

# Sustainability and the Supermarket

Exploring the role of sustainability  
in UK grocery buying





What people  
think, feel  
and do



# Background

When it comes to sustainable grocery shopping habits, the people who say they are most concerned are actually the ones doing the least to help the planet.

In the second wave of **Opinium's Sustainability Series**, we explore what this attitude-behaviour mismatch means for brands, retailers, and society. Our deep dive into sustainability in the context of grocery shopping explores not only what we buy and eat, but how it is packaged and what happens to this packaging.

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## Environmental concerns in the context of 2020

Despite the growing awareness of environmental issues, the level of concern shown about the environment has remained flat (71% across both 2019 and 2020). There has also been a reduction in the level of concern around specific environmental threats (such as single use plastics, water and air pollution). However, these findings are somewhat unsurprising given the events of 2020. The threat of Covid-19 and its impacts on health and the economy have been at the forefront of people's minds, ahead of environmental concerns which pose a less immediate threat to people on an everyday basis.



# A continuation of contradictions and knowledge gaps

Opinium's first report in the *Sustainability Series* focused on fashion sustainability\*; revealing that people are confused and undereducated on the topic. Despite showing concern about the impact of fast fashion on the environment, they continue to buy it, and are confused about what materials and retailers are sustainable. This year's report has seen the same patterns emerge in the context of grocery sustainability.

It is worth acknowledging the role affordability has to play here. Sustainable fashion items are far more expensive than fast fashion alternatives. Although people are aware and concerned about being unsustainable, they often do not have the means to change their

behaviour. Whilst this can be the case with grocery shopping (shopping local or organic can indeed prove more expensive), it is an area over which individuals generally have greater control.

As well as **contradictions in attitudes and behaviours, consumers are unclear about what 'being sustainable' means** in the context of fashion. In grocery, there is even more confusion and lack of knowledge when it comes to sustainability. The food sector comes out as the most sustainable sector (27%) but also appears as a 3<sup>rd</sup> least sustainable (19%), and the vast majority are uncertain of even the most commonly used recycling symbols.





This report explores the topic of **grocery sustainability in three sections**.  
In each of the sections, the main findings are explored in detail and  
then summarised with key takeaways for brands and retailers.

## Throw away culture

Generational  
differences in  
attitudes toward  
food waste and  
the impact of the  
Covid-19 pandemic

## The problem with packaging & recycling

The detrimental  
knowledge gap in  
waste disposal

## Future solutions

Exploring zero-waste  
shopping initiatives  
and the responsibility  
of encouraging  
sustainable grocery  
practices



# Throw away culture

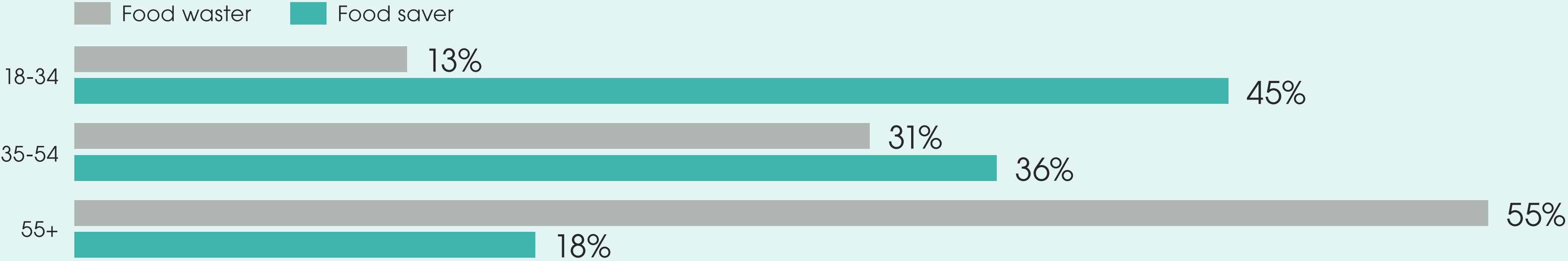
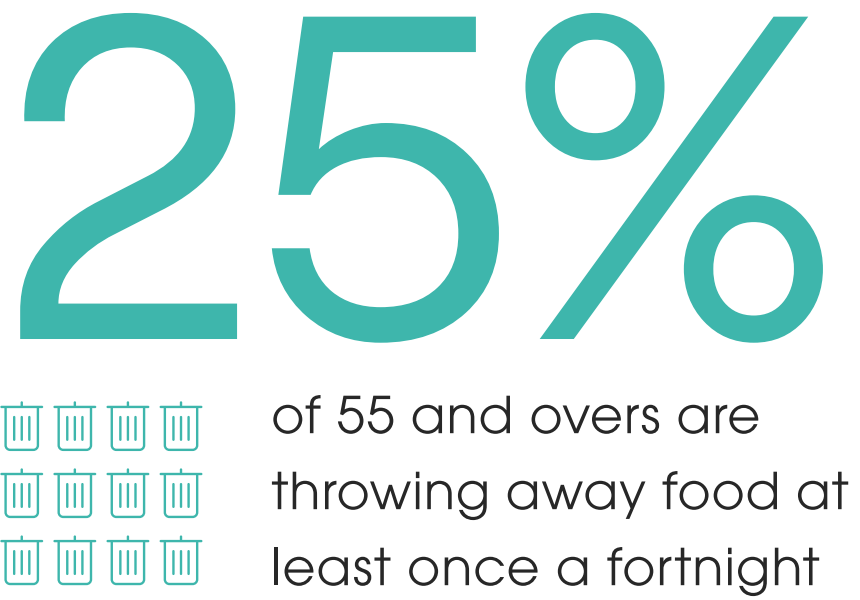


# The young and the wasteful?

If food waste were a country, it would be the 3<sup>rd</sup> largest emitter of greenhouse gases (after China and the USA)<sup>1</sup>.

Two in five (42%) UK adults throw food away at least once a fortnight yet there appears to be significant differences in behaviour according to age. Three in five 18 to 34 year olds (62%) – the age group who claim to be the most

concerned about the environment – say they are putting food in the bin at least once a fortnight, whereas older consumers are more likely to use what they buy rather than waste it with only a quarter of 55 and overs are wasting food once a fortnight. Older adults also seem to be more concerned about the notion of food waste with 29% worried about this compared to 18% of 18 to 34 year olds.





## Talking about my generation

So, why is it that **older generations** are the least likely to be concerned about the environment, yet they are the best at using up the food they have?


When looking into the reasons behind this we found this is likely a generational issue. Many 55 and overs grew up at a time when wasting food was not common practice, mainly for financial purposes, so storing food and making the most of leftovers was the norm. Clearly attitudes have remained firm and whilst not intentional, fulfil a sustainability need too.

“I was a child in the 1940s  
nothing wasted”

“I was brought up not to waste  
anything as we had very little money  
and could not afford to waste”

“I cook most food from scratch  
and use leftovers in other dishes  
or freeze them. Unused veg goes  
into soup. We plan shopping pretty  
carefully and buy what we need”





“Food doesn’t get eaten in time”

“Forget to use it”

“We end up getting a takeaway or we don’t use the food in time – ideally we need to freeze the food”

In comparison, **younger consumers** who are wasting the most food are not adopting these habits. Failing to make the same considerations as their older counterparts, they are likely to be throwing food away because its has gone off or they have not eaten it quick enough - clearly not making the effort to store or use it up as many older consumers have learnt to do. The reasons behind this are largely related to one of the key traits that is commonly associated with Millenials, being time poor.

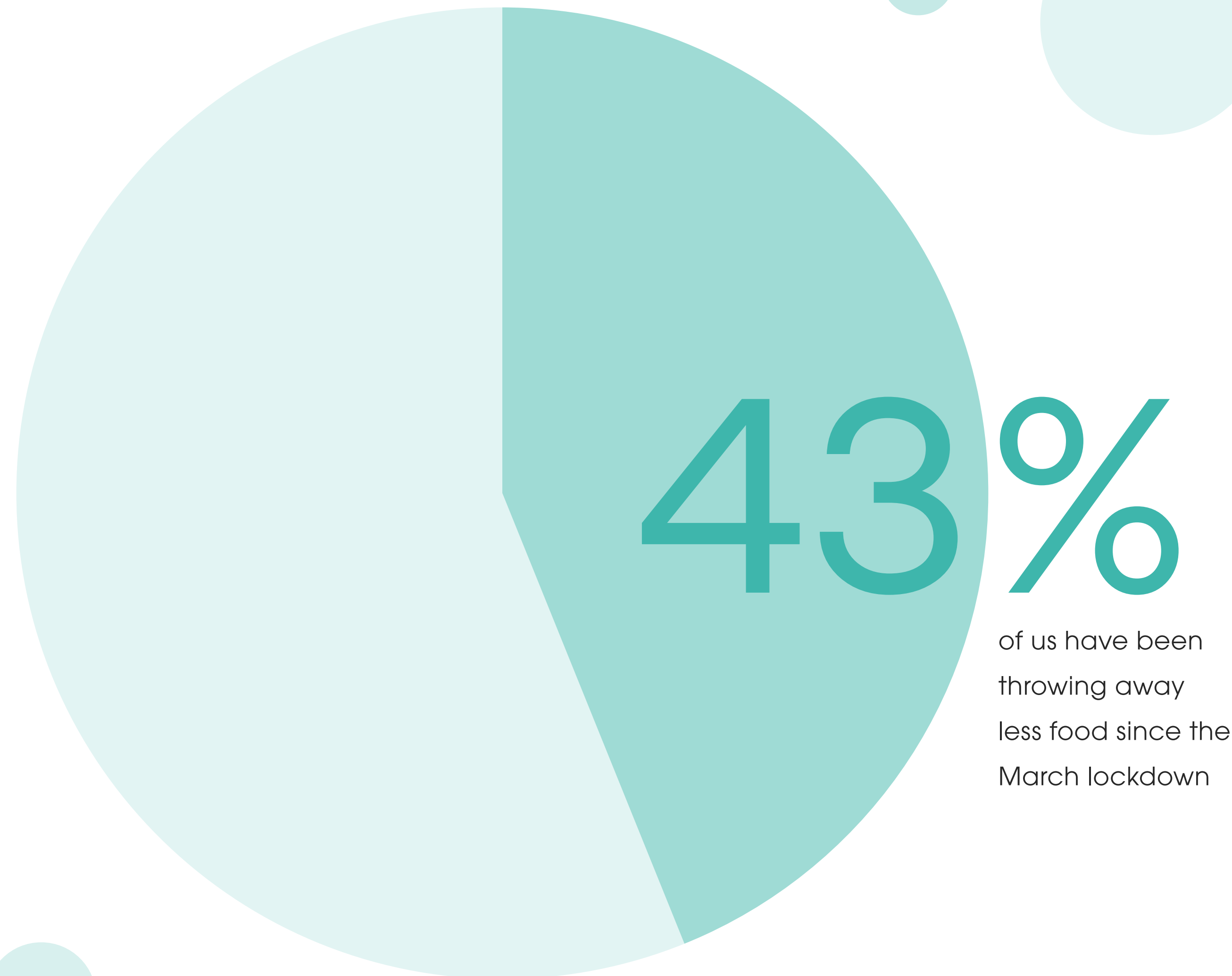


## Less waste in lockdown

The pandemic and ensuing lockdown has had a significant impact on consumer behaviour with two in five adults (43%) stating that they are now throwing away less. Amongst Gen Z, this rises figure to just under two-thirds (62%) who claim that lockdown has improved their sustainable practices.

### ***So why were people throwing away less food during lockdown?***

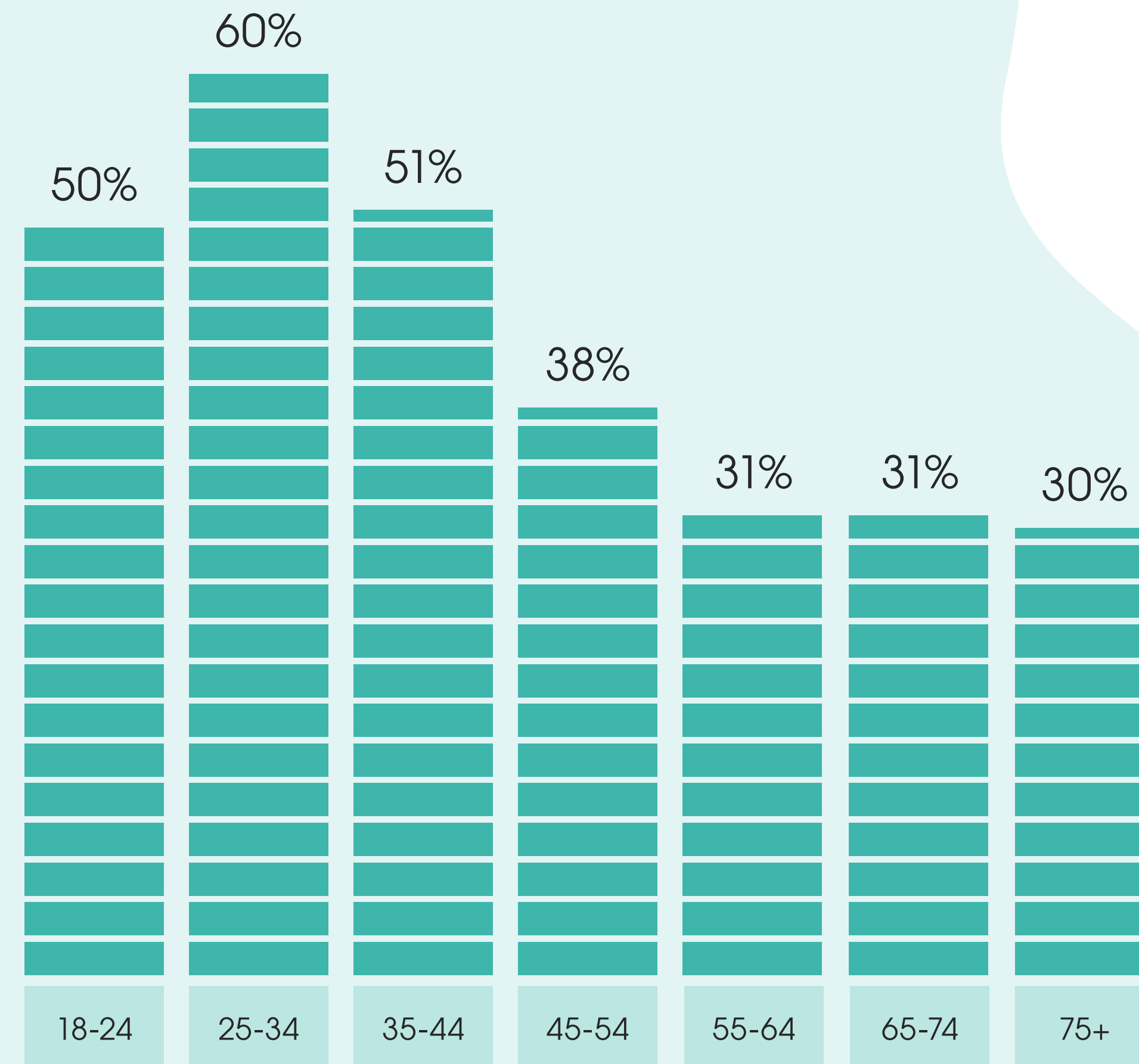
The main reasons for this were using up the food at home instead of going out to buy more, long supermarket queues being off-putting, Coronavirus threats and attempting to save money. Other reasons for reduced food waste include consciously meal-planning to ensure food was not wasted, and an increased awareness of the food they had as they were eating more at home.





## I don't think frozen food is as good as fresh food, by age

% Net: Agree



## How do you want it – fresh, frozen, or tinned?

The way in which food is packaged can have a considerable impact on food waste. Packaging methods such as canned or frozen foods are more sustainable, particularly for the consumer who is prone to forgetting that bag of salad in their fridge or sprouting potato in the cupboard. Consumers recognise this with 49% saying that frozen food decreases food waste vs only 7% for fresh food.

Fresh food is still often perceived as more nutritious and tastier. This view is most strongly held by those aged 25-34 years old with 60% stating that they believe frozen food is not as good as fresh. **This belief, however, is untrue.** Advances in flash-freezing technology mean that frozen fruit and vegetables can often be 'fresher' than produce found in the fruit and veg aisles of our favourite supermarkets<sup>2</sup>.

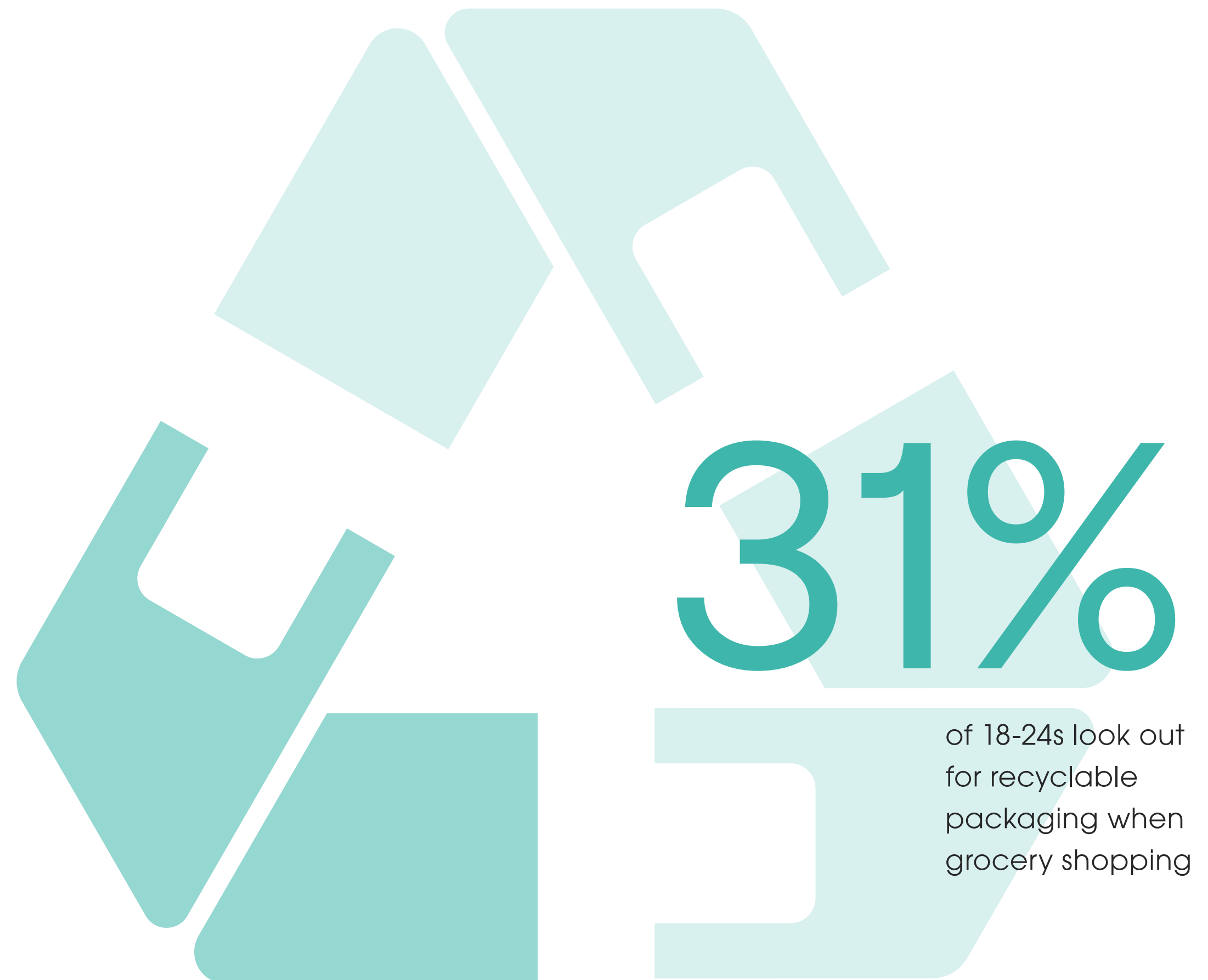


## Doing my bit for the environment

Consideration of environmental impact is becoming more prevalent in grocery decision making. Over a third (34%) of UK adults are limiting their meat consumption, and a quarter of those people started doing this within the last year (25%). Of those who have reduced their meat consumption, two fifths (38%) are doing so due to concerns about the environmental impact of meat production.

Sustainability concerns are also impacting consumer buying habits, with those who are limiting their meat intake more likely to consider factors such as whether the meat is locally sourced (44%). In addition, nearly a quarter of UK adults seek out locally sourced fish (23%), rising to just under a third (32%) amongst pescatarians.

There is also further evidence of younger generation's empathy towards environmental causes, with 18-24-year olds being more likely than any other age group to consider whether the packaging is recyclable when buying their fruit and veg (31%).





# Throw away culture, in summary...

01

Somewhat unintentionally, younger Britons are both the most environmentally conscious and the most wasteful when it comes to food.

02

During the pandemic, UK adults have spent more time at home than ever before and as a result have become less wasteful with their groceries.

03

Sustainability concerns are becoming more prevalent in grocery decision making particularly in relation to locality and origin of the product.



# Packaging & recycling



## Packaging & recycling

The packaging that encases our food is a big issue for retailers as pressure grows to reduce usage of non-recyclable or non-perishable materials. However, once products are taken home from supermarkets, the responsibility of how packaging is disposed of falls to the consumer.

### **But do we even know how to recycle correctly?**

Which bins are we supposed to put our grocery waste in? What do the symbols mean on the back of the packaging?

**Simply put,  
no, we don't.**

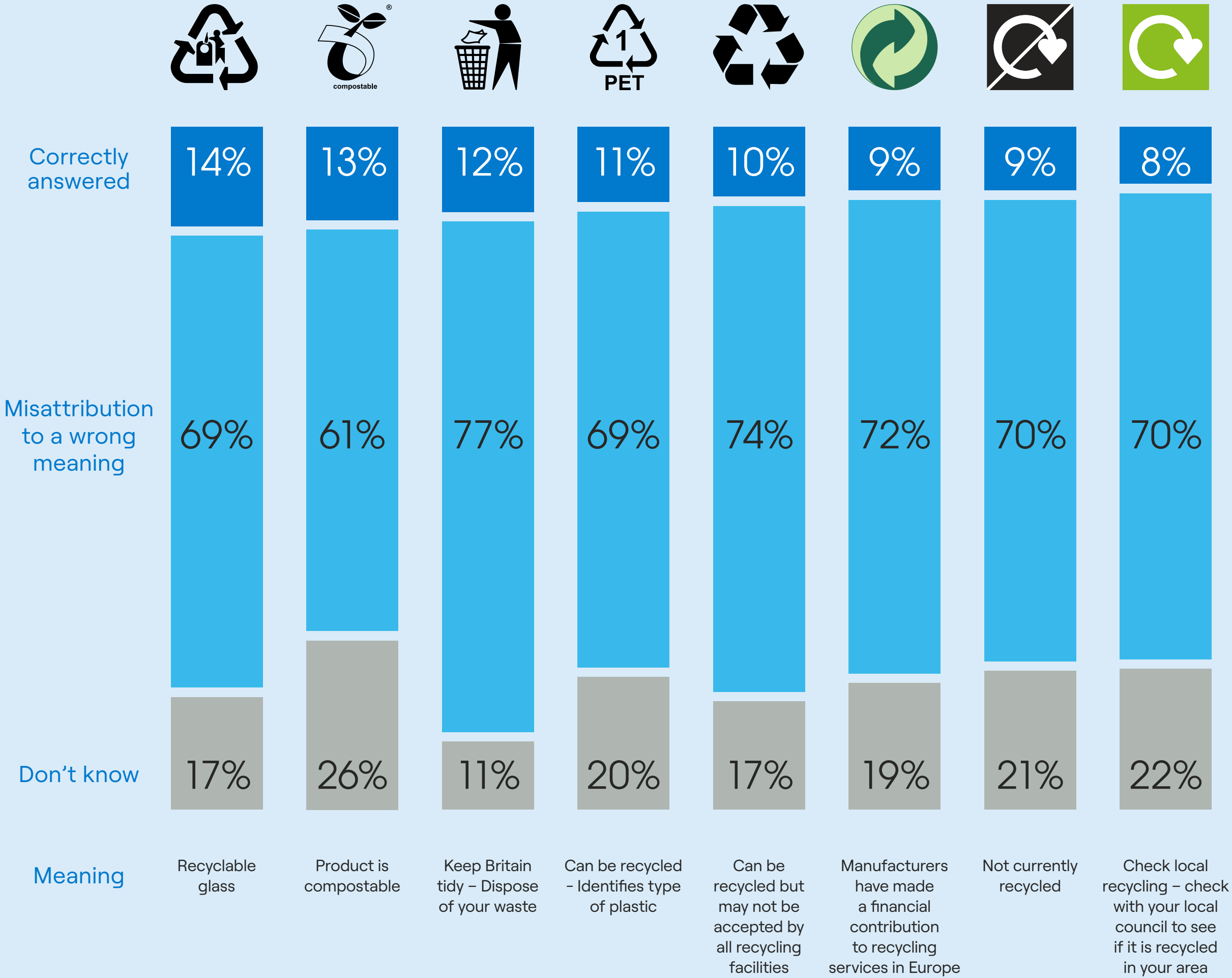


# A symbol of the knowledge gap

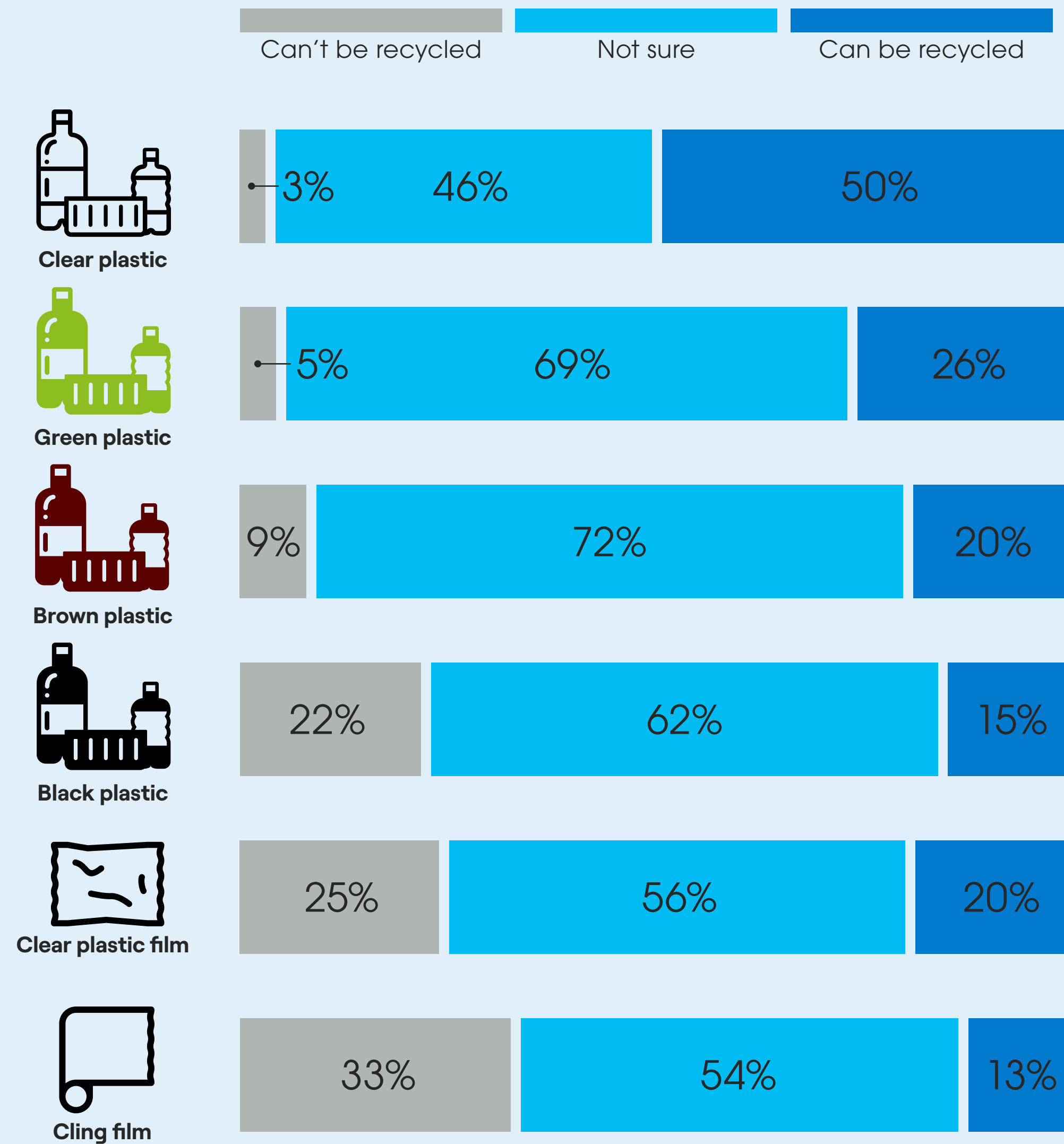
In the survey, Opinium displayed 8 different types of waste instruction symbols commonly found on packaging and asked the public to pair the symbol with the correct description of what it meant. **The results were alarmingly low, with some just not having any idea, whilst the majority misattributing the definition to the wrong symbol.**

The symbol most correctly paired with its matching statement was recyclable glass with only 14% of the population getting this right, followed by compostable material with 13% selecting the correct statement although a quarter didn't know – or weren't aware of it. This is a clear depiction of the lack of knowledge and confusion surrounding recycling and waste instruction. **These symbols need to be made more explicit, more distinguishable from one another and need to be better communicated to consumers to ensure waste is being disposed of correctly.**

The following symbols are found on packaging. Please match up the symbols with their meaning, select 'Don't know' if you are unsure.







## Confusion in colour

Not only are packaging symbols relatively unrecognisable to UK adults, but there is also a considerable amount of confusion about what the colour of packaging denotes and whether it can or can't be recycled. Increased focus on the use of plastic in grocery has seen pressure mount on supermarkets to better consider what they package their groceries in. This has particularly been the case with black plastic due to the difficulty in correctly identifying it by automatic sorting machines in recycling centres. **But do consumers know the difference between plastics when purchasing groceries and how they can then dispose of them once used? Again, the answer is no.**

When asked about different colours / types of plastic and whether or not they can be recycled, again the lack of awareness is evident in the data. Half of consumers (50%) were able to identify clear plastic as a material they can recycle, but a further 46% couldn't know for sure. Similarly, amongst the other plastic types, opinions are divided and some completely incorrect, such as 13% believing cling-film to be recyclable when in fact it isn't at all. Rules and guidance can vary drastically depending on where you live but, on the whole, **it seems to be a topic in desperate need of further education.**



## Recycling begins at home

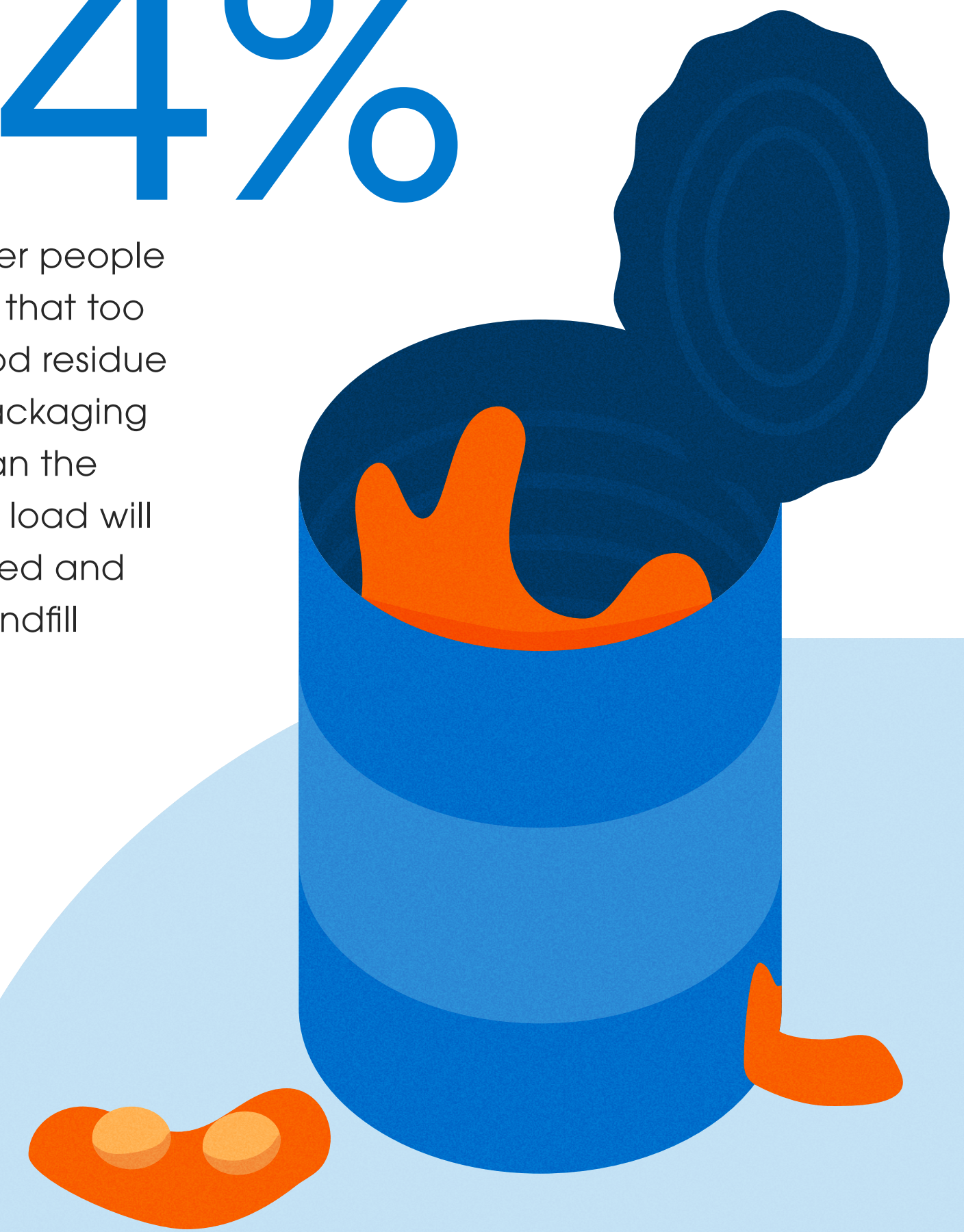
Reassuringly, 98% of UK adults claim that they recycle at home but only 3 in 5 (64%) say this do this all the time, 1 in 5 (22%) say this do this most of the time, whilst 12% only recycle some of the time. Despite around 9 in 10 people saying they recycle when at work and on the go, only 7 in 10 manage to do this all or most of the time further highlighting our plastic problem. The main reasons for not being able to recycle in these occasions aren't predominantly attitudinal, most blame a lack of recycling bins readily available as the key reason they don't do it.

Reducing the amount of plastic going to waste (54%) and being motivated by environmental concerns (52%) are the main reasons those who recycle at home do so. However, when asked if food packaging is rinsed before it's put in the recycling bin, 1 in 5 home recyclers never do this or do it only some of the time.

When it was explained to participants that too much food residue left on packaging may mean the recycling load will be rejected by the recycling facility and the whole load could potentially be sent to be burnt for energy or to landfill instead, a third were unaware, particularly younger people (44%). Again, **a clear knowledge gap that no doubt has detrimental environmental impacts.**

# 44%

of younger people unaware that too much food residue left on packaging may mean the recycling load will be rejected and sent to landfill





# Packaging & recycling, in summary...

01

There is a clear knowledge gap in consumer familiarity with waste instruction symbols. Many misattribute packaging symbols to the wrong meaning or are unable to identify them at all.

02

The colour of plastic packaging is also a topic of much confusion with the majority unable to identify which colour types can or cannot be recycled.

03

A third of home recyclers are unaware of the impact of not rinsing food packaging before its disposed of.



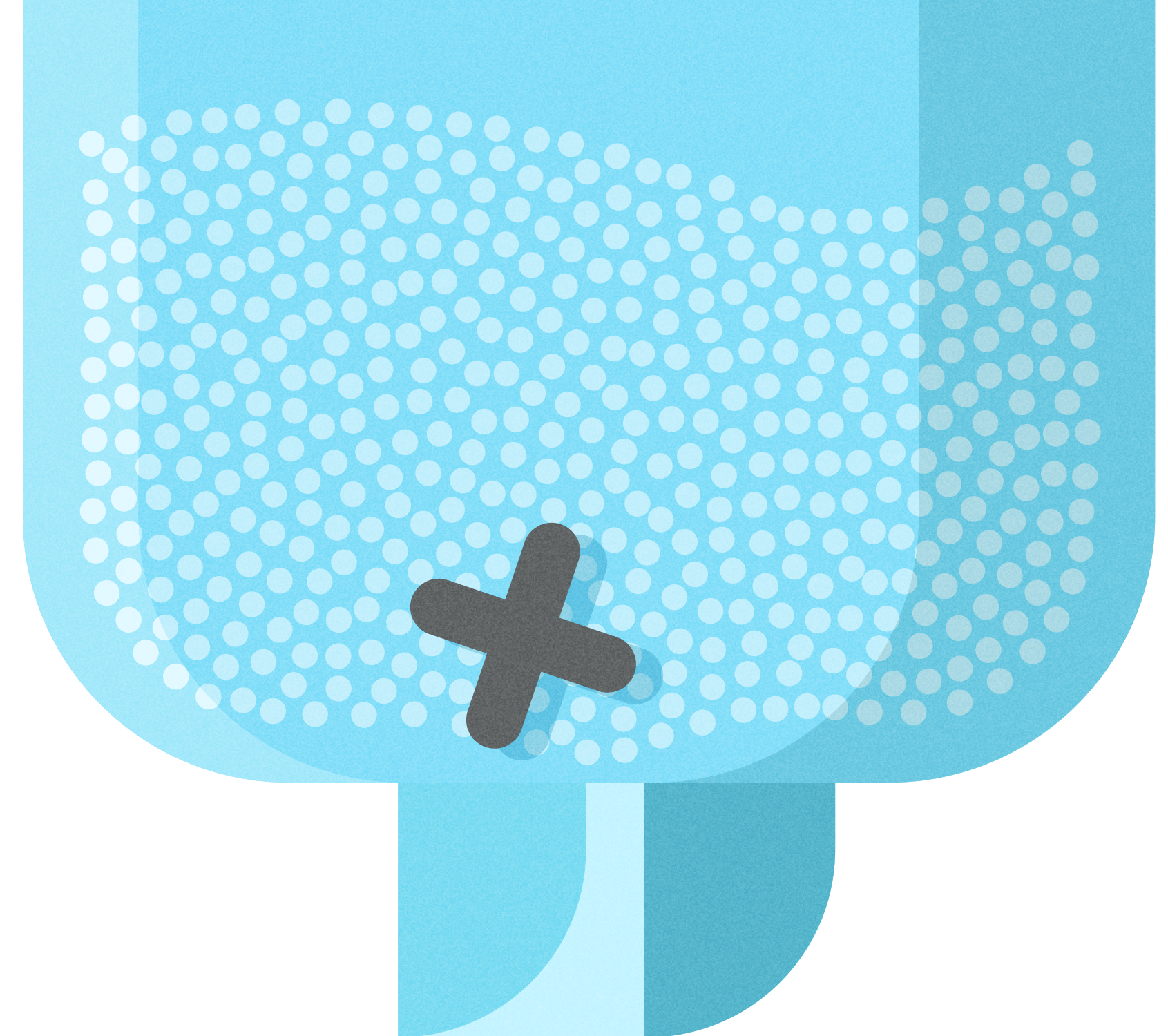
# Future solutions



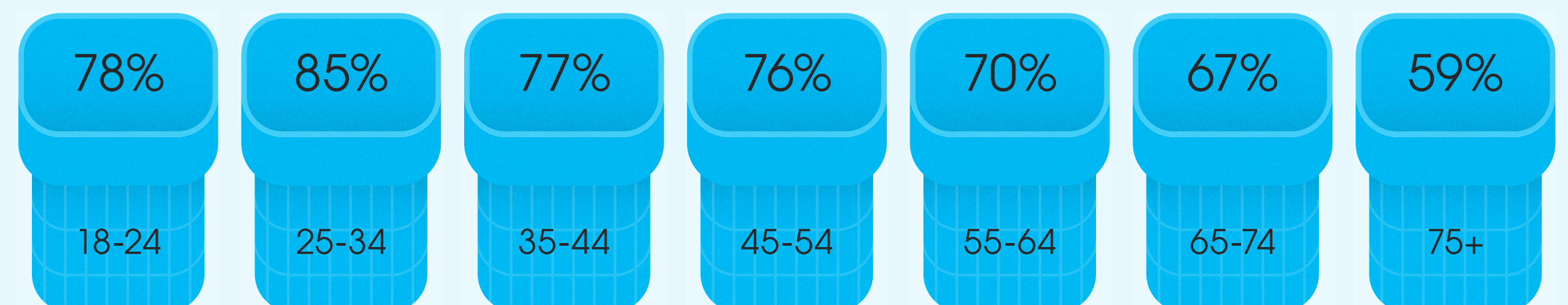
# Sustainable zero-waste shopping

With packaging and plastic pollution becoming an issue for the general consumer, a handful of supermarkets have introduced refillable stations, an alternative to traditional shopping which means nothing needs to be thrown away. Refillable stations encourage zero waste shopping, inviting shoppers to bring their own containers to fill up with groceries at the store, removing the need for single-use packaging.

Encouragingly, 58% of consumers are aware of these being available to use in supermarkets such as Waitrose, Tesco and more recently ASDA, all who have opened refillable stations in certain stores. Yet only 18% of UK adults have tried a zero-waste store, rising to 35% of 18 to 34-year olds compared to only 5% of 55 and overs. It should be note that the majority of consumers have not yet tried refillable stations raising the question of accessibility – nearly three quarters (74%) of the population say they would be likely to use them if they opened in their main supermarket, increasing to 85% of 25 to 34s.



## Likely to try a refillable station if one opened in main supermarket, by age



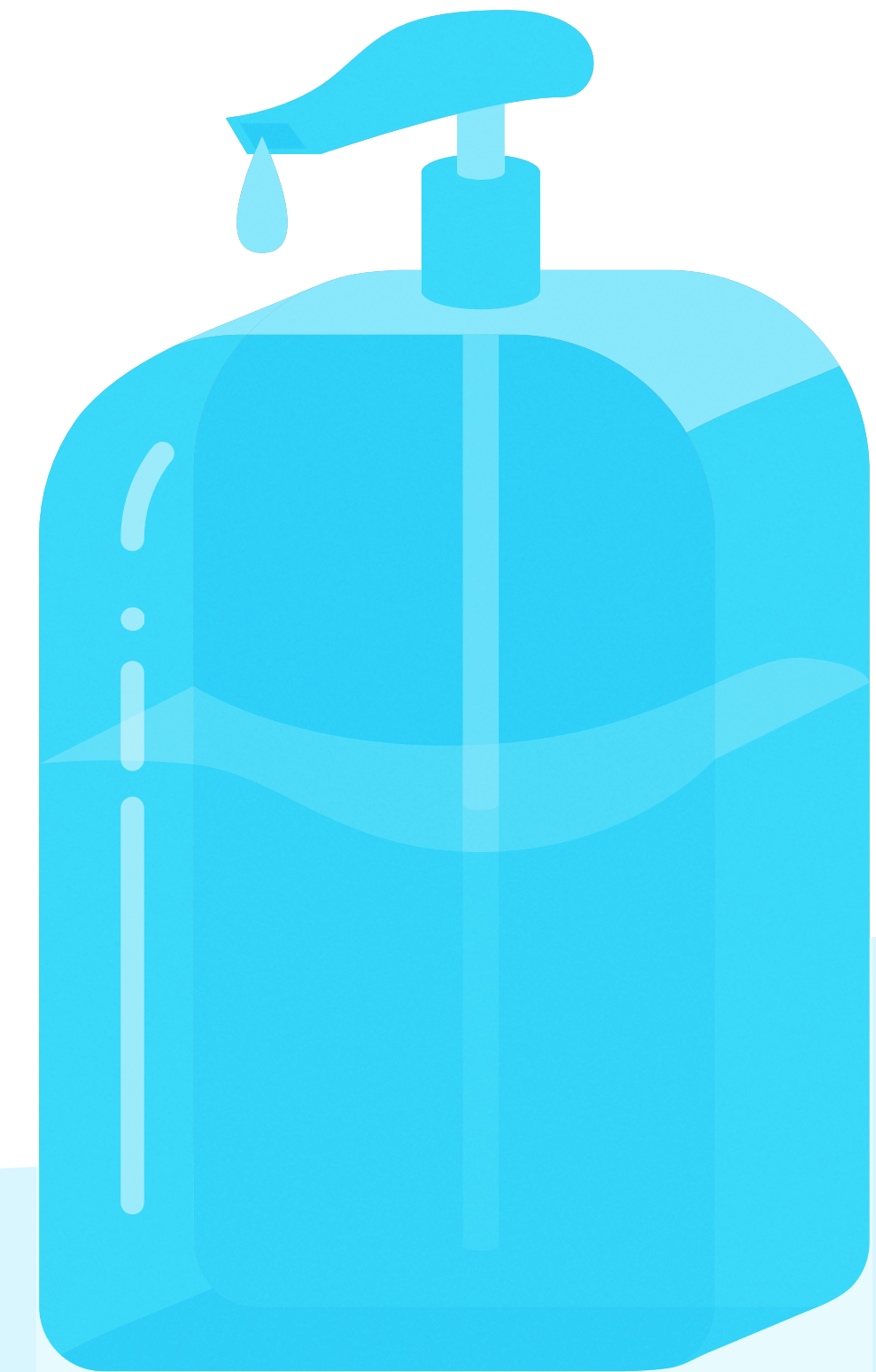


There are of course a few shoppers who are sceptical of refillable stations, namely older consumers, with 55% of 55 – 64s who state hygiene concerns as a key barrier to trial – a concern which was heightened during the pandemic.

However, there is an obvious benefit of this type of shopping for the eco-conscious consumer. This approach from supermarkets encouraging sustainable habits is a positive look at what could happen in the future of grocery shopping.

55%

of 55 – 64s state hygiene concerns as a key barrier to trying refillable stations

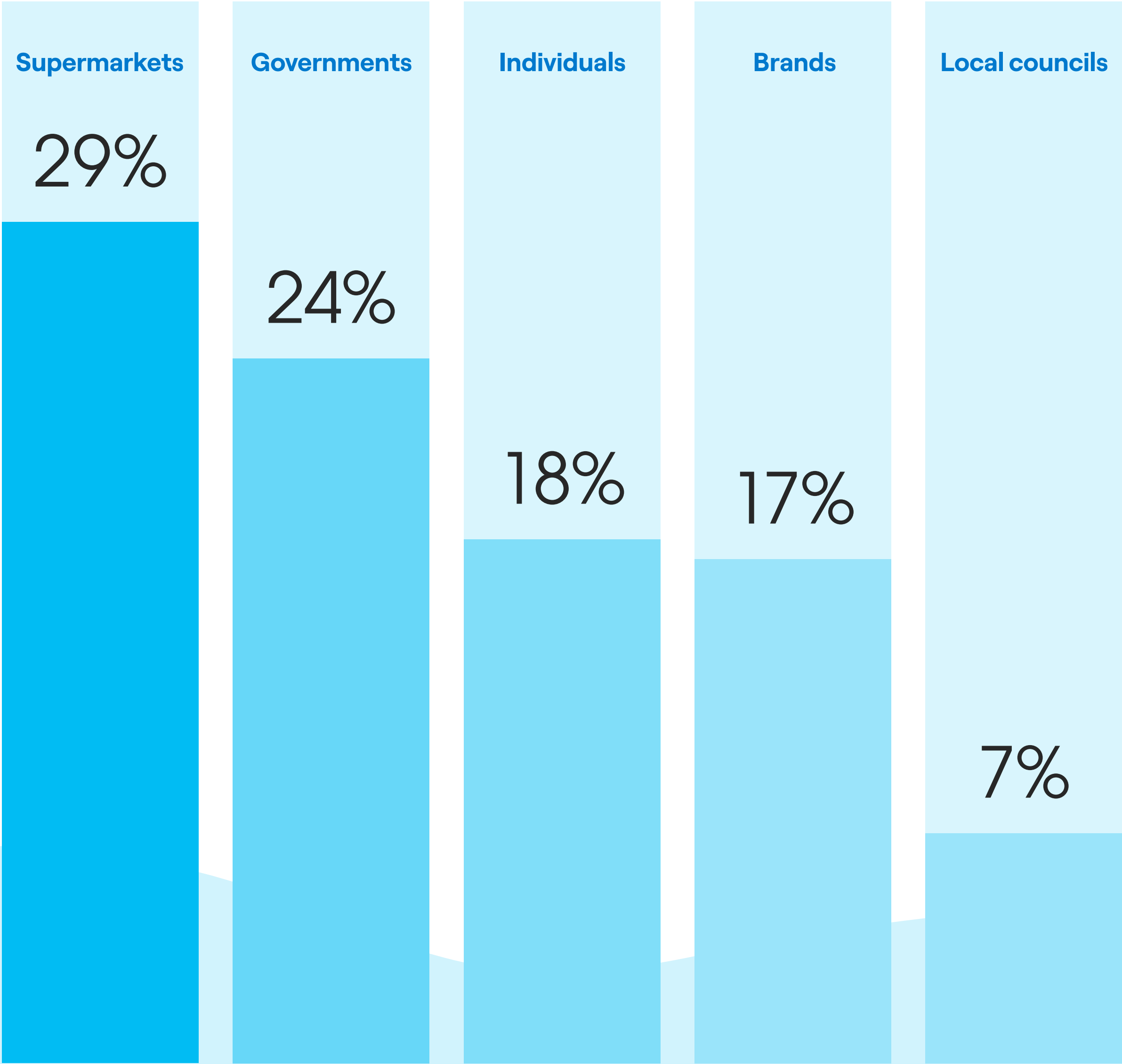




# Influencing behaviour change

Most consumers are concerned for the environment, but this isn't having an impact on their lifestyle choices.

So, what do we need to do to overcome this? And who is responsible then to encourage and educate consumers on the sustainable practices?





**Almost a third (29%) of consumers think it is the responsibility of supermarkets to encourage change to sustainable shopping behaviour.** There is already evidence of supermarkets aiding sustainable shopping habits ditching plastic produce bags for recyclable paper ones, increasing meat free offerings, switching to electric delivery vans and introducing zero waste refillable stations.

These introductions do however put the onus on the supermarket and the consumer to be more sustainable, whereas for a quarter (24%) of UK adults the government should be responsible for encouraging change to sustainable shopping behaviour. A good example of this is the 5p charge for single-use plastic carrier bags which reduced single use plastic bags usage by major supermarkets from 1.3 billion in 2016 to 226 million in 2020. **Changes implemented by the government such as this will change consumer behaviour and have a major positive impact for the environment.**

29%

of consumers think it is the responsibility of supermarkets to encourage change to sustainable shopping behaviour

24%

believe the government should too hold some responsibility.



# Future solutions, in summary...

01

Consideration of using refillable stations is high but a lack of accessibility within main supermarkets is preventing uptake.

02

Consumers believe the responsibility of encouraging sustainable shopping behaviours falls on supermarkets and the government. Many are looking for ways to be sustainable, but they want easy options that align with their current shopping behaviours.

03

More education is needed on how to shop sustainably. This will help to further bridge the gap between consumers who desire to be environmentally friendly, but in practice aren't currently able or know how to.



# About the authors



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What people think,  
feel and do

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