (liquid product)	≥ 10% of the total energy coming from added sugars	≥ 10% of total energy coming from saturated fats	≥ 1% of total energy coming from trans fats	≥ 1 mg of sodium per kcal or ≥ 300mg Calorie free beverages: ≥ 45 mg

... and result in the labeling of a majority of products.



Note: (1) Only the added critical nutrient is evaluated; (2) Enforcement date delayed to 11/2020; (3) If one critical nutrient is added, ALL critical nutrients are evaluated | Source: Global Agricultural Information Network; Government of Mexico

DETAILED CASE STUDIES OF RECENT INITIATIVES

CHL Mexico's regulatory situation demonstrates the need for active collaboration between retailers and manufacturers to achieve lasting impact.



Collaboration between manufacturers and retailer has been difficult...

- The retailer didn't fully embrace CHL initiatives:
 - The space allocated in stores was **charged to manufacturers**.
 - The **number of interactions** between the retailer and manufacturers **remained limited**.
- The **new regulation** required significant efforts from retailers and diverted them from CHL pilots.
- The retailer decided to join **another CGF initiative** with a greater focus on sustainability.

... which prompted manufacturers to unite at the LATAM level to search for a new retailer

- Manufacturers are trying to convince a **new retailer** to join the initiative with the support of **CHL LATAM Board**
 - The retailer selected among **CGF members** or retailers having already **engaged in a health program, and which** are large enough to cover a **vast geographical area**.
 - A collaboration with a **convenience store chain** is being considered, as it benefits from **deep consumer knowledge** and **broad reach**.
- CHL members in LATAM are now gathering under the **“Se Siente Bien”** movement to achieve **significant impact** at broader scale.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: CHL involvement is crucial to convince companies to allocate resources for consumer health initiatives



Key learnings for ensuring a thriving collaboration

- Invest in **paid advertising** to substantially enhance **consumer reach** and **pilot visibility**.
- Identify partners with **relevant scale and geographical coverage** and analyze their strategies to discover **potential synergies**.
- Partner with **committed retailers who fully embrace CHL mission**.
- Agree on the **resources to invest in**, ensuring the **pilot's sustainability** in terms of **financing and time commitment**.
- Extract **learnings from other initiatives** and **cooperate with other CHL members** in your region to build a **strong positioning**.
- Ensure that you can **showcase the success of your initiatives** to your **leadership** and other **CHL members** by **establishing clear KPIs** beforehand.

Going one step further

- CHL must ensure it **remains attractive** to potential partners compared to other CGF Coalitions (e.g., Environmental Sustainability Coalitions), particularly by **simplifying the process** of joining the Coalition and **actively communicating the benefits of membership**.
- CHL could go one step further in **fostering collaboration** by enhancing **cooperation between companies** (e.g., **coupons, samples, materials, conferences, and webinars**) ultimately increasing **cross-benefits for employees and consumers**.

DETAILED CASE STUDIES OF RECENT INITIATIVES

In Turkey, Migros and Danone collaborated to promote balanced diets with healthy and sustainable options as part of the “Wellbeing Journey”



TURKEY

Context



To evolve its on-going initiative, Wellbeing Journey (2018), **Migros** developed a **partnership** with **Danone** in 2022 to promote the **consumption of Alpro brand plant-based products** and advertised recipes with Alpro products as being environmentally-friendly.

Companies involved:

Objectives



- The Alpro pilot aimed to **raise awareness** among consumers about the **health and environmental benefits of balanced and sustainable diet**.
- The goal was to make plant-based alternatives **attractive, affordable and accessible**, demonstrating that they are **not limited to vegans or vegetarians** and can play a role in everyone’s diet.

Design principles



- The pilot was designed for a **two-week duration** with potential for repetition (e.g., every 2 months) is being considered.
- The initiative was about **promoting and discounting** plant-based products and **recipes** incorporating those products.
- A combination of **in-store** (e.g., workshops, animations) and **digital campaigns** (e.g., videos on **Migros TV** and YouTube, social media posts, in-app banners) were simultaneously deployed.
- Designed have the **largest reach possible across all demographics**.

+ reduction of cognitive load and habit formation

Deployed tactics



Self-monitoring or tracking	Financial incentives	Education	Increase of salience	Environmental restructuring	Reminders, cues or prompts	Personalization
Urge consumers to monitor the balance of their diet on the app over time.	Offer discounts on plant-based products.	Provide engaging educational videos about balanced nutrition.	Make the choice of plant-based products more obvious.	Showcase products for healthy recipes on designated shelves.	Use pop-ups to urge the consumption of plant-based products.	Display targeted communication and personalized offers using big data.

Source: Bain interviews with local companies involved in CHL initiatives

DETAILED CASE STUDIES OF RECENT INITIATIVES

Migros and Danone designed and implemented the large-scale initiative together in a few weeks through both in-store and digital activation.



TURKEY

Approach and execution



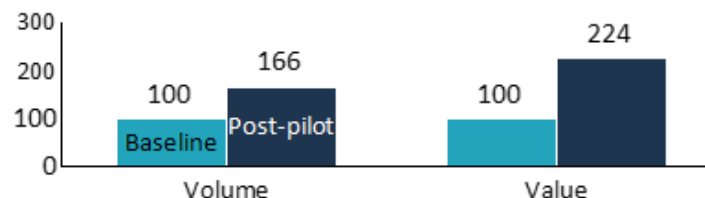
- In a brief **4-day ideation phase**, Migros and Danone teams chose to focus on a project centered around recipes and planned the entire **process**, before implementing in a few weeks.
- Consisted of a series of **in-store events** which combined **recipe workshops**, on-shelf **advertising**, increased awareness and outreach about plant-based diets and **rebates on Alpro products**.
- **Close cross team collaboration** (Migros' sustainability and category management teams and Danone's marketing teams) and support from **top management** provided the **credibility** needed to achieve ambitious results.
- Funds were spent on **video production** and **in-store application development** rather than paid advertising (relied on **organic sharing**).
- **Data** sourced from the **loyalty program** was used to target an **audience interested in healthy products**; through shopping basket analysis, it allowed for **focused communication** and **personalized discounts** for loyalty customers.

Measures of success



- A series of KPIs were defined and tracked along the journey, including:
 - **Sales in volume and value** of Alpro products.
 - **The brand's market share** within the product category.
 - **Consumer reach** (number of people targeted **through the app** or **social media** and number of **unique consumers** participating in the program).

Average evolution in plant-based products' sales after the pilot
(Base 100 before pilot)



Challenges



- **Limited amount of time** to make decisions about the **design principles** (e.g., format, duration) and to **execute the project**.
- **Scaling the project** to more stores.
- **Incorporating other brands and products** in the pilot.

DETAILED CASE STUDIES OF RECENT INITIATIVES

The promotion of Alpro products was pushed on several platforms, including Migros TV.



Illustration of the initiative



BETTER CHOICES, BETTER OPTIONS, BETTER FUTURE AT MIGROS

A HEALTHIER LIVES INITIATIVE FROM CHL TÜRKİYE TO ENCOURAGE HEALTHIER, BALANCED AND MORE SUSTAINABLE DIETS

The Healthier Lives Initiative in Türkiye (CHL Türkiye) led by Turkish retailer Migros Ticaret in collaboration with 11 manufacturers, launched the **Migros Wellbeing Journey** in 2018. Its aim is to encourage consumers through customized services to adopt balanced, healthier, and more sustainable diets.

Migros Wellbeing Journey in Numbers	WELLBEING JOURNEY	+15% Growth sales of healthier and more sustainable products
5.4M Reached Consumers	5.2% Balanced Nutrition Index	75 Stakeholders Involved
+30% Healthier Behaviour Engagement		

Supporting Healthy Lifestyle Habits for Children

Partnership with

176k
Reached children in-stores

2.1M
Online views

Sharing Healthy and Sustainable Recipes

Partnership with

1.3M
Recipe views

Wellbeing Week at Migros

Launched on World Health Day, Wellbeing Week at Migros featured discounted products across different food groups in our Migros catalogue. We connected the initiative to our Wellbeing Journey Program, which shares healthier living tips with consumers. As a result, the promoted wellbeing products experienced a 94.7% increase in purchases and 89.5% in turnover.

200k
Online views

PSYCHOLOGICALLY SOUND, WELL-EYE HEALTH & DISEASES, PAID ABOUT DIABETES, CARDIOVASCULAR RISK, BLOOD SUGAR & SOUND HEALTH, MOLE ANALYSIS

Entertainment From Public Authorities:

Academy & Reporting Partners:

Collaborations:

Learn more about our work at the Collaboration for Healthier Lives Coalition of Action www.c4hl.org

Empowering Healthier People Globally

Source: Bain interviews with local companies involved in CHL initiatives

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: Repeated, customized omnichannel initiatives result in high consumer engagement



Key learnings on shifting consumer behavior

- **Repeat initiatives** that are successful on a **regular basis to** anchor long-lasting, **healthier behavior**.
- **Restriction of pilots targeting a specific population or type of product** (e.g., vegan food) may be **counterproductive** and perceived as exclusive by the customer.
- **Combination of in-store and digital activations** provide maximum reach, especially when they include **financial incentives** as a tactic.
- **Top management endorsement**, achieved partly through the display of **strong KPIs**, provides the **credibility** and resources needed to create **ambitious** initiatives.



Key learnings for a successful collaboration

- **Leverage big data** collected through loyalty programs to offer **personalized content** (e.g. educational videos about the food categories neglected by each consumer) or **targeted advertising**.
- In mature markets, **capitalize on the trends** towards healthy and sustainable diets to establish new consumption habits.
- Empower consumers with tools to **monitor their own behavior**, which ultimately fosters them to achieve a well-balanced diet.
- Develop a **360° omnichannel communication plan** to continuously engage consumers with **pop-ups and reminders**.

DETAILED CASE STUDIES OF RECENT INITIATIVES

The UK market is uniquely mature and CHL's role in the country is bound to evolve to become a space for sharing.



U K



Note: (1) HFSS: High in fat, sugar and salt

The UK market is uniquely mature

- The country become a **unique space** for retailers and manufacturers with **specific regulations**, such as product labelling or promotions, due to **public health market**.
- The 2022 high-fat, high-sugar, high-salt (**HFSS**)¹ products regulations have forced a **systemic change in food profiling** with specific requirements established for both **retailers and manufacturers**.

CHL's role in the UK is set to evolve

- Due to the regulations are asked to implement significant changes to their product offerings, making the role of CHL pilots **less relevant** for companies.
- As a coalition, CHL is still **useful to both retailers and manufacturer** as it:
 - Provides an **open space for discussion** with external NGOs and activists to understand their view of the industry.
 - Allows **ideas and best practices** to be shared between retailers and manufacturers.

DETAILED CASE STUDIES OF RECENT INITIATIVES

HFSS-restricted products are limited when it comes to in-store and online placement and promotions; the impact is yet to be measured

HFSS definition



Retailers and manufacturers must work together to determine what products are HFSS based on their **“Nutritional Profiling Score”(NPS)**

This applies to prepackaged goods in the following **15** categories:

- Soft drinks with added sugar
- Juices with added sugar
- Milk drinks with added sugar
- Yogurts
- Ice cream
- Pudding and dairy desserts
- Cakes
- Confectionery
- Sweet biscuits
- Morning goods (e.g., pastries)
- Breakfast cereals
- Ready made meals
- Pizza
- Fried potato products (e.g., fries)
- Potato chips and puffed snacks

Scope of regulation

1. Location restrictions & 2. Online restrictions

WHO	WHAT
Convenience retailers with more than 50 employees¹ AND relevant internal floor area of over 2,000 sq. ft²	1. Location restrictions ban the display of HFSS products: <ul style="list-style-type: none"> – Within 2m of checkouts and designated queuing areas. – On or within 50cm of an end-of-aisle unit. – In a restricted area (3% of the total floorspace) at store entrances. 2. Online restrictions prevent retailers from locating HFSS on certain areas of their website: <ul style="list-style-type: none"> – Homepage. – Checkout page. – While a consumer is searching for non-HFSS products. – Pop-up page. – On a favorite products page.
WHEN	
1. From October 2022 2. From October 2023	
WHERE	
1. In-store 2. Websites, online marketplace	

3. Volume promotions

WHO	WHAT
Convenience retailers with more than 50 employees¹	3. Volume promotions restrictions apply to: <ul style="list-style-type: none"> - Multibuy promotion (e.g., “3 for 10\$”) - Extra free promotions (“Buy 1 get 1 free”, “50% extra free”) - Promotion of HFSS products alongside non-food products - Promotion of sets of products containing a HFSS products Exemption for: <ul style="list-style-type: none"> - Meal deals (lunch, breakfast) - Dine for two (or multiple persons) - Multipacks, and on-pack promotions (until Oct. 2024)
WHEN	
3. From October 2022	
WHERE	
3. In-store	

Projected impact



- Packaged food sales are projected to **lose the momentum** gained during the lockdown restrictions
 - **Cereal bars, chocolate bars and single-portion ice creams** rely heavily on **impulse purchases**, making them some of the **most affected** categories based because of **location restrictions**
 - **Potato chips and puffed snacks** might face additional challenges due to the **ban on volume promotions**
 - With limited non-HFSS options, the **pizza category** is also likely to be significantly impacted
 - Increased scrutiny regarding high sugar content in children’s **breakfast cereals** will pose significant challenges
 - HFSS regulation, combined with competitive pricing for low-calorie soda, will likely promote the growth of **reduced-sugar variants among soft drinks**

DETAILED CASE STUDIES OF RECENT INITIATIVES

Detailed guidelines are provided to retailers and manufacturers to ensure compliance with HFSS products restrictions.



Illustration of the ban on volume promotions



Illustration of location restrictions (not exhaustive)



Source: Association of Convenience Stores

DETAILED CASE STUDIES OF RECENT INITIATIVES

Specifically in England, all manufacturers and retailers are required to comply with Food Regulations of 2021, overshadowing CHL initiatives.



Context



The Food (Promotion and Placement) Regulations 2021 caused a **major paradigm shift** that brought all retailers and manufacturers in England onto a **common baseline** for offering healthier products, **overshadowing the initiatives launched with CHL**.

Zoom on next page

Companies involved:
All retailers and manufacturers in England

Objectives



- The goal of these regulations is to **sustainably reduce the visibility and accessibility of HFSS products** in England, in order to **guide consumer choices towards healthier options** in the long term,
- Government **regulations** in England have forced **manufacturers and retailers** to significantly transform the retail environment.
- While **outside the scope of CHL initiatives**, these regulations are a valuable **case study** because they **target similar outcomes on a larger scale**, requiring retailers to implement strict restrictions on **volume promotions** and **product locations** in-store and online.
- **Retailers are liable** if HFSS products are not correctly promoted or displayed in their stores, which requires **collaboration with manufacturers to identify HFSS products** among 15 categories of prepacked goods based on their Nutritional Profiling Score (NPS).

Rules and principles



This new regulation could very well have ended the need for CHL UK; however, the coalition remains active by those companies that are committed to working together. CHL UK is still relevant, making positive impact on diets in the UK.

Deployed tactics



Environmental restructuring
Modify the physical and digital environment to reduce the accessibility of HFSS products.

Increase salience
Remove HFSS products from visible locations to increase awareness, visibility and accessibility to healthier products.

Behavior substitution
Substitute the purchase of HFSS products with healthier options.

Active choice
Remove default HFSS options and increase salience of healthier choices.

DETAILED CASE STUDIES OF RECENT INITIATIVES



Due to newly enforced HFSS standards, manufacturers and retailers have started to implement change



U K

Consequences of the regulation



- **Both manufacturers and retailers** are strongly committed: the regulations are **legally binding**, forcing both parties to collaborate in order to avoid penalties and maintain positive public image.
- **Measurement is straightforward** and there is **no more controversy on the definition of "healthy"**: the new regulations provide clear guidelines on what constitutes a **healthy product**, ensuring **consistency across the industry**.

Collaboration between manufacturers and retailers



- **For each applicable category, retailers** collaborate with their **suppliers** to **adapt their offering and product range**.
 - **Category managers** revise **product assortment** by integrating **in-depth knowledge of consumer needs, brand strategies** and growth plans.
- As for **manufacturers, product managers** incorporate standards into their **reformulation requirements**.
 - They adapt their **innovation pipelines** to ensure products remain **visible and accessible to consumers**.
 - Reformulation is carried out in consideration of **consumer expectations and habits** (e.g., taste, formats) and is rolled out on a **step-by-step basis**.
- Both retailer and manufacturer work in **partnership** with the common goal of **regulation compliance**, while optimizing **growth and performance**.

Measures of success



- The implementation of the regulation is still **too recent for its effects to be measured** on consumer behavior and overall health outcomes.
- **KPIs need to be defined and monitored** as time progresses and more data becomes available.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: CHL UK illustrates the benefit of launching constraining regulation to generate a positive impact on the health of consumers.



Key learnings for driving significant shift in consumer behavior

- **Market maturity** is a key factor to consider when designing a pilot, as **consumers' readiness for change** plays a critical role in its success.
- **Mandatory regulation** tends to be more effective than CHL pilots for changing consumer habits as it forces **permanent change** and involves **all manufacturers and retailers**.
- **Changes should be implemented proactively**, anticipating potential regulatory scenarios, rather than reacting to regulation changes.
- **Deep change in the shopping environment** help achieve more sustainable change in consumer behaviors than little adjustments.
- **A permanent shift** in consumer behaviors can only be achieved by **scaling up successful pilots**, as the effects of the pilots cease once they are discontinued.

Key learnings for ensuring a thriving collaboration

- Align stakeholders on a **common definition** of a healthy product for **more direct and comparable measurements**.
- Design initiatives in a way that **does not put manufacturers or retailers at a competitive disadvantage**.
- Accompany consumers towards **better consumption choices** over time by implementing **small changes to product formulation** and keep in mind **their preferences**.

DETAILED CASE STUDIES OF RECENT INITIATIVES

CHL USA designed a holistic program to address health disparities in Chicago communities



Context



CHL USA designed a **holistic program** to address health challenges faced by communities in the Chicago area, where socioeconomic and health disparities are prominent and geographically-based.



Objectives



- Walmart launched a three-month pilot to position itself as a **wellness destination, targeting time and/or resource-constrained young families and particularly black and hispanic families**, who face higher risk of health disparities.
- The pilot aimed to make the **healthier choices easier choices**, which included making **fresh fruits and vegetables** more accessible for **low-income shoppers**.

Design principles and outcomes



- The pilot consisted of three, in-store components:**
 - Distribution of **sample boxes** containing **healthier products assortments**.
 - Community-based events** to educate consumers on how to live a better life by way of **games and samples**.
 - A **Fruit and Vegetable Incentive**, which **did not kick-off**, intended to offer a **\$5 discount on fruits and vegetables** for every \$10 spent in Walmart stores on over **400 selected healthy products**.
- The **duration** of the pilot was dependent on the **activation(s) and event(s) each supplier participated in and financially contributed to**.

Deployed tactics



Education or information	Environmental restructuring	Reminders, cues or prompts
Raise awareness of the importance of healthier choices through in-store activations and free samples of healthy products.	Set up in-store booths to make the healthier choices, easier choices.	Call attention to a healthier behavior with evocative taglines on merchandising supports.

DETAILED CASE STUDIES OF RECENT INITIATIVES



The initiative included various activations that manufacturers could choose to participate in.



Approach and execution



- Walmart leveraged the **CHL network** to bring together a coalition of **committed food and non-food manufacturers**.
- The initiative included in-store activations that invited **manufacturers** to **participate in several sponsored sampling** actions at different stores.
- The **costs associated with each program component** were **shared amongst the participating manufacturers**, including the payment of agencies (e.g., merchandising, in-store communication).
- **Community influencers** were identified to help **build awareness and trust within their communities**, with the objective of attracting people to the stores.

Measures of success



- The data is **not yet fully aggregated**, but the results will be measured by:
 - **Consumer reach**, the **number of samples** distributed, and **qualitative consumer feedback**;
 - **Sales increase in units and value** of featured products and brands following the events;
 - The **number of retailer, stores and manufacturers** involved.

36,356 Samples were distributed at community events

Challenges



- The number of in-store sampling operations did not **occur as initially planned**; however, the initiative has a potential to expand **to other locations** or be held on a **more frequent basis** using the learnings captured in the first versions.
- The Fruit and Vegetable Incentive did not launch due to **limited internal support, sponsorship, and unforeseen circumstances**; this example highlights the importance of securing **senior leader endorsement** and **alignment with stakeholders' health and wellness priorities** to ensure the success of future pilot launches.
- **Staffing changes** across member organizations and the project management team negatively impacted long term **momentum and commitment**; this emphasizes the importance of fostering **alignment across merchandising and store operations**.

DETAILED CASE STUDIES OF RECENT INITIATIVES

Sample boxes were distributed in-store and at community events



Illustration of the initiative

Community Events



In-store samplings



DETAILED CASE STUDIES OF RECENT INITIATIVES

Key learnings: Effective collaboration opportunities appear when people with seniority and sponsors are involved.



Key learnings on shifting consumer behavior

- **Collaboration with community influencers** can increase **participation and trust** among the targeted audience.
- Work with a **third-party Project Management Officer (PMO)** to **foster collaboration** among stakeholders, plan the operation and measure its success.
- Combine **retailers' business expertise** with **manufacturers' consumer knowledge** to achieve **mutual benefits** and drive impact.
- **Tailor messages** to address **specific market concerns**, such as excessive dining out in the USA, to increase the relevance and relatability of the pilot.



Key learnings for a successful collaboration

- **Involve CEOs** to guarantee the **appropriate level of sponsorship**.
- Involve **buyers and merchants** who respectively **manage product assortments** in their categories and **oversee store operations** for seamless execution of in-store activations.
- Establish **multiple “tiers” of participation** for suppliers to choose from, with **clear cost-sharing arrangements**.
- Develop and commit to a **data sharing agreement**.
- Collect a combination of **quantitative and qualitative success metrics** to **enhance pilots** that are based on **consumer feedback**.

CHAPTER

Empowering Consumers Towards Healthier Lives

Introduction to the Collaboration for Healthier Lives Coalition of Action (CHL)

Key Learnings for Enhancing Consumers' Health

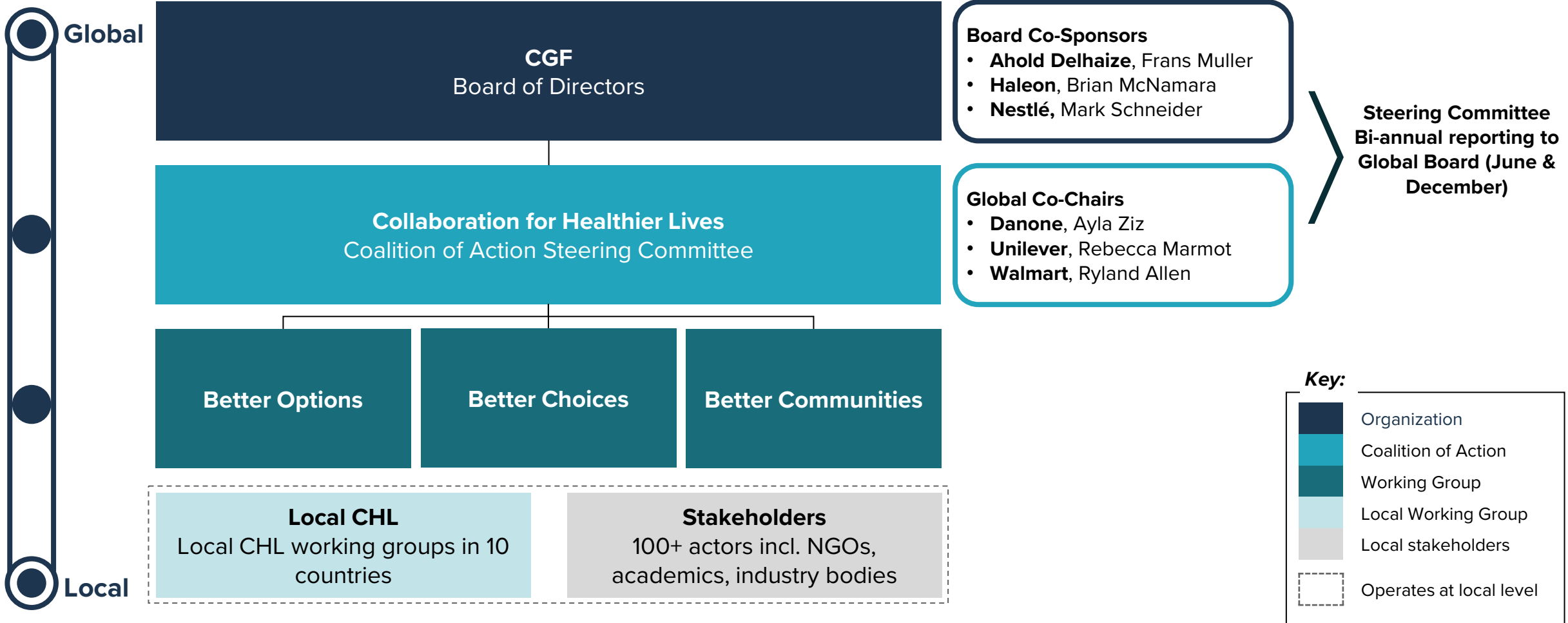
Inventory and Assessment of Impact of CHL Initiatives [June 2021 – June 2023]

Detailed Case Studies of Recent Initiatives

[Join CHL](#)

Join CHL

The CHL Coalition of Action Governance Structure



Unleash your inner Change-Maker: join CHL to deliver positive change at scale and shared business value.



CGF Members benefits



Get help, guidance and access exclusive resources

- Get access to **toolkits and guidelines** that explain the methodology.
- Get invited to expert-led **webinars and workshops**.
- Join **expert working groups** and committees and help develop solutions to global and regional issues.



Engage with key stakeholders with a common voice

- **Get a seat at the table**, as part of our unique, global platform.
- Help **shape the industry's position** on key topics.
- Help **represent the industry** at key stakeholder meetings and events.



Network with peers and share best practices on critical issues

- Get access to **member-only events** around the world.
- Get access to **case studies** and other resources.
- Receive **preferential rates** for CGF and partner events.



CHL Members benefits

- Inspire **healthier behaviors** in stores, online and in communities.
- Build upon **digital innovations** and **data sharing** to enable new business models.
- Enable **healthy workforces** by implementing Employee Health & Wellbeing programmes and Workforce Nutrition programmes.
- Be a part of a **convening platform** for business and stakeholders, incl. public health authorities, civil society organizations and academia.

The words of their members: CGF & CHL participants value their belonging to the organization



“We retailers play a vital role in the lives of our shoppers and food is a central part of life. Good food is one of the cornerstones of health. I am proud to see our industry, through the CGF, help shoppers better understand nutrition so they can make great choices for themselves and their families.”

CEO & President



“One of the ambitions of The Consumer Goods Forum is to empower people to lead healthier lives. The Health & Wellness Coalition helps us to achieve this by offering an open platform for collaboration and best practice. I invite all companies, small and large, to join us in this collective effort. Every contribution counts.”

CEO



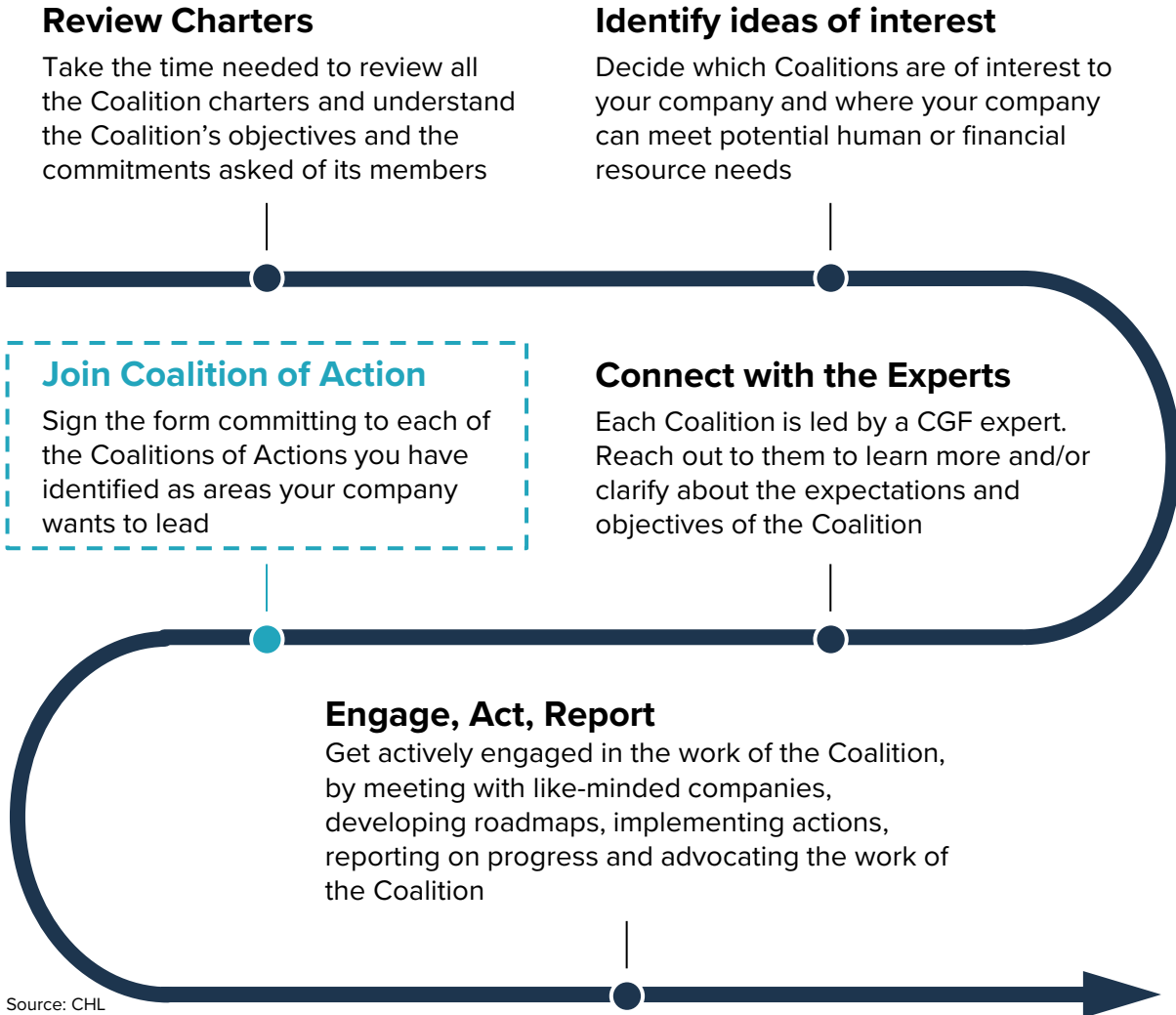
“If you want to know where the future is going to be, there is no place better than the Global Summit. We’re talking 1,000 CEOs and thought leaders coming together to talk about improving every aspect of our industry. We need events like this and the CGF delivers.”

Chairman



Join CHL

The process to join CHL, or any other CGF Coalition of Action, is simple and can be done in a few quick steps



Source: CHL

How to join the CHL Coalition of Action?

Let us Get to Know You...

ABOUT YOUR COMPANY

What is your organisation's sector? (Required)

- Retailer
- Manufacturer
- Service Provider
- Association
- Education

Where are your organisation's global headquarters located?

- Europe
- Africa
- Middle-East

ABOUT YOU...

Your Name (Required)

First: Last:

Your position in the organisation (Required):

Your professional email address (Required): Enter Email Confirm Email

Comments or questions:



[Find out more on the CGF website](#)

Research utilized for this project was used to showcase how to launch successful behaviour-changing initiatives. The types of sources used include:



Review of published CHL reports, third-party publications, and additional academic literature to provide context for CHL initiatives.

Provides insights into how CHL initiatives can be designed and used to **champion healthier lives among consumers.**



Refreshed analysis of self-assessment completed by CHL members evaluating relative success and feasibility of each initiative.

Compares **success and feasibility** of initiatives in different countries by variability of their design, characteristics and objectives.



Interviews with CHL core sponsorship team, co-chairs and local representatives.

Offers in-depth, qualitative discussions to **draw insights about the recipes for success and pitfalls** when it comes to launching a successful initiative.

About The Consumer Goods Forum



The Consumer Goods Forum (“CGF”) is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serves the consumer goods industry worldwide. It brings together the CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format. Its member companies have combined sales of EUR 4.6 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 55 manufacturer and retailer CEOs.

For more information, please visit: www.theconsumergoodsforum.com



About Bain & Company



Bain & Company is a global consultancy that helps the world's most ambitious change makers define the future.

Across 65 cities in 40 countries, we work alongside our clients as one team with a shared ambition to achieve extraordinary results, outperform the competition, and redefine industries. We complement our tailored, integrated expertise with a vibrant ecosystem of digital innovators to deliver better, faster, and more enduring outcomes. Our 10-year commitment to invest more than \$1 billion in pro bono services brings our talent, expertise, and insight to organizations tackling today's urgent challenges in education, racial equity, social justice, economic development, and the environment. We earned a platinum rating from EcoVadis, the leading platform for environmental, social, and ethical performance ratings for global supply chains, putting us in the top 1% of all companies. Since our founding in 1973, we have measured our success by the success of our clients, and we proudly maintain the highest level of client advocacy in the industry.



