



Healthy Retail San Francisco

FINAL EVALUATION REPORT: 2017–2021

San Francisco Department of Public Health Tobacco-Free Project

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Report Submitted: December 2021

Made possible by funds received from Propositions 99 and 56 through the California Department of Public Health—TCS Contract #1738.

ACKNOWLEDGEMENTS

The San Francisco Department of Public Health Tobacco-Free Project would like to thank the Office of Economic and Workforce Development, the Tenderloin Neighborhood Development Corporation / Healthy Corner Store Coalition, the Small Business Development Center, Sutti Associates, and the Healthy Retail SF Advisory Committee for their leadership and partnership in this work. We would also like to acknowledge the following organizations for their contribution and partnership toward healthy-retail efforts in San Francisco:

- Samoan Community Development Center and their Emerging Community Leaders
- Tenderloin Food Justice Leaders
- Bayview Food Guardians, formerly Southeast Food Access Working Group (SEFA)
- Vouchers 4 Veggies, formerly EatSF
- Yerba Buena Center for the Arts
- 18 Reasons Cooking Matters
- Shape Up San Francisco
- San Francisco Nutrition Education and Obesity Prevention (NEOP), formerly Feeling Good Project

Suggested Citation: Bright Research Group and San Francisco Department of Public Health Tobacco-Free Project. *Healthy Retail San Francisco Final Evaluation Report: 2017–2021*. California, 2021.

Between 2017 and 2021, 13 tobacco retailers participated in Healthy Retail SF's three-year program and were redesigned into healthy retail stores through the Healthy Retail SF program, including four new stores in the Tenderloin and Bayview neighborhoods. Stores that participated in Healthy Retail SF limited the amount of tobacco and alcohol advertising, stocked healthy products and produce, and followed other health-promoting standards.

ABSTRACT

Retail environments in San Francisco's low-income communities are inundated with access to and the promotion of unhealthy products, such as tobacco, alcohol, junk food, and sugary beverages. The Healthy Retail SF (HRSF) program aims to transform the retail environment in "food swamp" neighborhoods so that retail stores offer and promote healthy and affordable products, such as fruits and vegetables, and rely less on tobacco. HRSF is implemented in partnership with the San Francisco Tobacco-Free Project (SFTFP) and the Office of Economic and Workforce Development (OEWD), along with community and agency partners. To increase access to healthy foods, the HRSF program aimed to recruit and maintain a total of 8–12 participating stores that received interventions and incentives between July 2017 and December 2021. By the end of 2021, the HRSF exceeded its goal by engaging 12 participating stores, which included four new stores in the Tenderloin, Bayview, and Oceanview neighborhoods. Though they expanded recruitment and community engagement to Visitacion Valley, a store in that neighborhood was not ultimately selected.

HRSF codesigned annual Individualized Development Plans (IDPs) with all the participating stores, which included interventions such as replacing tobacco advertisements with produce signs; implementing a Point of Sale (POS) system; stocking produce and healthy snacks; and receiving training and technical assistance on small business operations. Resident Food Justice Leaders (FJLs) and HRSF partners conducted 11 community and media events to promote stores and their offerings among community members. A focus group of store owners demonstrated that the HRSF program's interventions in its three core program areas—community engagement, store redesign, and business operations—were highly valuable and impactful. Assessment of POS data for five of the graduating stores indicate that the stores are shifting their business models, increasing their proportion of produce sales while decreasing tobacco sales.

In 2019, the SFTFP conducted assessment activities for the Healthy Stores for a Healthy Community (HSHC) Campaign, including 438 observations of retail stores and public intercept surveys with 394 residents in nine zip codes, as well as five key informant interviews. The HSHC findings show the impact of San Francisco's policy that ended sale of flavored and menthol tobacco products while highlighting the need to increase access to fruits and vegetables in stores and educate stakeholders on a minimum-price policy for tobacco products.

AIM AND OUTCOME

To increase access to healthy foods and decrease access to and exposure to unhealthy products in San Francisco's low-income communities, the SFTFP set the following objective:

By June 30, 2021, the City and County of San Francisco will implement the HRSF policy with 6–10 tobacco retailers already participating in the three-year program by offering incentives (e.g., technical assistance, health-promotion materials, and community engagement activities) and recruit a minimum of two new additional tobacco retailers for a total of 8–12 tobacco retailers receiving interventions during the plan period. In exchange for these incentives, the participating HRSF retailers agree to follow their IDPs, which outline specific limitations on tobacco and alcohol advertising, specific produce and healthy products to stock, and many other health-promoting standards.

By the end of the 2017–2021 period, the SFTFP exceeded its objective by implementing the HRSF policy with 12 total tobacco retailers, including four new stores: Sav-Mor Mart in Bayview, Salem Grocery, Dalda's Community Market, and Golden Gate Market in the Tenderloin.

BACKGROUND

The City and County of San Francisco is a dense urban area with over 870,000 residents, of which 40% are White; 34% Asian; 16% Latino; and 5% Black. Low-income and underserved communities of color who live in the southeast neighborhoods of the city, such as the Tenderloin, Bayview, Hunters Point, and Oceanview, experience disproportionately high rates of preventable chronic disease. These neighborhoods are also considered “food swamps” in which there is a high saturation of unhealthy products (i.e., tobacco, alcohol,

processed foods, and sugary drinks) and little access to fresh and healthy foods. These neighborhoods also have the highest density of corner stores—many of which are tobacco retailers—in San Francisco. Corner stores are often subjected to pressure from and the supply of major snack, tobacco, alcohol, and sugary-beverage companies. As result, low-income residents who rely on corner stores to get food are exposed to more unhealthy products and their advertising. Greater exposure to tobacco outlets leads to greater risk for tobacco-related disease and death and higher body-mass indexes (Chuang J, 2005, Laska MN, 2010).

During the 2016 Community of Excellence (CX) process, San Francisco Tobacco-Free Coalition (SFTFC) members, residents, and the SFTFP staff prioritized increasing the number of HRSF stores as an objective. They prioritized the objective because of its impact on health equity, feasibility, capacity of staff and coalition members, and existing political will.

The HRSF program was established through a county ordinance in 2013. The mission of HRSF is to increase access to healthy foods and decrease access to unhealthy foods in low-income neighborhoods. The HRSF program incentivizes, supports, and builds the capacity of corner-store owners to redesign their stores to offer healthier products. The HRSF program is implemented in partnership with the OEWD. The HRSF program partners with corner stores in three key areas:

- (1) Community engagement
- (2) Physical store redesigns
- (3) Business operations

By 2016, nine tobacco retail corner stores were redesigned by the HRSF program, offering over 1,600 additional units of healthy food per month and increasing total sales per store by 25%. The stores also decreased their tobacco selling

space by 5% and removed tobacco advertising. The HRSF program mainly serves low-income, underserved, and food-desert neighborhoods in San Francisco, including Bayview, Hunters Point, Tenderloin, and Oceanview. Given that HRSF has matured in its program implementation, the SFTFP aimed to expand it to reach one additional low-income food-desert neighborhood in San Francisco and redesign at least two tobacco retailers.

EVALUATION METHODS AND DESIGN

The evaluation design was nonexperimental and included both process and outcome evaluations. The outcome evaluation was conducted through analysis of POS data for each HRSF store and the HRSF store-assessment survey. In addition, HSHC store survey data demonstrated any changes in store offerings across the county. Process data includes focus groups with merchants to assess the efficacy of HRSF program implementation and merchant feedback; tracking and analysis of media mentions of HRSF; and surveys and key informant interviews for the 2019 HSHC Campaign. Six training sessions were held with 17 youth and 26 adults, totaling 15 hours to prepare them to collect data for HSHC store-observation data.

The methods, sample size, analysis, and timing for each evaluation activity are described in table 1 on page 5.

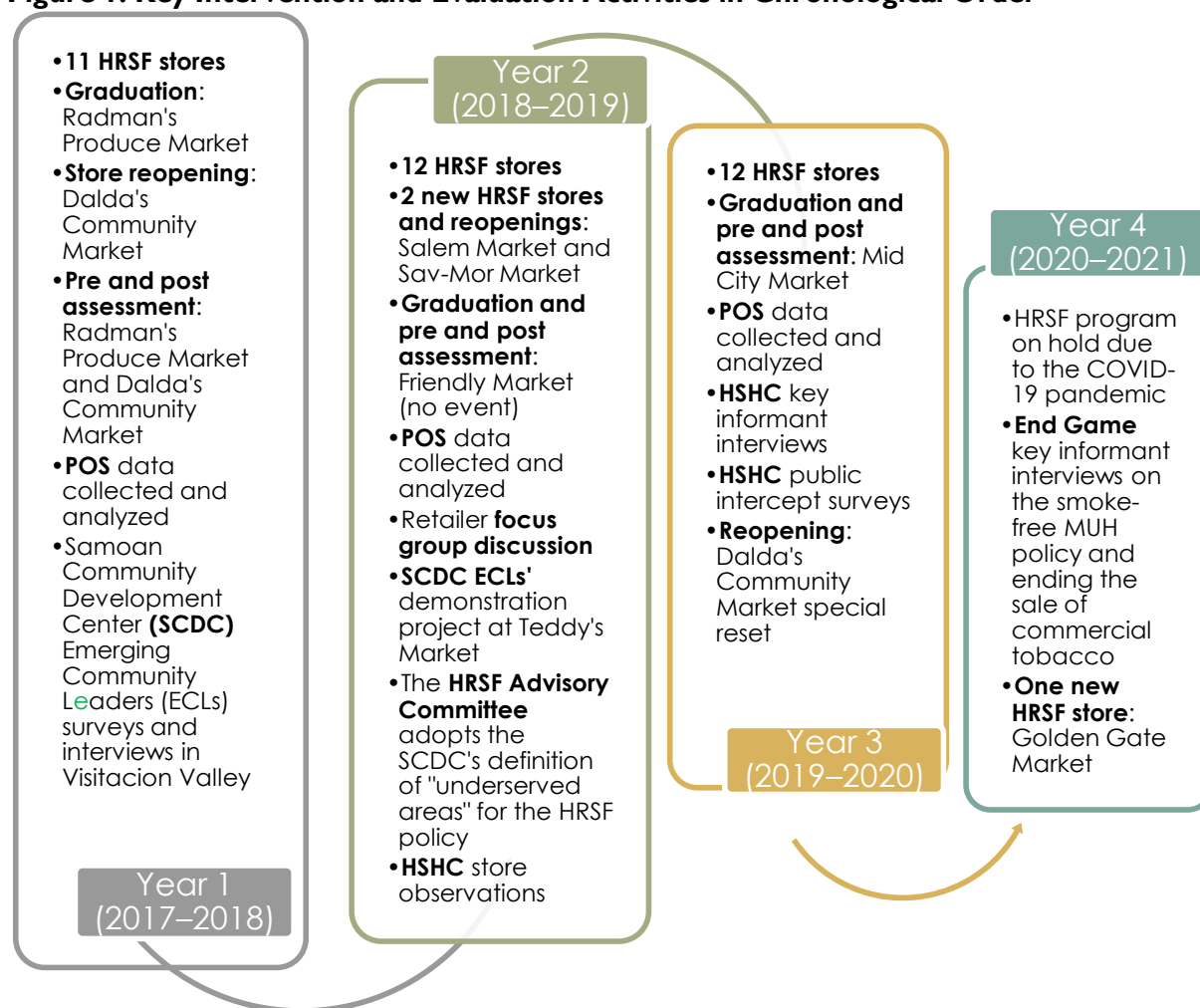
Limitations

A convenience sampling was utilized for the public intercept surveys and key informant interviews. Therefore, the findings cannot be generalized to other stakeholders' perspectives.

Table 1. Key Outcome and Process Evaluation Activities

Evaluation Activity	Purpose	Sample	Instrument Source	Analysis Method	Timing/Waves
Outcome Evaluation					
Pre and Post HRSF Store Standards and POS Assessments	Assess the availability and sales of healthy products, tobacco and alcohol advertising, and healthy promotional signage	Pre and post N = 3 POS data N = 8	HRSF	Descriptive analysis	Years 1–4 1 wave
HSHC Store Observation	Assess the availability of tobacco products, alcohol, healthy products, and other store offerings	N = 438	Tobacco Control Evaluation Center (TCEC)	Descriptive analysis	Year 2 1 wave
Process and Outcome Evaluation					
Focus Group Discussion with HRSF Merchants	Assess HRSF program efficacy around tobacco and alcohol interventions as well as feedback from merchants	N = 1 focus group, 8 participants	Evaluation consultant	Content analysis	Year 2 1 wave
Process Evaluation					
Media Activity Record on HRSF	Track and assess earned- and paid-media coverage of the HRSF program	N = 14	TCEC	Content analysis	Years 1–4 1 wave
Media Activity Record on HSHC	Track and assess earned- and paid-media coverage of HSHC Campaign	N = 0	TCEC	Content analysis	Year 3 1 wave
Key Informant Interviews for HSHC	Explore knowledge of and attitudes toward the HSHC survey findings and efforts to improve retail environments	N = 5	TCEC	Content analysis	Year 3 1 wave
Public Intercept Survey for HSHC	Explore the community's knowledge of, attitude toward, and perception of the retail environment	N = 394	TCEC	Content analysis	Year 3 1 wave
Key Informant Interviews for End Game	Explore knowledge of and attitude towards the End Commercial Tobacco campaign indicators to inform intervention implementation	N = 11	Evaluation consultant / TCEC	Content analysis	Year 5 1 wave

Figure 1. Key Intervention and Evaluation Activities in Chronological Order



IMPLEMENTATION AND RESULTS

The focus group for the participating store owners highlighted the value and impact of the HRSF program and informed future efforts.

Given that the HRSF program has been in existence for about five years and that 11 stores have participated to date, HRSF wanted to assess the program's efficacy and opportunities for improvement from the perspectives of the participating store owners. In the fall of 2018, the SFTFP engaged Bright Research Group (BRG) to conduct a focus group of six participating store owners to gain their insight

into the successes and challenges of the program as well as program improvement.

The focus group findings revealed high satisfaction from participating store owners and the following high-value interventions to store owners among the three areas of the program model:

Community engagement

- Media events and coverage
- Community marketing and events
- In-store signage

Store redesign

- Equipment (i.e., refrigerators, shelving, etc.)
- Product placement in the store
- Store design and layout
- Inventory and merchandising needs
- Advertisement outside the store

Business operations

- POS system and technical assistance for POS

The store owners did not have specific feedback on areas for improvement among HRSF's core areas but identified areas in which the HRSF program and the City and County of San Francisco can better support small businesses at large. From the highest priority to the lowest, these were the areas of support:

- Security and safety concerns around illegal activity in their neighborhoods and near their stores
- Lack of parking and loading and unloading zones
- Support and seniority status to apply for City and County of San Francisco store permits
- Education on EatSF vouchers and product eligibility
- Support with sourcing popular products to attract new customers

The HRSF program incorporated these findings into its implementation of interventions and technical assistance to future, selected store owners for HRSF for the 2018–2021 period. The identified high-value areas were also highlighted in information sessions to recruit new stores to participate in the program.

"The grand reopening was cool. They shut down the street. The city supervisors showed up, and I was in the news."

"When I started the [HRSF] program, I had nothing healthy. I started with a small shelf of potatoes and tomatoes. Now I have seven to eight feet of produce."

"People in the program should have some type of seniority with the city and the time to discuss what we can improve, what needs to be changed, and what does and doesn't work for us."

Community Action Model project: The SCDC youth define "underserved" communities in the HRSF ordinance

In 2018, the SFTFP partnered and funded the SCDC, which serves the Pacific Islander community in the Visitacion Valley and Sunnydale neighborhoods, to recruit a team of ECLs to implement the Community Action Model (CAM) steps to expand healthy retail in their community. Youth ECLs conducted a survey of 250 youth in their community and learned that less than half of Bayview Visitacion Valley youth find it easy to buy healthy foods in their community and that more than half would buy healthy affordable food if it were available in their community. To address this, the SCDC youth ECLs began an education campaign to compel the HRSF Advisory Committee to amend the HRSF ordinance to define the term "underserved areas" to include and prioritize high-need communities in San Francisco. They collected input from over 100 community members on the definition of "underserved areas" to ensure that it reflected the priorities of community.

To gain community support through endorsements, they presented to community

groups about the need for healthy retail in their neighborhood and implemented a social media campaign. They collected 25 endorsements. The SCDC youth also demonstrated that there was interest in a local corner store to offer healthier products and demand for these products from neighborhood youth. They partnered with Teddy's Market, a corner store in Visitacion Valley, to offer two types of healthy snacks and healthy fruit as well as health-promotion posters. Over the two-week demonstration project, Teddy's Market sold out of these healthy products and sold 150 pieces of produce.



Criteria for Underserved Neighborhoods in Selecting HRSF Store Participants:

- Distance to full-service grocery store
- Distance to small produce markets
- Density of off-sale alcohol sites
- Density of tobacco sale permits
- Proximity to transit services
- Proportion of population below the federal poverty level
- Crime rates by neighborhood
- Distance to recreation parks
- Diabetes rates
- Number of stores that accept SNAP or WIC

In the spring of 2019, SCDC youth ECLs presented the community recommendations for the definition of “underserves areas” along with

findings from their surveys, community endorsements, and highlights from their demonstration project with Teddy's Market to the HRSF Advisory Committee. The Advisory Committee unanimously recommended that the definition and criteria be used when selecting all future stores for the HRSF program. As a result, the HRSF program adopted the criteria and uses it currently in selecting stores to participate in the HRSF program. Though Teddy's Market in Visitacion Valley met the criteria and was selected to participate, the owner ultimately declined the opportunity due to family issues but is possibly interested in participating in the future.

The HRSF program expanded from nine stores to 13 participating stores

The HRSF program recruits and informs owners of tobacco retail stores in priority neighborhoods to apply for and participate in the HRSF program each year. The information sessions located in the community are held with store owners and include testimonies and question-and-answer sessions from current store owners in the HRSF program. Stores that apply go through an assessment and selection process with input from community partners and small business consultants contracted by the OEWD. The selection process ensures that the HRSF program provides incentives, technical assistance, and interventions to store owners and their stores that are viable. Between July 2017 and December 2019, a total of 18 store owners expressed interest in the HRSF program. In the 2017–2018 period, the HRSF staff and FJLs, community leaders who lead HRSF community engagement efforts, recruited store owners in the Tenderloin and held an information session. To expand the HRSF's reach into a new neighborhood and in alignment with the work of the youth ECLs from the SCDC, the HRSF program recruited

stores and held two information sessions in Visitacion Valley, a neighborhood in the southeast corridor of San Francisco. Between 2017 and 2021, five stores were selected to take part and receive a full intervention in resetting their store:

1. Salem Grocery in the Tenderloin (2018)
2. Sav-Mor Mart in Bayview (2018)
3. Young Ellis Market in the Tenderloin (2019)
4. Dalda's Community Market in the Tenderloin (2020)
5. Golden Gate Market in the Tenderloin (2021)

Despite the HRSF program's desire to expand to Visitacion Valley and other underserved neighborhoods, the stores expressed interest but ultimately did not get selected. Young Ellis Market in the Tenderloin also dropped out of the program due to ongoing issues with POS system installment and store ownership. The HRSF program learned that store-owner cooperation and buy-in, especially around the POS system earlier in the process, is essential for successful participation in and completion of the program.

The HRSF program codeveloped and implemented individualized IDPs for participating stores with the goal of increasing access to healthy foods and decreasing the promotion of tobacco and alcohol

The HRSF participating stores and their owners met with the HRSF program staff to negotiate and codevelop an IDP on an annual basis throughout their three years in the program. The purpose of the IDP is to set store-specific goals and interventions to ensure the sustainability of the store's physical and business-operations redesign. The HRSF program hopes that participating stores will continue its business model of offering and

promoting healthy products in their community after graduating from the program. Graduating stores and store owners have also become mentors and support other store owners in implementing their redesigns.



The Mid City Market store owners received a Certificate of Honor award from the Board of Supervisors for being HRSF mentors

Throughout the 2018–2020 period, the HRSF program negotiated IDPs with all nine participating stores. The IDP includes interventions and activities within the HRSF's core program areas: community engagement, physical store redesign, and business operations. Examples of the activities include holding community events and food tours; replacing tobacco advertisements with signage promoting healthy products; installing new equipment, such as shelves and freezers, for healthy products; setting up a POS system and receiving technical assistance; and attending trainings on produce procurement and handling. Each intervention is implemented by an HRSF program partner, including the Department of Public Health, the OEWD, the Small Business Development Center, community FJLs, and other partners. The store owners are also held accountable to implement key activities each year. Three stores—Salem Grocery, Sav-Mor Mart, and Dalda's Community Market—received an IDP during the initial assessment process that

outlined details on implementing the redesign measures, conducting customer surveys, and hosting a community event to launch the reopening of their stores as a healthy retailer. All the participating stores received an annual IDP to implement throughout the year, which may include additional incentives. In total, the SFTFP HRSF program staff provided over 410 hours of technical assistance to stores to implement their IDPs. See table 1 in the appendix, which includes a summary of the IDPs and activities per store within the grant period.

Figure 2. HRSF Stores from 2017 to 2021



The HRSF promoted participating stores through community engagement events and media events

Community engagement is a core component of the HRSF program. FJLs are assigned to each store to promote community engagement in the HRSF store-redesign process. The FJLs conduct customer surveys to ensure that the

store redesign and product offerings reflect the priorities and needs of the community. During the store redesigns, they help install equipment, remove tobacco and alcohol signage, and put up healthy-product marketing. Using monthly report cards, they act as liaisons between store owners and the HRSF program to support implementation of IDP activities and quality improvement of the store offerings. Lastly, the FJLs organize and host community events, including store grand openings, store tours, and taste tests with residents; promotion of the store during Sunday Streets and other neighborhood events; and store-graduation celebrations. The events often included media presence or a press event to promote the HRSF program and the store.



Salem Grocery grand-reopening ribbon cutting

Store-Reopening Events

- Dalda's Community Market—April 2018
- Sav-Mor Mart—August 2018
- Salem Market—February 2019
- Palou Market—spring 2020, postponed
- Dalda's Community Market new location—December 2021

Store-Graduation Events

- Radman's Produce Market—2017
- Mid City Market—September 2019

Between 2018 and 2021, a total of 11 HRSF community events were held to promote the participating stores, including 14 media stories in the local news.

The COVID-19 pandemic put a temporary halt on the implementation of the HRSF program, including recruitment, community events, and media coverage. As a result, many stores did not have community events, such as graduations, store tours, and taste tests. But as shelter-in-place guidelines lifted and the COVID-19 pandemic subsided, the implementation of the HRSF program resumed in late 2021. During the fall of 2021, Golden Gate Market was selected as a new participating store, with a redesign slated for 2022. The HRSF program also held a reopening event at the location of the new Dalda's Community Market on December 12, 2021.

The HRSF graduating stores transitioned their business model to promote health in their community



The HRSF program monitors and evaluates the program's impact on stores and the community through POS data and regular store standard assessments. In 2020, the HRSF developed a high-level report for the OEWD that included the accomplishments and outcomes of the graduating stores. The report is available on the HRSF website, healthyretailsf.org. Key findings from pre and post assessments of the POS data

among the graduating stores include the following:

- **The stores' business models shifting toward produce sales over tobacco sales.** The average proportion of produce sales increased from 6% to 12% of the total sales, while the proportion of total sales that came from tobacco decreased from 10% to 7%.
- **The stores are selling more units of produce, stocking a greater variety of fresh fruits and vegetables.** On average, the stores sold an additional 21,000 units of produce and increased the number of produce store items by 39%.
- **The stores' revenue increased by \$33K due to the increase of produce sales.**

With the support of the HRSF program and the FJLs, the graduating stores also made significant changes in their store environments to advertise healthy foods and incentivize community members to buy healthy foods. The graduating stores eliminated tobacco advertisements on the exterior of the stores and took down advertisements for sugar-sweetened beverages, replacing them with signs to promote healthy foods and shelf labels to indicate healthy choices. The stores also moved produce placement to the front of the store. All the stores accepted EatSF (now known as Vouchers 4 Veggies) vouchers and increased access to affordable fruits and vegetables. EatSF provided free vouchers to low-income residents to redeem \$20-to-\$40 worth of vegetables and fruits from the participating stores. Over \$80,000 in EatSF vouchers were redeemed in HRSF stores. The participating stores also report selling more fruits and vegetables and having more costumers.

The SFTFP tailored the 2019 HSHC Campaign assessments to gain insight on inequities within San Francisco’s retail environment

Since 2013, the HSHC Campaign has been a statewide initiative among tobacco, nutrition, alcohol, and Sexually Transmitted Infections (STI) prevention partners. HSHC aims to improve the health of all Californians through changes in community stores and community education on how in-store marketing influences the consumption of unhealthy products. During this reporting period, the HSHC Campaign assessments were conducted in March through November of 2019 and included three types of data collection: store assessments, key informant interviews, and public intercept surveys.

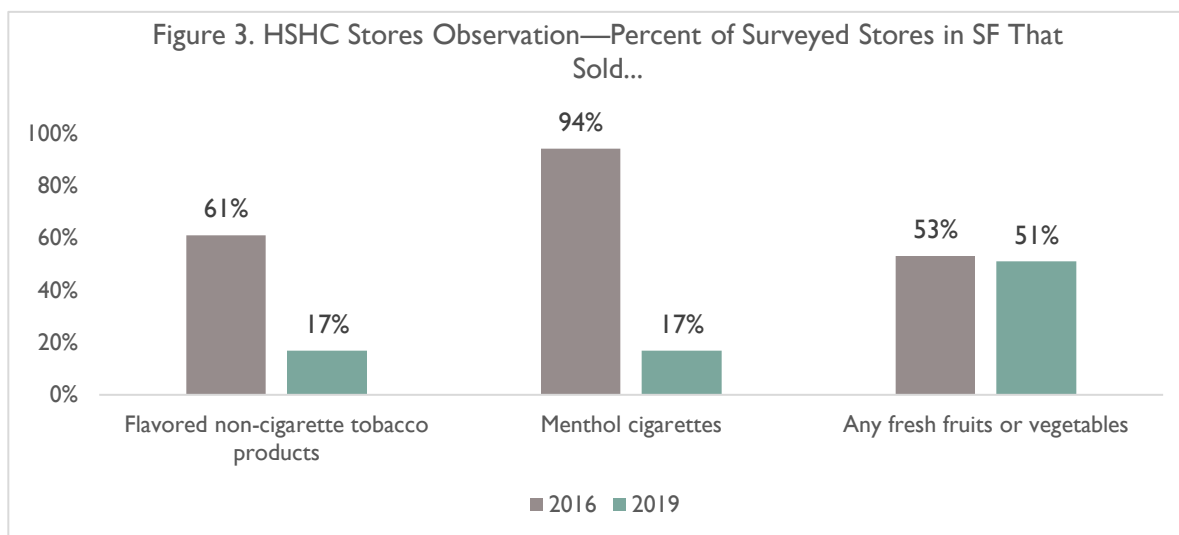
To gain better insight into the San Francisco tobacco retail environment and the communities most impacted by tobacco, the SFTFP tailored the California Tobacco Control Program’s (CTCP) standardized assessments:

- **Store observations and public intercept survey sample:** Adding zip

codes with the highest density of tobacco retailers and Black / African American residents, which resulted in including an additional 218 “nonrandom” sample stores

- **Store-Observation Tool:** Adding two modules to correspond to new San Francisco ordinances that banned flavored tobacco products (passed in 2017) and restricted the sale e-cigarettes (passed in 2019).
- **Public Intercept Survey Tool:** Removing questions about the availability of types of liquor and adding a question to mark surveys completed in Chinese as well as an Arab American option in the demographics section.

The SFTFP hired a consultant who conducted six trainings, totaling 15 hours of training, and developed a detailed training agenda to train both Community Survey Leaders and Community Survey Specialists to collect the HSHC store-observation data. The trainings took place in March 2019. In total, the consultant trained 43 data collectors (17 youth and 26 adults) to survey 438 stores in San Francisco.



The store observations demonstrated a decrease in the sales of flavored non-cigarette tobacco products as well as menthol cigarettes

Between April 1 and April 28 in 2019, 438 store-observation surveys were collected using handheld electronic devices and a pocket survey instrument. Among some of the key findings of the store observations and surveys conducted are the following:

- **Only 17% of the stores surveyed sold flavored non-cigarette tobacco products**, indicating the impact of San Francisco's policy to end the sale of menthol and flavored tobacco, which was implemented in early 2019. This was a remarkable decrease from 2016, when 61% of the surveyed stores sold them.
- **17% of the stores surveyed still sold menthol cigarettes, a significant decrease since 2016**, when 94% of the stores surveyed sold them.
- **About half of the surveyed stores offer fresh fruits and vegetables.** This proportion stayed the same between 2013 to 2019, indicating the need bolster efforts to incentivize and support stores to offer healthy products.

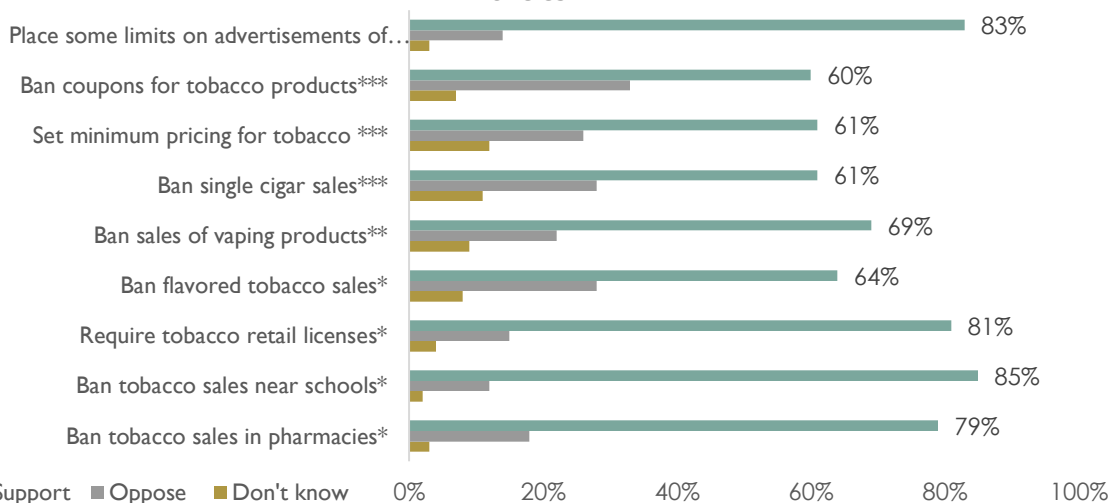
The CTCP had planned to implement a media event and press release of the HSHC store-observation findings across the state in March 2020. Given that the World Health Organization conducted a media brief on COVID-19 and media outlets across the world increased their coverage of the new virus, San Francisco's final press release highlighting store observations from HSHC was not picked up by media outlets. Instead, the press release was featured on the HSHC website.

The public intercept surveys demonstrated a poor understanding of minimum pricing among community members' policies compared to other tobacco control policies

Public intercept surveys and key informant interviews were conducted in the fall of 2019. The public intercept surveys were conducted in September and October of 2019 by five local data collectors in nine zip codes (see the Appendix), which corresponded to the areas where stores assessments in the spring were conducted. Data collectors used handheld electronic devices to survey a convenience sample of San Franciscans at various public locations and events, such as near public transit stops, schools, and libraries. A total of 394 people completed the survey. The survey respondents were asked whether they would support or oppose a sampling of tobacco control policies selected by the CTCP, four of which are already law in San Francisco. Overall, more than six out of 10 respondents were in support of every tobacco control policy mentioned (see figure 2).

The policy with the highest proportion of respondents who stated that they didn't know whether to support or oppose was minimum pricing, with 12% of the respondents unsure of their position. Even though the minimum-pricing policy was supported by most of the survey respondents, the support varied by neighborhood. The highest-income neighborhoods (the Marina and the Presidio) had the highest levels of support, while the lowest-income neighborhoods (the Tenderloin, Bayview, Hunters Point) had lower levels of support and higher levels of the "don't know" response. These results are somewhat unsurprising, given that lower-income people have higher smoking rates and are more impacted by policies that increase prices.

Figure 2: HSHC Survey—Percent of Resident Support for Healthy Retail Policies



*Signifies that the policy has already been enacted in San Francisco

**Signifies that the policy was passed but not yet enacted and was subject to potential repeal via a ballot measure at the time of the survey

***Signifies that the policy has not been enacted in San Francisco

Ultimately, the 2019 HSHC public intercept survey shed light on inequities related to tobacco access and use as well as healthy-food access among priority populations.

Interviews supported policies that could affect youth tobacco consumption and confirmed confusion about minimum-pricing policies

For the HSHC key informant interviews, the SFTFP selected a convenience sample of five San Franciscans representing two decisionmakers, a community advocate, and two tobacco retailers to participate in the KIIs. The SFTFP engaged BRG to conduct the interviews, and the SFTFP staff conducted the qualitative analysis. Since all the respondents had some previous familiarity with at least one of the SFTFP's programs, they were more likely to be informed on tobacco control and retailer policy than the average San Franciscan.

There was almost unanimous support for the existing policies that ban tobacco sales in

pharmacies, requiring tobacco retailers to obtain a license, and that ban new retail licenses near schools. Even the ban on flavored tobacco products, which was only a year old at the time of the interviews, was supported by four of the five respondents. The two participating retailers tended to be less supportive of additional restrictions on what they can sell.

At the time of the interviews in October 2019, the San Francisco Board of Supervisors had recently passed a moratorium on the sale of e-cigarettes and vaping products that were pending Federal Drug Administration approval. The policy had not yet gone into effect, and there was a ballot initiative in November 2019 sponsored by Juul Labs that would overturn it.

There was strong support among informants, including the two retailers, for the policy to end the sale of e-cigarettes and vaping products. Only one respondent was unsure and stated that they had seen friends quit cigarettes by switching to vaping.

“I don’t know. I kind of struggle with that simply because I know some people who tried to quit who say vaping has helped them with their journey to quit. I wouldn’t want to make [vaping devices] illegal, but I do know it’s easy for young people to get their hands on vapes. Maybe there is a world where it’s illegal to have flavored liquid nicotine and only allows non-flavored vaping products.”

Similarly to the public intercept surveys, the interviews also revealed confusion about the minimum-price policy. Two out of the five respondents did not understand the policy enough to voice support or opposition, and two voiced being against the policy. The two interviewed retailers were against the concept of fixing a price even though they were confused about the concept of minimum pricing for tobacco. Given that this policy continues to be a priority issue for the SFTFC, policymakers, stakeholders, and the general public need more education about minimum pricing in order for such a policy to be successful.

“Against. I don’t want government to get into that area. If they are going to get into controlling/fixing prices, they should focus on medicine and making it more affordable. People can’t afford medicine these days.”

San Francisco’s tobacco control leaders are uncertain about the policy goal of ending the sale of commercial tobacco in San Francisco

In the summer of 2021, 11 interviews with a diverse group of key stakeholders were conducted by Facente Consulting to explore

current knowledge of and attitudes regarding End Commercial Tobacco indicators—smoke-free multi-unit housing and ending the sale of commercial tobacco—to inform the SFTFP’s January 2022–June 2025 workplan. These interviews are part of the CTCP’s “tobacco end game” assessment efforts. Key informants included housing and tenants’-rights advocates, public health professionals, community leaders, and experts in tobacco control policy. Informants spoke about the importance of meaningfully engaging community stakeholders throughout efforts to educate, develop, and adopt these two policies. They emphasized that the SFTFP and the San Francisco Department of Public Health need to be open and responsive to community input and changes. Lastly, several informants expressed that any policy that limits the sale or use of tobacco products should be coupled with a strong commitment to cessation services and resources to address the root causes of tobacco use, such as housing, basic needs, and mental health services.

“The tobacco movement can feel very top-down and very policy driven. That pushes people away. Ultimately, we all want the same thing. The approach may be different. We’re all coming from a place of caring...For us to be successful and make even more impact, more wins would come from building that community organizing. The only way to do that is to engage people where they are at and not come with a set agenda.”

“You’ve got to say, ‘Here is our plan for alternative revenue services for you.’ Revenue is the important part. They gotta feed their families; they don’t necessarily want to sell.”

When it comes to the proposed policy of ending the sale of commercial tobacco in San Francisco, the informants were hesitant about the idea and suggested policy alternatives that

would take an incremental approach to reducing tobacco sales and availability. Other key themes related to ending the sale of commercial tobacco included the following:

- Denormalizing tobacco use and sales while shifting community mindsets toward a critical analysis of the tobacco industry's tactics and a social justice response
- Challenges in enforcing a ban on commercial tobacco sales that has the unintended consequence of criminalizing marginalized groups for selling tobacco products in an underground market
- Mitigating the economic impact on small businesses by providing an alternative revenue source, including partnering with the HRSF program

CONCLUSION AND RECOMMENDATIONS

The SFTFP and the HRSF program met and exceeded their objective: 13 stores participated in the HRSF program, including four new stores: Salem Market, Sav-Mor Market, Dalda's Community Market, and Golden Gate Market. They also made intentional efforts to expand to a new neighborhood, Visitacion Valley, which is also a low-income food-swamp area, but ultimately, a store was not selected in that neighborhood to participate in the HRSF program. However, through the engagement of youth ECLs in Visitacion Valley, a new set of criteria for "underserved area" was developed and adopted to facilitate HRSF's expansion to high-need neighborhoods and to advance health equity in its efforts.

The HRSF program offers incentives and interventions to physically redesign stores and their business models to promote community access to healthy products in low-income neighborhoods. POS data show that graduating stores increased produce sales by 39%, resulting in an increase in revenue for stores and an

increase in the consumption of fruits and vegetables in the community. Several factors facilitated the HRSF program's success in meeting the objective and the success of the program:

- Community recruitment and referral of potential stores to the HRSF program, including information sessions with testimonies from participating store owners
- Annual IDPs to implement activities toward a store transition to healthy retail in the areas of community engagement, physical store redesign, and business operations
- Partnership among the San Francisco Department of Public Health, the OEWD, and other key partners to implement IDPs with participating stores
- FJLs and the HRSF program staff engaging the community throughout the process with customer surveys and community events, such as store grand re-openings and graduations
- Trusting relationship between store owners, the HRSF staff, and FJLs
- POS systems to monitor and evaluate the impact of the store redesign

The SFTFP also engaged in two statewide assessments related to the tobacco retail environment and policies to reduce access to and the use of tobacco products: HSHC and Tobacco Endgame interviews. The HSHC store assessment indicated that San Francisco's policy to end the sale of flavored and menthol products effectively reduced the availability of these products among stores, but that there was more work to be done to increase access to fresh fruits and vegetables. The HSHC public intercept survey and interviews reveal that community members and leaders were supportive of policies that limited the tobacco retail environment, which indicate opportunities for the SFTFP to advance policies that limit

store advertisements, restrict tobacco coupons, and set a minimum price for tobacco products. However, the survey respondents' and key informants' uncertainty about setting a minimum-price policy for tobacco products indicates that more education is needed on the policy. Finally, the interviews with key stakeholders on indicators toward the "end game" for tobacco showed that leaders were hesitant about the idea of ending all sales of tobacco products. The leaders emphasized the need for authentic community engagement; alternative policies to incrementally reduce tobacco sales and use; resources and efforts to support tobacco cessation; and support for retailers to mitigate the economic impact of tobacco-related policies.

The HRSF program will continue to recruit and support tobacco retail stores in low-income "food swamp" neighborhoods to transition into healthy retailers. For the next grant period, the OEWD and their contracts will be holding a larger role in project-managing and implementing the program, while the SFTFP staff will provide support through a public health lens. This final evaluation report will be shared with the HRSF agency and community partners.

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APPENDIX

Table 1. HRSF Participating-Store Summary

Store Name	Redesign	Year 1 IDP	Year 2 IDP	Year 3 IDP	Graduation
Tenderloin Stores					
1. Radman's Produce Market		Previous grant period			August 2017
2. Amigo's Market	March 2015	Previous grant period		On hold due to COVID-19	
3. Mid City Market	June 2015	Previous grant period		May 2018 Community event; youth developed the exterior and interior store art; stock healthy snacks	April 2019 Became the first mentors of the HRSF program
4. Fox Market	August 2016	Previous grant period	October 2018 Corrective action to ensure that POS reports are submitted in a timely fashion	May 2019 POS system and TA; inventory support	
5. Salem Grocery	November 2018	September 2018 Plan and implement a store reset; customer surveys; install a produce neon sign; a grand reopening event	March 2020 Increase shelving; become a SNAP authorized vendor		
6. Dalda's Community Market (Phase 2)	December 2017	February 2018 Remove alcohol and tobacco advertisements; source healthy products; install a neon produce sign		February 2020 Discount loyalty program for Tenderloin residents; increase healthy food options; POS system	
7. Golden Gate Market	TBD 2021	2021 Replace tobacco, alcohol, and sugary-drink signage; install a healthy-beverage refrigerator; implement a POS system			
Bayview Stores					
1. Friendly Market	April 2015	Previous grant period		November 2017 Stock healthy fruits and vegetables; taste tests or a community event; remove alcohol signage	July 2018
2. Palou Market	September 2016	Previous grant period	March 2018 Stock healthy snacks; special promos and events; install a neon produce sign	December 2019 POS requirements; graduation plans	Spring 2020
3. Sav-Mor Mart	November 2018	April 2018			

		Plan and implement a reset with equipment installation; a customer survey; and a grand reopening event			
Oceanview Store					
I. Ana's Market	Fall 2014	Previous grant period		July 2017 Tax and business trainings and TA; replacement freezer; and community promotions	Wants to stay in the program

Table 2. Geographic Distribution of the Survey Respondents (N = 394)

ZIP	District	HSHC ZIP Code	Number of surveys
94123	2	Marina	40
94114	8	Noe Valley, Castro	42
94118	1	Inner Richmond, Laurel Heights, Presidio Heights	40
94112	9/11	Excelsior, Crocker Amazon, Oceanview, Outer Mission	45
94110	9	Mission, Bernal Heights	47
94109	2/5	Tenderloin, Japan town, Russian Hill, Nob Hill	44
94102	5/6	Tenderloin, Hayes Valley	47
94103	6	South of Market Area (SOMA)	43
94124	10	Bayview-Hunters Point (BVHP)	46

1. Healthy Retail Store Owner Focus Group Discussion Summary
2. Healthy Retail SF 2020 Report for the Office of Economic and Workforce Development
3. HSHC San Francisco Press Release
4. HSHC Key Informant Interview Summary Report
5. HSHC Public Intercept Survey Summary Report
6. End Game Key Informant Interview Report

HEALTHY RETAIL SAN FRANCISCO MERCHANT FOCUS GROUP SUMMARY REPORT

OVERVIEW

Healthy Retail San Francisco (HRSF) is a public-private collaboration, led in partnership by the Office of Economic Workforce Development and the San Francisco Department of Public Health), that utilizes a “three-legged stool” model to transform neighborhood corner stores into healthy retailers within San Francisco underserved communities that are considered “food swamps¹.” “Food swamp” is a term used to describe a neighborhood that is saturated with unhealthy food and beverages and limited access to fresh, healthy food. Goals of the HRSF Program include promoting healthy eating, strengthening small businesses, and increasing community cohesion. To meet these goals, HRSF Program works with corner stores in three areas (the “three-legged stool”): 1) Community Engagement, 2) Physical Store Redesign, and 3) Business Operations, to do the following:

- Provide equipment and technical assistance to redesign and transform corner stores into healthy-food retailers
- Improve the availability of produce and healthy foods in the corner stores
- Increase the amount of store revenue from healthy-product sales
- Provide training and business support to store owners
- Reduce the influence of tobacco, alcohol, sugary beverages and other unhealthy foods
- Engage and empower community leaders to help drive demand for produce and healthy products in their neighborhood healthy retailers

To date, eleven merchants have participated in Healthy Retail SF program. Eight merchants are current program participants and three have graduated from the program.

METHODOLOGY

On October 24, 2018, Bright Research Group facilitated a focus group with six of the eight merchants currently participating in the Healthy Retail San Francisco Program and two members of the Tenderloin Healthy Corner Store Coalition. Four of the six merchants present have been in the HRSF program for over two years; the other two merchants have been HRSF participants for less than a year. During the focus group, participants discussed their successes, challenges, and suggestions on how the program could better support them as local, small business owners in San Francisco. A content analysis on notes taken during the discussion was performed to identify key themes from the merchants’ feedback. This report summarizes those findings.

FINDINGS

SUCCESSSES

Finding: Overall, merchants were highly satisfied with the HRSF program and identified several program components as highly valuable to the success and sustainability of their stores. Merchants

¹ <https://sanfranciscotobaccofreeproject.org/case-studies/healthy-retail-san-francisco-2016/>

identified community engagement, several components of the store redesign, and the POS system as the most valuable aspects of participating in the program. Merchants discussed the impact that signage and upgraded inventory has had on community engagement. Merchants expressed appreciation for the colorful new signs that were installed and product placement assistance that was provided as part of their redesign, noting that it has helped merchants cater to the needs and wants of their customers. In addition, merchants regarded the grand re-opening as a successful event in garnering new clientele as well as retaining regular customers at their store. Notably, merchants were excited about both the attendance of city officials and the press coverage that their store received during the re-opening of their respective businesses.

“The new vegetable fridge keeps vegetables fresh and [they] last longer. Also, it’s very appealing to the customers.”

“The grand reopening was cool, they shut down the street, city supervisors showed up, and I was in the news.”

“When I started the [HRSF] program I had nothing healthy. I started with a small shelf of potatoes and tomatoes. Now, I have seven to eight feet of produce.”

Merchants also said that the Point of Sale (POS) system has been an asset to their business and increased customers’ perceptions of their store’s credibility. POS systems consist of a computerized network linking the cash register, scale, and scanner that helps centralize business operations through features such as inventory management and linking item costs with a “product code.” One merchant contributed greater customer satisfaction as a result of the POS system, stating that customers like getting an itemized receipt and are more comfortable when they know and see that there is a set price for the items they are purchasing. Merchants also noted that the POS systems have helped increase their efficiency in terms of keeping up with inventory.

“POS system improved my business. I feel like people are a lot more comfortable to come in and shop when you scan the product because they know you aren’t overcharging them. Even if your price is a little high, they still feel more comfortable because they know they are paying the same price as the guy before them and the guy after them.”

Table 1. Merchant successes as a result of HRSF participation

Community Engagement	Store Redesign	Business Operations
<ul style="list-style-type: none"> Media In-store signage Community Marketing/Events 	<ul style="list-style-type: none"> Equipment (refrigerators, shelving, etc.) Product placement in the store 	<ul style="list-style-type: none"> Point of Sale (POS) system & technical assistance

	<ul style="list-style-type: none"> • Store design and layout (inside) • Inventory and merchandising needs • Advertisement in and outside of store 	
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Finding: Merchants feel respected and supported by the HRSF staff. Merchants value the relationships they have built with the HRSF staff and their fellow merchant program participants. When asked about how participating in HRSF has impacted them, merchants responded that the program has led to positive changes in how they run their business as well as new friendships that they value highly – particularly those with HRSF staff. In addition to the friendship and respect that HRSF provides, merchants were appreciative of the business support and development they have received as a result of participating in HRSF. Specifically, merchants emphasized the support that HRSF staff has provided with improving their accounting skills, using their POS system, and inventory management.

“[I value] the friendship with Jessica and Larry and the support they provide, everything I have learned has made a huge difference with my family and with myself.”

“They [HRSF staff] are always positive, I never had a problem. If I have a question that they don’t know off the top of their head they follow up.”

“I recently got evicted and if it wasn’t for the support of the community and Healthy Retail San Francisco, we wouldn’t have been able to make the move.”

AREAS OF IMPROVEMENT

Finding: Merchants did not have specific feedback regarding areas for improvement among HRSF’s three core components; however, merchants did mention areas where they would like the City and County to provide greater support. When asked to provide feedback on how the HRSF may improve their community engagement, store redesign, and/or business operations, merchants did not have much feedback about how HRSF could improve but they did discuss safety/security, parking, and programs such as WIC and EatSF as additional areas of improvement that would benefit their businesses.

Finding: Security and safety concerns ranked highest for merchants when asked about areas of support. Security and safety issues are longstanding amongst the merchants, all of which said that customer safety concerns are negatively impacting their business. Most merchants discussed how their neighborhoods felt safer and were more attractive for shopping when there was an officer on foot patrol, especially during the afternoons and evenings. A few merchants felt that the SF City police patrols were more of a show than an actual intervention to prevent crime. However, several merchants

in the HRSF program used to split the cost for private security with other retailers on their block to help deter illegal activity but they stopped for financial reasons. Merchants would like support in improving customers' sense of safety and level of comfort shopping at their store. One merchant spoke at length about how, despite improvements and upgrades in their store, violence over the last year and frequent suspected illegal activity near their location has kept customers from frequenting their store. Merchants were vocal in their desire for some type of assistance that would improve residents' perception of safety in the neighborhood and increase their likelihood of returning to the HRSF-participating retailers.

"People don't come because they are afraid."

"Police patrols are a facade, they aren't really addressing the problem."

"We are in the Tenderloin, there is no security."

Finding: Parking is a major pain point for many of the merchants. Merchants feel that lack of parking is negatively impacting their business and that the lack of unloading/loading areas in front or behind the store make it cumbersome for companies to make deliveries to their store. One merchant discussed that delivery companies have received citations or been warned about getting citations for unloading outside of the store and have had to park around the corner or farther when making deliveries. In addition, merchants feel that potential customers often go elsewhere because they cannot find parking near the store. Merchants also noted that the fee to apply for parking spots is too expensive and does not guarantee that their request will be granted.

"People have said they don't come as much as they want or would because of parking."

Finding: Merchants would like support with permitting and receiving seniority status when applying for permits with the City of San Francisco. When discussing permits, merchants mentioned that there is a cumbersome permitting process and several rules for parking, display space outside of their store, and eligibility for programs such as WIC. Merchants requested aid with navigating the permitting process for the aforementioned items. Merchants also expressed frustration that all of these processes have separate fees that are not refunded in the event that the permit is not granted. Merchants are interested in receiving "seniority status" as a benefit for their participation in the HRSF program. For example, a benefit for both participation and compliance in the program HRSF merchants would be placed higher on waitlists or given priority status when applying for various permits in the City of San Francisco (i.e. parking spots in front of or near their place of business). This priority status could also apply permit fee reductions and discounts when purchasing various produce wholesalers that partner with the City and County of San Francisco.

"People in the program should have some type of seniority with the city and time to discuss what we can improve, what needs to be changed and what does and doesn't work for us."

"I would like help with becoming part of the WIC program."

Finding: Merchants feel that recipients of EatSF vouchers need additional education about how the vouchers can be used and what products are and are not eligible as part of the EatSF voucher program. Merchants discussed that customers often become frustrated with them when they try to use their EatSF vouchers and are told that their request cannot be granted. For example, some customers try to buy tobacco products or get cashback from their EatSF vouchers, both of which are ineligible according to the EatSF guidelines. Merchants asked that the vouchers provide greater clarification of EatSF regulations.

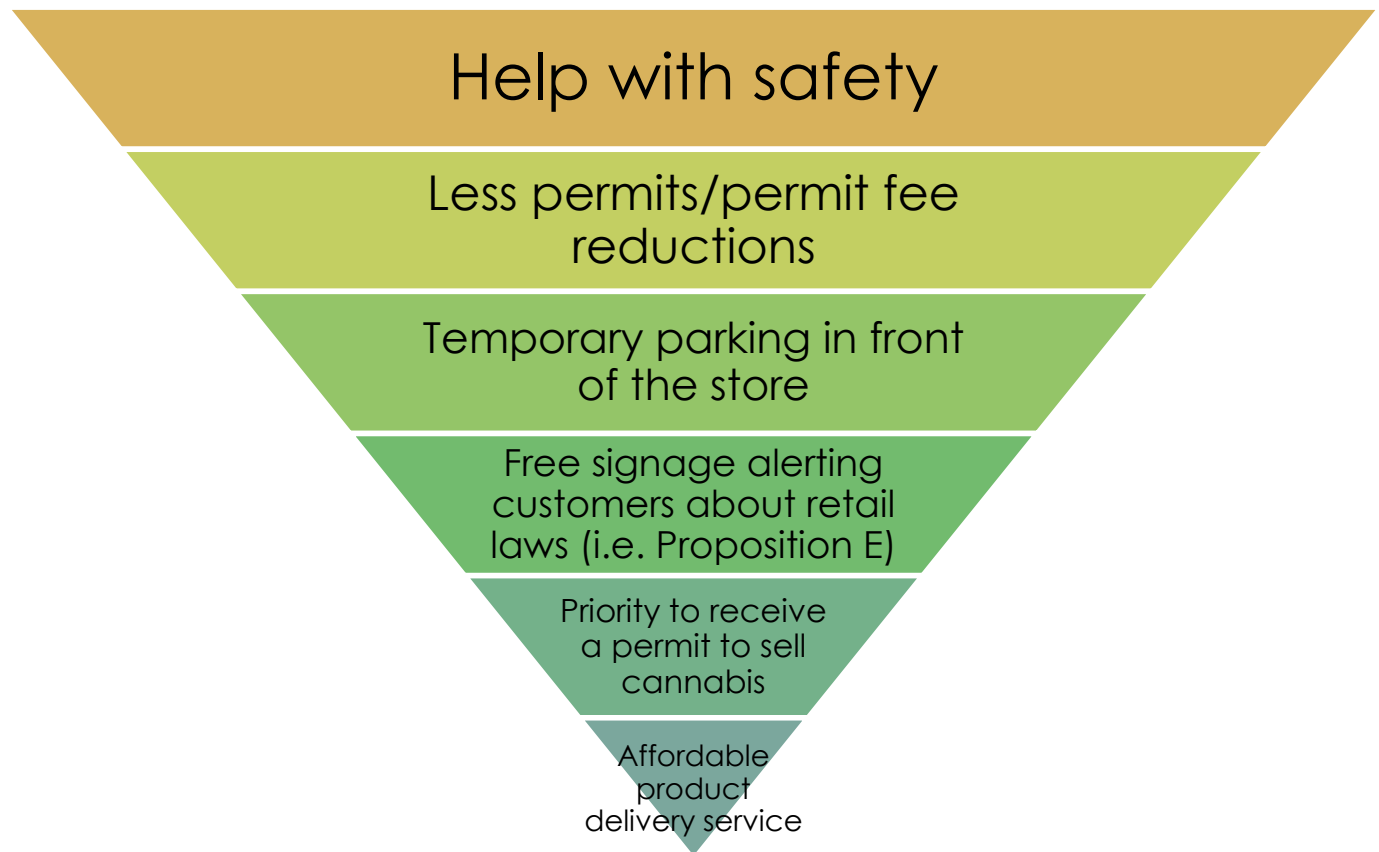
"The vouchers don't explicitly say no cash back or no cigarettes, customers get mad."

Finding: Merchants are interested in other forms of support that would help them increase sales and cater to the wants and needs of their customers. During the discussion, merchants talked about changes within their clientele and the need to modify and/or add to their inventory strategically in order to attract customers who are new to neighborhood. One merchant suggested that it would be helpful to have a website or newsletter disseminated to HRSF participants that provided them with updates on best-selling health products. In addition, some merchants noted that a "go-to" salesperson or catalog that would aid them with sourcing and securing popular, in-demand products would help them to increase foot traffic and sales within their individual stores.

POTENTIAL FUTURE AREAS OF SUPPORT

Finding: When presented with a list of other services that the City and County of San Francisco was considering for small businesses, merchants continued to focus on safety, permits, and parking as core areas of support, in addition to support with signage about retail laws, cannabis permits, and affordable delivery services. The following is a list the potential support items merchants were most interested in, arranged in order of popularity:

Figure 1. Merchant Preference for Future Areas of Support



CONCLUSION AND RECOMMENDATIONS

Overall, HRSF merchants are satisfied with their experience in the Healthy Retail San Francisco Program. Merchants highlighted that the community engagement and store redesign have either met or exceeded their expectations. Lastly, the discussion also provided insight on potential areas of improvement such as aid with improving the parking infrastructure, security, receiving seniority with City/County permitting applications, WIC eligibility, sidewalk display space, and cannabis retail.

It is important to note that most of the merchant requests and suggestions for improvement are outside of the purview of the Healthy Retail San Francisco Program. The following recommendations are areas of support that the HRSF program staff may want to advocate for when meeting with other City agencies and departments in the City of San Francisco:

- Consider a priority ranking or seniority system for HRSF merchant participants applying for permits such as loading zones, sidewalk displays, WIC, or other programs. Provide workshops and technical assistance that increase merchant awareness and capacity to apply for San Francisco City and County permits.
- Consider and test security measures that may support customer safety at participating retailers, such as increased street lighting, sharing cost of private security, community event or benefit

that will attract customers to the store again, or other additional measures especially after an incident of violent crime near an HRSF retail store.

- Support retailers in filing complaints or requests to other city departments that might support parking or security issues.



Healthy Retail San Francisco

2019 REPORT

PREPARED BY:

Prepared by Bright Research Group for Office of Economic and
Workforce Development and Department of Public Health

Acknowledgements

Established by legislation in 2013, Healthy Retail SF (HRSF) is led by the Office of Economic and Workforce Development (OEWD) and the San Francisco Department of Public Health (SFPDH) in partnership with the Tenderloin Healthy Corner Store Coalition (TLHCSC), the Small Business Development Center (SBDC), and Sutti Associates. Thank you to the HRSF Advisory Committee for providing guidance, leadership, and valuable feedback to the Program. Learn more at www.healthyretailsf.org.

This report was prepared by Bright Research Group (BRG) on behalf of HRSF. SFPDH contracted with BRG, an independent evaluation group, to produce this report. Founded in 2010 by Brightstar Ohlson, BRG is a community-centered design and research firm based in Oakland, California. BRG is a women- and minority-owned firm and a certified small local emerging business (SLEB) in Alameda County. Learn more at www.brightresearchgroup.com.

This report would not have been possible without the insights and data provided by HRSF retailers, food justice leaders, and key program partners. Thank you to all HRSF retailers for participating in focus groups and interviews with the authors of this report; special thanks to Satwinder Multani, Ali Saeed, and Thelma Orozco for agreeing to have their stores and experience featured in this report.

Thank you to Ehab Shqair of Mid-City Market who also provided his insight about being an alumni of the HRSF program and serving as a mentor to other retailers. Thank you to Shelley Dyer and John McCormick from the Tenderloin Healthy Corner Store Coalition and the team of Food Justice Leaders for sharing their experiences and perspectives. Thank you to Gabriela Sapp of the Small Business Development Center for collecting the store-level data that was analyzed for the purposes of this report. Thank you to Larry Brucia of Sutti Associates for all his time and energy to ensure equipment and neon produce signs were delivered to participating stores.

Thank you to Melissa Akers and EatSF's Vouchers 4 Veggies program team at UCSF for providing data about EatSF voucher redemptions. Thank you to Dr. Erika Van Buren for conducting the quantitative data analysis on store outcomes. Finally, thank you to Jessica Estrada and Jacquelyn Boone from SFPDH, and Larry McClendon and Jorge Rivas from OEWD, for their supervision and direction on this report, for providing data, resources, and connections to the individuals mentioned above, and for their review of this report. Finally, thank you to Susana Hennessey-Lavery, who built the foundation for the HRSF Program with her many years of tireless work with the SFPDH.

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Citation:

Bedrossian, K and Thomas, V (2020). "Healthy Retail San Francisco 2019 Report." Prepared by BRG for San Francisco Department of Public Health and San Francisco Office of Economic and Workforce Development.

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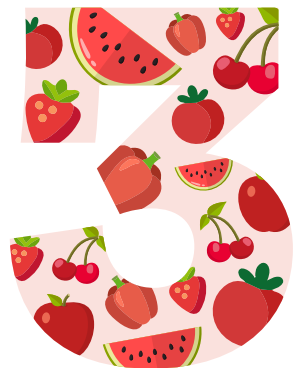
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Foundations





Summary
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Summary

The Healthy Retail SF (HRSF) program partners with merchants of local retail shops, or corner stores, to revitalize and strengthen their stores and offer healthier food options in their communities. Healthy Retail SF's goals are to promote healthy eating, strengthen small independent business, and increase community cohesion while reducing visibility and de-normalizing unhealthy products so that all residents and children have access to healthy, fresh, and affordable foods. Healthy Retail SF is an incentive-based voluntary program that offers small business owners three key areas of support: 1) store redesign and physical-environment improvements; 2) business-operations advising and technical assistance; and 3) community engagement. Healthy Retail SF helps small business owners shift their business models to become healthy-food retailers in their community.

Since 2016, 12 stores in the Tenderloin, Bayview-Hunters Point, and Oceanview neighborhoods have participated in the program. Five stores have already graduated from the program, and an additional seven stores have already undergone their redesign and are on track to graduate. The participating stores have been in business in their neighborhoods for an average of 17 years. Several of these longstanding community-based businesses were at risk of

displacement or closing before participating in the program. Stores receive support and access resources and supports that allow them to redesign the physical footprint of the store space, reconfigure shelving for more healthy products, make improvements to exterior signage and facades, install new equipment and appliances, and obtain technical assistance on retail management, operations, finance, and marketing, including market research. Healthy Retail SF aims to preserve and strengthen the sustainability of these stores in their community.

Established by legislation in 2013, Healthy Retail SF is led by the Office of Economic and Workforce Development (OEWD) and the San Francisco Department of Public Health (SFDPH) in partnership with the Tenderloin Healthy Corner Store Coalition (TLHCSC), the Small Business Development Center (SBDC), and Sutti Associates. Before Healthy Retail SF was a program of the City and County of San Francisco, it was a successful program designed, implemented, and supported by community-based advocates in the Tenderloin and Bayview-Hunters Point neighborhoods. The model, advice, and lessons learned from these foundational community-based programs are integral to the success of this program.

Goals & Objectives

- **Redesign and transform** corner stores into healthy-food retailers, devoting at least 35% of the store's selling area to fresh produce, whole grains, lean proteins, and low-fat dairy products
- **Improve** the availability of healthy food in corner stores
- **Reduce** the total percentage of shelf space dedicated to selling tobacco and alcohol through more efficient shelving and the introduction of new healthy products
- **Engage and empower** communities in the transformation of retail environments

History

As early as 2002, African American community leaders in the Bayview-Hunters Point neighborhood began organizing to transform corner stores into healthy retailers. The Bayview-Hunters Point community launched the Good Neighbor Program—a pilot project to transform corner stores into healthy retailers in the Bayview. Similar efforts started in the Tenderloin neighborhood in 2012. A Tenderloin youth group (funded by SFDPH) surveyed community members, developed relationships with store owners and residents, and formed the TLHCSC, which learned from and built upon the work that had been done in the Bayview over the previous decade.

From 2009 to 2013, SFDPH partnered with grassroots groups to address limited food access in the Tenderloin and BHVP neighborhoods. With the support of SFDPH's community grant funding, the Healthy Southeast Coalition (Bayview HEAL Zone), formerly HEAL Zone / Southeast Food Access (SEFA), piloted the initial corner-store conversions with Sutti Associates—a private firm specializing in grocery- and retail-store design. TLHCSC followed and piloted another store conversion in 2012.

In the fall of 2013, prompted by resident food leaders in the Tenderloin and Bayview-Hunters Point, city leaders and agencies came together to launch a new city and community partnership. The partnership increased incentives for small businesses to offer affordable and healthy food products and combat food swamps. Legislation introduced by Supervisor Eric Mar and cosponsored by Supervisor Jane Kim and Supervisor Malia Cohen led to the creation of the Healthy Retail SF pilot program.

Results and key accomplishments from the program's first three years were first described in the 2016 Healthy Retail SF report. Go to <https://oewd.org/healthyretailsf> to view the 2016 report.



Program Model

The Three-Legged Stool

Healthy Retail SF operates a comprehensive “three-legged stool” model to assist corner stores. Stores participate in the program for an average of three to five years.



Program Partners

It Takes A Village

Healthy Retail SF is implemented by an ecosystem of essential program partners:



COMMUNITY ENGAGEMENT

San Francisco Department of Public Health (SFDPH): Community Health Equity & Promotion (SF Tobacco-Free Project, Healthy Eating Active Living Prevention Programs)

SFDPH's Nutrition Education & Obesity Prevention (NEOP) program
(formerly Feeling Good Project)

Tenderloin Neighborhood Development Corporation (TNDC) / Tenderloin Healthy Corner Store Coalition (TLHCSC)

Vouchers 4 Veggies/EatSF



REDESIGN AND PHYSICAL ENVIRONMENT

Sutti Associates

Office of Economic and Workforce Development (OEWD):
SF Shines Program



BUSINESS OPERATIONS

Office of Economic and Workforce Development (OEWD):
Invest in Neighborhoods program

San Francisco Small Business Development Center (SBDC)



Healthy Retail SF is housed at OEWD and implemented in partnership with staff in SFDPH and OEWD.

SFDPH contributes its subject-matter expertise and resources in public health, food access, health promotion, and community capacity-building. SFDPH's Tobacco-Free Project provides outreach and education on tobacco-prevention policies as well as incentive-based strategies that support San Francisco retailers to rely less on tobacco and other unhealthy products. Nutrition Education & Obesity Prevention (NEOP) program (formerly Feeling Good Project), funded by the State of California, focuses on the prevention of nutrition and physical activity-related chronic diseases among low-income San Francisco residents. The Project leads health promotion initiatives through policy, systems, and environmental changes, including development of institutional policies related to nutrition and wellness, fostering interagency collaborations, and applying nutrition knowledge to improve impact evaluation.

OEWD contributes its subject-matter expertise and resources in economic development, business operations, and workforce development. Invest in Neighborhoods (IIN)—an OEWD initiative—leverages partnerships between city agencies and nonprofits to enhance and strengthen neighborhood commercial corridors around San Francisco, including Bayview-Hunters Point and the Tenderloin. The IIN Small Business and Neighborhood services strengthen small businesses, improve physical conditions, increase quality of life, and build community capacity. OEWD's SF Shines program also provides grants for storefront and interior improvements as well as design services for businesses and nonprofits in select IIN neighborhoods, including Bayview-Hunters Point and the Tenderloin.



The San Francisco Small Business Development Center

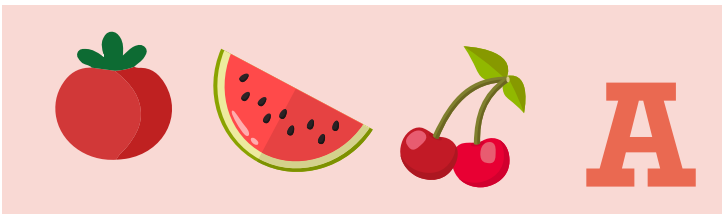
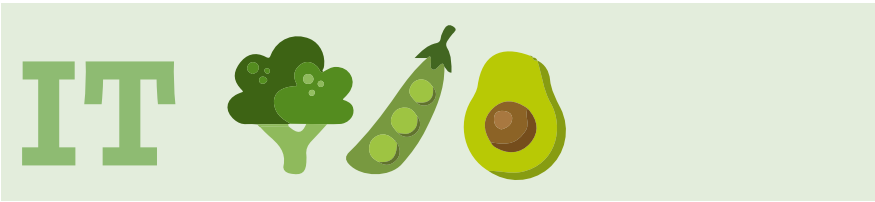
provides no-cost support and technical assistance to entrepreneurs and business owners to address business challenges and grow their bottom line. The SBDC Consultant develops Individualized Development Plans (IDPs) with Healthy Retail SF stores to ensure goals, objectives, and all activities including POS implementation and data collection are met.

Sutti Associates works with store owners to develop pre- and post-schematics that detail the redesign of the retail space for participating Healthy Retail SF stores. Sutti Associates also purchases and installs necessary equipment for the redesign and identifies resources, programs, and incentives that will address the design needs of the corner store.

Tenderloin Neighborhood Development Corporation

is a community-based nonprofit that employs and trains FJLs. The Tenderloin Healthy Corner Store Coalition is housed within TNDC's Community Organizing Department. Hired as part-time staff, FJLs are residents who are regular customers of HRSF stores. FJLs build relationships with retailers to support them during the store redesign and transition process. FJLs conduct customer surveys to understand community preferences for products to stock, assist with store-reset days, visit monthly to provide feedback and technical assistance to the storeowner, and coordinate store-launch, street-activation, and media events.

Vouchers 4 Veggies - EatSF provides fruit and vegetable vouchers to low-income, food-insecure individuals and families through a network of clinics and community-based organizations. Since its launch in early 2015, EatSF has helped more than 11,000 low-income San Franciscans increase their access to and consumption of produce while infusing more than \$1.5 million in produce purchases into low-income neighborhoods. All stores that participate in Healthy Retail SF accept EatSF vouchers.



Accomplishments





Key Accomplishments Positive Changes Case Study: Daldas Grocery

Participating Grocers Map



Key Accomplishments

Five Stores Graduated from the Healthy Retail SF Program.

Twelve corner stores in the Tenderloin, Bayview-Hunters Point, and Oceanview neighborhoods have participated in the program. Five stores graduated from the program, and an additional seven stores have already undergone their redesign and are

on track to graduate. Stores participate in Healthy Retail SF for an average of three to five years before graduating from the program. Participating stores have been in business in their neighborhoods for an average of 17 years. Several of these longstanding community-based businesses were at risk of displacement or closing before participating in the program.

Participating Grocers

TENDERLOIN



Radman's Produce Market
201 Turk St.



Daldas Grocery
200 Eddy St.



Amigo's Market
500 Ellis St.



Mid City Market
868 Geary St.



Fox Market
570 Larkin St.



Salem Grocery
920 Geary St.



Young Ellis Produce Market
398 Ellis St.

BAY VIEW



Lee's Market
1397 Revere Ave.



Friendly Market
1499 Thomas Ave.



Palou Market
4919 3rd St.



Sav-Mor Mart
4522 3rd St.



Big Save
5001 3rd St.

OCEANVIEW



Ana's Market
105 Broad St.

Positive Changes

Healthy Food Retailers Are Successfully Transitioning their Business Model to Promote Health

For a typical corner store, at the beginning of their participation in their program, produce accounted for only 6% of the store's sales (on average). After three years in the program, that number had doubled to 12% of total sales. While the store's business model increases its reliance on produce sales, stores are also decreasing their reliance on tobacco sales. The proportion of total sales that came from tobacco sales decreased from 10% at the beginning of the program to 7% after three years.

Healthy Food Retailers Are Promoting Healthy Messages and Reducing Community Exposure to Unhealthy Advertisements

All five graduating stores have implemented significant improvements in their practices around the advertisements displayed in their stores. None of the graduating stores has any advertisements promoting sugar-sweetened beverages at entryways, on doors, near checkout counters, under four feet, or outdoors. In addition, none of the stores displayed tobacco advertisements on the exteriors of their stores.

Healthy Food Retailers are Selling More Fruits and Vegetables and Increasing Revenue

Healthy-food retailers are realizing the value of selling fruits and vegetables to their community. After three years of participating in Healthy Retail SF, each Healthy Retail SF store, on average, did the following:



21k

additional units
of produce sold

39%

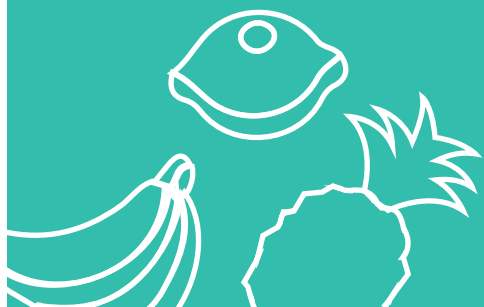
Increase in number
of produce items sold

\$33k

increase in revenue
due to increased
produce sales



In addition, from 2016 to 2019, \$81,000 in EatSF vouchers were redeemed to purchase fruits and vegetables at Healthy Retail SF stores. These vouchers make fresh fruits and vegetables affordable and accessible to customers at stores who have low or no income.



Healthy-Food Retailers Are Selling Less Alcohol and Tobacco and Fewer Sugar-Sweetened Beverages

Preliminary data suggests that fewer alcohol, tobacco, and sugar-sweetened-beverage products were sold at Healthy Retail SF stores during the nine-month period after the Sugar-Sweetened Beverage (SSB) Tax went into effect, compared to the same time period in the previous year. A small sample of Healthy Retail SF stores revealed the following:

25% decrease

in alcohol products sold



19% decrease

in tobacco product sales



3% decrease

in sugar-sweetened beverage products sold



SSB Tax Revenue Is Promoting Community Engagement in Healthy Retail SF Redesigns

SSB Tax Revenue funds created a sustainable source of funding for the community-engagement leg of the three-legged Healthy Retail SF stool. As the recipient of these grant funds, the Tenderloin Neighborhood Development Corporation employs and trains FJLs. FJLs are community members who are regular customers of Healthy Retail SF stores. They develop close relationships with the store owners to share community priorities and needs and to support the store's successful redesign and transition. FJLs participate in the store redesigns by building and installing shelving and equipment and helping stock healthy products in the stores. FJLs host monthly taste tests of products at every participating store, with an average of 35–50 residents attending these events. FJLs also host store grand reopenings at newly redesigned stores and graduation events at stores that have been in the program for at least three years.

Healthy Retail SF Launched a Mentorship Program for Graduating Retailers to Advise their Peers

In the last year, Healthy Retail SF launched a mentorship opportunity to allow graduating store owners to mentor and advise peer store owners who are new to the Healthy Retail SF program. Ehab Shqair, the owner of Mid City Market in the Tenderloin, graduated from the Healthy Retail SF program this year. Mr. Shqair offers store owners his expertise and training on sourcing produce at the San Francisco Wholesale Produce Market, purchasing and stocking the right volume of produce, and other key aspects of produce sales.

Healthy Retail SF
Store Profile:

Daldas Market

Store Facts

Location: Tenderloin

Years in business: 11

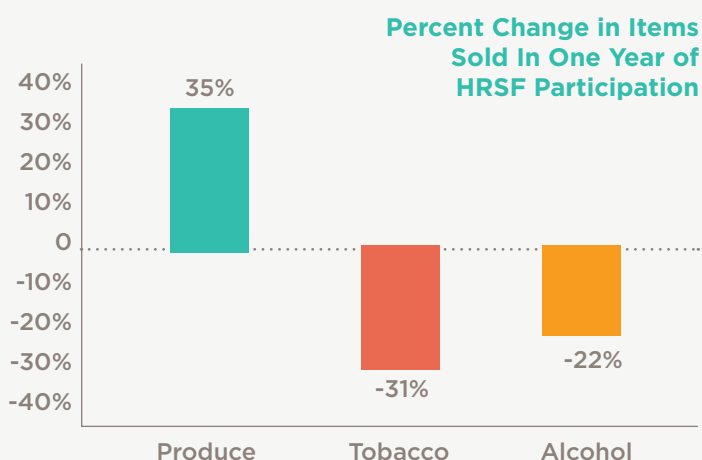
Year of reset: 2015

Years in HRSF: 3

Anticipated graduation: 2021



Daldas owner Satwinder Multani has been in the convenience-store business for over a decade and has always taken an interest in the communities his business serves. When Satwinder was presented with the opportunity to be a part of HRSF, he took it, noting that the program doesn't just benefit retailers but also "increases opportunities and options for some of the local residents," particularly in terms of access to products not easily found in the neighborhood.



Item sales for the period of July 2017 – March 2018 were compared to item sales for the same period in the next year, July 2018 – March 2019.

“The image of my business has changed. It’s our neighborhood grocery store. People know they can come here for one-stop shopping—they have more access.

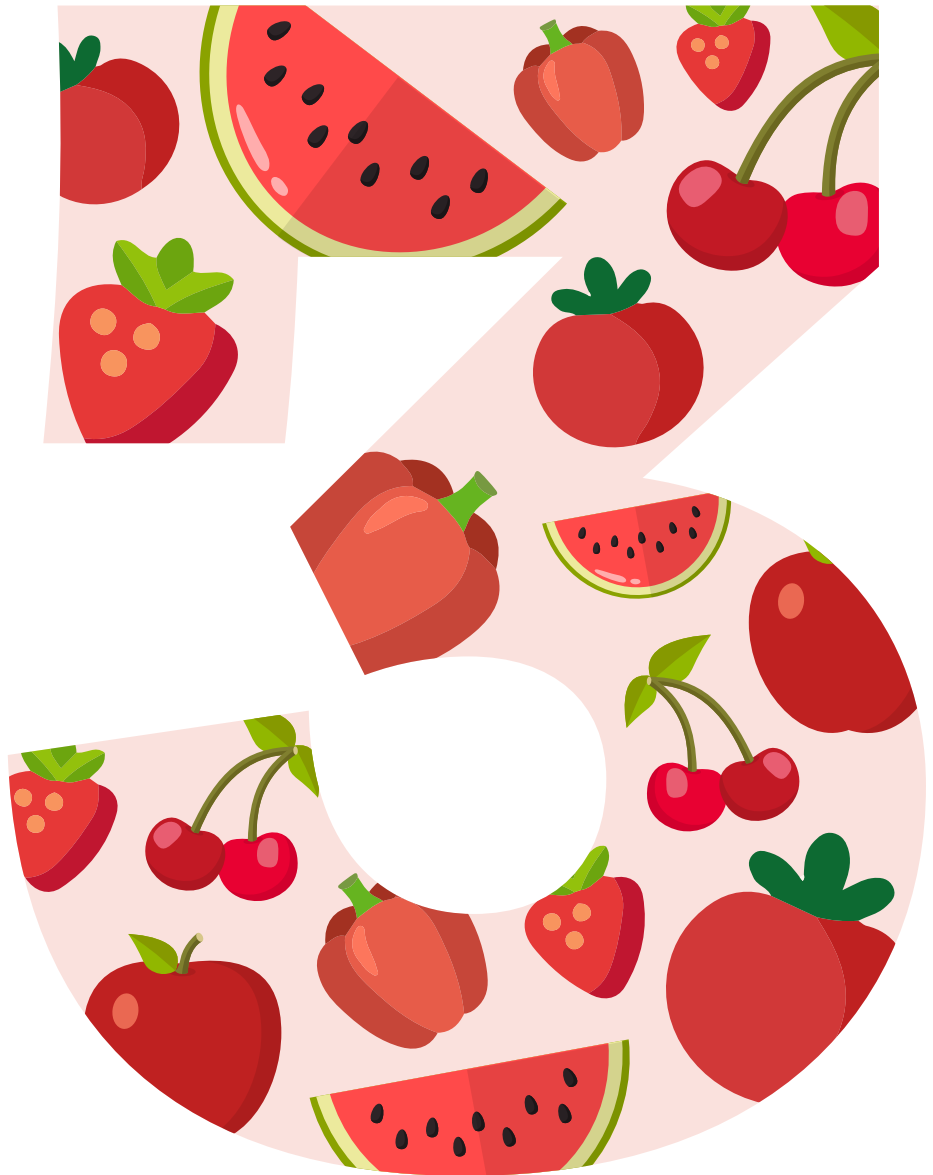
—**Satwinder Multani**, Daldas Grocery Owner

“Satwinder has been very dedicated, diligent, and active in his community. Satwinder spoke at a Food Justice Forum in the Tenderloin and regularly participates in community-block-activation events and other community meetings, like the Tenderloin police captain’s monthly meetings.

—**Jessica Estrada**, HRSF Program Coordinator



Benefits





Impact Store Outcomes Case Study: Palou Market Community Health Benefits Case Study: Ana's Market Future of the Program

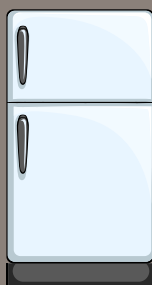
Impact

Healthy Retail SF's multifaceted program benefits small business owners, transforms corner stores, and strengthens community health.

Benefits to Small Business Owners

Between 2016 and 2019, the Healthy Retail SF program contributed approximately \$86,500 worth of store equipment—such as refrigeration units, produce bins and baskets, metro shelving, and signage—to participating stores. New equipment, such as metro shelving and updated produce bins, have created more open floor space within the stores, more space for storage, improved organization of products, and improved ease and efficiency of transporting products after delivery.

Store Equipment Contributed



- 1 Freezer
- 6 Produce refrigeration units
- 208 Feet of metro shelving
- 3 Dry-produce bins
- 84 Produce baskets
- 7 “Fruits & vegetables” neon signs

[Healthy Retail SF staff] are always positive. I never had a problem. If I have a question that they don't know off the top of their head, they follow up.

—HRSF Small Business Owner

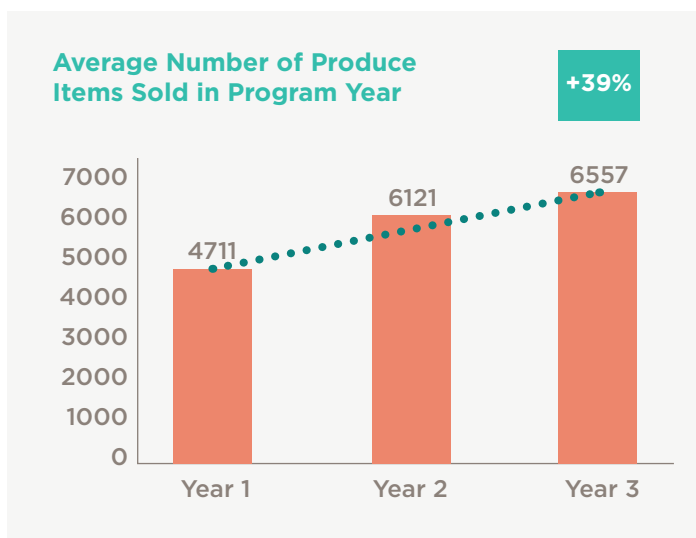
In addition to providing this equipment, Healthy Retail SF's partners have contributed hundreds of hours of technical assistance and advising to small business owners participating in this program. Sutti Associates provided over 4,000 hours of support to Healthy Retail SF store owners from 2016 to 2019. This support includes creating pre- and post-schematics, ordering and installing new equipment, and providing expertise on merchandising during the store-reset day. Additionally, the Small Business Development Center Consultant provided over 2,000 hours of technical assistance to HRSF store owners to build their capacity in business operations, retail and financial management, POS implementation, and other one-on-one technical assistance.



Store Outcomes

Healthy Food Retailers Are Selling More Fruits and Vegetables and Are Increasing Revenue

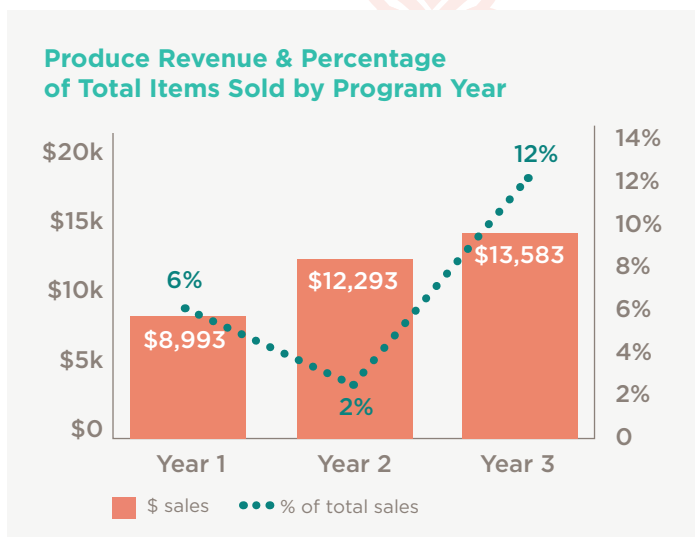
A primary goal of Healthy Retail SF is to improve the availability of healthy food, especially fruits and vegetables, in corner stores. Each HRSF store sold an average of 21,000 additional units of produce during the three-year program period.ⁱ Program participation allows stores to stock and sell more produce. These increased sales accounted for an average increase of \$33,000 in revenue.ⁱⁱ After three years of participating in the program, Healthy Retail SF stores increased the number of produce items sold by 39%.ⁱⁱⁱ



Stores are selling more units of produce, and they are also stocking a greater variety of fresh fruits and vegetables. Before each store redesign, FJLs survey customers of HRSF stores to gather data on the types of fruits and vegetables that they would like to buy at the store. FJLs provide this data to the store owner, support them in stocking this produce, and track the store's ability to keep these products stocked and available to the community. Three out of five graduating stores

saw large improvements in the variety of fresh fruits and vegetables that they stocked at their stores.

For example, Ana's Market in the Oceanview stocked three times more types of produce due to program participation; similarly, Mid City Market and Radman's Produce Market both stocked approximately 1.2 times and 1.5 times more types of produce, respectively.^{iv}

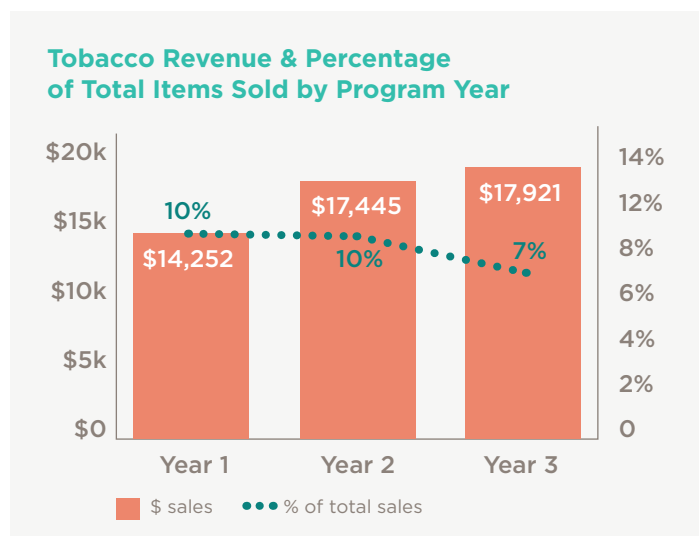


[I value] the friendship and the support [of Healthy Retail SF staff]...Everything I have learned has made a huge difference with my family and with myself.

-HRSF Small Business Owner

Healthy Food Retailers Are Successfully Transitioning Their Business Models to Promote Health

For a typical corner store, at the beginning of their participation in the program, produce accounted for only 6% of the store's sales (on average). After three years in the program, that number had doubled to 12% of total sales. While the store's business model increases its reliance on produce sales, stores are also decreasing their reliance on tobacco sales. The proportion of total sales that came from tobacco sales decreased from 10% at the beginning of the program to 7% after three years.



Preliminary data also suggests that HRSF stores sold fewer alcohol items (-25%), tobacco items (-19%), and sugar-sweetened-beverage items (-3%) during the nine months since the SSB tax went into effect, compared to the same time period in the year prior.^v

Improvements to the Overall Retail Environment

FJLs score HRSF stores on 67 retail-food standards at the beginning of their participation in the program and after graduation from the program. These retail-food standards include the variety and quality of fresh fruits and vegetables, the variety of other healthy food products and snacks (e.g., eggs, milk, whole-wheat bread, healthy organic snacks, etc.), the variety of non-sugar-sweetened beverages, product-display standards that prioritize healthy products, store advertisements that prioritize healthy products and do not promote unhealthy products, and acceptance of EBT, WIC, and EatSF vouchers. After graduating from the program, stores increased their scores by an average of 16 points (on a scale of 64).^{vi}

All five graduating stores also noted several improvements in their practices around the advertisements displayed in their stores. Notably, none of the graduating stores has any advertisements promoting sugar-sweetened beverages at entryways, on doors, near checkout counters, under 4 feet, or outdoors. In addition, none of the stores displayed tobacco advertisements on the exteriors of their stores.^{vii}

All five stores that have graduated from the HRSF program have made important changes to the display and placement of products in their stores to help promote healthy products and health-promoting messages. For example, all five graduating stores placed produce near the front of the stores or in easy-to-find locations, displayed posters promoting healthy foods, and used shelf labels that indicated healthier choices.^{viii} FJLs play a vital role in this success. FJLs create monthly report cards that track and support the changes that storeowners are implementing at their stores. They also submit requests for healthy food signage to the Feeling Good Project.

Graphs Data Source: Three-year trend analysis of HealthyRetailSF stores point-of-sale data. Conducted by Bright Research Group in November 2018.



Graduating Stores



Doubled
produce sales

.....



No advertisements
promoting sugar-sweetened
beverages

.....



No tobacco advertisements
on the exteriors of stores

.....



Moved produce placement
to the front of the store

.....



Displayed posters promoting
healthy foods and used shelf
labels to indicate healthier choices

Healthy Retail SF
Store Profile:

Palou Market

Store Facts:

Location: Bayview

Years in business: 3

Year of reset: 2016

Years in HRSF: 3

Anticipated graduation: 2020



Located in a high-traffic area of Third Street in the Bayview neighborhood of San Francisco, Palou Market has become a beacon of quality produce for the neighborhood and the most cost-effective grocer around since its redesign in 2016. Store owner Ali Saeed noticed the success of other HRSF retailers and felt that the program would be perfect in helping him increase healthy-food access in his neighborhood. As a part of Palou Market's store redesign, Ali received new produce decals and signage to increase the visibility of his store as well as increased shelving to allow him expand the store's selection of produce and dry goods.



The Healthy Retail SF program has helped me build the sales of my store. Fruits and vegetables have given my customers more options. Families come to my store. They feel it's a safe space. I'm thankful for all of the assistance from the program.

—Ali Saeed, Owner of Palou Market

BEFORE RESET



AFTER RESET



Because his market is a business on a street that receives a lot of foot and vehicle traffic, it was important to Ali that his store redesign include a makeover of the store's facade.

Community Health Benefits

Environmental and social factors contribute to health inequities in low-income and underserved neighborhoods, where residents face disproportionately high rates of preventable chronic disease, such as obesity, diabetes, heart disease, and hypertension. Many studies have demonstrated that the health inequities and disproportional impacts that low-income and communities of color suffer are due in large part to diet-related illnesses such as diabetes, hypertension, and heart failure.^{ix} Regular fruit and vegetable consumption is linked to reduced risk for heart disease and some cancers.^x However, many low-income residents cannot access



affordable produce and healthy food in their neighborhoods. A lack of full-service grocery stores and affordable healthy restaurants means that residents often have to choose between fast-food restaurants and corner stores that have limited healthy offerings. Dubbed “food swamps,” these neighborhoods are saturated with unhealthy food, beverages, tobacco, and alcohol. A key objective of Healthy Retail SF is to provide consumers with more choices and access to healthy food in San Francisco’s communities that are “food swamps”—most significantly, the Tenderloin and the Bayview-Hunters Point neighborhoods.^{xi} Healthy Retail SF is one strategy that aims to improve food options and support health in low-income neighborhoods by transforming corner stores.

Key Partnership with the Vouchers 4 Veggies - EatSF Program Ensures Equitable Access to Produce at Healthy Retail SF Stores

Healthy Retail SF has demonstrated an increase in the quantity and quality of produce and other healthy products sold when stores participate in the program. In addition, the redemption of EatSF vouchers at Healthy Retail SF stores demonstrates that low-income consumers are buying this produce. Between 2016 and 2019, \$81,183 in EatSF vouchers were redeemed for the purchase of fruits and vegetables in Healthy Retail SF stores. All Healthy Retail SF stores now accept EatSF vouchers—guaranteeing that residents, regardless of income, can access these fresh and healthy products. EatSF has proven results, according to their own evaluation: “Participants increase their daily fruit and vegetable intake by one serving per day—enough for immediate health impacts. They are more confident in making healthy food choices on a budget (98%) and report eating less unhealthy food (91%). Stores report selling more F&Vs (89%) and having more customers (78%). One out of every two stores reports displaying or stocking more F&Vs as a result of the program, shrinking food deserts by increasing the quality and quantity of produce available.”^{xii}



Key Benefits

In addition to the key benefits of store redesign, business operations support, and community engagement, Healthy Retail SF small business owners highlighted several specific key benefits that supported their success and sustainability as a small business owner in their community.

- Healthy Retail SF supports store owners in the acquisition of POS systems and the transition from paper-based systems to POS systems. POS systems consist of a computerized network linking the cash register, the scale, and the scanner that helps centralize business operations through features such as inventory management and linking item costs with a product code. POS systems give owners reliable real-time information on their sales, growth, and needs—which allows them to increase their efficiency and decrease losses related to unsold or spoiled merchandise. POS also allows them to effectively manage inventory, accounting, and compliance with tax regulations.
- Healthy Retail SF provides neon storefront signage, produce decals, and in-store signage that beautify the store and promote positive, healthy messages. Store owners felt that these changes reflected their own cultural values around health and helped them feel like responsible stewards of health in their communities. Healthy Retail SF grand reopenings of stores activated the newly redesigned spaces, promoted the stores in their communities, and increased the store owners' sense of pride in their stores.
- Owners received layered, high-touch, intensive support to help them navigate and access to customized, high-touch, free or affordable small business resources that are available to small business owners in San Francisco. Owners felt that Healthy Retail SF helped them navigate and apply to the programs that were right for them, and improved their capacity to manage their business and address common challenges for small business owners. For some stores, this support meant they were able to prevent eviction or relocate with the assistance they needed to be successful.

“When I started the [Healthy Retail SF] program, I had nothing healthy. I started with a small shelf of potatoes and tomatoes. Now I have seven to eight feet of produce...The new vegetable fridge keeps vegetables fresh, and [they] last longer... It's very appealing to my customers.

—HRSF Small Business Owner

FJLs Promote Community Engagement in Healthy Retail SF Redesigns

With funding from the Sugar-Sweetened Beverage Tax and support from TNDC's Community Organizing Department, the TLHCSC hires FJLs to support each store that participates in the Healthy Retail SF Program. The SSB Tax funding creates sustainable jobs for community residents who shop at HRSF corner stores. There are currently seven total FJLs, and each one is paired with a store in their community. FJLs support their stores in a number of ways, including the following:

Customer Surveys: FJLs survey customers of Healthy Retail SF stores to gather information about the types of produce and healthy foods that local customers would like to see in the store. FJLs share this community input with the store owner and help the owner source and stock these products in their store.

Monthly Report Cards: FJLs rate participating stores on nutritional standards, advertisement practices, cleanliness, and the welcoming atmosphere of the store. FJLs use this information to support the store owner in continually improving their store's status in the

community. FJLs develop close relationships with the store owners and also relay observations to Healthy Retail SF program staff to help address any needs or challenges that they are facing.

Monthly Taste Tests: FJLs host monthly taste tests at stores to highlight the types of foods and produce available, allow community members to taste them, and learn how to cook with these products. Approximately 250 monthly taste tests were hosted by FJLs at Healthy Retail SF stores during this three-year program period, with an average of 30-50 community members attending each event.

Corner-Store-Redesign Days: FJLs go into the corner stores on the days when the store is being remodeled to build/install shelving, install equipment, remove alcohol and tobacco advertisements, and stock healthy foods in the stores.

Store Grand Reopenings: After each corner-store redesign is complete, the Food Justice Leader organizes and hosts a grand reopening to celebrate the store and promote awareness of healthy foods among community members. Grand reopenings include a ribbon-cutting ceremony, and often the mayor of San Francisco, the district supervisor, community leaders, and the local media are in attendance.

Store-Graduation Celebrations: FJLs also organize and host a graduation celebration for the store after they graduate from the program—usually after three years of program participation. Graduation celebrations honor the store's commitment and present the store owner with a certificate or commendation.

Street-Activation Events: FJLs conduct outreach and connect with local neighbors at street-activation events, such as tabling at Tenderloin Sunday Streets, Bayview Sunday Streets, and other local community fairs. TNDC also hosts the Better Lower Eddy Street (BLES) monthly block party on the first Friday of every month, which explicitly promotes the Healthy Retail SF stores in the neighborhoods and allow residents to sample food and learn more about the store.

“As an owner, he is one of the friendliest people who will go above and beyond for customers and always makes sure he has fruits and vegetables, frozen foods and cheeses, bread, spices and baking goods, and an assortment of canned, boxed, and jarred foods.

—Larry McClendon, Bayview-Hunters Point Project Manager / *Invest in Neighborhoods* about Ali Saeed of Palou's Market

Food Justice Leaders have shared their own pride in supporting stores to become healthy assets to their communities:

“[Before there was produce], you go in, and you’re confronted with this big rack of chips. Every chip in the world you could ever imagine—bombarded with chips, candies, a lot of sugary drinks, and canned stuff...You call this a food desert. There’s no real food here—just stuff. It was shocking. Even the way the store was designed, you’re just hit with this as you go in...He changed the front and got rid of candy and put granola, nuts, and healthier snacks so kids couldn’t stare and say, ‘Mommy, I want this!’”

—Food Justice Leader

“The change that I see in all these stores is it gives more healthy options for people who live here—families, seniors with limited mobility—a chance to help their community thrive instead of going outside to get groceries. And it just creates more positive environments, which is important. I think that the regular corner store, when you walk in and see advertisements for tobacco, for alcohol, for beer—that’s not really positive for kids and for people who are addicted to alcohol and want to stop. I really appreciate the work we do and the resources we have, like the Feeling Good Project.”

—**Jennifer**, Food Justice Leader and point person for Daldas Grocery

“It’s also really important to remind people—or for people to know outside of the Tenderloin—that people in the Tenderloin actually do care about our lives, our food, our planet, and the wellness of it all. I think that is one great thing about the coalition: a lot of us are always thinking about the larger food system and food justice.”

—**Jennifer**, Food Justice Leader and point person for Daldas Grocery

Healthy Retail SF
Store Profile:

Ana's Market

Achievements since 2014 store reset:

- Tripled fruit sales
- Doubled vegetable sales
- 20% increase in bottled-water options
- Dedicated shelf space to low-fat, low-sodium, low-sugar, whole-grain, organic items



Thelma Orozco and Bayardo Talavera's Ana's Market is the only store that provides fresh produce in their Oceanview neighborhood. Thelma and Bayardo were referred to the HRSF in 2014 at a time when the store was at risk of closing its doors. In the last five years their business has done the following:

- Obtained a long-term lease
- Replaced failing and outdated equipment
- Doubled gross sales and foot traffic into the store

As active community members, Thelma and Bayardo table at the annual OMI Health & Wellness Fair and the Minnie & Lovie Ward Recreational Center and are featured on a community mural located on the corner of Broad Street and Plymouth Avenue.



I am very grateful that Diana Ponce De Leon from OEWD referred me to Gabriela Sapp from SBDC, who, along with the Healthy Retail SF team, helped me to turn around my business. Without their assistance and guidance, Ana's Market would not have been able to grow and contribute to the community.

—Thelma Orozco, Owner of Ana's Market



Future of the Program

Healthy Retail SF is a comprehensive partnership of several key public, private, and community-based partners working to make a collective impact on healthy-food-access issues in San Francisco. Healthy Retail SF supports and benefits small business owners, corner stores, and community members. The program has engaged 12 stores during the last three years, with nearly half of those stores graduating. Trends in data suggest that participating stores can expect increased revenue, increased produce sales, reduced reliance on tobacco and alcohol sales, and improved relationships with their customers and key San Francisco City and County departments. Participating storeowners are more financially stable and secure in their neighborhoods after participating in this program.

With an annual budget of \$210,000, Healthy Retail SF is a lean, cost-effective, efficient, and multidisciplinary program. With approximately 70% (or \$150,000) of the program budget coming from Sugary Drinks Distributor Tax revenue contributions, the tax has created a sustainable funding source for Healthy Retail SF's community-engagement arm. This investment allows the program to hire and train FJLs—which strengthens their impact and reach in the community.

As Healthy Retail SF looks ahead, the program intends to do the following:

- Expand its Healthy Retailer Mentorship program to offer peer support and expertise to store owners
- Purchase water and healthy-beverage refrigerators for all new redesigned stores
- Upgrade POS systems and training for store owners to improve the categorization of healthy beverages in their systems
- Provide signage/neon signs promoting healthy beverages
- Continue to support between 7 and 10 stores participating in the program at any given time
- Recruit new stores to participate in the Tenderloin, Bayview-Hunters Point, and Oceanview neighborhoods, and expand into the Visitacion Valley neighborhood and other underserved areas of San Francisco
- Continue to strengthen the FJLs program through the sustainable investment of Sugary Drinks Distributor Tax revenue
- Offer advising and training on Healthy Retail SF to other jurisdictions across the country

End Notes

i. Healthy Retail SF POS Three-Year Data Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, November 2018

ii. Healthy Retail SF POS Three-Year Data Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, November 2018

iii. Healthy Retail SF POS Three-Year Data Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, November 2018

iv. Healthy Retail SF Pre-/Post-observation Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, April 2019. Data collected by FJLs.

v. Healthy Retail SF POS July 2017–March 2018 compared to POS July 2018–March 2019, conducted by Bright Research Group for the San Francisco Department of Public Health, July 2019.

vi. Healthy Retail SF Pre-/Post-observation Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, April 2019. Data collected by FJLs.

vii. Healthy Retail SF Pre-/Post-observation Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, April 2019. Data collected by FJLs.

viii. Healthy Retail SF Pre-/Post-observation Analysis, conducted by Bright Research Group for the San Francisco Department of Public Health, April 2019. Data collected by FJLs.

ix. According to the Centers for Disease Control and Prevention (CDC), 30.3 million Americans—approximately 9.4 percent of the US population—had diabetes. Rates of diagnosed diabetes were higher among American Indians / Alaska Natives (15.1 percent), non-Hispanic blacks (12.7 percent), and Hispanics (12.1 percent), compared to Asians (8.0 percent) and non-Hispanic whites (7.4 percent). CDC, National Diabetes Statistics Report, 2017

Available at: <https://www.cdc.gov/diabetes/pdfs/data/statistics/national-diabetes-statistics-report.pdf>

African American adults are 80 percent more likely than non-Hispanic white adults to have been diagnosed with diabetes by a physician. US Department of Health and Human Services Office of Minority Health.

Accessed at: <https://minorityhealth.hhs.gov/omh/browse.aspx?lvl=4&lvlid=18>

Heart disease is the leading cause of death for people of most racial/ethnic groups in the US, including African Americans, Hispanics, and whites. For Asian Americans or Pacific Islanders and American Indians or Alaska Natives, heart disease is second only to cancer. The Centers for Disease Control and Prevention, Division for Heart Disease and Stroke Prevention.

Available at: https://www.cdc.gov/dhdsp/data_statistics/factsheets/fs_heart_disease.htm

Low-income people and people of color are disproportionately obese. For example, 50% of African American women and 45% of Mexican American women are obese. [1] Ogden, CL, and MD Carroll, “Prevalence of Obesity among Children and Adolescents: United States, Trends 1963–1965 through 2007–2008,” Centers for Disease Control and Prevention, National Center for Health Statistics (2010).

Available at: www.cdc.gov/nchs/data/hestat/obesity_child_07_08/obesity_child_07_08.pdf

x. According to the CDC, fewer than 1 in 10 adults and adolescents eat enough fruits and vegetables. Eating healthy helps prevent, delay, and manage heart disease, type 2 diabetes, and other chronic diseases. Centers for Disease Control and Prevention, National Center for Chronic Disease Prevention and Health Promotion.

Available at: <https://www.cdc.gov/chronicdisease/resources/publications/factsheets/nutrition.htm>

xi. The Tenderloin and Bayview-Hunters Point neighborhoods have some of the highest concentrations of individuals living below the Federal Poverty Level (FPL). According to the US Census, 24% of residents in the Tenderloin (94102 zip code) and 21% of residents in the Bayview-Hunters Point neighborhood (94124 zip code) live below the poverty level, compared to the average of 12% across all of San Francisco. These numbers would be even higher when adjusted to account for the high cost of living in San Francisco. US Census Bureau 2013–2017, American Community Survey 5-Year Estimates.

Accessed at: https://data.census.gov/cedsci/table?g=0500000US06075_8600000US94102,94124&tid=ACST5Y2017.S1701&q=S1701

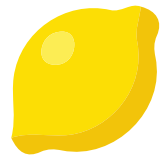
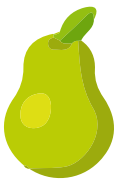
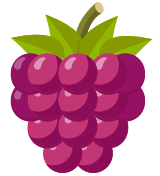
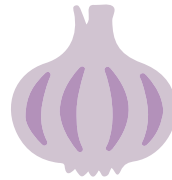
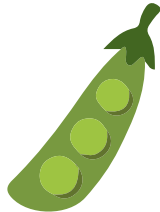
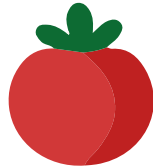
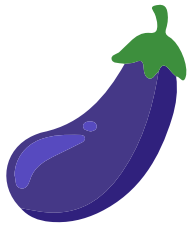
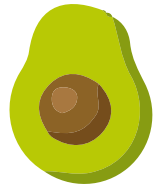
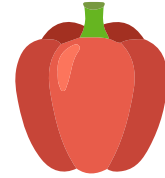
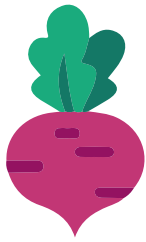
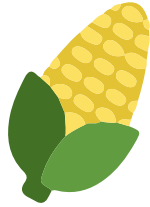
People living in households earning less than 200 percent of the Federal Poverty Level (FPL) are three times more likely to have diabetes than those who earn more in San Francisco. San Francisco Health Improvement Partnership, Diabetes Fact Sheet.

Accessed at: <http://www.sfhip.org/diabetes.html>

The risk of being overweight or obesity is unevenly distributed across San Francisco zip codes. Obesity among adults is concentrated in parts of the Bayview-Hunters Point, Visitacion Valley, Excelsior, Mission, South of Market, and Tenderloin zip codes. San Francisco Health Improvement Partnership, Overweight or Obesity Fact Sheet.

Accessed at: <http://www.sfhip.org/overweight-or-obesity.html>

xii. Vouchers4veggies.org (partnership of ZSFGH, SFDPH, and SF General Hospital Foundation)



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Summary of Findings: 2019 HSHC Key Informant Interviews and Public Opinion Poll

San Francisco Department of Public Health- Tobacco Free Project

Report prepared by Nora Anderson, Health Care Analyst, December 2019

Executive Summary

In Fall of 2019, the San Francisco Tobacco Free Project conducted qualitative interviews around healthy retail options and tobacco control policies with five community stakeholders in San Francisco. Participants were diverse in ethnic background, age, and gender and included policymakers, retailers, and a community advocate. Using an interview guide written by the California Tobacco Control Program, a consultant assessed each participant's reasons for supporting or opposing ten public policies related to a healthy retail environment. Responses are summarized in the following report.

Background & Methods

Healthy Stores for a Healthy Communities (HSHC) is a state-wide initiative among tobacco, nutrition, alcohol, and STI prevention partners aiming to change the retail or store environment to promote health of Californians. HSHC consists of three modes of data collection: public intercept surveys, key informant interviews, and store assessments.

The San Francisco Tobacco Free Project (SF TFP) selected a convenience sample of five San Franciscans representing the categories of policy influencer, community advocate, and retailer to participate in key informant interviews. All respondents had some previous familiarity with at least one of TFP's programs and thus are likely more informed on tobacco control and retailer policy than the average San Franciscan. The interview questions were adapted by SF TFP from a guide provided by the State and assessed respondents' support or opposition for various tobacco control and healthy retail policies. These questions were an open-ended, qualitative version of the policy assessment portion of the public opinion survey. The interviews were conducted over the phone in October 2019 by SF TFP's external evaluator, Bright Research Group, who transcribed responses in real time. Qualitative analysis of the responses was conducted by SF TFP staff.

Demographics

The five respondents identify as:

- Respondent 1: Legislative Aide to Member of San Francisco Board of Supervisors. Mid-30s Heterosexual Latinx Woman.
- Respondent 2: Community Engagement Leader at Community Health Policy organization. Mid-40s Heterosexual Chicano Man.
- Respondent 3: Retail Store Owner. Mid-50s Heterosexual Arab Man.
- Respondent 4: Staff member of San Francisco Youth Commission. Early 20s Queer Mexican Woman.
- Respondent 5: Retail Store Owner. Mid-40s Indian Man (declines to state sexuality).

Of note, we received feedback from two of the respondents that they do not identify with the terms Latino/a or Hispanic to describe their background but offered up Chicano/a and Mexican as alternatives. **Please keep this demographic information confidential as the level of detail collected and reported here could be identifying.** In reports shared with partners, identifying details will be removed.

Key Findings

The role of retailers and the community in promoting healthier living for Californians

To begin the interview, respondents were asked to share their general thoughts on the relationship between products sold in stores and the health of Californians, and the role of retailers in promoting healthier living. Perhaps unsurprisingly, the two retailers interviewed were reluctant to draw a line directly from the food options in stores to chronic health conditions. While the retailers agreed that consuming unhealthy food can lead to problems like diabetes, they pointed out the role of exercise and individual responsibility in personal health, stating *“if you have problems you probably shouldn’t pick out unhealthy options from the grocery store.”*

Respondents offered their own recommendations on how retailers can be involved in improving the health of the community. A retailer respondent provided some big-picture perspective, stating:

“To tell you the truth, [retailers] cannot do anything alone. It’s a system problem... Manufacturers also have to participate because they are the ones who put the products out there. Retailers are just poor people trying to make ends meet, they sell what the people will eat.”

The two retailers also had some specific suggestions regarding the role of retail in building healthier communities, including providing financial incentive to spend money on healthy products and encouraging community members to share feedback directly with the store owners.

“...Motivate the community members to come and spend more in the store like providing them with some type of voucher. There are a few programs like on in San Jose where the user of the voucher gets double for buying produce. For example, if you spend \$10 in fruits and vegetables that were grown in CA they will double the amount of the voucher so you can get \$20 worth of fruits and veggies. You need to incentivize people to buy good food, not sodas.” – Respondent 3

“The [store] owner and the consumer have to communicate...community should tell the store if there is an item they want. They should work together.” – Respondent 5

One retailer also noted that, *“The sugar tax is exempt when using food stamps which just incentivizes consumers to buy more – it’s a loop hole.”*

The community members/policy advocates who were interviewed also suggested a combination of legislative efforts and community-led efforts to create healthier retail options. Two respondents recommended healthy cooking demonstrations to be held at stores and led by “residents of low-income communities of color, who have relationships and trust in the community, understand the culture and speak the language.” All three non-retailer respondents actually advocated for more financial support for retailers, especially in the face of recent bans and tax increases affecting retailers’ inventory.

“Also, in SF where we’ve banned vaping products and we are raising the cost of sugary drinks with a tax – retailers have complained that they need support to enable them to sell products

that are healthy and that are not limited by local policy. There is still an unmet need for partnering with small business owners, primarily in low income communities where they often sell unhealthy products.” – Respondent 2

“I think it would be cool for retailers to create a coalition for themselves. Oftentimes when there is legislation or policy that limits the products they can sell it can seem to retailers that the city or advocates are looking at them as the bad people or trying to make their lives harder and that’s not the case. Having a coalition where they could come together and invite DPH or other CBOs that do public health and equity work and they can have a dialogue where they can share their point of views to find common goals to help everyone. This way, retailers won’t feel like they are always being punished or have to make changes because of changes to public policy.” –

Respondent 4

These respondents also recommended some legislative remedies including:

- Warning labels for sugary drinks
- Eliminate advertisements for sugary drinks near schools and playgrounds
- Increase funding for CBOs and lay health workers who promote healthy eating
- Implement Healthy Retail programs statewide
- Offer price promotions/subsidies on healthy food products

Support for existing and proposed policies

Table 1: Key Informant Support or Opposition for Healthy Retail Policies

**Signifies policy that has already been enacted in San Francisco*

***Signifies policy that was passed but not yet enacted and was subject to potential repeal via ballot measure at the time of the interview*

***Signifies policy that has not been enacted in San Francisco

Proposed strategy/legislation	In Favor	Against	Don't Know	Key quotations
a. *Would you be in favor or against a law that bans pharmacies from selling tobacco products?	5	0	0	
b. *Would you be in favor or against a law to prevent stores near schools from selling tobacco?	4	1	0	"I am against because if kids or students want to get cigarettes they will get it regardless of location. They [policymakers] should not go at retailers – the system is broken they need to better educate kids in school about tobacco." – Respondent 3
c. *Would you be in favor or against a law requiring store owners to have a local license to sell tobacco?	4	0	1	
d. *Would you be in favor or against a law to ban the sale of flavored tobacco products?	4	1	0	<p>"I work with a couple of African American researchers who championed a similar policy here across the Bay Area and their primary intent was to reduce cancer in African American communities and they felt that it was important to enact this policy in order to achieve that goal because they had a tremendous body of evidence for how the tobacco industry targets African American communities with flavored products." – Respondent 2</p> <p>"I am against the ban – they want to ban everything. To ban flavor makes no sense – if you're going to ban tobacco, ban all tobacco. I used to smoke and I know how bad it is." – Respondent 3</p>

e. ***Would you be in favor or against a law that makes it illegal to sell small amounts of tobacco like single cigarillos, or other tobacco products in packs of one?	5	0	0	<i>"Yes because it's a lot easier to sell singles which and makes [tobacco products] more accessible to youth and minors." – Respondent 1</i>
f. ***Would you be in favor or against a law that sets a minimum price for tobacco products?	1	2	2	<i>"I don't know how that works." Respondent 2</i> <i>"Against. I don't want government to get into that area – if they are going to get into controlling/fixing prices they should focus on medicine and making it more affordable. People can't afford medicine these days." – Respondent 3</i>
g. ***Would you be in favor or against a law that bans price discounts on tobacco?	4	1	0	<i>"In favor, because [retailers] get discounts from manufacturers based on number they sell and it encourages store owners to sell more and not check IDs." – Respondent 3</i> <i>"That's a tricky one because some of the products, for example the cigarette, they have a buy down price anyway through the wholesaler and I don't think there is anything wrong with accepting the coupons – it's just like accepting a coupon for any other item." – Respondent 5</i>
h. **Would you be in favor or against a law to ban sale of vaping devices? <i>(Note: At the time of the interview, this policy was in legislative limbo.)</i>	4	0	1	<i>"In favor because it is another form of addiction. They addict people on the same thing as cigarettes is probably twice as harmful." – Respondent 3</i> <i>"I don't know. I kind of struggle with that simply because I know some people who tried to quit who say vaping has helped them with their journey to quit. I wouldn't want to make [vaping devices] illegal, but I do know it's easy for young people to get their hands on vapes. Maybe there is a world where it's illegal to have flavored liquid nicotine and only allows non flavored vaping products." – Respondent 4</i>
i. ***In exchange for reducing tobacco and alcohol products and increasing fruits and	4	0	1	<i>"I think that is a very interesting policy to consider. I think we would want to tie it to not just reducing tobacco but also sugary beverages – I think that would be a good driver to reduce</i>

<p>vegetables in stores, would you be in favor or against incentives such as financial aid, tax credits, technical assistance (e.g. business planning) or other tangible goods and services?</p> <p><i>(Note: San Francisco has the Healthy Retail SF program which is open to a limited number of stores and provides technical assistance but not tax credits)</i></p>				<p><i>other unhealthy items that are potentially sold in stores. I am wondering where funding would come from to provide that incentive/ tax incentive – It's a great idea but I would want to know how we actually get that pool of funding to provide assistance before I saying yes or no ."</i></p> <p>- Respondent 1</p> <p><i>"I'm in favor of those supports because I think we need to support retailers that are willing to partner with us to improve public health by reducing unhealthy products. I think that we can't achieve our public health goals by only providing punitive measures and disincentives to retailers. We must couple the stick with the carrot and provide incentives that will encourage retailers."</i></p> <p>– Respondent 2</p> <p><i>"Yes – we see the results from Healthy Retail SF of reducing alcohol and tobacco sales and having other optional items that bring in more families and customers."</i> – Respondent 5</p> <p><i>"To reduce not eliminate – Yes it would be a good idea if the incentives are financial because that's where it hurts the retailer the most – Technical assistance doesn't generate money we [retailers] need to pay rent and insurance and our employees. We lose income from reducing sales so we should have incentives that make up for the loss."</i> – Respondent 3</p>
<p>j. ***Should advertisements in stores be limited in where they are displayed?</p> <p><i>(Note: this question was not phrased in a way that facilitates "in favor/against" voting)</i></p>	0	0	5	<p><i>"It depends on the type of advertisements."</i> – Respondents 1,2,3,4,5</p>

Discussion & Recommendations

Respondents generally support existing policies

Since all of the respondents had some familiarity with the Tobacco Free Project before their interview, they were likely more aware of San Francisco's existing tobacco laws than the average resident. There was almost unanimous support for the existing policies banning tobacco sales in pharmacies, requiring tobacco retailers to obtain a license, and banning new retail licenses near schools. Even the ban on flavored tobacco products, which is only a year old, was supported by four of the five respondents. The two retailers tended to be less supportive of additional restrictions on what they can sell.

At the time of the interviews in October 2019, San Francisco's board of supervisors had recently passed a ban on the sale of e-cigarettes and vaping products pending FDA approval. The ban had not yet gone into effect and there was a ballot initiative in November sponsored by Juul Labs that would overturn the ban. So, whether the ban on vaping devices would be upheld was still a matter of debate. That said, the two retailers actually supported the vape ban, as did the legislative aide and the community advocate. The only respondent who was unsure whether or not they supported the ban was the Youth Commission member, who stated that they had seen friends quit cigarettes by switching to vaping. The other respondents cited recent reports about outbreaks of vaping-related lung disease as part of their reasoning for supporting the ban. Between the time of the interviews and the writing of this analysis, the Juul-sponsored ballot initiative failed to pass, which means that the vape ban is upheld and will go into effect in stores in January 2020.

Minimum pricing is a poorly-understood policy

There is not yet a law setting a minimum price for tobacco products in San Francisco. Some of the members of San Francisco Tobacco Free Coalition are working towards getting such a policy enacted. However, three of the respondents we spoke with did not understand the concept of a minimum price policy well enough to even voice support or opposition. The exception was one respondent who had been a Project Coordinator for one of our community partners' policy efforts in the past. The two retailers were against the concept of fixing a price although they were somewhat confused about the concept of minimum pricing for tobacco. The legislative aide and community advocate both stated that they were unsure and needed more information. Given that this policy is a priority issue for our local Coalition, it seems likely that policymakers, stakeholders, and the general public all need more education about minimum pricing in order for such a policy to be successful.

Confusion around limitations on store advertisements

The concept of limiting store-front or in-store advertisements was also met with questions and confusion. Respondents generally disagreed with the idea of limiting all advertisements, stating that it only made sense to limit advertising for harmful products such as tobacco and alcohol, while increasing advertising for healthy products. All five respondents included some caveats in their response, such as limiting ads that promote substance abuse or only regulating ads in regards to how they affect children.

Enthusiastic support for healthy retail incentives

Respondents were the most enthusiastic about the idea of a program to provide financial incentives to retailers who stock more healthy products and fewer tobacco products. Of all of the policies mentioned, this one inspired the most commentary. Most supported the idea, with the exception of the legislative aide who added the caveat that while she supported the concept, she needed to know the funding

source. Both retailers and the community advocate and mentioned that since so many anti-tobacco policies end up being punitive towards retailers, a positive financial incentive for retailers to decrease tobacco access would be embraced.

Support for banning sale of small amounts of tobacco products and coupons

Five of five respondents supported a hypothetical ban on the sale of single cigarillos. Respondents connected this type of ban to keeping tobacco products out of the hands of young people, who are more likely to buy these lower-priced items. One retailer stated that he thought this was already the law, although he was likely referring to the prohibition on selling “loosies.” The existing support for such a measure indicates that this is a potential area of focus for Coalition partners.

Four of five respondents were in favor of banning coupons and price discounting for tobacco products. The two retailers noted that there is a somewhat complex interplay between the prices and promotions offered directly from manufacturers to retailers and the prices that retailers charge customers.

Conclusions and Recommendations

A diverse group of stakeholders including policymakers, retailers, and a community advocate, participated in key informant interviews regarding healthy stores in San Francisco. Participants had high familiarity with existing tobacco regulations in San Francisco and were mostly supportive of existing regulations. Some key themes of the interviews were support for policies that would provide retailers with more financial incentive to promote healthy products, and to involve store owners and communities in requesting healthy products in their communities. Participants’ low familiarity with the concept of minimum pricing for tobacco products revealed an opportunity for more education and outreach to stakeholders around this concept, especially as a minimum pricing policy is being explored locally.



Healthy Stores for a Healthy Community: Public Intercept Surveys

San Francisco Department of Public Health - Tobacco Free Project
Nora Anderson, December 2019

Background & Methods

Healthy Stores for a Healthy Community (HSHC) is a state-wide initiative among tobacco, nutrition, alcohol, and Sexually Transmitted Infections (STI) prevention partners to support changes in the retail or store environment to promote health of Californians. HSHC assessments were conducted in March through November of 2019 and included three methods: public intercept surveys, key informant interviews, and store assessments.

Public intercept surveys were conducted in September and October of 2019 by five local data collectors in nine zip codes, which corresponded to where stores assessments were conducted. The survey questions were provided by California Tobacco Control Program (CTCP) and adapted by San Francisco Tobacco-Free Project (SFTFP) to meet the needs of our local community. Changes included removing some more granular questions about availability of types of liquor, adding a question to mark surveys completed in Chinese, and an Arab-American option in the demographic section. Data collectors used handheld electronic devices to survey a convenience sample of San Franciscans at various public locations and events, such as near public transit stops, schools, and libraries. Surveyors approached every fifth person, in an attempt to remove some types of bias from the sampling approach. Participants were provided with a novelty whistle as a thank-you for their participation. A total of 394 people completed surveys; a breakdown by ZIP code and neighborhood is in *Table 1: Geographic distribution of survey residents*. One bilingual Spanish-speaking surveyor and one bilingual Cantonese-speaking surveyor offered participants the opportunity to complete the survey in their native languages. Surveys collected in Spanish were done so using the Spanish version that was pre-translated in Survey Analytics; surveys collected in Chinese were verbally translated on the spot into Cantonese by the surveyor.

Table 1: Geographic distribution of survey respondents

ZIP	District	HSHC ZIP code	Number of surveys
94123	2	Marina	40
94114	8	Noe Valley, Castro	42
94118	1	Inner Richmond, Laurel Heights, Presidio Heights	40
94112	9/11	Excelsior, Crocker Amazon, Oceanview, Outer Mission	45
94110	9	Mission, Bernal Heights	47
94109	2/5	Tenderloin; Japantown, Russian Hill; Nob Hill	44
94102	5/6	Tenderloin, Hayes Valley	47
94103	6	South of Market Area (SOMA)	43
94124	10	Bayview Hunters Point (BVHP)	46



Data Summary: Demographics

We aimed to sample a representation of San Franciscans most impacted by lack of access to healthy retail options, and oversaturation of unhealthy products. Since CTCP's random sample of ZIP codes included San Francisco's wealthiest neighborhoods and did not include ZIP codes where many Black/African-American residents live and where there are "food swamps," we expanded our sampling area to include a more diverse population. In comparison to 2018 American Community Survey (ACS) population estimates for San Francisco County, we oversampled for Native Hawaiian/Pacific Islander, Latinx and Black/African American while Asians and Whites were under-sampled. Slightly more than half of respondents (56%) identified as a woman, 41% identified as a man, and a handful identified as either transmen or transwomen. Ages of respondents range from 18 to 92, with a mean of 36 years and a mean of 32. The majority of respondents were in their 20s and 30s.

Due to the small sample size and the non-random selection of ZIP codes and respondents, the survey results are not generalizable to San Francisco as a whole.

Table 2. Respondents by Race/Ethnic Identity *Participants could choose more than one race/ethnicity								
	White (n=89)	Native Hawaiian /Pacific Islander (n=16)	Asian (n=93)	American Indian/ Alaska Native (n=4)	Black or African American (n=118)	Latinx (n=103)	Arab American (n=4)	Other/ Decline to state (n=5)
Respondents (N=394) (%)	23	4	24	1	30	26	1	1
2018 ACS (%)	47	0.3	34	0.3	5	15	-	-

Ease of accessing healthy and unhealthy products

The first half of the survey asked whether it was "Easy" or "Difficult" to buy certain products, both healthy and unhealthy, in the respondent's neighborhood. Beginning with tobacco products, slightly more than half of respondents stated the flavored tobacco products and menthol cigarettes are difficult to obtain, an increase from previous years that may reflect the impact of the menthol and flavored tobacco ban that was enacted in San Francisco about nine months before the survey period. Slightly more than half of respondents stated that regular cigarettes are still "easy" to obtain, while around one-third of respondents thought that little cigars/cigarillos or vaping devices were easy to obtain. Respondents overwhelmingly agreed that unhealthy beverages like beer and soda were easy to obtain (Table 3).

In terms of healthy products, 100% of respondents agreed that it is easy to obtain water in neighborhood stores, while around two-thirds felt it was easy to obtain fresh fruit and vegetables, an increase from previous years. Proportions were similar across ZIP codes, with the exception of 94124, which encompasses the Bayview/Hunters Point neighborhood, where only around 20% of respondents felt it was easy to obtain fresh fruits and vegetables.



Table 3: Product accessibility, unhealthy and healthy (N=394)			
	Easy (%)	Difficult (%)	Don't Know (%)
Soda	99	0	1
Beer	96	1	4
Malt liquor	80	8	12
Cigarettes	53	32	14
Little cigars/cigarillos	39	32	28
Vaping devices	34	34	31
Menthol cigarettes	18	53	29
Flavored tobacco products	16	53	31
Water	100	0	0
Condoms	85	3	12
Fresh fruit	67	27	6
Fresh vegetables	64	28	8
Whole wheat bread	47	18	34
Milk	46	25	29
100% fruit juice	42	36	22

Support and opposition for tobacco control policies

Survey respondents were asked whether they would support or oppose a sampling of tobacco control policies selected by CTCP, four of which are already law in San Francisco. One policy, a ban on sales of vaping products, was passed by the Board of Supervisors at the time of the survey, but had not yet been enacted and was subject to potential repeal via a JUUL Labs-funded ballot measure. Ultimately, the policy was not repealed and went into effect on January 29th, 2020. Overall, more than 60% of respondents were in support of every tobacco control policy mentioned. The policy with the highest proportion of respondents who stated that they didn't know whether to support or oppose was minimum pricing, with 12% of respondents unsure of their position. This mirrors a trend that was seen in the key informant interview portion of HSHC data collection. More results are below in Table 4.

Table 4: Support for healthy retail policies (N=394)			
	Support (%)	Oppose (%)	Don't know (%)
Ban tobacco sales in pharmacies*	79	18	3
Ban tobacco sales near schools*	85	12	2
Require tobacco retail licenses*	81	15	4
Ban flavored tobacco sales*	64	28	8
Ban single cigar sales***	61	28	11
Set minimum pricing for tobacco***	61	26	12
Ban coupons for tobacco products***	60	33	7
Ban sales of vaping products**	69	22	9
Place some limits on advertisements in stores***	83	14	3



**Signifies policy that has already been enacted in San Francisco*

***Signifies policy that was passed but not yet enacted and was subject to potential repeal via ballot measure at the time of the interview*

****Signifies policy that has not been enacted in San Francisco*

San Francisco Tobacco Free Coalition members are working to gain support for a minimum pricing policy, for which additional analysis is highlighted in Table 5. Though the policy is supported by a majority of survey respondents, support does vary by neighborhood. The highest income neighborhoods (Marina and Presidio) have the highest levels of support, while lowest income neighborhoods (Tenderloin, Bayview, Hunters Point) have lower levels of support and higher levels of the “don’t know” response. These results are somewhat unsurprising given that lower income people have higher smoking rates and are more impacted by policies that increase prices.

	Support (%)	Oppose (%)	Don’t know (%)
Marina 94123	88	10	3
Noe Valley, Castro 94114	74	24	2
Inner Richmond, Laurel Heights, Presidio Heights 94118	78	15	8
Excelsior, Crocker Amazon, Oceanview, Outer Mission 94112	80	18	2
Mission, Bernal Heights 94110	64	26	11
Tenderloin, Japantown, Russian Hill, Nob Hill 94109	52	26	18
Tenderloin, Hayes Valley 94102	49	32	19
South of Market Area 94103	30	40	30
Bayview Hunters Point 94124	39	54	26

Prevalence of smoking and vaping

Respondents to the HSHC Public Intercept Survey had higher rates of smoking and vaping compared to findings from other recent surveys of San Franciscans. For example, the California Health Interview Survey for 2018 showed a current cigarette smoking rate of 12% for adults in San Francisco and vaping at 6%. Of those who disclosed smoking status in the 2019 HSHC Public Intercept Survey (n=385), 45% had smoked cigarettes at least “some days” of the last 30 days, while 31% had vaped in the last 30 days. One explanation for these incongruous findings could be our decision to include a non-random sample of additional ZIP codes in our survey areas in order to gain more information about healthy retail access in San Francisco’s “food swamp” neighborhoods. These neighborhoods may have higher rates of smoking for some of the same reasons that they are “food swamps”, i.e. targeting by the tobacco and food industries, structural inequality and racism. When broken down by race/ethnicity, all races still had much higher tobacco use rates than other existing reports. Latinx and Black-African-American respondents had the highest cigarette use rates and Latinx and white respondents had the highest vaping rates.



Table 6. Tobacco use last 30 days, by ethnicity (%)		
	Cigarette (%)	E-cigarette (%)
Asian (n=93)	25	16
Black or African American (n=116)	53	27
Native Hawaiian/Pacific Islander (n=16)	31	19
Hispanic/Latino (n=83)	60	51
White (n=88)	43	35

Note: Table 6 only includes groups that made up >1% of respondents

One interesting finding from our analysis is that 88% of current vape users (n=119) are also current users of other types of tobacco products. Despite the vape industry's protestations, it appears that vaping products are not so much "quitting aids" as simply another tobacco product.

Recommendations

While the 2019 HSHC Public Intercept Survey has some limitations, including the fact that it is not a random and representative sample of San Francisco, it does shed light on inequities related to tobacco access and use and healthy foods access among some key priority populations. Based on our analysis of the 2019 findings, we recommend the following next steps for consideration by SF TFP, our local partners, and CTCP.

- **Conduct a more extensive local tobacco-use survey that includes clear vaping questions.** In light of San Francisco's historic vaping ban which goes into effect in January 2020, it would be very useful to have reliable, current data on teen and adult vaping prevalence. The HSHC Public Intercept Survey does not meet statistical standards for reliability, but the fact that we obtained a vaping rate five times greater than CHIS' vaping rate suggests that the true number may be somewhere in between. Vaping is a rapidly evolving public health issue and keeping track of its reach and impact is vital.
- **Increase availability of healthy products in certain neighborhoods.** Access to flavored tobacco products is declining in all neighborhoods, but there is still progress to be made in increasing access to healthy products like fruits and vegetables. This is especially true in the Bayview and Hunters Point neighborhoods. These findings are echoed by our HSHC key informant interviews, in which stakeholder respondents advocated for more positive incentives for retailers to stock healthy products, rather than a focus on bans and fines for unhealthy products.
- **Educate the public about minimum pricing and minimum pack size.** These two policies had the highest proportion of respondents who replied "don't know" when asked about their support or opposition. They also happen to be two policies that are not yet enacted in San Francisco but are the subject of TFP community partners' education efforts. The support for these policies is lowest in lower income neighborhoods that also have some of the highest concentrations of tobacco retailers.





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For Immediate Release

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New survey finds progress in reducing the availability of harmful tobacco products but more work is needed

San Francisco, CA (March 24, 2020) -- New research shows that the availability of flavored tobacco products has decreased from 61% in 2016 to 17% in 2019 among surveyed stores in San Francisco. This finding is part of new research released today on the availability and marketing of tobacco products, alcohol, condoms and healthy and unhealthy food options in California stores that sell tobacco.

The Healthy Stores for a Healthy Community (HSHC) Survey is the largest scientific survey of its kind in the state and builds upon previous research released in 2014 and 2017 to look at changes in the availability and marketing of the studied products over time. Information collected from nearly 8,000 randomly selected licensed tobacco retailers in all 58 California counties included convenience, gas, grocery, liquor, and drug, as well as tobacco stores.

One of the key goals of the survey was to examine the accessibility and marketing of healthy and unhealthy products to youth. In San Francisco, 42% of surveyed stores still have tobacco marketing in kid-friendly locations, such as near candy or toys or under three feet.

"The findings show that San Francisco's groundbreaking ban on menthol and flavored tobacco products has been effective in making it harder for kids to access the flavored products that can be a gateway to nicotine addiction," said Tonya Williams of the San Francisco Tobacco Free Coalition. "We have made progress in the fight against Big Tobacco and Big Vape, but there is still more work to be done. Overall, we need a better balance of healthy choices in our stores. This information is important to examine because the three leading causes of death in California are from heart disease, cancer and stroke. We can largely prevent them by eliminating tobacco use, limiting alcohol use, eating healthy and being physically active."

The survey found the following for San Francisco County:

- Shortly after the implementation of San Francisco's menthol and flavored tobacco sales ban in early 2019, only 17% of stores surveyed sold flavored, non-cigarette tobacco products such as grape e-cigarettes. This is a decrease since 2016 when 61% sold them. In addition, 17% of stores still sold menthol cigarettes, a significant decrease since 2016 when 94% sold them.



San Francisco Department of Public Health

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- Two-thirds of surveyed stores that were near a school displayed advertisements for unhealthy products on the storefront.
- In San Francisco, 28% of surveyed stores sold sugary drinks at the checkout counter. California teens consume the equivalent of 39 pounds of sugar each year from sugary drinks.
- Many of the surveyed stores that sold alcohol (65%) sold alcopops. These alcoholic beverages come in sweet and fruity flavors that can be appealing to kids.
- Of all stores surveyed, 71% sold condoms but only 34% sold them on unlocked shelves where people do not have to worry about being embarrassed by asking a clerk to access them. This is important because in California in 2018, bacterial STDs (chlamydia, gonorrhea, and syphilis) significantly increased.

“The continued presence of advertisements for unhealthy products, including tobacco, in kid-friendly areas shows that the tobacco industry is still targeting kids.” said Tonya Williams. “The San Francisco Tobacco Free Coalition is committed to continuing to work with local health advocates and partners to provide accurate information and help make the healthy choice the easy choice for Californians. We have an important opportunity, now, to make sure our stores offer healthier options.”

The Healthy Stores for a Healthy Community campaign is a statewide collaboration between tobacco and alcohol use prevention, sexually transmitted disease prevention, and nutrition partners to examine what is in our community stores and how that impacts public health.

For full state and county-specific data and more information on Healthy Stores for a Healthy Community, please visit www.healthystoreshealthycommunity.com.

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About San Francisco Department of Public Health (SFDPH)

The mission of the San Francisco Department of Public Health (SFDPH) is to protect and promote the health of all San Franciscans. SFDPH strives to achieve its mission through the work of two main divisions – the San Francisco Health Network and the Population Health Division. The San Francisco Health Network is a community of top-rated clinics, hospitals and programs that serves more than 100,000 people annually at sites such as Castro Mission, Chinatown, and Southeast health centers, Zuckerberg San Francisco General and Laguna Honda Hospital and Rehabilitation Center. With a broad community focus, the goal of the Population Health Division is to ensure that San Franciscans have optimal health and wellness at every stage of life. To achieve this, the Division is comprised of branches dedicated to core public health services, such as health protection and



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