



Research on market solutions to childhood obesity

Invitation To Tender

Background

Big Society Capital is a wholesale social investment institution whose mission is to support charities & social enterprises to access the mission-aligned investment capital they need to become more sustainable, to grow and to scale.

Guy's & St Thomas Charity is an independent charitable foundation, focused on supporting health in the London Boroughs of Lambeth and Southwark.

Big Society Capital and Guy's & St Thomas Charity are interested to explore enterprise solutions to childhood obesity, and how philanthropy and social investment could help scale socially impactful enterprises in this area.

This includes seeking a better understanding of the current market for products and services that effectively enable families on a low income in urban areas to access a nutritious diet. In addition, we aim to consider which models would best support this market to sustainably grow.

We are looking for a researcher or research organisation to produce a piece of market analysis over a three-month period exploring this question.

Context – Childhood Obesity & Poverty

This fits into a wider programme of work by Guy's & St Thomas Charity, seeking behavioural science driven solutions to tackle childhood obesity and inequality.

Evidence suggests that one of the strongest direct drivers of obesity is eating behaviours; the number of calories and nutritional content consumed. In turn, that these behaviours are strongly influenced by our surrounding food environments, and the incentives that they contain to access healthy and nutritious diets. International evidence of interventions trying to affect eating behaviour suggest higher levels of success when providing healthy products and services that meet people's need for quick, affordable and tasty food products than for healthy eating education programmes and campaigns alone. This is particularly the case when trying to reduce inequalities in obesity rates across income.

Across the country, there is a strong correlation between area deprivation and rates of childhood obesity. Children living in the most disadvantaged areas are over twice as likely to be obese as those living in the most affluent areas. This may be because general behavioural drivers of obesity are exacerbated in disadvantaged areas. Household poverty and its associated stressors puts further literal and psychological constraints on families' ability to plan for and choose healthy food options. More deprived urban areas are also associated with higher levels of high-fat fast food options and lower levels of green space.

Objectives

GSTC and Big Society Capital are interested to explore opportunities and barriers for enterprise models that:

- Provide products or services that improve access and engagement (e.g. are quick, affordable & tasty) with nutritious diets;
- Effectively markets to and serves a low-income urban family household consumer base; and
- Has sustainable & scalable business models;

This may include large scale commercial enterprises, social enterprises, online delivery platforms, market co-operatives etc. Out of scope for this research piece are non-commercial based community models. The research will sit alongside some current ethnographic work being undertaken with families in Guy's & St Thomas' Charity's local area, exploring customer segmentation and user need from this perspective.

We also invite a consideration of the current competition across this market segment from less-nutritious or unhealthy alternatives and the business models, supply chains and other infrastructure that supports these.

We are looking for this analysis to tell us what the current market looks like in this area and the models that are showing potential both domestically and internationally.

Additionally, the analysis should consider the current barriers to the sustainability and scale of this sector and draw upon international examples and new thinking to explore potential models for overcoming these barriers to increase the scale and impact of this sector, including but not limited to the role of subsidy at different levels of a business model.

We are expecting this to rely on secondary data sources and research material.

Questions to Explore (in order of priority)

- What are the current consumer purchasing habits of the lower income deciles of family households in urban areas within the UK related to food and drink, based on an analysis of existing macro consumer purchasing data sources and research? Please note which data sources you would draw upon for this work and the cost of access.
 - E.g. average food spend, sources of purchasing, % spend and/or calories fit with recommended EatWell guidance on a balanced diet, difference between income deciles, difference between age groups, demographics, genders etc.
- Who is currently serving this population with products and services related to non-nutritious & nutritious diets?
 - E.g. % split between food type, company type, scale, business models, supply chains, supporting infrastructure, financing
- What is the international best practice in serving low income populations with products and services related to nutritious diets?
 - E.g. company type, scale, business models, target customers, supply chains, impact (theory of change/logic model), supporting infrastructure, financing
- What are barriers to the growth of businesses providing products or services that support more nutritious-diets amongst a low-income urban family household consumer base?
 - E.g. financial and non-financial barriers across different stages of the business growth cycle? How unique are these or are they shared across the market segment (nutritious & non-nutritious)?

- How might these barriers be overcome to help such enterprises be supported to scale? Who is currently addressing these barriers either domestically or internationally? What type of support is seen to be most valued/most effective? Where are there gaps?
 - E.g. tailored business development support programmes, grants, subsidised and/or patient investment, priority access to markets, specialist marketing advice, investment-readiness, R&D, R&D commercialisation/go-to-market, impact evaluation.
- What could be a first step to supporting this market?
- Key questions to be answered/considered further including delivery options and next steps?
- What are the differences/similarities between the non-nutritious and nutritious-offering groups? Are there any innovations in product/service offer or business model particularly associated with models supporting nutritious diets?

Outputs

A presentation/report summarising the findings and recommendations from the research period.

Timings

Please submit an Expression of Interest by **5pm on the 27th April**.
 We'll be inviting shortlisted candidates for interview in **early May**.
 Provisional timings for the research are **21st May – 13th August**.
 Final output expected by **20th August**.

Budget

We have a £20,000 budget for this research, with the potential for additional funding to cover costs of accessing specific datasets (if required).

Partner

We are looking for a research partner who can demonstrate ability to rapidly undertake sector level research around market size, segmentation, gaps. Ideally, we are looking for a partner with experience in doing analysis around consumer retail and understanding of social enterprise and mission-driven business.

Expression of Interest (Eoi)

Eois should be less than 10 A4 pages and include:

- Your proposed methodology
- Details of your organisation
- Details of the staff team who will be working directly on this project
- Any additional or alternative research questions or approaches you feel appropriate
- Evidence of recent and relevant experience
- A detailed budget
- Details of 2 recent referees who are willing to be contacted regarding work you have completed on their behalf

Contact

Please send Expressions of Interest to Alex Goodenough at AGoodenough@bigsocietycapital.com.

If you have any questions, please get in touch with Alex on the email above or Sarah Hickey at sarah.hickey@gsttcharity.org.uk.