



IMPACT

FROM INSIGHT TO INFLUENCE

THE GREAT GREEN SUSTAINABILITY STUDY

Brand Rankings: Sustainability Score
Wave 11 – October 2024

www.impactmr.com

The background of the page is a scenic landscape. In the foreground, there is a calm lake reflecting the warm, golden light of a sunset. The middle ground shows a dense forest of trees, some of which are illuminated by the low sun. In the background, there are rugged mountains with some snow or light-colored patches. The overall atmosphere is peaceful and natural.

This year marks an exciting milestone for **Impact's Great Green Sustainability Study** - our fifth anniversary! Over the past five years, this bi-annual UK study has grown to become a valuable tool for brands to measure public attitudes towards sustainability. Not only is this wave the largest in the study's history having spoken to 8000 UK consumers, but it also includes an impressive evaluation of 159 brands, showcasing the study's broad and ever-expanding scope.











The study remains focused on three key objectives:

- Understanding public sentiment on environmental and climate issues;
- Analysing everyday sustainable behaviours; and
- Assessing perceptions of major brands' sustainability efforts.

These insights are underpinned by a robust scoring system that evaluates brands based on their perceived environmental friendliness, ethics, social responsibility, and financial responsibility. Scores range from 0 to 100, with higher scores reflecting stronger positive perceptions.

This report, the 11th wave conducted in October 2024, represents a comprehensive snapshot of where UK public opinion stands on brand sustainability. We are presenting **insights into 159 brands**, making it the most extensive wave to date. Alongside celebrating the frontrunners in sustainability, this report sheds light on those lagging behind, offering a rich narrative on the evolving relationship between UK consumers and the brands they trust to lead on environmental and ethical responsibility.

TOP 10 BRANDS

1 st	2 nd	3 rd	4 th	5 th
				
90	88	82	81	81
6 th	7 th	8 th	9 th	10 th
				
78	78	78	78	77

Sustainability in Action: What Every Brand Can Learn from the Top 10

The success of the top 10 brands in our sustainability ranking highlights key lessons for businesses aiming to improve their perception among consumers. Brands such as Ecover, Who Gives A Crap, and Oatly have achieved this not merely by adopting sustainable practices but by seamlessly integrating these values into their identity, product design, and communication strategies.





A common thread among these leaders is their ability to make sustainability accessible and relatable. For example, Ecover's focus on refillable packaging and biodegradable ingredients simplifies eco-friendly choices for consumers. This approach underscores the importance of reducing perceived barriers to sustainable consumption - a lesson for other brands seeking to engage eco-conscious audiences.

Transparency is another standout feature. Brands like Who Gives A Crap, which donates a significant portion of profits to sanitation projects, and Beyond Meat, which openly communicates the environmental benefits of plant-based diets, demonstrate that clear, values-driven narratives resonate with consumers. This transparency builds trust.

Innovation plays a key role too. The use of alternative materials, such as The Cheeky Panda's bamboo-based products, and the creation of carbon-neutral product lines by The Collective Dairy, highlight the value of aligning product innovation with environmental goals. This not only strengthens brand positioning but also inspires consumer confidence in the brand's commitment to making a difference.

For other brands, the takeaway is clear: sustainability must transcend marketing campaigns to become an intrinsic part of the business model. By prioritising transparency, reducing barriers to sustainable choices, and investing in innovation, brands can create meaningful engagement with eco-conscious consumers while contributing to broader environmental goals.

SUSTAINABILITY SCORES

11 th 	12 th 	13 th 	14 th 	15 th 
76	75	74	74	72
16 th 	17 th 	18 th 	19 th 	20 th 
72	72	71	70	70
21 st 	22 nd 	23 rd 	24 th 	25 th 
70	68	68	68	68

Retailers vs. FMCG: The Battle for Sustainability Recognition

Retailers face unique challenges in being perceived as sustainable, but they also operate in a context where FMCG brands often have an advantage. In our study, only 5 retailers made the top 25, including The Body Shop, Lush, M&S, IKEA and Waitrose. These retailers stand out due to clear, consumer-facing sustainability strategies. For example, IKEA's focus on circular economy practices, like its furniture take-back program, resonates with eco-conscious customers. Similarly, The Body Shop and Lush are recognised for refillable options and ethical sourcing, making their efforts tangible to consumers.

In contrast, FMCG brands often deal with narrower product lines, making it easier to showcase sustainability credentials. For instance, brands like Oatly or Beyond Meat focus solely on plant-based products, aligning their entire operations with environmental messaging. These brands also benefit from packaging that explicitly highlights sustainability, such as carbon labelling or recycled materials, making their efforts immediately visible.

Retailers, on the other hand, face complexities like managing diverse supply chains and balancing competing priorities across numerous product categories. While initiatives such as M&S's Plan A or Waitrose's commitments to reducing plastic waste are significant, these may not always translate into clear consumer recognition. Retailers must find ways to better communicate these efforts, leveraging their scale and visibility to demonstrate leadership in sustainability.

SUSTAINABILITY SCORES

26 th 	27 th 	28 th 	29 th 	30 th 
67	67	67	66	66
31 st 	32 nd 	33 rd 	34 th 	35 th 
66	66	65	65	65
36 th 	37 th 	38 th 	39 th 	40 th 
65	64	64	64	64
41 st 	42 nd 	43 rd 	44 th 	45 th 
63	63	63	63	62

Local, Charitable, Trusted: The Supermarket Sustainability Formula

Supermarkets perform relatively well in sustainability perceptions compared to most retailers. This is perhaps driven by their frequent interactions with customers and their visibility in addressing environmental and social issues. With brands like Co-op, Sainsbury's, Tesco, Waitrose, and Asda often at the forefront, supermarkets use their platform to highlight initiatives that resonate with consumers, such as reducing food waste, promoting sustainable practices, and supporting local communities.

Their emphasis on sourcing from UK suppliers further enhances their image, aligning with consumer priorities around reducing food miles and supporting local farmers. Perceptions of "helping in the community" and "supporting charities" also play a significant role, with supermarkets topping these categories. For example, Tesco's food redistribution partnerships, Co-op's ethical and Fairtrade commitments, and Waitrose's community-focused programmes demonstrate clear contributions beyond their core business. These efforts, combined with their prominent role in customers' daily lives, position supermarkets as accessible and proactive in addressing sustainability and community concerns.

SUSTAINABILITY SCORES

46 th 	47 th 	48 th 	49 th 	50 th 
62	62	61	61	61
51 st 	52 nd 	53 rd 	54 th 	55 th 
60	60	60	60	59
56 th 	57 th 	58 th 	59 th 	60 th 
59	58	58	58	58
61 st 	62 nd 	63 rd 	64 th 	65 th 
58	58	58	58	57
66 th 	67 th 	68 th 	69 th 	70 th 
57	57	57	56	56
71 st 	72 nd 	73 rd 	74 th 	75 th 
56	56	56	55	55

SUSTAINABILITY SCORES

76 th  55	77 th Waterstones 55	78 th  55	79 th  55	80 th  54
81 st LEON 54	82 nd  54	83 rd  54	84 th G A P 54	85 th OLAY 53
86 th  53	87 th  53	88 th  53	89 th  53	90 th  52

Sweet Success: How Confectionery Can Win on Sustainability



Sustainability in confectionery is a mixed picture. While many brands like Rowntree's, Lindt, Skittles, Haribo, and KitKat rank in the lower half of the table in our study, there are bright spots worth celebrating. Green & Black's, Cadbury, and Tony's Chocolonely demonstrate that progress is possible, even in a category often criticised for environmental and ethical challenges.

Green & Black's, part of Mondelez, has long prioritised organic ingredients and sustainable sourcing. Its commitment to Fairtrade-certified cocoa reflects a proactive approach to addressing labour and environmental concerns. Similarly, Cadbury, another Mondelez brand, has made significant strides with its Cocoa Life program, which supports sustainable farming practices and improves the livelihoods of cocoa farmers. These initiatives help build trust by tackling key supply chain issues head-on.











Tony's Chocolonely, renowned for its mission to create a slavery-free chocolate industry, goes even further by making its supply chain fully transparent and encouraging other brands to follow suit. Its bold marketing and advocacy for ethical sourcing set a benchmark for change.

For confectionery brands struggling with sustainability perceptions, these examples show that clear commitments to ethical sourcing, transparency, and environmental stewardship can resonate with consumers and help overcome challenges in a historically problematic category.

SUSTAINABILITY SCORES

91 st 	92 nd 	93 rd 	94 th 	95 th 
52	52	52	52	52
96 th 	97 th 	98 th 	99 th 	100 th 
52	51	51	51	51
101 st 	102 nd 	103 rd 	104 th 	105 th 
50	50	50	49	49
106 th 	107 th 	108 th 	109 th 	110 th 
48	48	48	48	48
111 th 	112 th 	113 th 	114 th 	115 th 
48	48	48	48	47
116 th 	117 th 	118 th 	119 th 	120 th 
47	47	47	47	47

SUSTAINABILITY SCORES

121 st 	122 nd Robert Dyas	123 rd 	124 th 	125 th 
46	46	46	46	46
126 th 	127 th 	128 th 	129 th 	130 th 
45	45	45	45	45
131 st 	132 nd 	133 rd 	134 th 	135 th 
45	44	44	44	44














Serving Sustainability: What Food-to-Go Brands Must Do Next

Sustainability perceptions remain a challenge for the food-to-go sector, with Greggs ranking highest in this category yet still only 79th out of 159 brands. This indicates that consumer expectations are not being fully met. While issues like food waste, plastic waste, and sourcing practices play a significant role, underlying perceptions of the sector being “unhealthy” may also weigh down scores. Fast food and convenience items are often linked with over-processed, high-calorie options, which can negatively influence both health and sustainability perceptions, and this is demonstrated by our health metrics where most food-to-go retailers score poorly.

Efforts by brands like Costa, Starbucks, and McDonald’s to promote reusable cups, sustainable sourcing, and reduced packaging are commendable. Greggs has also made strides with plant-based menu options and waste reduction. However, the broader challenge lies in overcoming the deep-seated view of food-to-go as environmentally and nutritionally problematic.

To improve, food-to-go retailers need to focus on bolder communication strategies that align sustainability efforts with health messaging. Promoting the environmental benefits of plant-based menus, showcasing progress in reducing food and packaging waste, and educating consumers on how these actions contribute to better outcomes for the planet could reshape perceptions. By tying sustainability initiatives to wellness and transparency, food-to-go brands can address both environmental and health concerns, boosting consumer trust.

SUSTAINABILITY SCORES

136 th 	137 th 	138 th 	139 th 	140 th 
44	44	44	44	44
141 st 	142 nd 	143 rd 	144 th 	145 th 
44	43	43	43	42
			146 th 	147 th 
			42	42
			148 th 	149 th 
			41	40

Delivering Change: The Sustainability Hurdles of E-Com

E-commerce platforms face significant challenges in showcasing their sustainability credentials, with brands like ASOS, Funky Pigeon, and Wayfair ranking lower in our study. These brands operate in sectors often associated with packaging waste, energy-intensive delivery systems, and sourcing practices that lack transparency for consumers. ASOS, for example, faces added scrutiny due to the environmental impact of their production and return policies, which can overshadow progress in areas such as their use of recycled materials and circular fashion initiatives. Similarly, Funky Pigeon's heavy reliance on customised goods and individual deliveries may amplify concerns about carbon footprints and packaging.











Wayfair contends with sourcing issues, as consumers increasingly demand responsibly sourced materials. Its size and global reach make it challenging to communicate its sustainability efforts effectively to consumers.

Amazon, however, has managed to buck the trend with its visible investments in electric vehicles, renewable energy, and its Climate Pledge. For brands like ASOS, Funky Pigeon, and Wayfair, focusing on reducing packaging waste, offering more sustainable delivery options, and promoting ethically sourced products could significantly improve perceptions. Clear integration of these initiatives into the customer experience could help e-commerce brands address sustainability concerns and gain consumer trust.

Sustainability in Low-Cost Retail

Value retailers face significant challenges in communicating sustainability credentials, with brands like Poundland, B&M, The Range, and Home Bargains ranking lower in our study. The affordability focus creates a perception gap: premium brands often benefit from a halo effect of quality and responsibility, while value brands are associated with cost-cutting and unsustainable practices. This highlights an opportunity for value retailers to prove that eco-consciousness doesn't have to break the bank balance.

SUSTAINABILITY SCORES

150 th 	151 st 	152 nd 	153 rd 	154 th 
39	39	39	38	38
155 th 	156 th 	157 th 	158 th 	159 th 
38	36	35	35	32

The Sustainability Struggle: What's Holding Brands Back?

The bottom 10 brands in our sustainability rankings face several challenges that may have contributed to their poor scores. Common perceptions of unsustainable practices, coupled with negative press in some cases, create hurdles for these brands in gaining public trust.

Brands like Boohoo and Sports Direct have faced significant scrutiny over labour practices and working conditions. These controversies may overshadow efforts to improve sustainability, as the public perceives these issues as part of broader corporate irresponsibility. Similarly, paper-heavy brands such as Moonpig and Clintons grapple with environmental concerns linked to waste and packaging, which often dominate discussions around their sustainability efforts.

Confectionery brands like Skittles are associated with plastic-heavy packaging that is not recyclable, while retailers such as JD Sport and Spar may struggle due to less visible sustainability efforts and associations with low-cost convenience, which can suggest limited environmental commitments.

To improve, these brands must address underlying concerns and take tangible steps to build credibility. Transparent communication about their efforts to reduce waste, source responsibly, and support environmental goals will be essential to turning perceptions around and building consumer trust.

Clear and Credible: Turning Sustainability Into Consumer Connection

For brands, this report highlights the growing importance of transparency and clear communication in sustainability. Our research has found that consumers respond to specific, authentic claims that resonate with their values, rather than broad, vague statements. Across all retail sectors and FMCG categories, addressing packaging, waste, and sourcing will be key to strengthening sustainability perceptions. These areas offer tangible, visible opportunities for brands to demonstrate progress. Initiatives that are clearly communicated through trusted channels help build credibility and foster stronger consumer relationships. Whether reducing plastic use, sourcing responsibly, or minimising waste, brands that prioritise these efforts and convey them meaningfully can better align with the expectations of today's eco-conscious consumers.

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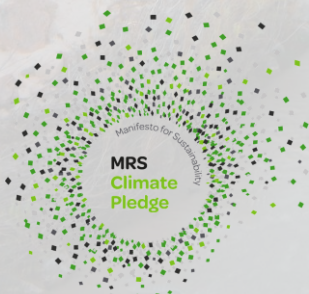


If you would like to find out more about this study and how we could support your business with your sustainability strategy, please contact Tom Gould, Managing Director.

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Impact has signed the MRS Climate Pledge and is committed to reducing its carbon emissions and eventually achieving net zero.