# **Shop Digital**

Understanding the influence of digital on shopping behaviours

Commissioned by:





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# In this report

- 03 Introductions
- Opjectives and Methodology
- 17 The Wider Context
- **27** Shopping Behaviours
- 32 Meet the Shoppers
- 44 A Role for Digital?
- 49 Testing Some Propositions
- 56 Appendices

## **Introductions**

Nice to meet you



## **Introducing Shift**

Shift brings together rigorous research, ambitious creativity and commercial expertise to design solutions to challenging social problems, together with partners and collaborators.

We work on complex social issues including childhood obesity, mental health, infant development and financial resilience.



## Introducing Guy's and St Thomas' Charity

Guy's and St Thomas' Charity is an independent urban health foundation. It works in partnership with Guy's and St Thomas' NHS Foundation Trust and others to improve health in the London boroughs of Lambeth and Southwark. Through its childhood obesity programme, the Charity aims to close the childhood obesity inequality gap by bringing the high rates of childhood obesity in neighbourhoods with the lowest incomes down to the level of the more affluent ones. The programme focuses on making sure all children have healthy food options and places to run and play by redesigning the spaces where children and families spend their time.

All children should have the opportunity to be healthy, no matter where they live. Yet children's chances of being overweight depend strongly on where they grow up. The moment families and children step outside, they are flooded by invitations and incentives that encourage unhealthy food options. This is amplified in inner-city high streets.

The Charity commissioned Shift to look at the role of digital technology in supporting families on lower incomes to navigate often confusing in-store food environments. The goal was to see where the opportunities lay and how digital can make it easier for families to find healthier options.



## **Introducing Shop Digital**

The shopping experience and environment makes unhealthy food options easier to find, harder to ignore and more affordable, meaning the family food shop can be a real challenge for many people on a lower income.

Shop Digital is a rapid research project exploring whether digital products and services could be harnessed to help nudge healthier food choices in store.

# Objectives and Methodology

What we did



### Research Aim

Shop Digital was designed to explore the extent to which personalised in-store digital technology reflects the needs of families on lower incomes in Lambeth and Southwark and how it can support them to find healthier options.

Our aim was to understand how, if at all, Guy's and St Thomas' Charity might invest in this space. We focused on the following three categories:







## **Research Objectives**

- 1. To understand local families' needs and barriers around making healthy switches
- 2. To understand what this type of support might mean to them (i.e. what they need help with, barriers they want to overcome, if any)
- 3. To understand their attitudes to using digital in store and explore how these will or won't fit in with shopping habits
- 4. To evaluate parent responses to six value propositions supported by example product ideas to explore what does and doesn't work

## Methodology

The project had three phases, each involving different methodologies:

Phase I: Scope	Phase II: Immerse	Phase III: Develop
Kick-off Scoping Session	2 x Local Parent Focus Groups	Analysis & Synthesis
Desk Research	3 x Local Parent Shopalongs	Opportunity Space Workshops
Expert Interviews	Analysis & Synthesis	Final Debrief Workshop

### **Subject Matter Experts**

Phase I: Scope	Phase II: Immerse	Phase III: Develop
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### **Subject Matter Experts**



Dr. Carmen Piernas-Sanchez

University of Oxford The Oxford Martin Programme on the Future of Food



Public Health England

Tim Chadborn

Head of Behavioural Insights & **Evaluation Lead** 



**Professor Ivo Vlaev** 

Warwick Business School. **University of Warwick** Professor of Behavioural Science



**Markus Stripf** 

Spoon Guru Co-founder and Co-CEO

Focus groups with local parents

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Focus groups with local parents

All 13 5 - 11 yr olds Lambeth Southwark Women Men Mix All All None **Ethnicities** C2DE (<£25k) Main Shopper Open to Healthy Tech Rejectors

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## The Wider Context







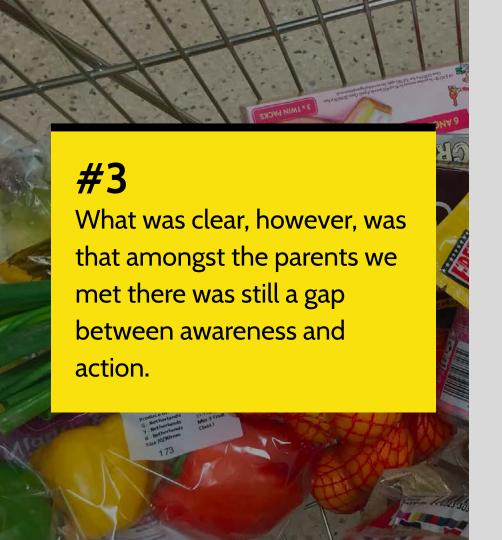


During the focus groups we asked parents to share self-reported healthy habits in their home.

#### Healthy habits included:

- Cooking from scratch
- Trying not to fry
- Drinking lots of water
- Cutting down on juice
- Not having snacks in the house
- Lots of fruit for snacking
- Fewer processed food items
- Less meat/ meat alternatives
- Eating 5-a-day
- Opting for low sugar options

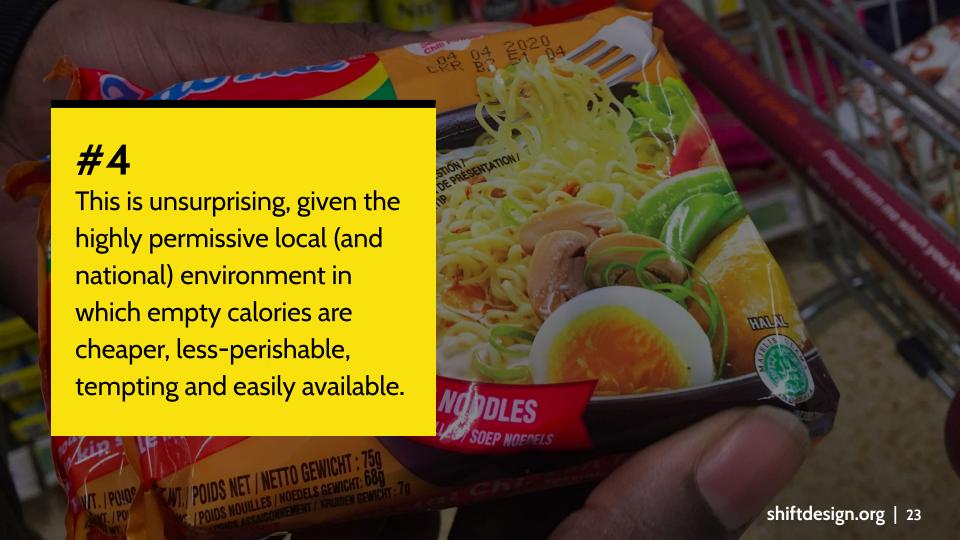


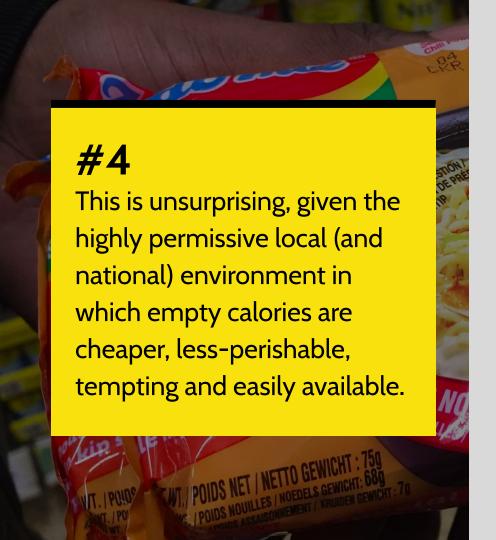


During the focus groups we also asked parents to share self-reported unhealthy habits in their home.

#### Unhealthy habits included:

- Eating takeaways and/or fast food (at least once a week)
- Constant snacking and grazing
- Rewarding children with snacks
- Fizzy drinks
- Processed carbs (i.e. noodles, pasta, rice etc.)
- Ready and convenience meals
- Limited fresh fruit and veg to avoid waste
- Not having consistent meal times or eating late
- Not having a table to eat at





### "Unhealthy calories are three times cheaper than healthy calories"

- The Food Foundation in April 2019



### So What?

For digital interventions to be effective in changing in-store behaviours, they need to overcome the political, environmental and economic barriers that make calorific foods the easier choice.

# **Shopping Behaviours**



## **Planning**

We heard and observed a range of ways in which parents planned their shopping. Some common themes included:

#### **Making Lists**

Many parents reported making lists as a way to 'stick to plans' and ensure shopping 'stayed on track'

#### Meal planning

Some parents described shopping 'in meals', planning meals for the week up front and buying accordingly

#### Flex planning

Some parents described relying on 'flexible ingredients' that enabled them to adapt plans and day-to-day decisions about what to eat

#### Popping in

Some shopping was more spontaneous and prone to 'treats', with top up shops tending to appear less planned amongst the parents we spoke to

#### Going list free

A small group of parents we spoke with did not use lists and described their approach as 'less organised' which led to shopping 'mistakes'

## Shopping

We heard and observed many similarities in the ways that parents shop. Some of their common approaches included:

#### **Deal Sensitivity**

While the parents we met did not display signs of being budget conscious (with few setting weekly budgets) they were very deal sensitive

#### Kid-free

While many spoke of the challenges of pester power, we heard or observed mostly child free shopping amongst the parents we met

#### Same Old

Many of the parents we met described sticking with common staples, and brands that they knew their family would like and wouldn't waste

#### Aisle Avoidance

While this wasn't common some parents described avoiding certain aisles. However, for many every aisle was visited as part of their shop

#### **Limited Bulk**

We only met one parent who described shopping on bulk to stock up on everyday staples. It was unclear how common this was amongst the others

"There are Snack A Jacks on one aisle and Walkers and Fatty Food on another. They differentiate, so it's up to you to go to that aisle"

Parent, Focus Group Peckham

### At Home

The eating habits of families we spoke with felt similar, with many of their common experiences appearing to drive their behaviour in store:

#### **Need for Speed**

Most parents we spoke with had jobs so they relied on their ability to throw together quick tasty meals that everyone would eat

#### **Juggling Likes**

Even in smaller families, competing tastes and preferences made meal time complex and meal planning a constant headache

#### **Snack Drawer**

Many parents used snacks liberally as a way to tide kids over between meal times, reward behaviour or as part of ritualistic family time

#### **Added Extras**

Parents we spoke with regularly added their own touch to products including jars, tins and ready meals, using seasoning that was often high in salt

#### **Family Faves**

While parents we spoke with didn't tend to cook from scratch day-to-day, when they did it was often food from their background or heritage

# **Meet the Shoppers**



## Meet the Shoppers

In order to understand the interplay between the in-store environment and personal attitudes and behaviours, we accompanied three parents on their weekly shop. They represented one self-reported healthy shopper, one self-reported unhealthy shopper and one who reported more neutral attitudes and behaviours. We've categorised them as:

#### **DENYING**

"I would describe this trolley as the 'I want to give you diabetes' trolley" (Parent, Shopalong)

#### **TRYING**

"This trifle is half price and just too good to resist" (Parent, Shopalong)

#### **DEFYING**

"After a visit to the dentist, we cut out all snacks overnight" (Parent, Shopalong)

### **DENYING**



### DAMI

31 years old, Married



5 year old twin girls, PCG



**Black British** 



Under £20k Household Income



世 Tesco, Asda and Iceland

- Cooks most main meals from scratch and associates this with health
- Typically prepares West Indian and Caribbean dishes
- Believes 'home cooked' equals healthy
- Spends £50 every 2 weeks on snacks
- Will stock up on snacks if there is a promotion and loves 'a good deal'
- Believes cooking from scratch balances out snacks
- Awareness of general nutrition related health risks (esp. diabetes)
- Perceives no personal nutrition related health risks for family
- Actively avoids healthy eating initiatives and often finds them irrelevant

"My family is quite slim so I'm not really worried, I don't think I really need to change our diet or watch our calories and weight" (Parent, Shopalong)

This is a composite quote

### **DENYING**



### DAMI











#### **Shift's Observations**

Dami filled her basket with highly calorific treats and snacks for her twins. She seemed throughout to chase the yellow 'save' stickers around the store. These, plus her perceived family health, allowed her to fill her basket defiantly and almost guilt free





### **TRYING**



### TINA

42 years old, Single



7 year old boy, PCG



Afro Caribbean



Under £25k Household Income



**世** Morrisons, Tesco, Sainsbury's, Aldi

- Cooks most main meals from scratch
- Health aware and (slightly insecure) but not preoccupied by it
- Focus on health comes in waves. Diets about twice per year
- Sees a balanced diet as a more equal weighting of healthy vs. unhealthy foods
- Has a limited budget so shopping is dictated by cost and limiting waste
- Buys frozen vegetables and always checks discount aisle
- Continually tempted by price promotions
- Recommendation / easy introduction to try new things

"As a parent I am always looking for snacks and food he can eat but in the back of my mind, I want them to be healthy" (Parent, Shopalong)

This is a composite quote

### **TRYING**



## **TINA**













Throughout the shop, budget and waste were on Tina's mind; balancing what was 'good' for her son with what he'd actually eat. She wasn't sure she was doing a good job. At the end of the interview she said "it would be interesting to know how you think I shop. If I'm as healthy as I think I am".

### **DEFYING**



## DEREK

46 years old, Married



6 year old boy, PCG



Afro Caribbean



Under £20k Household Income



**世** Sainsbury's, Asda



- Wife is in charge of the cooking, dictates what the family buys and eats
- Has a largely 'British' menu at home
- Diet includes salad, lean meat, no ready meals, very little processed foods
- Overhauled diet 18 months ago after dentist discovered hole in son's tooth
- Restricts the amount of snacks they have at the house
- A few treats or convenience based purchases (e.g. Aero Yogurt and Indomie)
- Uses on-pack messaging (i.e. low sugar, low calories) to navigate food choices
- Shopping aim is 'to get the best quality product for the cheapest price'
- Open to further support to make healthier changes to his family's diet

"We previously had lots of snacks in the house. We used Haribo's to reward good behaviour" (Parent, Shopalong)

This is a composite quote

### **DEFYING**



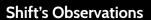
## **DEREK**









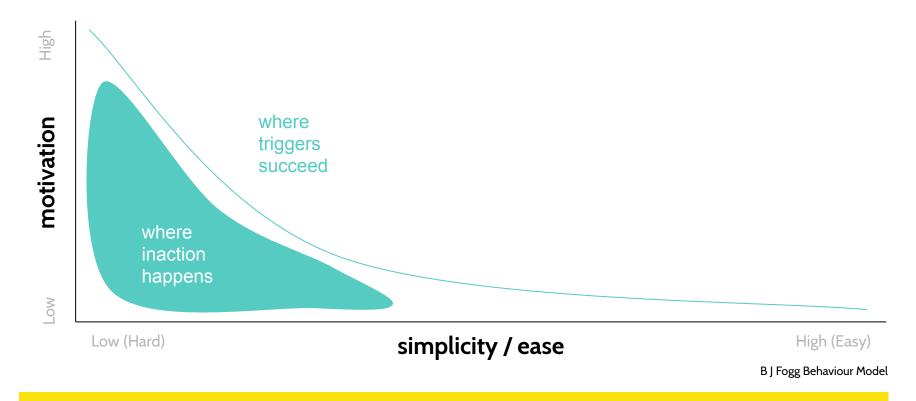


Walking up every aisle Derek selected products based on perceived quality or instruction from his wife. His shop included organic or fair trade products and while he didn't pay attention to labels he used signals like 'Taste the Difference' as a marker of quality.





## A model of behaviour change



## Breaking down the model

BJ Fogg, describes the following model of behaviour change that highlights that when things are incredibly hard (or there are many natural barriers in our way), attempts to trigger behaviour change are futile. We should instead look at how we can create environments which make change possible for everyone - not just those who have the extremely high levels of motivations needed to jump through social, economic, cultural and structural hoops.

### **Motivation:**

Our intrinsic and extrinsic drive to do something typically triggered by pleasure, pain, hope, fear or social cohesion / rejection. When we have extremely high motivation we can do very difficult things.

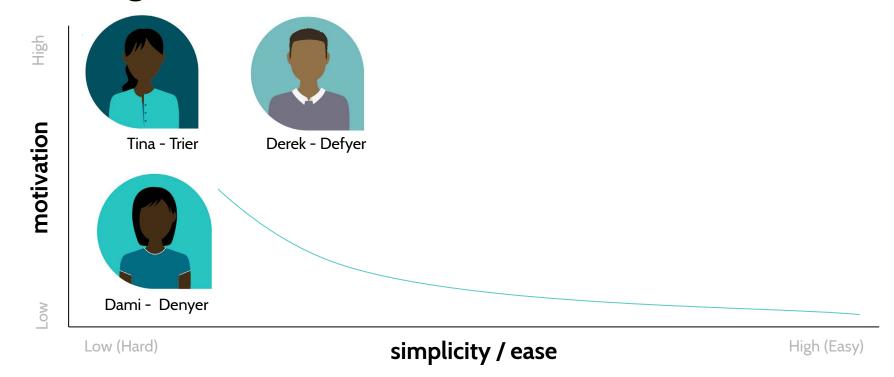
### Simplicity / Ease:

How difficult a thing is to do. This is determined by actors like time, money, mental effort, physical effort, social deviance and non-routine. The more hoops I have to jump through the less likely I'll take this harder path.

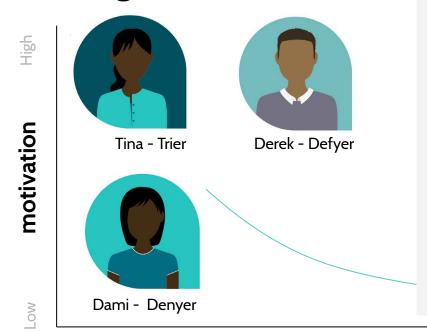
### **Triggers**

the things that prompt action in the moment. These work best when both motivation and ease are high. If they aren't high it's best to work on increasing ease/simplicity and motivation first.

## **Plotting Our Personas**



## **Plotting Our Personas**



The reality is that it **isn't "easy"** for any parents from a low income household in Lambeth or Southwark to adopt and sustain healthier shopping behaviours. The social, political, economic and physical environment makes healthier eating the harder, more demanding choice. However, only a few parents we met had experienced a trigger big enough to have and sustain the motivation to battle against the grain. Our job then should not only be to help build and sustain motivation, and create timely triggers but also to create an environment in which healthier eating is an easier decision to make.

Low (Hard)

simplicity / ease

High (Easy)

# A Role for Digital?





## The brief for Dami

#### Barriers to Motivation and Ease

- Is heavily motivated and enabled by price promotions (esp. on calorific treats)
- 'British' foods signalled in most health messaging not relevant to her
- Believes slim means healthy
- Believes cooking from scratch means healthy
- Perceives only significant health events as a reason for behaviour change

To be adopted and to have an impact on in-store behaviour, a digital intervention would need to overcome or address the following barriers or leverage the following opportunities:

### **Health Disengagement**

Dami cooks from scratch and her family isn't obese. In her eyes there is no need or motivation to change.

### **Cultural Relevance**

Dami does not cook traditionally 'British' meals so health messaging often feels irrelevant to her.

#### **Promotion Power**

Good deals shows Dami she's a 'good shopper' and make it attractive, easy and permissible to stock up on snacks.



## The brief for Tina

#### Barriers to Motivation and Ease

- Is heavily influenced and tempted by price promotions (esp. on calorific treats)
- Fears waste through perishable items and things her son won't eat
- Isn't sure where she is currently in terms of 'healthiness'
- Feels moderation (esp. moderating snacks) means her family's diet is balanced
- Weight gain is the only evidence of an event that has triggered behaviour change

To be adopted and to have an impact on in-store behaviour, a digital intervention would need to overcome or address the following barriers or leverage the following opportunities:

#### **Unclear on Balance**

Tina believes balance is all about moderation and so she's 75% sure she's doing a good job.

#### **Waste Avoidance**

Tina's limited budget means she fears food going to waste. Trying new things feels like a risk.

### **Cheap Treat Temptation**

Special offers and money off are enough to erode all of Tina's ability to fight of the temptation to treat.



## The brief for Derek

### Barriers to Motivation and Ease

- Front of pack labelling is more influential than detailed nutritional info on the back
- The need for quick son-friendly favourites mean *some* high sugar or sodium treats
- A dental health scare has given motivation for healthier shopping for 18 months but it's unclear how long this motivation will sustain
- Sons 'sweet tooth' means sugary treats won't be cut out for good

To be adopted and to have an impact on in-store behaviour, a digital intervention would need to overcome or address the following barriers or leverage the following opportunities:

### Being a Good Dad

The 'shame' of his sons dental scare was enough to transform the way Derek and his family shop and eat.

### **Front of Pack**

Derek is influenced by the shortcut of front of pack labels meaning he's navigating health via 'product claims'.

### **Sweet Snacking**

Derek's son's sweet tooth mean high sugar and sodium snacks are staples and are hard to fully cut out.

## Our Recommendation

All parents from low income households in Lambeth and Southwark, including Dami, Tina and Derek are shopping in an environment where unhealthy calories are cheaper than healthy ones, price promotions on obesenggic treats are almost consistent, spotting healthier alternatives takes a lot of work, and healthier foods are perishable and easier to 'waste'. These things, and more, each make choosing healthier food in store harder. In the face of this, a parent would need near superhuman levels of motivation to make healthier food choices in store. So while digital could be used to increase motivation and act as a trigger for change, it will be more impactful if it focuses or works alongside efforts to makes healthier options easier to access and find.

# **Testing Some Propositions**

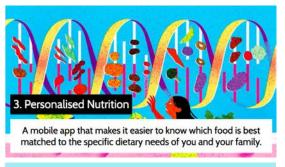


## What We Tested

We used a deductive research approach during this project, testing the validity, utility and landscape surrounding six specific digital propositions:













## The Winner

We used a deductive research approach during this project, testing the validity, utility and landscape surrounding six specific digital propositions:















## Support for Little Swaps

### **Parent Feedback**

### **Clear winner for most parents**

- Simple and easy to use
- Provides a clear, straightforward understanding of what action needs to be taken
- Would want suggested swaps to be for a comparative product at a comparative cost
- Some concern that it might be too time-consuming for bigger shops

### **Expert Insights**

"What's good about 'Healthy Swaps' is that it changes the paradigm from search to discovery... We think 'Healthy Swaps' will be key in changing behaviour because it takes the hassle out of reading labels and tells you how and why it's healthier" (Markus Stripf, Spoon Guru)

"We did a comprehensive systematic review last year... economic interventions worked, and swaps were promising but there are very few studies on those" (Dr. Carmen Piernas-Sanchez, Oxford University)

"There is a big opportunity around swaps " (Tim Chadborn, Public Health England)

## Why Little Swaps Work

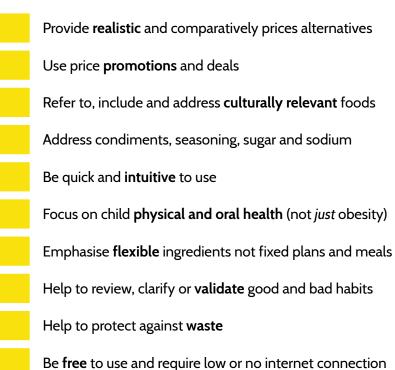
Digital interventions that share realistic and affordable 'little swaps' have the potential to make change easier by helping parents spot accessible products, ideas and options in their shopping environments that are otherwise hard to see.

## Winning With Local Families

We believe there is a limited role that digital can play in driving long-term and sustainable change to in-store shopping habits amongst families living on a low incomes.

Pricing, taxation, regulation and bold moves are needed to change the environment that surrounds us, which makes unhealthy food cheap, attractive and easily accessible. We do however believe that while the environment remains obesogenic, digital's core role is to make healthier shopping choices the easier ones to make.

In order for such digital interventions to have the chance of achieving appeal, penetration and sustained use amongst parents, we advise that they must do the following...



# **Appendices**



# The Current Landscape



### **Food Diaries and Trackers**

An established and cluttered category of digital tools and apps, mainly targeted at weight loss:

- Offer food tracking
- Provide calories and nutritional information
- ✓ Often include barcode scanner to use in-store
- X Effort intensive, requires an initial effort to set up goals
- X Requires daily commitment with high risk of drop off
- X Reliance on self report risks inaccuracy and partial report
- X Often have an associated cost

### Awareness and Relevance

High awareness and moderate usage amongst the parents we spoke with. The most frequently mentioned products were MyFitnessPal and Weight Watchers.

"I use MyFitnessPal whenever I'm going on a diet" (Parent, Shopalong)





## **Meal Planners**

A few different apps aimed at supporting people to create meals around personal needs & requirements:

- Often consider diet, budget, food intolerances, nutrition targets, taste preferences, time constraints
- ✓ Some link recipe ingredients to online grocery lists
- ✓ Some offer instructional videos and in-app timers
- X Often cater for typical 'British' diet and dishes
- X Often focus on meal planning rather than flex planning
- X Often struggle to take on each family members needs & tastes

### **Awareness and Relevance**

Some awareness and low usage amongst the parents we met. Many didn't diligently plan meals and prefered instead to shop for flexibility. Many didn't shop for or cook a 'British' cuisine. "Food is how you feel - it's instinctive. This kind of thing feels regimented" (Parent, Group)



## Information and Education

A few 'healthy eating' apps aimed at educating people about the nutritional content of foods

- Provide and / or translate information on nutritional guidelines
- Often help to make nutritional guidelines more accessible
- ✓ Often include a barcode scanner to use in-store
- ✓ Some include weekly coaching sessions
- X Not a habitual behaviour to interrogate nutritional content
- X Can add time, effort and complexity when used in store
- X Often provide obvious or no new news (esp over time)

### Awareness and Relevance

Broad awareness but low reported sustained usage amongst the parents we spoke with. Some parents reported a poor user experience, rapid drop-off and limited help with making choices.

"You might as well just read the information on the back of the pack" (Parent, Group)



### **Personalised Nutrition**

A few different apps that use personal information and profiles to help find foods to match individual needs

- ✓ Aim at making suggestions / recommendations relevant
- ✓ Often provide food ratings from other users
- Often support dietary needs, health needs, food intolerances or allergies
- ✓ Some offer preset profiles, including 'healthy eating'
- X Can require motivation and effort to set up initial profile
- X Some (e.g. DNA) raise privacy concerns or feel to intimate

### **Awareness and Relevance**

Relatively low awareness and no usage reported amongst the parents we spoke with. Some felt the concept of personalisation and relevance was interesting but the intimacy of sharing information (e.g. DNA) outweighed the potential benefits.

"Who holds the data? Who is paying for this?" (Parent, Group)

This is a composite quote



## Wearables and Sensors

Current technology is medical (e.g. glucose monitoring) but there is some emerging health technology, and early prototypes being developed to help with allergies, nutrition and health these included:

- Oral sensors monitoring things like metabolism and glucose, salt and alcohol consumption
- Tech to monitor a wider range of nutrients and build a database that can act as a digital substitute for a food diary and management system

### Awareness and Relevance

None of the parents we met were aware of or using any non-medical wearable technology related to diet, food or nutrition.



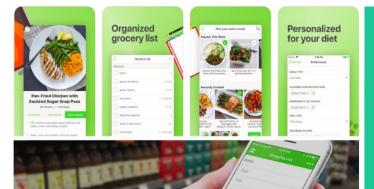
# Responses to the Proposition



## 1. Nutrition Checker

A mobile app that helps you check the nutritional value of the food you're about to buy to help you make decisions as you shop.







#### **Parent Feedback**

### Not particularly excited by this idea:

- Felt it wasn't 'new' especially by those who had used MyFitnessPal and Change4Life scanner
- Effort intensive, both in the initial set up and then need to scanning every product while shopping
- Feel this nutritional information is readily available on pack
- Nutritional information didn't feel enough to motivate or trigger behaviour change

### 2. Meal Planner

A mobile app that helps you to pre-plan nutritious meals and create a shopping list that helps you stick to goals / stay on track.

Create a profile that is unique to you and your family's taste and preferences

Set vour weekly shopping budget to make sure you always stay within budget

Choose nutritious meals for the week that your family will love

**Automatically** generate a shopping list for your weekly shop





### Parent Feedback

#### A mixed response to this idea:

- Liked by some for its inspiration
- Budgeting felt useful (esp if linked with special offers and deals)
- Some felt it would take the fun and spontaneity out of cooking
- Some needed a more flexible approach to deal with unexpected events during the day or week
- Felt it was important to take on cultural relevance and context

### 3. Personalised Nutrition

A mobile app that makes it easier to know which food is best matched to the specific dietary needs of you and your family.

Share some info about you and your family (e.g. age, gender, height, weight, allergies, etc).

Include any relevant medical conditions or genetic predispositions (e.g. are you pre-diabetic)

Scan or enter food items as you shop to see if they're a good fit for you and your family

Use the information to make decisions before you get to the till







### **Parent Feedback**

#### Positive with some essential barriers:

- Liked the idea of tailoring food choices to the nutritional needs of individual family members
- Concerns emerged around the effort to set up and the ease and simplicity of the information provided
- There were barriers to providing their DNA unless it was linked to understanding food intolerances felt intrusive

## 4. Shopping Coach

A mobile app that acts as a nutritional advisor, so you can ask questions and stay motivated to stick to goals as you shop.





#### **Parent Feedback**

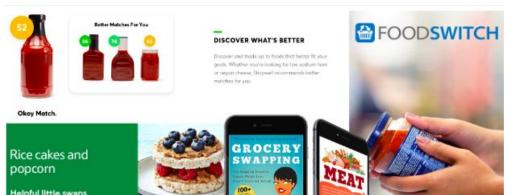
### This idea as a digital product lacked appeal:

- Felt too 'hands on' and didn't feel easy or intuitive
- Unclear about what information it would offer that couldn't be searched for quickly online
- Many cited bad phone reception in store as a barrier and a reluctance to use their phone while shopping
- Raises concerns around how much the service would cost
- Open to an in-store nutrition advisor

## 5. Little Swaps

A mobile app that helps you make tiny (healthier) swaps, as you shop, to improve your family's nutrition week by week.





### **Parent Feedback**

### Clear winner for the majority

- Simple and easy to use
- Provides a clear, straightforward understanding of what action needs to be taken
- Would want suggested swaps to be for a comparative product at a comparative cost
- Some concern that it might be too time-consuming for bigger shops

## 6. Good Healthy Fun

A mobile app that makes sticking to healthier food choices, while you're shopping for the family, much more fun.





#### Parent Feedback

### This idea lacked appeal for the majority:

- The gamification of shopping was felt to be unnecessary, with potential to increase the stress of shopping
- People are not looking for 'fun', they're looking for quick, easy and efficient
- Some potential benefit to use as an educational tool with kids... but it could also be an annoying distraction
- Gamification felt neither appropriate nor motivating in this context

## Get in touch

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