



SUPERMARKET SUSTAINABILITY REPORT

Customer Perception Twitter Study: Jul 21 - Jan 22

Uncover what customers are really saying about supermarket sustainability and the topics influencing buyer behaviour.

3 INTRODUCTION

- 3. What is 3rd Level Insight?
- 4. What we did and what we found

5 SUSTAINABILITY FOCUS

- 5. Plastics & Packaging
- 8. Waste
- 11. Vegetarianism & Veganism
- 13. Who won Veganuary?

14 BRAND FOCUS

- 15. UK Supermarket League Table
- 16. UK Supermarket fact-files

23 WHAT NEXT?

So what the hell is 3rd Level Insight?



If you asked someone what pizza toppings they liked and they said “meats and vegetables”, you’d think they were being monumentally unhelpful. Sadly, this is the level of detail most text analysis tools on the market give you.

Wordnerds coined the phrase 3rd level insight to describe the **specific, actionable and measurable** insight that a business requires to really move the dial on customer experience.

First level insight is the category. Great for top-level reporting in your business against KPI's, strategic objectives and performance-related metrics. An absolutely vital part of understanding text data, but useless by itself.

Second level insight is the theme – an AI putting your data into a pre-determined list of generic codes. It’s very useful for tracking issues, but you need to know what you’re looking for, and training it to find something new is time-consuming and expensive.

Plus, it doesn’t give you actionable insight – specific things within those categories that you can actually do something about.

When it comes to finding insight in unstructured text, everyone focuses on levels one and two.

How they do it has radically changed – Natural Language Processing has found new and exciting ways to establish sentiment and categorise data. But the outcomes remain the same - from the biggest megacorp to the edgiest startup, you’re getting general feelings about general categories.

The Wordnerds platform uses first and second level analysis a lot. They’re both super-important. But we have the only tool on the market that offers **3rd Level Insight**.

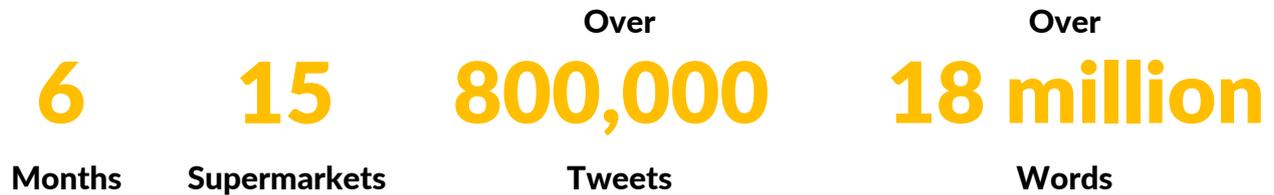
We break the data down into topics that allow you to easily understand what’s happening, and crucially, what you can do about it. These topics are completely unsupervised – no training, no waiting. It’s just there for you, from the first time you add your data to the platform.

And with that, we're off for a meat and vegetable pizza.



What we did

We fed 800K (public) tweets mentioning the 15 most popular UK supermarkets, as well as general conversations around sustainability, through our text analysis and insight platform.



What we found



Co-Op

Tops the charts in sustainability sentiment



Tesco

Scores the lowest in sustainability sentiment



M&S

Has the most polarising sustainability conversations



Social media forms an important forum for customers to discuss their takes on supermarkets' policies, especially those concerning **sustainability**. However, it also reveals many instances in which **clearer communication** on the reasoning behind decisions would resolve the complaint.



Veganism, vegetarianism, and plant-based diets are becoming more popular, but there is a great deal of nuance between these customer segments – their **reasoning** behind these dietary choices makes a big difference to their stances on certain products.



Knowing more about what qualifies as "**environmentally friendly**" helps some customers make informed choices about where they shop, but even when things like **plastic-wrapped fruit and veg** are very valuable in reducing waste, it can still drive customers away.



Plastics & Packaging

One of the issues foremost in the minds of retail customers is that of packaging. It is one of the most tangible representations of sustainability shortcomings, and is increasingly becoming an issue customers expect retailers to be on top of.

The reporting period saw frustrations around the continued use of non-recyclable plastics, as well as praise of supermarkets offering expanded recycling schemes.

Top topics



- Fruit and veg packaged excessively
- Plastic bags used in home delivery orders
- Confusion around which items are recyclable
- Discussions around circular economy
- Excessive cardboard replacing plastics



That Wordy One
@Herofthewords

Question for @sainsburys - why, out of this entire bank of toilet papers, is the recycled one the ONLY product wrapped in paper instead of plastic. Same for the kitchen towel. Why not swap all of them for paper packaging??

Consumers are asking for:

Bagless home delivery

- All supermarkets to offer bag-free delivery option on orders

Recyclable options

- More items packaged in recyclable packaging, and clarity when this isn't possible

Leading industry on packaging

- Keeping up with other non-food retailers' commitments to plastic-free packaging, eg. e-commerce

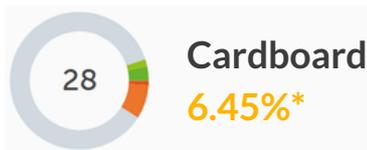




Plastics & Packaging

The "Big Four" Key Issues

The numbers here show the sentiment of customers' comments in the dataset as they relate to the major discussion points around plastics and packaging. For instance, during the reporting period, carrier bags were talked about in a broadly negative light - an average sentiment of 27%, which is quite low indeed!



There was some praise for the gradual replacement of plastics with cardboard, but much of the negative sentiment came from packaging using both.



While single-use and soft plastics were much maligned, the big green bar represents praise heaped on brands offering soft plastic recycling schemes.



Discussions were split broadly between unwanted bags provided on delivery, and "bag for life" conversations – which bags are best, and which aren't worth the spend. Woven bags won big here!



Concerns about overpackaging focused primarily on bakery items and fruit & veg. Emerging discussions questioned the respective environmental impact of different kinds of packaging.

ALMOST HALF OF ALL POSTS IN THIS CATEGORY AND THE LOWEST OVERALL SENTIMENT

61%

of consumers sought to limit their use of single-use plastic last year
Deloitte, 2021

* Percentage of total conversations relating to plastics and packaging



Plastics & Packaging

3rd Level Insights



Certain customer discussions in this category highlighted specific issues time and again (whether consciously or not). In this section, we have compiled the key takeaways from some of these discussions to aid understanding of how best to tackle your customer strategy in this area.

Complexity of "eco-friendly packaging"

Sustainability is a category that eludes precise definition. Customers will often praise what they perceive to be the most "environmentally friendly" option, without solid understanding of why this might be the case.

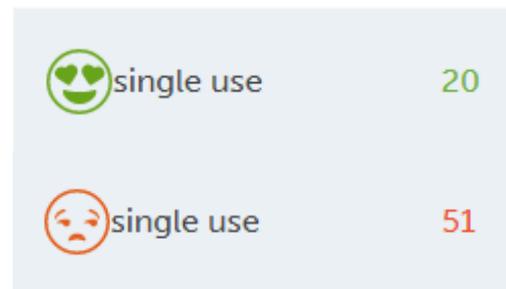
Transparent communication on Scope 3 Emissions from brands will help settle these discussions once and for all.



Turn a negative into a positive

Single use plastic was a much-discussed topic, and discussion was split between criticism for its use and praise for its removal.

In such cases where tackling an issue earns high praise and ignoring it draws staunch opposition, this suggests a clear business case for addressing it if you haven't already.



PRaise for action is a significant portion of criticism for inaction



14%

of all discussions around packaging related to fruit/veg - the highest of any category. *Wordnerds, 2022*



Waste

Waste - whether it's food, material, or logistical — is a broad issue that covers many topics and sectors. From fast fashion to use-by dates, consumers are growing more conscious of what their consumption leaves behind. The reporting period saw increasingly low sentiment related to best before dates, but plenty of positive discussion around food banks.

Top topics

- Usefulness and accuracy of use-by and best before dates
- Range of available recycling facilities
- Appreciation of supermarkets supporting food banks
- Loose fruit and vegetables vs. the packaged equivalents



Consumers are asking for:

Recycling schemes

- Increased availability of soft plastic recycling points, plus coat hanger and beauty product drop off boxes

Consistency in sustainability

- Clarity on why certain sustainable practices are introduced in one area and neglected in others

Zero-waste options

- Offering lines of products with reusable packaging, no packaging at all or refill stations



Waste

Topics of discussion

The numbers here show the most popular topics of discussion within the category of waste, and their relative overall volume. For instance, the dominant topic was around use-by dates and food waste - with a 109% spike in volume in early January as customers got incredibly vocal about milk.



Use-by/best before
956 comments



Many comments about receiving short-date items in deliveries; around 1/3 of these 956 related to this, with a higher proportion relating to Tesco and Sainsbury's than other brands.

Food waste
614 comments



Discussion around food preservation and what can be done to reduce this on a personal scale. Around 200 comments in this conversation revolved around milk use-by dates, most of whom backed Morrisons' sniff test.

Food banks
610 comments



Praise for supermarket donations; discussions around charitable giving within retail, and which organisations should be supported.

Reduce/reuse
415 comments



Zero-waste pilot programmes in stores garnered very high sentiment; reusable packaging/bags were highlighted as a popular project.

~70%

of food waste in the UK is generated by consumers
WRAP, 2019



Waste

3rd Level Insights

Certain customer discussions in this category highlighted specific issues time and again (whether consciously or not). In this section, we have compiled the key takeaways from some of these discussions to aid understanding of how best to tackle your customer strategy in this area.



Local charity support

Food bank donations drew some of the highest sentiment amongst the larger topics, but smaller local projects within communities drew even more vocal support. Customers look to retailers to help support their local communities and charities.



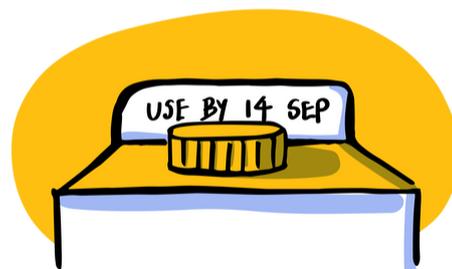
Supermarkets and fast fashion

Discussions on fast fashion were limited in volume in this dataset. However, more positive sentiment in this small subset was linked to Sainsbury's and Waitrose moving ahead with "circular" shopping bags – avoiding common criticisms of greenwashing associated with ordinary canvas bags.

The milk carton in the room

Observations about food waste in the reporting period would not be complete without commenting on the milk debate.

Morrisons' decision to replace "use by" with "best before" on milk cartons drew a split of 56% positive comments. Praise focused particularly on a retailer leading the way in sustainability, while criticism was focused on the "sniff test" in the age of Covid anosmia.



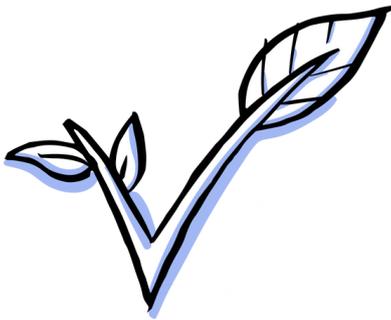


Veganism & Vegetarianism

One category that has skyrocketed in popularity in recent years is the plant-based diet. While for a long period veganism was associated most strongly with vociferous animal rights campaigners, that label is being adopted increasingly for purely environmental purposes. The reporting period saw discussion of new plant-based ranges, limiting meat consumption, supply chain animal cruelty, and - of course - Veganuary.

Top topics

- New and expanded plant-based ranges
- Issues with palm oil provenance
- Animal cruelty and viral petitions
- Plant-based and free-from incompatibility
- Promotion of local produce



Kelly 🌱 🌻 🌿 + 🇬🇧
@purplepenguin81

Plant based food does not have to try and look and taste like meat! It actually causes anxiety for some vegetarians/vegans. Please stop pandering to meat eaters! @TheVeganSociety @vegsoc

Consumers are asking for:

Consistent stocking of plant-based treats

- Items that prompted the most lamenting at their disappearance were treats like ice cream and chocolate

"Cruelty-free" products

- Products that are sourced without incidental damage to animals – i.e. habitat destruction linked to soy

Extending products and offers beyond Veganuary

- Customers are big fans of many of the new plant-based products, and want them to remain accessible



Veganism & Vegetarianism

3rd Level Insights

Certain customer discussions in this category highlighted specific issues time and again (whether consciously or not). In this section, we have compiled the key takeaways from some of these discussions to aid understanding of how best to tackle your customer strategy in this area.



Free-from vs Plant-based

A small but significant cohort of customers observed that free-from ranges were not as accessible as plant-based ranges - whether vegan products contained gluten, or plant-based ranges expanded at the expense of their free-from counterparts.

VALUABLE INSIGHT FROM POOPERMAN



"Fake meat"

A subset of the conversations around plant-based foods and meat alternatives focused on vegans frustrated that so many products were attempting to imitate meat. These customers advocated for a higher profile for balanced plant-based meals that did not rely on meat substitutes.

Localitarians

While plant-based diets were the dominant topic in this area, there was significant overlap with those advocating for "living local". While some individuals hoping to reduce their carbon footprint have reduced their meat intake, others have simply opted for sourcing as much food from their local area as possible - especially with fish and fruit.



Who won Veganuary?

Plant-based battle royale

Veganuary is always a huge topic of conversation after the excesses of Christmas, and it is only growing year on year. In the aftermath, the question on everyone's mind is... Who is the last brand standing?

Overall victor:

Co-op



Co-op received widespread praise for its Gro range, and sealed the pole position with its fishless fillet.

Best product:

Aldi



Aldi's various vegan "chicken" products were the most likely to have customers requesting a restock during veganuary!

Special mention - supermarket:

M&S



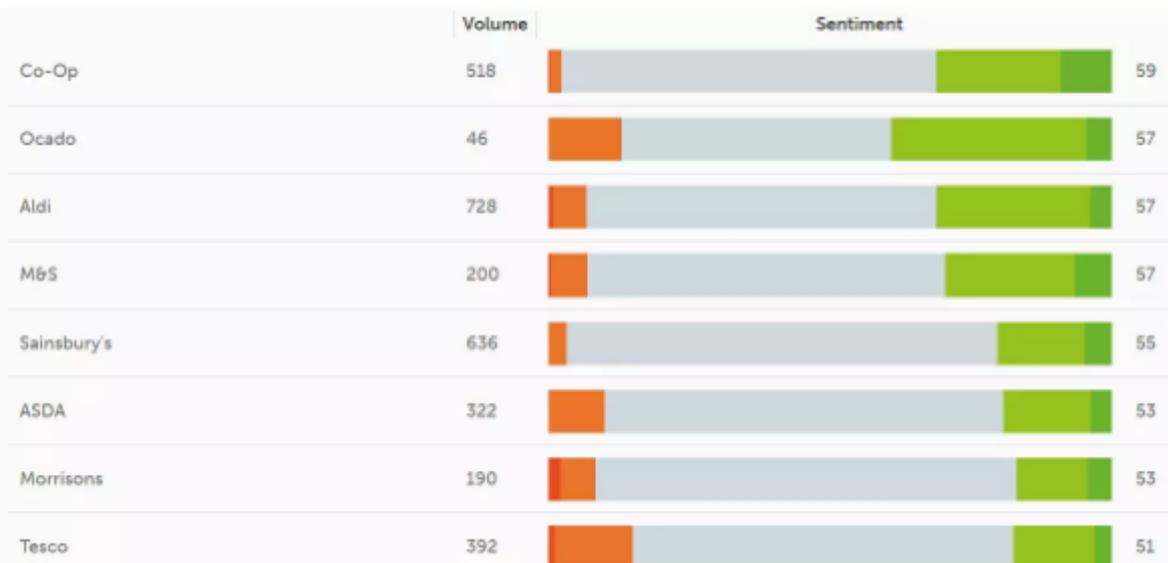
M&S' Plant Kitchen range expansion, along with the low-carbon diet program, made a splash with customers and resulted in a big boost to both volume and sentiment.

Special mention - non-supermarket:

McDonalds



The McPlant stormed away with non-supermarket discussion of food in January.





7



Supermarket Rundown

With our eyes on sustainability, we've done a deep dive into the largest UK supermarkets. Take a look at our sustainability league table, along with how consumers are approaching UK supermarkets and what they look for when it comes to sustainability.



EST. 1884





UK Supermarkets League Table

Based on tweets Jul 21 - Jan 22

League table of a selection of the most popular UK supermarkets based on a weighted average of Wordnerds' generated sentiment score out of 100. This table shows overall volume and sentiment of comments specifically relating to sustainability.



Headlines...

Co-op leads the table with strong brand advocacy from its customers in the realm of sustainability.

Tesco, while trailing in sentiment, has by far the greatest share of conversation on sustainability.

M&S provokes the most passion from its customers, with the greatest proportion of its comments either "very positive" or "very negative".



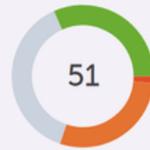


Aldi

Based on tweets 17th Jul 21 - 31st Jan 22

Total no. of tweets Overall sentiment

94,593



Aldi customers tend to be very vocal about their love of Aldi's marketing and ad campaigns. The middle aisles are also a big draw, and customers are more likely to discuss non-food products at Aldi than other supermarkets.



What's winning...

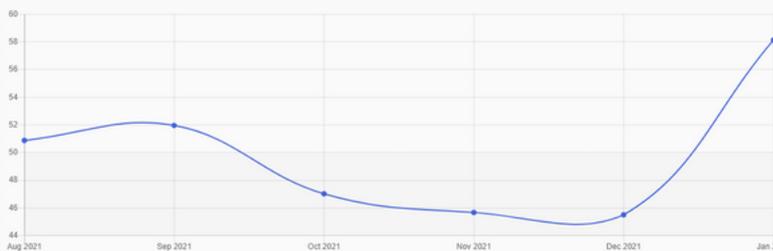
Food donations

In line with our [analysis of last year's Christmas adverts](#), Aldi's work with Neighbourly and its donations to local causes earned high praise – exemplified by Marcus Radishford's performance in Christmas ad sentiment charts.

What's losing...

Meat and mould

Customers shopping at Aldi are more likely to complain about meat going off (and thus being wasted) than at any other supermarket.

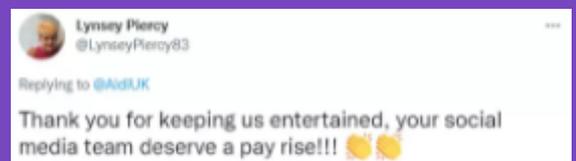


What's changing...

Plant-based attitudes

Aldi customers are much more positively inclined towards the supermarket's plant-based ranges than they were 6 months ago. Thank veganuary, vegan cheese, and lactose-free pain au chocolat for that!

One thing people love: Aldi's social media team, especially during the height of #FreeCuthbert. There was a strong relationship between "social team" and "pay rise"!





Asda

Based on tweets 17th Jul 21 - 31st Jan 22



Total no. of tweets Overall sentiment

93,803



Asda customers are among the least likely to discuss sustainability in relation to the brand (3.2% of conversations related to it) but there are several topics that appeared prominently in this dataset.

What's losing...

Plastics and Packaging

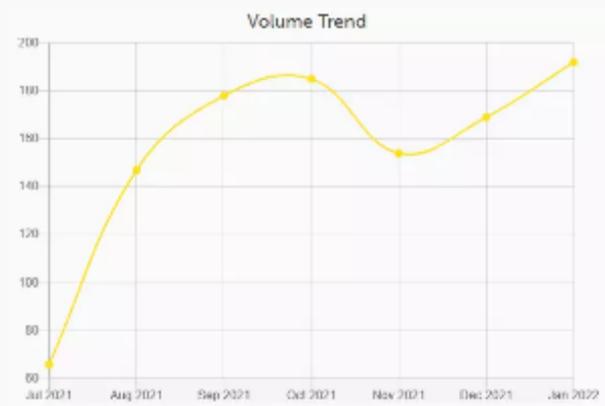
Customers are less happy with Asda's plastic bag/packaging policies than elsewhere, though much of this frustration centred on difficulty unloading delivery crates without bags.

What's winning...

Refill stores

Accounting for just over 5% of conversations relating to sustainability around Asda, refill stores (especially in York and Leeds) were a hit. Customers particularly appreciated EV charging bays.

Brand	Volume	Sentiment	Score
Co-Op	522	Orange, Grey, Green	42
Aldi	496	Orange, Grey, Green	37
Tesco	1,265	Orange, Grey, Green	37
Morrisons	692	Orange, Grey, Green	36
Sainsbury's	1,042	Orange, Grey, Green	35
M&S	341	Orange, Grey, Green	35
ASDA	594	Orange, Grey, Green	34

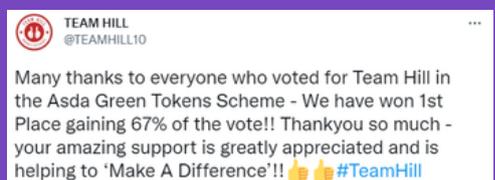


What's changing...

Conversations on waste

Asda customers were talking about use-by dates before it was cool, and that trend has only picked up with the Morrisons milk news in January. Stock turnover in stores was a bigger problem for Asda than any other supermarket.

One thing people love: The Green Token Scheme. Local charities gush about the support on social media, and customers enjoy seeing local causes supported.





Co-op

Based on tweets 17th Jul 21 - 31st Jan 22

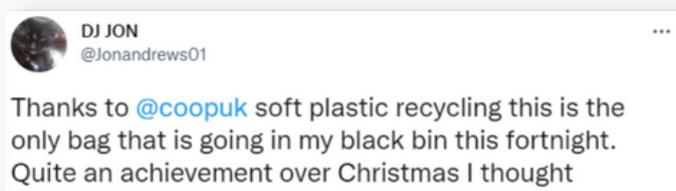


Total no. of tweets **Overall sentiment**

62,628



Co-op has strong representation from its brand advocates and employees on social media, but also has a vocal number of customers who share what they want to see from their Co-op on issues of sustainability.



What's winning...

Soft plastic recycling

Co-op's expanding soft plastic collection scheme is the dominant topic among customers, accounting for 14% of sustainability conversations while maintaining high sentiment.

What's losing...

"Values and principles"

Given its unique nature as a national co-operative, Co-op receives consistent criticism for policies that its members disagree with. Advertising with GB news and continuing a partnership with Amazon were the two biggest issues by volume, coming close to soft plastic in terms of numbers.

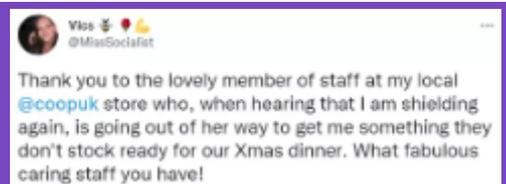


What's changing...

Mask-wearing

Interestingly, conversation around mask-wearing at Co-op has actually increased in the last quarter – rising from barely 0.5% of all comments to more than 3.5%. Most concerns were around other customers refusing to wear masks.

One thing people love: Staff being kind and understanding, especially when it comes to issues relating to Covid, mask-wearing, and shielding.





Marks & Spencer

Based on tweets 17th Jul 21 - 31st Jan 22

Total no. of tweets Overall sentiment

55,485



M&S

EST. 1884

M&S customers display strong brand loyalty in many areas, though they are less likely to discuss sustainability issues than other brand adherents – except in the realm of packaging and plastics.

What's losing...

Wrapping paper

Customers were behind plastic-free wrapping paper in principle, but criticised the execution – stickers ripping the paper caused even more waste. 9% of all conversations around packaging were taken up by this issue.



Matt Browell-Hook @BrowellHook

@marksandspencer I really want to be happy at the plastic free packaging but I think these need a redesign?! Just rips everything...



What's winning...

Low-carbon diets

M&S' announcement of the Sparking Change program in partnership with Hubbub has drawn some very positive feedback, accounting for 16% of conversations around carbon impact and sustainable sourcing.

What's changing...

Vegan volume

Between the low-carbon diet program and a popular veganuary range, January saw discussion around M&S plant-based options soar to new highs. This continued a trend present through the whole reporting period.

One thing people love: M&S Romford TikTok. Customers loved seeing employees have fun with what they do; the Christmas song drew particular accolades.



Emma @hiddenreylo

Everyone stop what you're doing and go look at the M&S Romford TikTok page this is the greatest thing I've ever seen 🤩



Morrisons

Based on tweets 17th Jul 21 - 31st Jan 22

Total no. of tweets Overall sentiment

96,598



Morrisons has had the spotlight on it for a variety of reasons during the reporting period, for reasons ranging from sick pay cuts to the sniff test. Amongst all that, though, Morrisons customers are among the most likely to discuss issues of sustainability.

What's losing...

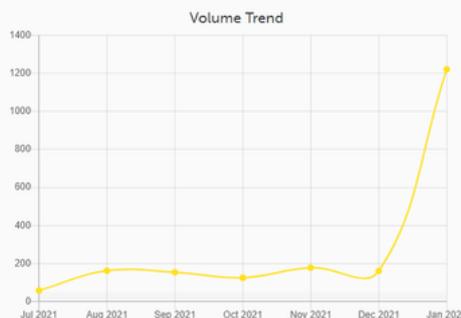
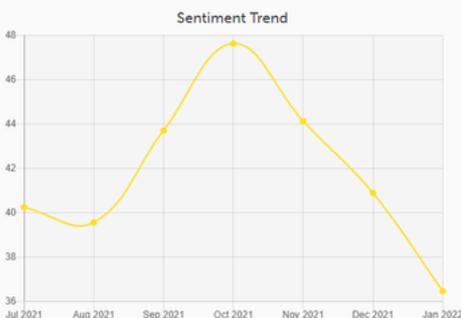
Bag inconsistency

Customers took issue with the fact that some categories such as fruit and veg had paper bag options, while items in the bakery had been moved to plastic bins. The inconsistency without explanation struck some as greenwashing.

What's winning...

Plant Revolution

The expansion of Morrisons' V Taste range to the more varied Plant Revolution range has been popular; the Crunchy Slaw in particular drew a lot of love.



What's changing...

Food waste

Hundreds of users have weighed in on the food waste debate triggered by the use by/best before decision, but the rise in volume has been mirrored by a fall in sentiment.

One thing people love: Community champions. Customers loved shouting out the people and the brand providing donations to their local charity.





Sainsbury's

Based on tweets 17th Jul 21 - 31st Jan 22

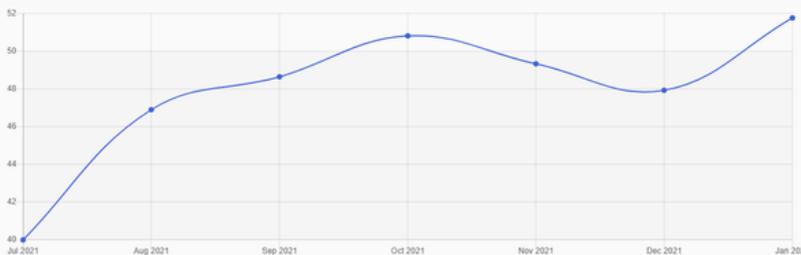
Total no. of tweets Overall sentiment

162,542



Sainsbury's customers are very vocal when it comes to issues they care about. During the reporting period, they consistently held the brand to account over issues from advertising to seafood supply chains.

Sainsbury's



What's winning...

Plant Pioneers

The new plant-based range has the highest average sentiment in associated conversations of any major Sainsbury's sustainability-related topic (70+). This veggie love is reflected in continuously rising plant-based category sentiment.

What's losing...

Fish. Just fish.

Many shares of petitions on the topic are interspersed with regret that fish counters have disappeared from some stores, making it harder to choose sustainable options.

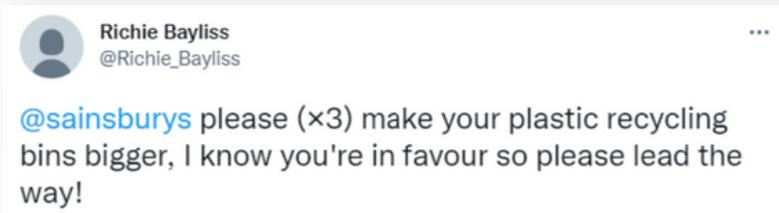
THIS TOPIC WAS ENTIRELY UNIQUE TO SAINSBURY'S - THEIR CUSTOMERS ARE THE MOST PASSIONATE ABOUT THIS ISSUE



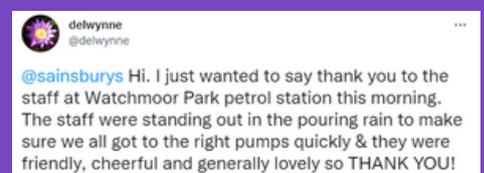
What's changing...

Soft plastic recycling bins

People love them! But they are consistently full to the brim. This has started to dominate the conversation.



One thing people love: Petrol station staff keeping their cool and providing a friendly service during busy periods - especially during the "fuel shortage" back in September.

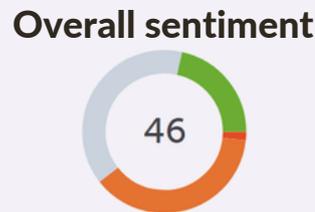




Tesco

Based on tweets 17th Jul 21 - 31st Jan 22

Total no. of tweets **212,365**



Tesco had by far and away the most comments during the reporting period, most of them focused around the end of 2021. While Tesco customers seem broadly happy with the brand's carbon credentials, they were very likely to call out waste and packaging issues.

TESCO'S WWF PARTNERSHIP IS A BIG POSITIVE FOR MANY CUSTOMERS



What's winning...

Emission reduction

Various schemes Tesco has undertaken to reduce its carbon footprint have not gone unnoticed, and while users go back and forth on their effectiveness, most are happy to see the work being done.

What's losing...

Unnecessary plastic

Items across many categories are seen as being needlessly plastic-wrapped, and customers buying loose fruit and vegetables feel punished by higher prices than those for packaged counterparts.



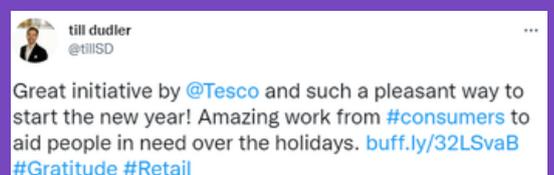
What's changing...

Veggie/Vegan diets

Sentiment relating to plant-based diets has followed a fairly steady upward trend during the reporting period. Users sharing "accidentally vegan" products has made an impact in the past few months.



One thing people love: Food donation drive in November. Tesco's drive to collect long-life foods for FareShare and the Trussell Trust had customers happily getting involved.



All this from a sample of Twitter data only.

What could you achieve with a **layered view of social, customer, product and employee data?**



Discover the stories behind the data

Wordnerds gives you real-time, actionable insight to:

Objective measure of CX

Track and monitor changing customer expectations and shifts in priorities. Understand how seismic shifts in public opinion is impacting CX and what you can do to improve.

Better strategic decision-making

Chart progress against strategic objectives. Then improve it.

Measure the true impact of change

Monitor what your customers or the market are talking about right now and see the issues that are impacting sentiment or being talked about most.

Competitor insight & benchmarking

Measure how you are doing relative to the other brands in your space and spot opportunities to delight or where you need to improve.

Does your insights team have the tools to make **real change** in your organisation?

Power up your existing CX tools with Wordnerds text analytics and **3rd Level Insight**

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