

**THE
BIG
GREEN
JOURNEY**

ASDA

SAVING
YOU MONEY EVERY DAY

Introduction

Since the beginning of 2011, we've been working with a panel of over 7,500 Asda customers to find out what they think about sustainability, and the actions they take to be green. We call this panel 'Everyday Experts', because they are the experts when it comes to understanding what most people think, do and expect around sustainability in their everyday lives.

After two and a half years of running these surveys, we have found that everyone, no matter their income, age or gender, cares about sustainability. But while most of our Everyday Experts say they are green, they also believe they could be doing more.

The results show that our customers don't just want to hear us talking about what we're doing to be more sustainable, or what they can do to be more sustainable. Of course, they're happy to find out how to be green, but they want it backed up by ideas for action or help to be more sustainable.

We've found that, for our Everyday Experts, the two main barriers to being green are accessibility and affordability. They want to see Asda offering more green products in our stores and more affordable ways to be green. And we want to empower our customers to make those green choices - stocking sustainable products at an affordable price to make being green an achievable goal.

After two and a half years of running these surveys with our Everyday Experts, we have found that the vast majority of our customers, no matter their income, age or gender, cares about sustainability.

Our Everyday Experts

The research we carry out with our Everyday Experts does not just take the form of surveys. We also carry out qualitative research on specific topics to get a more rounded, detailed insight into sustainability.

Our Everyday Experts are Asda shoppers who come from all over the country and represent every group in the UK; old and young, women and men; from young mums to busy working couples to pensioners on benefits.

Listening to what they have to say since January 2011 has taught us a lot. At the end of 2011, we launched the Green is Normal report, which busted five big myths about who cares when it comes to sustainability.

Our Everyday Experts said:

Green is normal No matter how old or young they are, how much they earn, or where they live, our Everyday Experts agree; the new weird is to do nothing.

I set the sustainability agenda According to our Sustainability Study, the people retailers like Asda should listen to most on green issues are Everyday Experts – their customers.

Green should be easier to find Over three quarters of Everyday Experts say they've bought a green product, from Fairtrade to locally sourced options. They tell us they'd buy even more if they could find the right option easily and if 'green' claims weren't so complicated.

I expect to be greener in the future Everyday Experts make it clear that they don't see green as just a trend or a fad. Nearly 70% of lower-income households, 90% of women and nearly 80% of men expect to do more to be greener in the future.

The green choice shouldn't cost more Everyday Experts don't see why they should pay a premium for the green choice. Over 80% buy green products because they think it's the right thing to do, and the same amount expect those products to be priced within their means.

The research

Extending the scope

The Big Green Journey explores what we've found out since the Green is Normal report.

The findings are based on the results of quarterly surveys, which include eight questions repeated every time, as well as questions on topical issues such as 'organic products' and 'affordable sustainability'. We've also extended the scope of our research to include a study with Defra in 2012 and another qualitative study, which has recently looked at food waste.

This research is not just a learning experience; it's about sharing knowledge and empowering our customers. Our Everyday Experts share what they think about being green and the actions they take in exchange for us keeping them up to date with what we're doing to become more sustainable and sharing tips and advice on what they can do to live a greener lifestyle. They are also entered into a monthly prize draw as an added incentive.

We've worked hard to engage our customers on the issues around sustainability and, as a result, Everyday Experts are no longer fully representative of the UK. In fact, we've found that they care more about sustainability than the wider population.

Definitions

We use the terms 'sustainability' and 'green' in the way Everyday Experts understand them. Green usually refers specifically to environmental issues, whereas sustainability incorporates social issues too. We came up with the following definitions, which are used throughout our research:

A 'green' product is a product that is environmentally friendly i.e. it's made with minimal impact on the environment.

A Fairtrade product is a product which is good for people i.e. it's made by people who are paid a fair wage for their work and helps to support communities.

A 'healthy' product is a product which is good for you i.e. it's got fresh ingredients, or low fat or salt content.

Food waste is anything intended for human consumption that is not consumed by humans. This includes food that is composted or fed to the dog, but it doesn't include things like orange peel and banana skins.

Our partners

The survey questions are designed in partnership with key stakeholders, including The Environment Council and Populus. These organisations ensure the research is robust and externally assured.

Populus verified the market research process, outcomes and analysis. Populus is a leading research and consulting firm that provides informed insight for clients in the worlds of business, politics, culture and communications through the application of intelligent research.

The Environment Council led the qualitative research project, provided advice and information to support the survey. The Environment Council is a charity dedicated to the authentic engagement of people to accomplish a sustainable society.

Methodology for quantitative research

Who? A panel of over 7,500 Asda customers aged 16 years and older, with an average of over 3,750 participating in each survey.

What? We want to find out Asda customers' attitudes and behaviours around sustainability. Some of the questions are repeated in every survey in order to gauge changes over time. Other questions are issue specific.

When? Quarterly since January 2012. The research is ongoing.

How? An opt-in online survey of approximately 15 questions sent to more than 7,500 members of the Asda Pulse of the Nation Sustainability Panel. Results are broken down by key demographics such as age, gender, socio-economic grade and region.

Segmentation

Our partner, Populus, grouped the population into six segments based on attitudes towards sustainability.

Green Messengers are the classic, traditional 'ethical consumers'— they are passionate supporters for the natural environment and their local communities.

Living Greens would like to 'walk the talk' about sustainability. They occasionally buy green products, are good recyclers and think about being green at home. Green starts at home and they leave the big global issues to others.

Good Deal Greens are driven by value as well as values. They are the shoppers that choose sustainable products if they think it's worth it, and green their homes once they've got proof it will cut their bills.

Green Wheelers are the 'technophiles'; the people who are most likely to be inspired by exciting new innovations like electric cars. 'Warm and fuzzy' green claims bring out their sceptical side.

Family Greens are much more likely to be influenced by their friends and family to be green than they are by public figures.

Green Starters think of green behaviours such as saving water as common sense, not as a uniquely 'green' approach.

Findings

Since our first Green is Normal report back in 2011 to the research we have carried out in 2013, the undeniable fact is that our customers still care about being green, no matter their income, age or gender.

In fact, the vast majority (81%) of Everyday Experts tell us they care about being green and of these, 51% say they care 'a lot' or 'very much indeed'.*

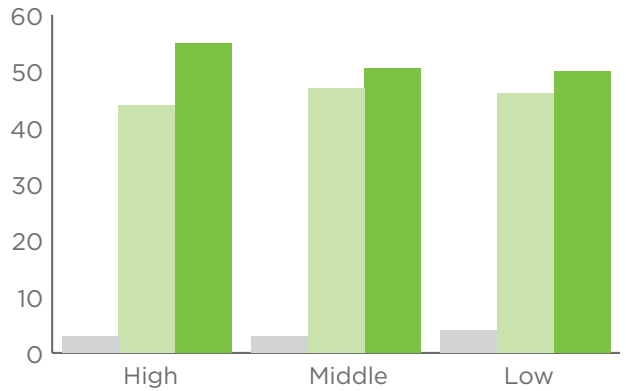
*This section has been amended to allow direct comparison with our Green is Normal report (2011)

1. Green is still normal for our customers



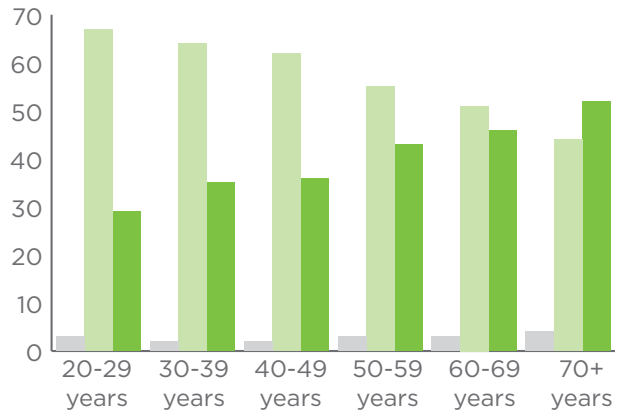
Graph 1:
How much do you care about being green (by income)?

No matter what the income bracket, the vast majority (96-97%) of our Everyday Experts care 'a bit' or 'a lot' about being green.



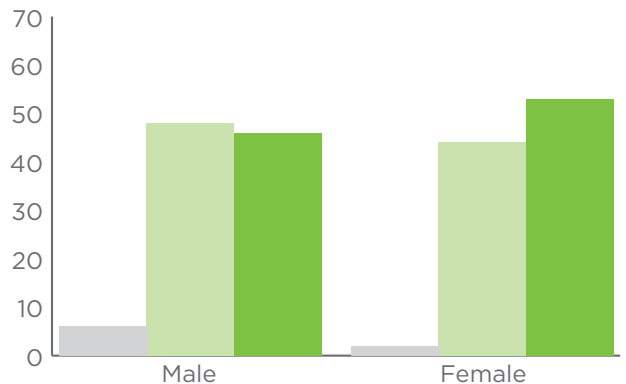
Graph 2:
How much do you care about being green (by age)?

Across all age groups, the majority of our Everyday Experts care about being green 'a bit' or 'a lot'. Only 2-5% of each age group responded with 'not at all'.



Graph 3:
How much do you care about being green (by gender)?

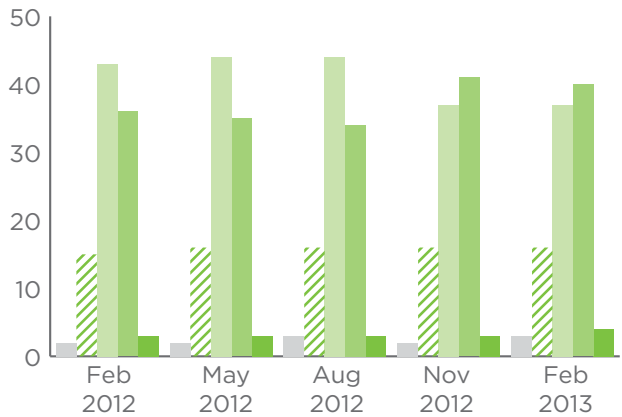
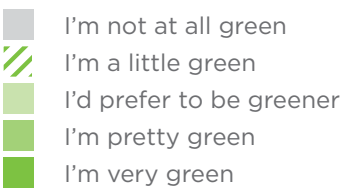
Again, there's a relatively even split across males and females. However, in terms of those who answered 'a lot', females cared slightly more than the males with 53% compared to 46%.



Taking action

Since the start of our work with Everyday Experts we have asked what actions they are taking to be green in their day-to-day lives. In February 2013, only 2% of respondents said they weren't doing anything to be green. 57% said they were doing a bit and 40% said they were doing a lot.

Graph 4:
How green would you say you are?



The results since our first Green is Normal report show that our Everyday Experts still think they could be doing more to be green. We've found that the main barriers to our Everyday Experts being greener are accessibility and affordability. We are responding to this by making a commitment to make sustainable products even more accessible and affordable. In a new partnership with the University of Leeds, we are working together to make being green even more achievable for all our customers.

2. Accessibility and affordability are key to the decisions our customers make.

In every survey, we've been asking our Everyday Experts what they think is helping them to live a greener lifestyle.

Graph 5:

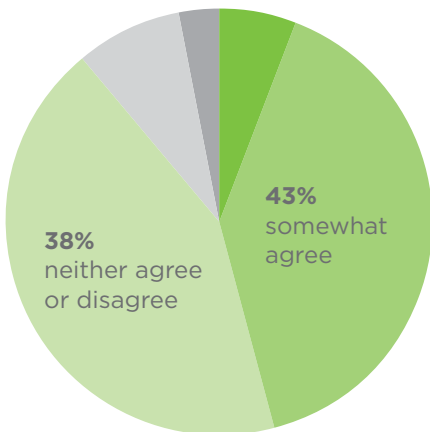
Asda talking more about what we are doing to be more sustainable in our own operations and supply chain.

Some customers agreed that they'd like to know more about what Asda is doing in terms of our own operations, but almost the same proportion neither agreed nor disagreed, meaning it's not of critical importance.

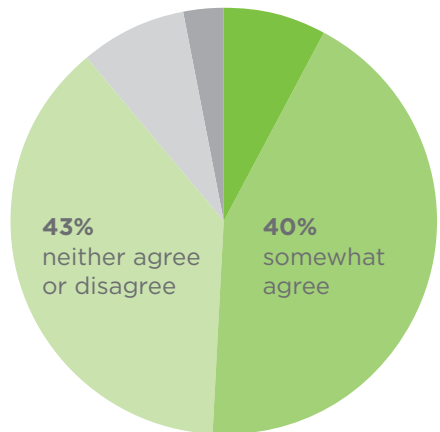
Graph 6:

Asda talking more about what you and other customers can do to be more sustainable.

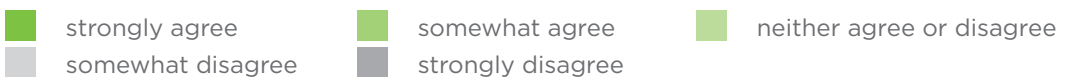
Again, some customers agreed that they'd like to know more about what Asda customers could do to be more sustainable. But again, almost the same proportion neither agreed nor disagreed, meaning it's not high on their list of priorities.



Graph 5



Graph 6



Graph 7:

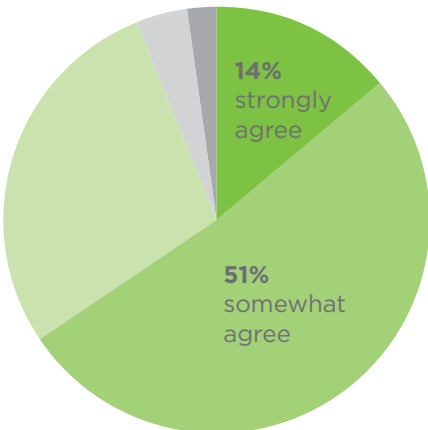
Asda offering you more green products in our stores.

The majority of customers (65%) wanted to see us offering more green products to help them to live a greener lifestyle.

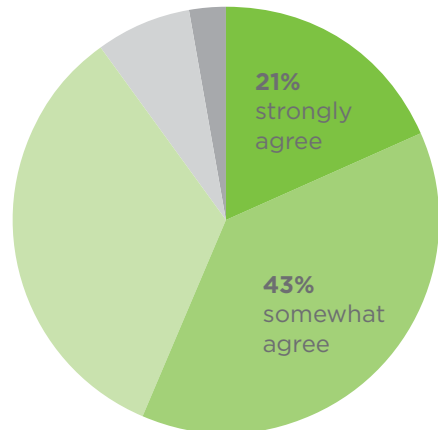
Graph 8:

Asda offering you more affordable ways to be green.

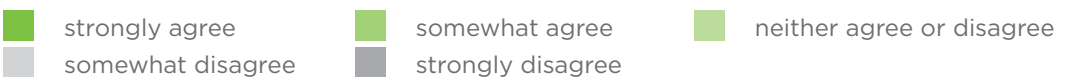
Similarly, the majority of customers (64%) wanted to see us offering more affordable ways to be green to help them to live a greener lifestyle.



Graph 7



Graph 8



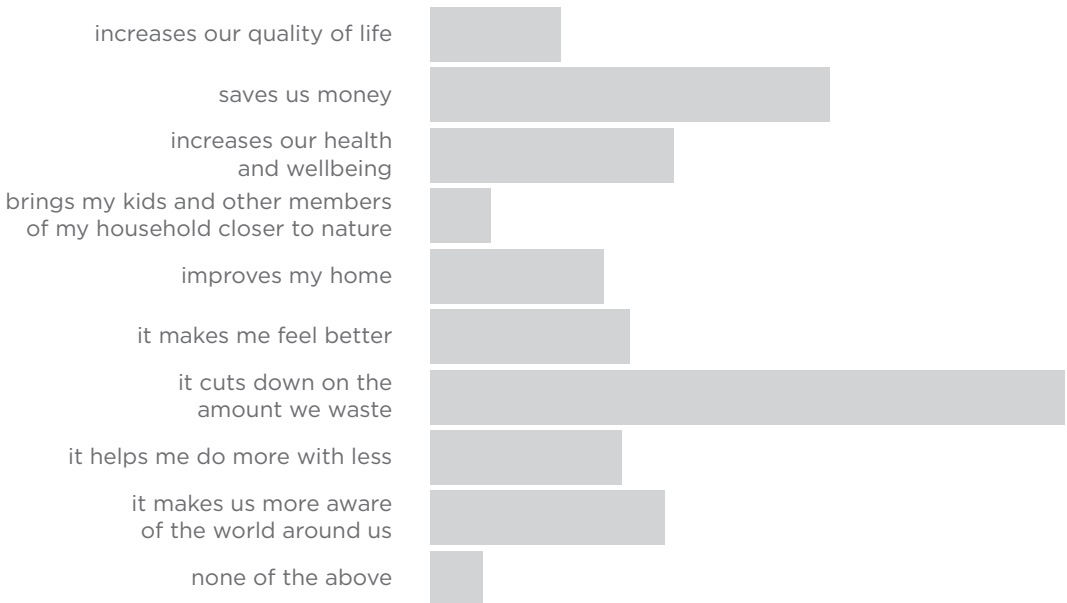
These results show that Asda shoppers don't just want to hear us talking about what Asda is doing to be more sustainable, or what Asda shoppers themselves can do to be more sustainable – however, they're happy to hear about it if it's backed up with actions or help to be more green. Our customers want to be empowered. They want to see more green products in the stores and for those products to be affordable. And here at Asda, we're committed to making that happen.

In fact, 65% of Asda shoppers agree that Asda offering more green products in our stores is helping them to be green, and 64% of our Everyday Experts agree that Asda offering more affordable ways to be green is helping them to live a greener lifestyle.

Graph 9:

Which of the following best describes how leading a more sustainable lifestyle helps you and your family?

The key responses to this question were the 73% who responded saying 'it cuts down on the amount we waste' and 46% that said it 'saves us money'.



This link between waste and affordability is something that we have explored in greater depth. In terms of our own operations, we have made direct savings through sustainability of around £100m since 2005. These savings have helped to keep our prices low and it's great that our customers recognise this link too.

In our customers' homes, the link also becomes apparent – the more they cut down on waste the more money they can save. The Waste and Resources Action Programme (WRAP) has found that the cost of wasting food comes to an average of £480 per month, rising to £680 per month for families with children. Our qualitative research, outlined later in this report, asked Asda customers to record the amount of food they threw away over a two-week period. The results of this showed a shift in awareness and behaviour with 57% of participants saying they plan to reduce food waste in the future.

'Affordable sustainability' is important to an overwhelming majority of customers:

85% say that affordable sustainability matters at least 'quite a bit'. Of that, 55% say that it matters 'a lot' or 'very much indeed'.

61% say that 'good value or low price to buy' is most important when deciding whether to buy a green product.

71% say that affordable sustainability matters to them because it 'makes it easier to do what is right' (37%) or because it means they 'don't need to sacrifice to live green' (43%).

Our Everyday Experts rate us positively on our affordable green products offer:

49% rate Asda as 'good' or 'very good' at offering affordable green products.

36% rate Asda as 'fair'.

Focus on: food waste

Throughout our work with Everyday Experts, we've been interested in food waste, both in terms of what Asda stores can do, and how we can help our customers to reduce their household food waste.

The Waste & Resources Action Programme (WRAP) says 49% of all food wasted in the UK is wasted at the household level. So we've been working more closely with our Everyday Experts and have undertaken qualitative research to find out more about what people think on this issue and what we can do to help.

Attitudes and behaviours around food waste

Rather than conducting an Everyday Experts online survey in May 2013, we embarked on a qualitative research project to further explore our Everyday Experts' attitudes and behaviours around food waste. This work also helped to lay the foundations for a Knowledge Transfer Partnership with the University of Leeds, which is aiming to understand the behaviour of our customers and help them reduce food waste at home.

We worked with a group of 47 Asda shoppers selected by our partner Populus.

These shoppers recorded their household food waste in an online diary for two weeks. At the end of the two weeks, they filled in a questionnaire on the diary experience, and some participants attended a workshop on how to reduce food waste at home and how to share what they had learnt with others.

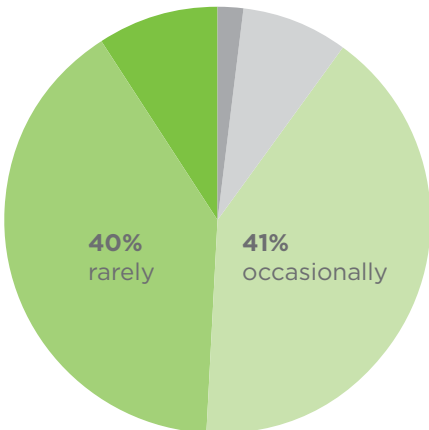
Our Everyday Experts survey in February 2013 also focused on food waste, and we asked some of the same questions to the people who kept food waste diaries in our qualitative research.

The answers given show how the food waste diaries influenced participants' opinions and how it can raise people's awareness of the amount of food they are wasting.

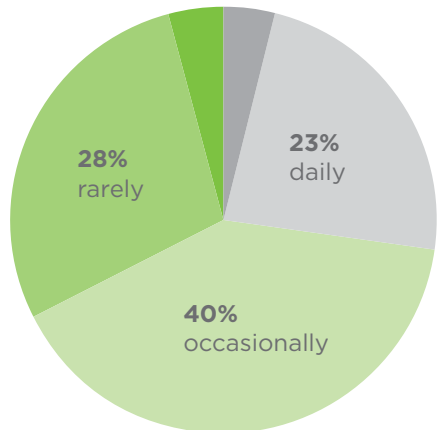
Graph 10:

How regularly do you think food is thrown away in your household?

February's respondents mostly said 'rarely' (40%) or 'occasionally' (41%). Only 8% said 'daily'. However, 23% the respondents who kept the food waste diary said they throw away food 'daily', with only 28% saying 'rarely' and 40% saying 'occasionally'.



Graph 10a
February survey



Graph 10b
Post food waste diary

- don't know
- occasionally
- never
- daily
- rarely
- most mealtimes

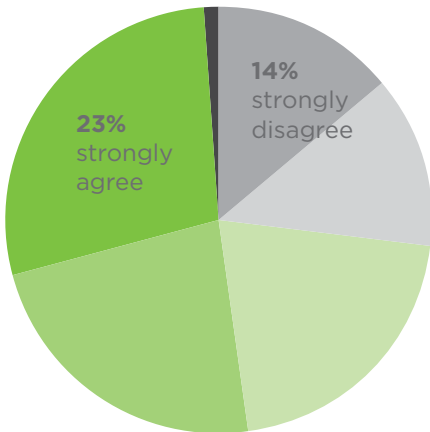
Graph 11:

To what extent do you agree with the following statement: 'I wish I didn't throw away so much food'?

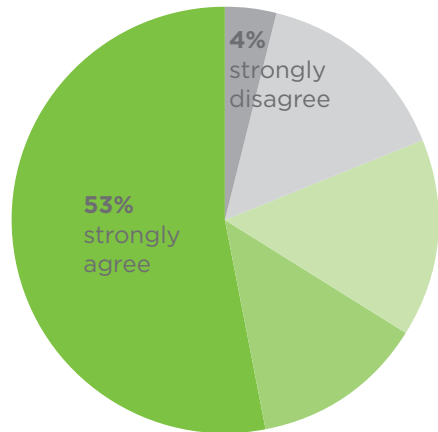
We asked our Everyday Experts and the people who kept the diaries questions about their attitudes to food waste. Those who kept a food waste diary were more aware of the amount of food they were throwing away and, in turn, they also said they 'wished they didn't throw away so much food'.

In the February survey, 14% of respondents 'strongly disagree' with the statement 'I wish I didn't throw away so much food', as opposed to only 4% of diary keepers.

And again in the February survey, only 23% of respondents 'strongly agree' with the statement, compared to 53% of diary keepers.



Graph 11a
February survey



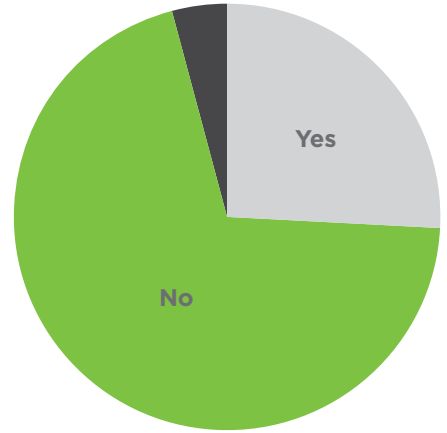
Graph 11b
Post food waste diary

- strongly agree
- somewhat agree
- neither agree or disagree
- somewhat disagree
- strongly disagree
- don't know

Graph 12:

Do you think the diary changed your food waste habits during this two-week period?

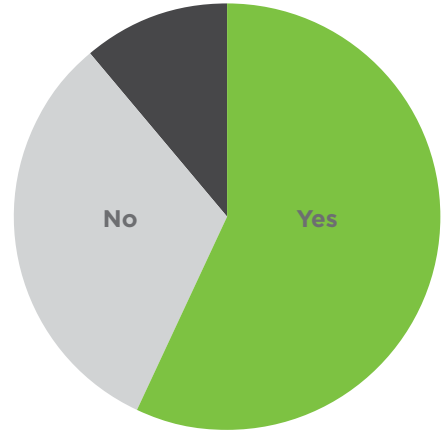
26% of participants changed their food waste habits during the two weeks – the act of keeping a diary was enough to change the way that some people behave when it comes to food waste.



Graph 13:

Do you have plans to make changes to reduce your food waste in the future?

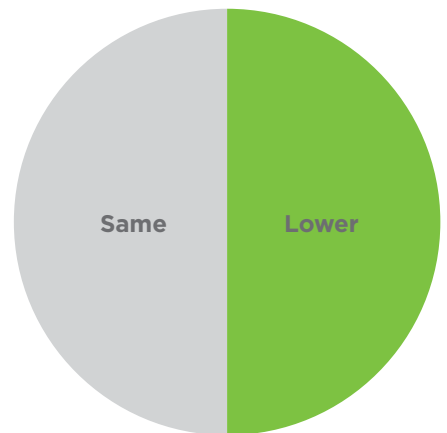
Over half (57%) said that they have plans to make changes to reduce their food waste in the future.



Graph 14:

Was the amount of food you threw away higher, lower or about the same as you expected when you started the diary?

Of the 43% who answered 'no' or 'don't know', 50% said the amount of food they threw away was less than they expected before starting the diary. This suggests that, because the amount of food they threw away was less than they expected, they don't feel as much of a need to reduce it as those who found that they threw away more than they expected.



If... then...

In 2012, we worked with the Department for Environment, Food and Rural Affairs (Defra) on 'Implementation Intention Plans' (or 'if...then...' plans); a technique for breaking old habits and forming new ones. It uses a simple sentence structure to get people thinking about everyday actions and to form new habits; "if x situation is encountered, then I will initiate behaviour y in order to reach goal z".

We used these 'if...then...' plans to support a group of 18 Asda shoppers from our panel of Everyday Experts in changing their habits around food waste. So, a participant might use the technique to change the way they shop: "if I am running out of something, then I will add it to my shopping list".

Before we began the process, we conducted hour-long telephone interviews with participants to talk them through the technique. After three months, we interviewed them again to see how they were getting along.

The results showed that the 'if...then...' technique was effective in changing participant behaviours – 50% of participants reported that they always use a shopping list; 14% reported that they often use a shopping list, and another 14% reported that they have made other positive changes.

These changes in shopping habits (i.e. making shopping lists) also led to a reduction in household food waste. Since using the 'if... then...' technique 46% of participants reported that they never waste food, 36% reported that they rarely waste food, and another 18% reported that they have made other positive changes. On top of this, all participants said they felt an 'enduring sense of change'.

When it comes to sustained behaviour change, these projects show that these methods can be effective but they are difficult to scale up. We want to find a solution where we can empower our customers to make changes for themselves – changes that they've told us they want to make. We've partnered with the University of Leeds on a government-supported Knowledge Transfer Partnership to explore how to do this.

Conclusion

This updated study into the attitudes and behaviours of our 7,500 Everyday Experts has generated some clear results. In the two and half years we've been working with our customer panel, their views on sustainability will have changed as they become more aware, or as other pressures come to the fore. However, and this is our critical finding, our customers still care. They want to be green. They want to be make the sustainable choices. And they want us to play our part and make these choices accessible and affordable.

What next for the research?

Here at Asda we have over 18 million customers and, as much as we'd like to, we can't talk to each and every one of them about their views on sustainability. Instead, we're working with the University of Leeds in a pioneering new programme to create more sustainable products for our customers and to help them reduce food waste.

The University of Leeds has a reputation for developing strategic partnerships and offering truly collaborative research projects that offer maximum value and the expertise of its world-renowned academics.

Funded through the government-backed Knowledge Transfer Partnerships (KTP) by the Technology Strategy Board, and the Economic and Social Research Council and Asda, the partnership will see Asda become one of the first major retailers to develop new products, based on its customers concerns and expectations in the area of food sustainability.

The programme will run over two and a half years and will look into best practice measures in food wastage. It will focus on research into customer attitudes around sustainability, understanding customers' motivations and actions. The partnership will also develop tools to assist in large-scale behaviour change - ultimately helping our customers to save money at home by reducing food waste.

