Superlist Pilot UK

Research Methodology

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Introduction

Supermarkets influence to a large extent what their customers buy. This gives them the opportunity to make food habits healthier and more sustainable. With Superlist, Questionmark Foundation helps supermarkets to seize this opportunity.
Superlist is a multi-year research project that provides insight into what supermarkets are doing to make our food healthy and sustainable. Superlist also shows which supermarkets are leading the way and which lag behind, and what they can do to improve their position.
Superlist started in 2019 in the Netherlands. Following the first Superlist on the theme of health, published in October 2020, the second Superlists focusing on sustainability was published in May 2021.
The current project in the UK is the first pilot outside of the Netherlands, to be followed by a pilot in Sweden and a full scope Superlist Environment in Belgium in 2022.

Governance

Questionmark Foundation is a Netherlands based research institute, committed to providing facts, figures and arguments to the public debate on healthy and sustainable food. Questionmark Foundation is governed by an independent board whose members have no interests in the food industry. Questionmark does not receive any funding that is directly or indirectly related to the British retail or food industry. Our integrity policy can be found on our website.

Partners

Partners in this pilot project are Eating Better (environment) and ShareAction (health)

Funding

This project would not have been possible without the generous contribution of Swedish Postcode Foundation.

General approach

This document specifies the indicators to be used for an assessment of the largest supermarket chains in the UK. The general research approach for the assessment is based on our Research Framework, as published on www.superlijst.nl. The current document may deviate from the framework, due to the pilot status of this project.
This document has been written in collaboration with our partners ShareAction and Eating Better, and in consultation with Public Health England.

Scope
The scope of this assessment includes the four largest supermarket chains in the UK in terms of market share: Asda (14.8%), Morrissons (10%), Sainsbury's (15.3%) and Tesco (27%). The total market share of this selection adds up to 67.1%.

Research period
Data on assortment and promotions will be collected during a 6-week period, starting on the day of issue of this document. During this period, all webshops will be visited in 4 data collection cycles.

Product
This assessment will lead to a short report with the main findings. The report will be published in two parts: one on the two health indicators and an exploration of online promotional techniques, the other part on the two sustainability indicators.

Indicators Health

Indicator 1: HFSS products in volume promotions
The share of HFSS-products in online food promotions with a volume based price reduction.

Explanation
The UK government has decided to introduce legislation by mid-2021 to restrict promotions of HFSS products in, among others, supermarkets in England. This indicator helps to sketch the possible impact of the regulation on an important part of the food environment, by assessing the prevalence of HFSS products among volume based promotions.

Definitions & calculation
From the webshop, we take into analysis all food products to which either a 'multibuy' or an 'extra-free' promotion applies, as defined by the Department of Health & Social Care in the consultation outcome on the forthcoming legislation (see Annex A).
Products are classified as either HFSS or non-HFSS according to the 2004/05 Nutrient Profiling Model as laid down by the Department of Health & Social Care in the consultation outcome on the forthcoming legislation.
Product descriptions lacking data needed to calculate the HFSS classification will be marked 'unknown'.
Product groups with many products marked 'unknown' (for one or more webshops) may be left out of analysis for all supermarkets.

Indicator 2: HFSS in simple price promotions
The share of HFSS-products in online food promotions with a simple price reduction.

Explanation
The forthcoming regulation of HFSS promotions only applies to volume promotions ('multi-buy' or 'extra-free'), the rationale being that volume promotions would cause the greatest sales uplift (PHE, 2015). This restriction however brings along the risk that supermarkets shift their promotion strategy to other types of price promotion, such as simple price reductions.
This indicator assesses that risk by determining the prevalence of HFSS promotions that will *not* be affected by the legislation. Meanwhile, the indicator serves as a baseline measurement of this type of promotion. As soon as legislation has entered into force, a repetition of this measurement will enable us to notice and quantify any possible shift in promotion types from volume to price based.

Definitions & calculation
From the webshop, we take into analysis all food products to which a promotion applies based on a temporary price reduction not based on volume ('10% off', '~~1.50~~ now only 1.25', etc.).

Products are classified as either HFSS or non-HFSS according to the 2004/05 Nutrient Profiling Model as laid down by the Department of Health & Social Care in the consultation outcome on the forthcoming legislation.
Product descriptions lacking data needed to calculate the HFSS classification will be marked 'unknown'.
Product groups with many products marked 'unknown' (for one or more webshops) may be left out of analysis for all supermarkets.

Exploration: online promotions of HFSS products
The share of HFSS-products in online food promotions with a simple price reduction.

Apart from the assessment on the indicators 1 and 2, we will explore the possibilities of benchmarking the online shopper experience offered by webshops, focussing on the online promotional techniques that supermarkets use to advertise HFSS products. As this field of research is virtually uncharted, the exploration will result in general observations rather than in a quantified assessment of (differences between) webshops.

Indicators on Sustainability

Indicator 3: less meat
Share of meat promotions as a ratio of total food promotions.

Explanation
The UK government's net zero carbon emissions goal by 2050 requires a significant shift in consumption behaviours, part of which is a reduction in meat consumption with 20% (CCC, 2021). Meat, especially red meat, has a very high carbon footprint relative to almost all other types of food.
Promotions can be regarded as an incentive to buy more than one needs. There is evidence that to an average food category, over a fifth (22%) of promoted volume bought is incremental (PHE, 2015).
An important contribution of supermarkets to national emission goals could therefore consist in a moderate promotion policy for meat.

Definitions & calculation
From the webshop, we take into analysis all food products to which either a 'multibuy' or an 'extra-free' promotion applies (e.g. "2-for-1", "3rd product free", "XL for only £1,- extra", etc.) A definition is given in annex 1.
All products categorized as 'meat' (or 'beef', 'porc', etc) in the *supermarket's own categorization* count as a meat product.

Indicator 4: better meat
Availability of relevant information on the provenance of meat products.

Explanation
According to the "Better by Half" roadmap ('Eating Better', 2021), transparency on the provenance of animal products and ingredients is one of five most important actions to be taken by retailers. Each product offer, whether on the shelf or online, should be accompanied by clear information on the origin and method of production of its animal ingredients. This indicator assesses the availability of that information for meat products.

Definitions & calculation
All products that are categorized as 'meat' or as a specific type of meat ('beef', 'chicken', etc) count as a meat product. This includes frozen meat and processed meat products such as sausages, hamburgers, chicken nuggets, etc. This excludes composed products with meat ingredients such as prepared sandwiches and salads, soups, etc.
In the assessment of available information we restrict the analysis to information that is *coded* into the webpage where the product is offered; for instance in the product description, the ingrediënt list or as a machine readable logo added to the page. This restriction excludes:

- generic information on some other page (e.g. general policies such as "did you know that all of our minced meat is made from British beef?"); and

- information (text or logo) on the photographed package of the product, even if it would be human-readable from the product page.

As relevant information on production method we consider at least the following logos and standards:

- Free Range
- Free to Roam
- Pasture Fed
- Pasture for Life
- Organic
- Red Tractor
- RSPCA
- Soil Association

As relevant information on the origin we consider any mention of a country or a region within a country.

References

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ANNEX 1 Definitions

multibuy promotion – a promotion that requires the shopper to buy one or more items to benefit from a discounted price compared to the price when bought separately. For example, 'buy one get one free', '3 for 2'; as well as types that state a fixed price or saving, for example '3 for £10' or 'buy 6 and save 25%').
Definition adopted from Annex 4 of (DHSC, 2020)

extra free promotion – a promotion that occurs when an enlarged pack size is created by the manufacturer and where the pack label states that a proportion of the product is free. For example, an extra-large packet stating "50% extra free". This does not prevent a manufacturer from labelling products with volume promotions but restricts medium and large retailers from offering these for sale.
Definition adopted from Annex 4 of (DHSC, 2020)