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Partner

2023 US Brand Sustainability Benchmark Report

Food & Grocery Industry



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Social
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Welcome.

I'm Tim, the founder of on-demand consumer research platform Glow. We are delighted to bring you this inaugural sustainability benchmark report for the US Food & Grocery (F&G) industry.

Investors, employees, customers and consumers want to see more progress in terms of sustainability initiatives that support people, the environment and the planet. Brands are increasingly sharing their credentials, communicating their milestones and publishing performance against their ESG and sustainability goals. Consumers now have access to more sustainability information than ever before from a variety of controlled and uncontrolled sources.

As a result, consumers are making their own impact by shedding the brands that don't meet their sustainability expectations, and moving to brands that better align with their values.

This report highlights the scale of this movement, provides insight into what consumers expect from F&G brands and highlights those that are leading the way.

It provides benchmarks to allow brands to assess opportunities relevant to them and practical direction on how to optimize current ESG programs and marketing activities.

The report leverages Glow's unique Social Responsibility Score (SRS) along with data and insights from NielsenIQ research studies.

We hope it will help you in your sustainability journey so that you can create greater impact.

Thanks for reading,



Tim Clover

Glow Founder & CEO



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This report uses data from Glow and NielsenIQ.

Glow.

Glow, a research technology ('restech') company, is on a mission to make consumer research faster, more transparent and more accessible to all businesses. Glow's supported software offering enables clients to conduct high-quality consumer research faster for concept testing, audience insights, category evaluation, brand tracking, and more. It enables businesses to make better decisions that fuel their growth and support their customers, stakeholders and the planet.

Glow is a proud member of the 'data for good' movement which encourages businesses to use data to help better the world. Glow uses its technology to produce the largest syndicated ESG/sustainability brand tracker of its kind, Social Responsibility Score (SRS), which measures 600 brands in three markets. SRS enables brands to diagnose and benchmark consumer perception of their ESG performance over time, across audiences, markets and competitors. This report contains data from SRS and a range of proprietary Glow research studies.

[Visit glowfeed.com](https://www.glowfeed.com)

NielsenIQ

NielsenIQ, a global information services company, delivers the gold standard in consumer and retail measurement, through the most connected, complete and actionable understanding of the evolving global omnichannel consumer. NielsenIQ data, connected insights and predictive analytics optimize the performance of CPG and Retail companies, bringing them closer to the communities they service and helping to power growth.

The complete and clear NielsenIQ Product Insights provide purchase signals that unlock new pathways to growth, tied to the most important consumer values and lifestyles.

This report contains data from NielsenIQ and other proprietary NielsenIQ studies.

[Visit nielseniq.com](https://www.nielseniq.com)



Data sources.



The majority of the data in this report comes from Glow's proprietary Social Responsibility Score (SRS) diagnostic & brand tracker, with additional data from Glow studies and the Catalyst program.

The SRS data is from Apr-Dec 2022, from over 33,000 respondents. Using a nationally representative sample of US consumers based on age, gender and geography to obtain their views on 165 food and grocery brands.

SRS measures consumer perception of social and environmental responsibility and is reported as a single number (range -100 to +100) for easy comparison across brands & time.

SRS is underpinned by 13 drivers across Environmental, Social and Governance dimensions that explain the overall score and provide brands direction for action. Other data comes from a range of Glow proprietary studies, as referenced.

To find out more visit: socialresponsibilityscore.com

NielsenIQ

This report also contains data from NielsenIQ studies including data from NielsenIQ's proprietary Product Insight. NielsenIQ offers detailed, reliable product data and insights to help clients understand what is driving growth in today's complex market.

NielsenIQ Product Insights (NPI) combines NielsenIQ's robust market measurement and Consumer Panel insights with more than 1,500 in-depth product attributes from Label Insight's deep product metadata.

NPI covers thousands of attributes, married up against NIQ's total store database, aligned to the most important consumer need states today bring together ingredient-based attributes, nutrients, plus package claims and certifications to allow clients to achieve more holistic and focused marketing, and innovation success. With both stated and qualified versions broken out, NIQ reveals the full product view.

To find out more visit: nielseniq.com



Key outtakes from the report.

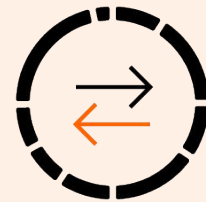
Outtake



Sustainability is good for business

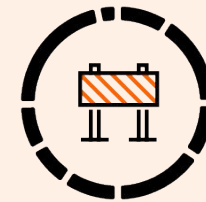
Sustainability leaders grow faster than those perceived as laggards. Current sales & future share are at stake and the impact will only grow

Insight



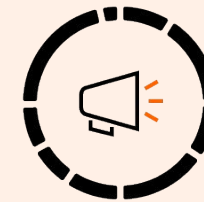
Consumers are switching based on sustainability considerations

Switching is seen across all categories, and younger consumers switch at much higher rates. Brands that lead in ESG perceptions are benefiting most



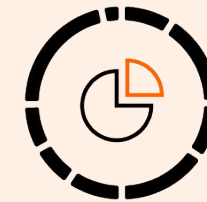
Sustainability can be a barrier to trading down

Trading down is widespread due to cost of living concerns. For a number of consumers sustainability is a reason not to do so - especially for younger generations



Where and what you communicate matters

Many brands aren't getting the recognition they deserve because their ESG story isn't cutting through



F&G leads but an opportunity exists in the expectation / performance gap

Environmental concerns in particular are not being met. Expectations differ across departments



02. Expectations

**Consumer
expectations
are high.**



Sustainability isn't just a growing internal imperative. Consumers expect more.

Consumers are increasingly willing to spend to align their purchases with their values. A range of studies, including multiple by Glow and NielsenIQ, showcase that attitudes and behaviour are changing for the better and progressive brands are benefitting.

Belief

9 in 10

consumers believe it's important for businesses to act in a **socially and environmentally responsible** way¹

Influence

78%

of consumers say a company's **purpose and values** play an important role in their purchasing decisions²

Purchase

1 in 2

consumers say they've **changed F&G brands** based on perceptions of a brand's ESG performance³

Price

64%

of consumers will **pay more** for products supporting communities and vulnerable groups⁴

Loyalty

79%

of consumers say they are **more loyal** to purpose driven brands⁵



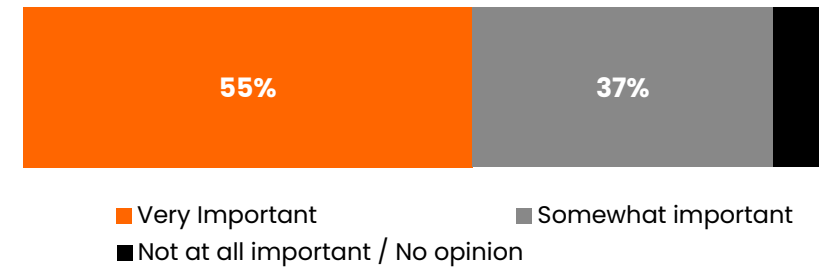
Sustainability is a key decision criteria and growing in importance.

7 in 10

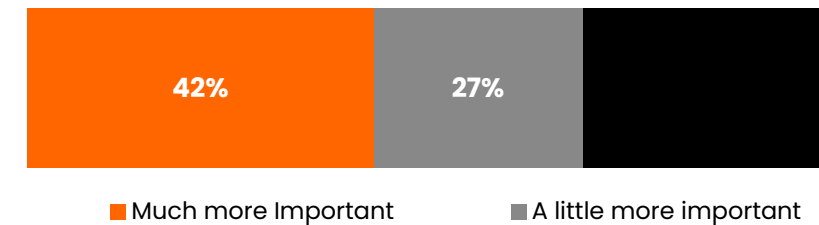
respondents to a NielsenIQ study stated sustainability concerns were 'more important' than 2 years ago, with more than 4 in 10 stating it was **much** more important'.

This results in over 9 in 10 respondents stating that sustainability is either 'very' or 'somewhat' important today, with over half of all respondents viewing sustainability as **very** important'.

Importance of sustainability TODAY



Change in importance v. two years ago



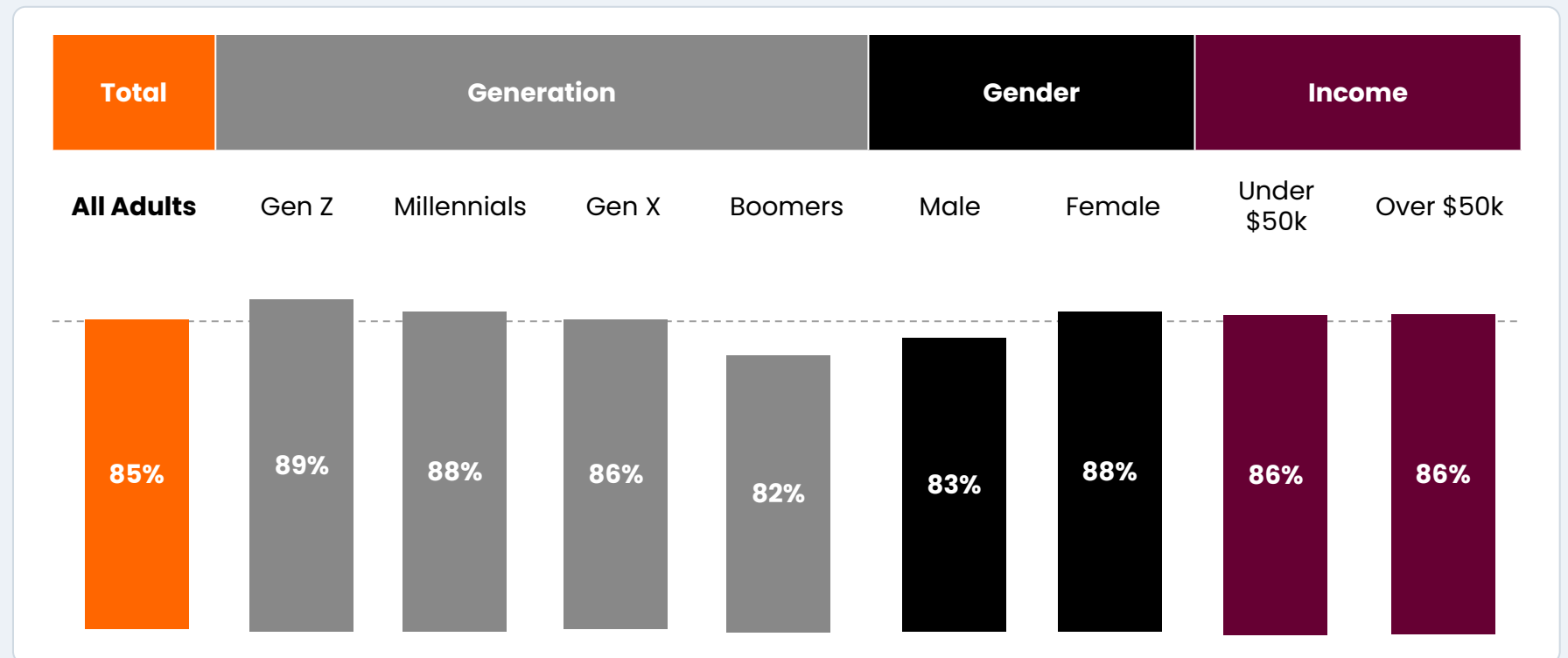


Consumers expect brands to behave responsibly, but younger consumers expect more.

85%

of US residents surveyed believe that it is important for businesses to act responsibly when it comes to society and the environment.

More than **1 in 3** believe it is **very** important for businesses to do so with this rising to almost **4 in 10** for **Gen Z and Millennial** consumers.



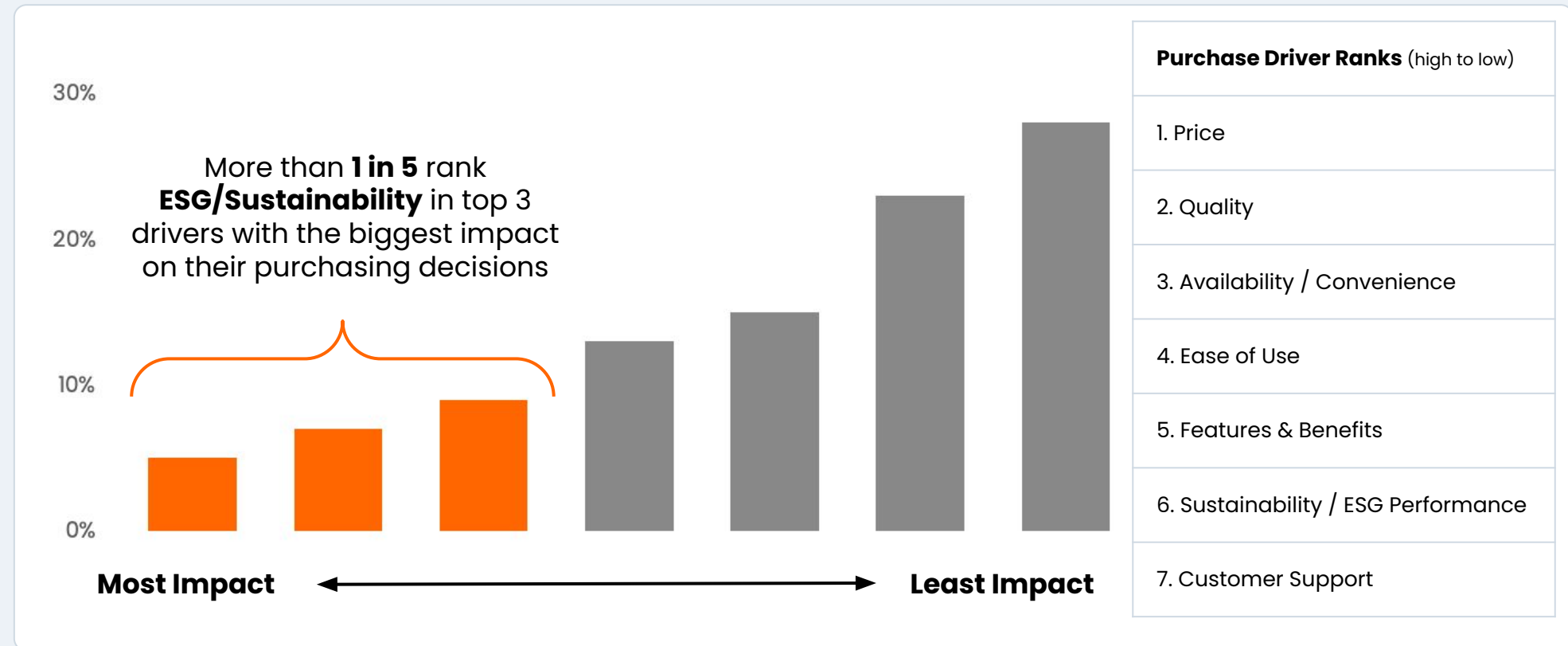


1 in 5 rank ESG / Sustainability in the top 3 purchase drivers when choosing F&G brands.

Price and quality are, unsurprisingly, the top purchase drivers. And while sustainability ranks 6th of 7 drivers overall - 1 in 5 consumers view it as significantly more important and rank it in the top 3 drivers when selecting F&G brands.

1 in 3

Millennials rank ESG/Sustainability in the **top 3 purchase drivers** and **1 in 10 as the most important** - ahead of even Price or Quality!



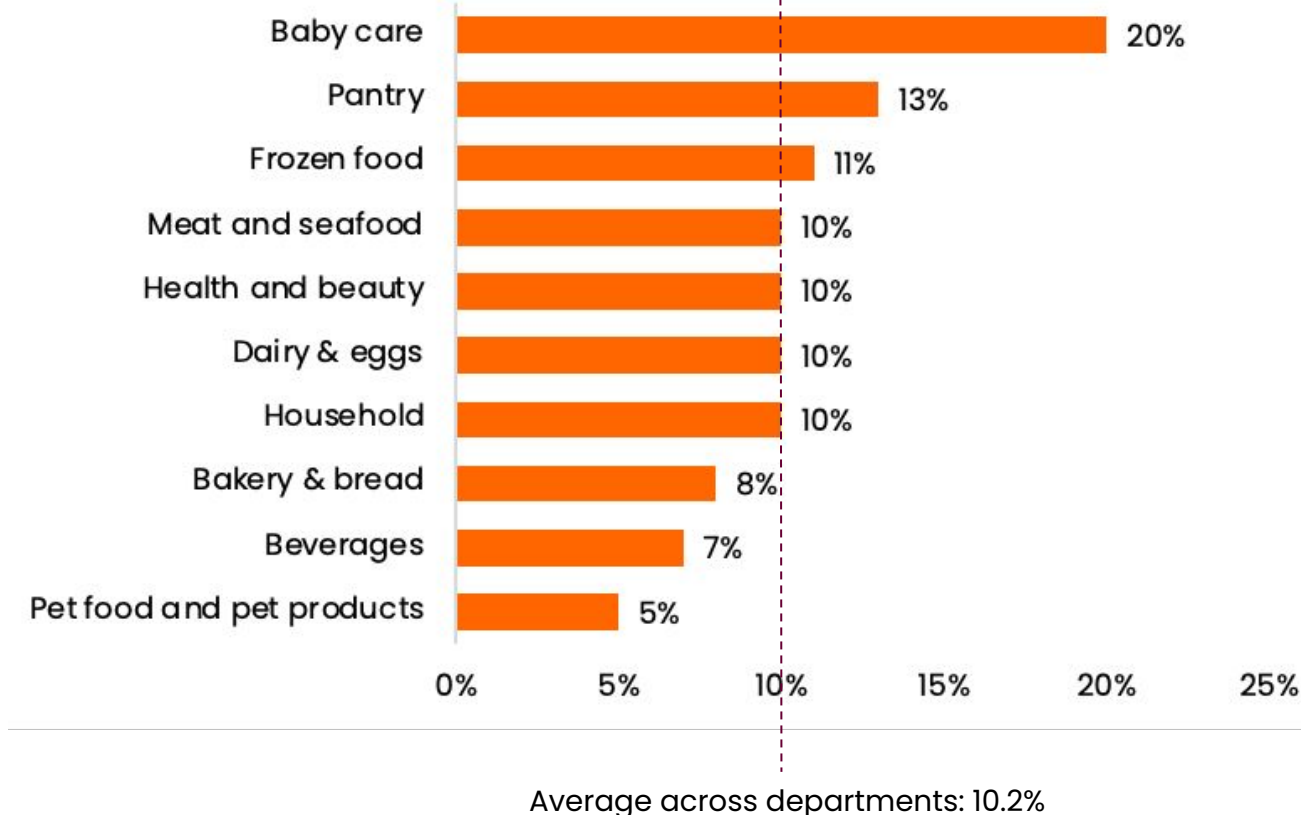


Sustainability is a barrier to trading down.

Cost of living is a huge concern with almost **7 in 10 respondents actively switching F&G brands to save money** and 65% of them switching all / almost all or a large number of products.¹

Similar to the top ranked purchase drivers, the primary barriers to trading down were price and quality – in this case a lack of price saving or loss of quality. However **sustainability was a significant consideration for many**, and of **particular importance in Baby care** where 1 in 5 cited it as the main reason they did not trade down.

For Millennials it is an even more important reason to not trade down. In fact in Baby Care, Household and Dairy & Eggs it was the **2nd most important** factor.





Perceptions are contributing to switching and leading brands are reaping the benefits.

1 in 2

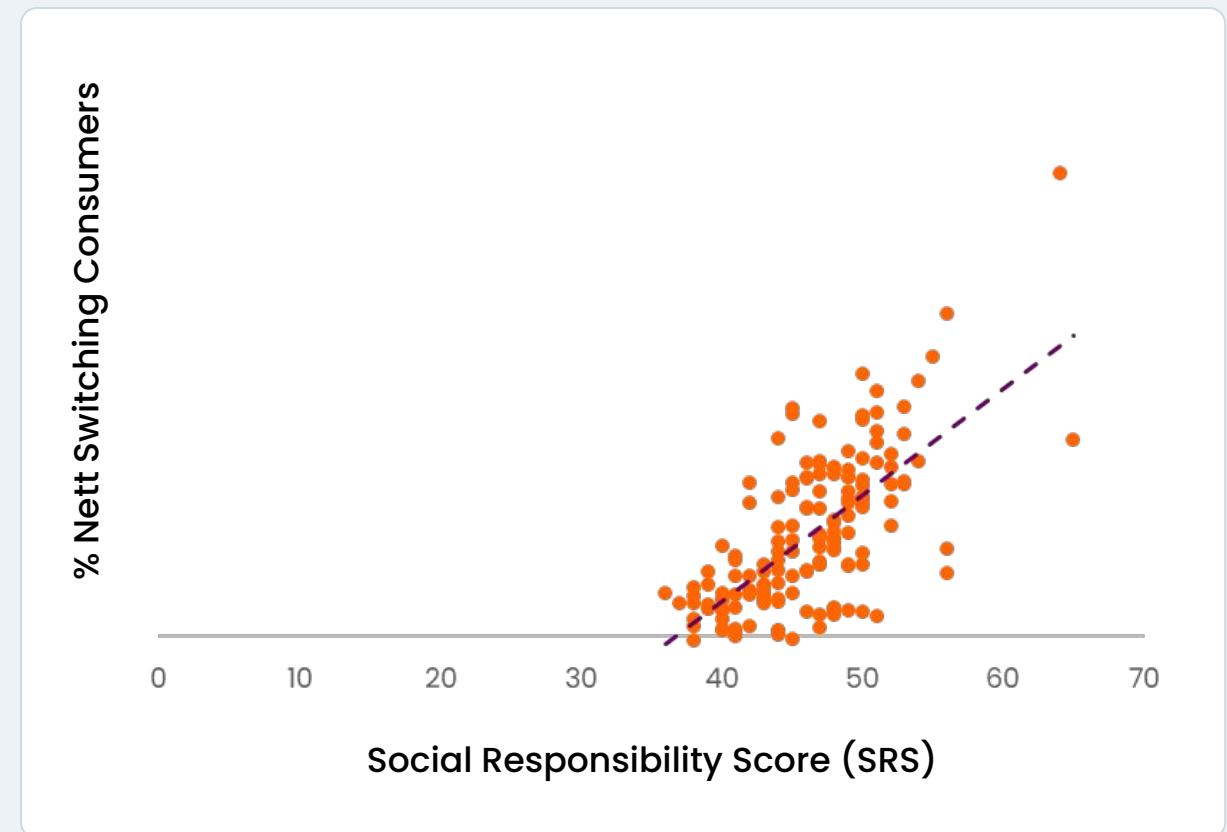
consumers say they have **started or stopped** using a F&G brand based on the **brand's ESG behavior**.

7 in 10

This switching rate is higher for **Millennials** and **People with children**.

x 2

Consumers say they are **switching* into the top 10 ESG performing F&G brands** (as measured by SRS) at twice the rate of the average across all tracked brands.





Sustainability perceptions correlate with revenue growth.

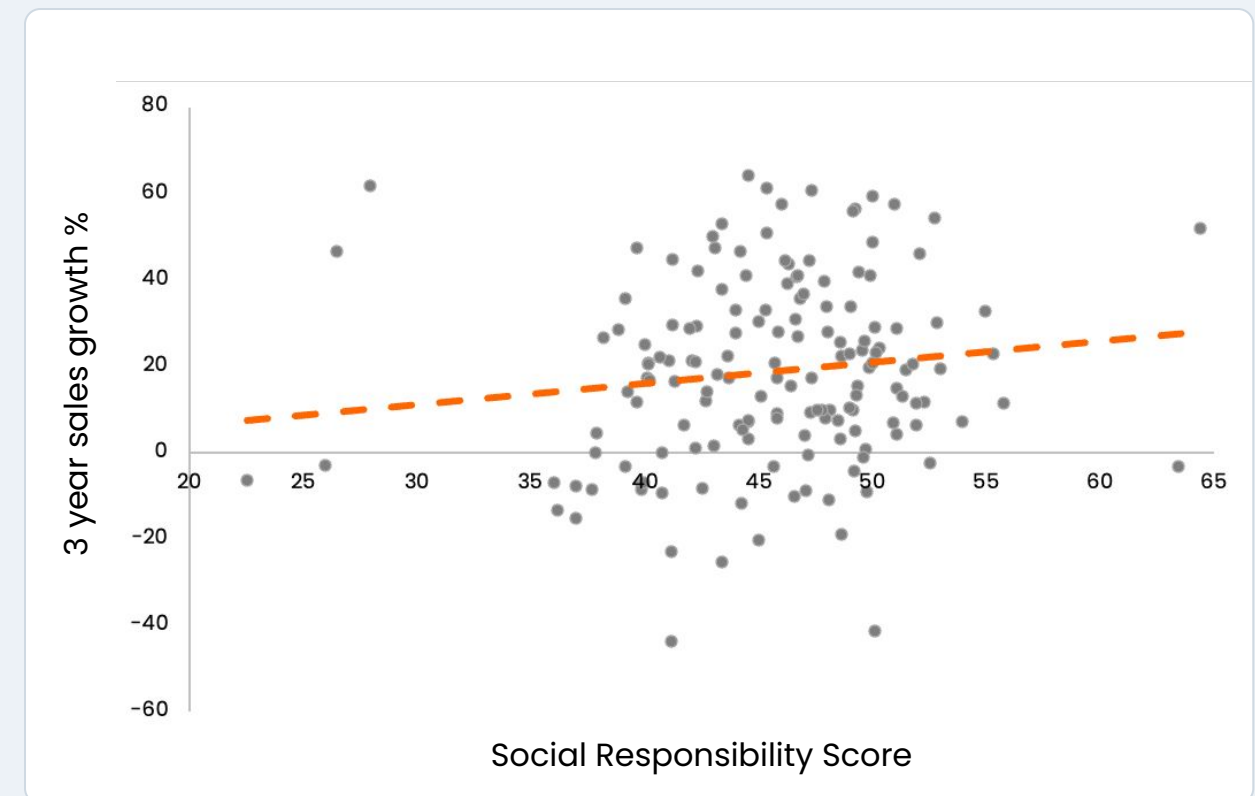
Across 2 separate studies, Glow has compared Social Responsibility Score with US sales and consumer data (supplied by NielsenIQ).

Study 1 focused on sales growth of **50 randomly selected F&G brands** (from nearly 200), while study 2 analyzed sales growth of the **150+ tracked F&G brands** in the US SRS program; utilizing over \$1Trn in annual sales data. **Both studies showed a positive correlation between SRS performance and revenue growth.**

The latest study showed that a 2 point higher SRS was equivalent to 1% point more in revenue growth over 3 years.

For example, a \$500M turnover brand that had an SRS 10 points higher than their similarly sized competitor would, on average, expect to see an additional \$25M in revenue over 3 years.

This supports NielsenIQ analysis (see [Section 5](#)) that shows brands with sustainability claims on pack grow on average 1.7% points faster p.a. than those without.





It is vitally important for companies to contribute to supporting society and the planet. And there is a growing body of evidence that doing so is more than the right thing to do, it is good for business. This report provides further evidence from Glow and NielsenIQ that those who are leading in consumers' minds are already reaping the commercial benefits and are best placed for future success.



Julia Collins
Founder & CEO

PLANET→FWD™



03. Drivers

**What drives
sustainability
perception.**

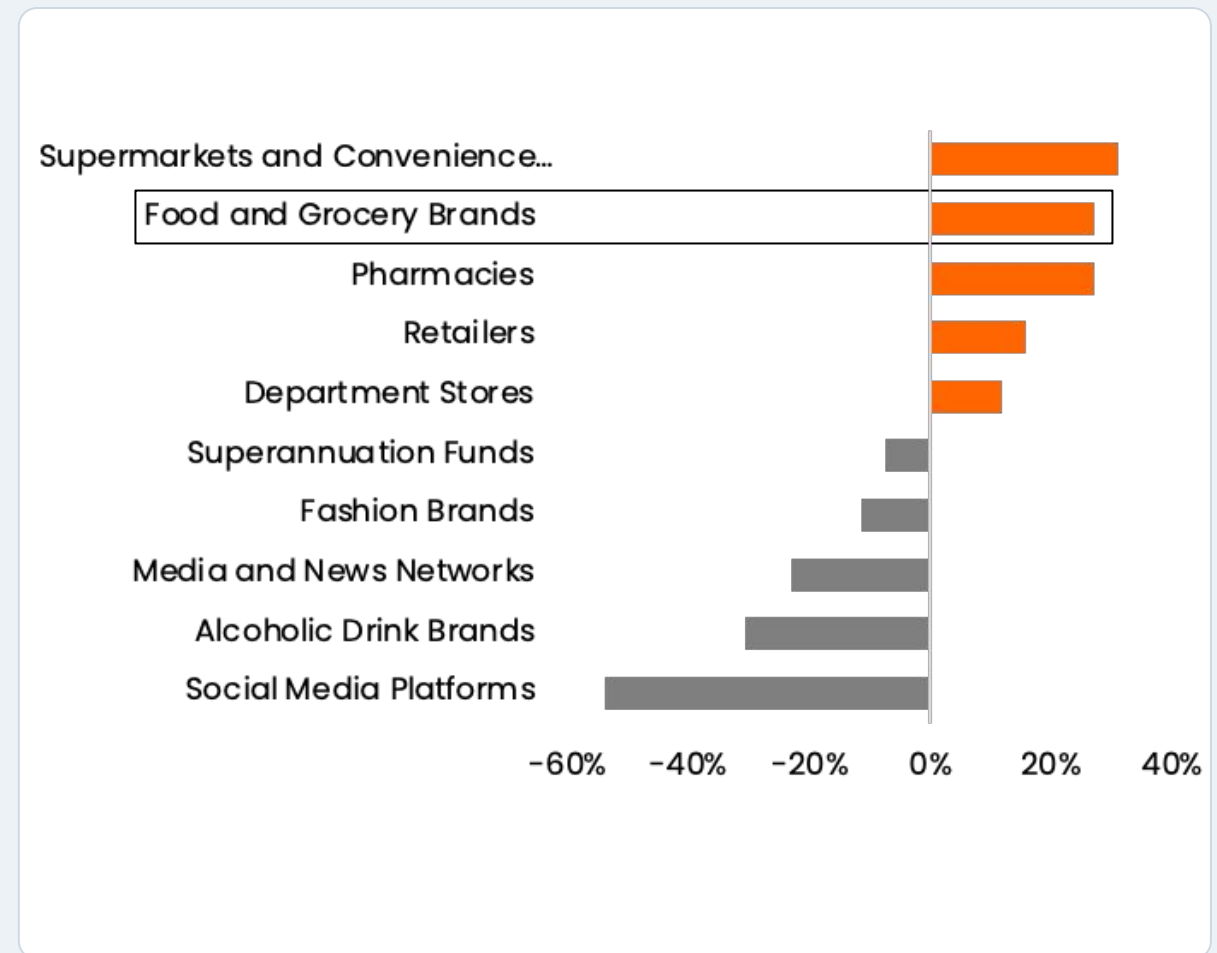


The F&G industry is seen as a leader in social and environmental responsibility.

Rank	% Difference (vs. average of all industries measured)
#2 / 20	+27%

The F&G industry is deemed to be one of the industries leading the way to a more sustainable future. It ranks second of 20 industries measured in this research, behind supermarkets and convenience stores.

Consistent with previous research conducted by Glow, Social Media platforms are viewed as the most socially irresponsible industry by US residents by a significant margin.





What is most important to consumers differs by industry.



There are 13 key drivers that influence consumer perception of a brand's ESG credentials.

These drivers are consistent across industries but differ in importance based on industry.

The 13 Environmental (E), Social (S) & Governance (G) drivers have been developed from 18 months of research, using over 100k data points across 3 markets and have been derived from investigation of over 40 issue areas.

The drivers enable brands to undertake detailed diagnostics and action planning in any stage of their sustainability journey.





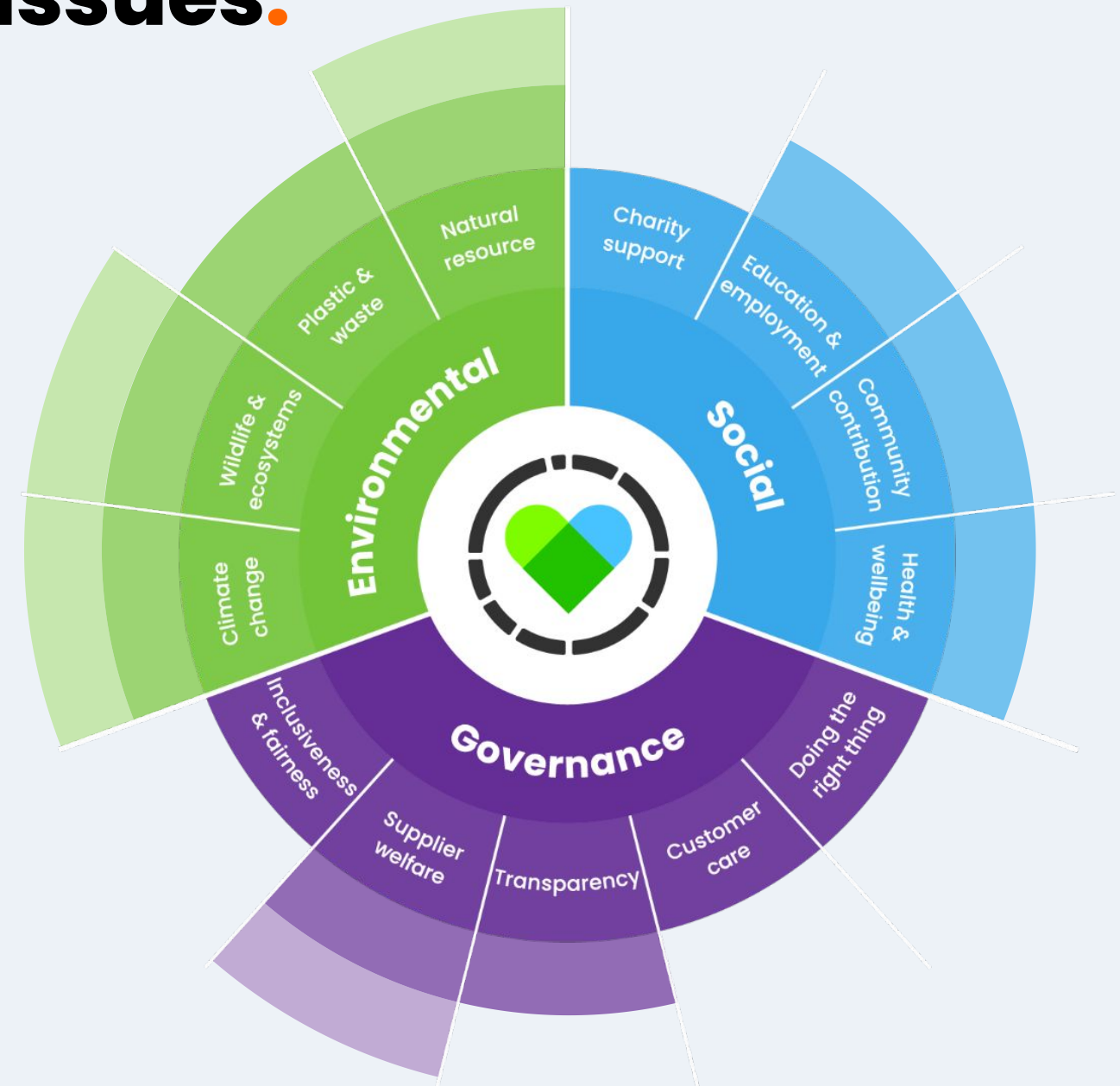
Consumers expect F&G brands to focus on Environmental issues.

The drivers that are most important in overall perception for Food & Grocery brands are:

- **Reducing emissions & climate change**
- **Respecting & protecting natural resources**
- **Protecting wildlife and ecosystems**
- **Taking care of supplier welfare**

The expectations of consumers are weighted towards the E (Environment) with 3 of the 4 drivers being deemed the most important, and the 4th not far behind.

This balance shifts across industry type (i.e. consumers want Financial Services to focus far more on Governance), but for Food & Grocery brands, caring for the environment and supplier welfare are the most important areas for the industry to focus on.





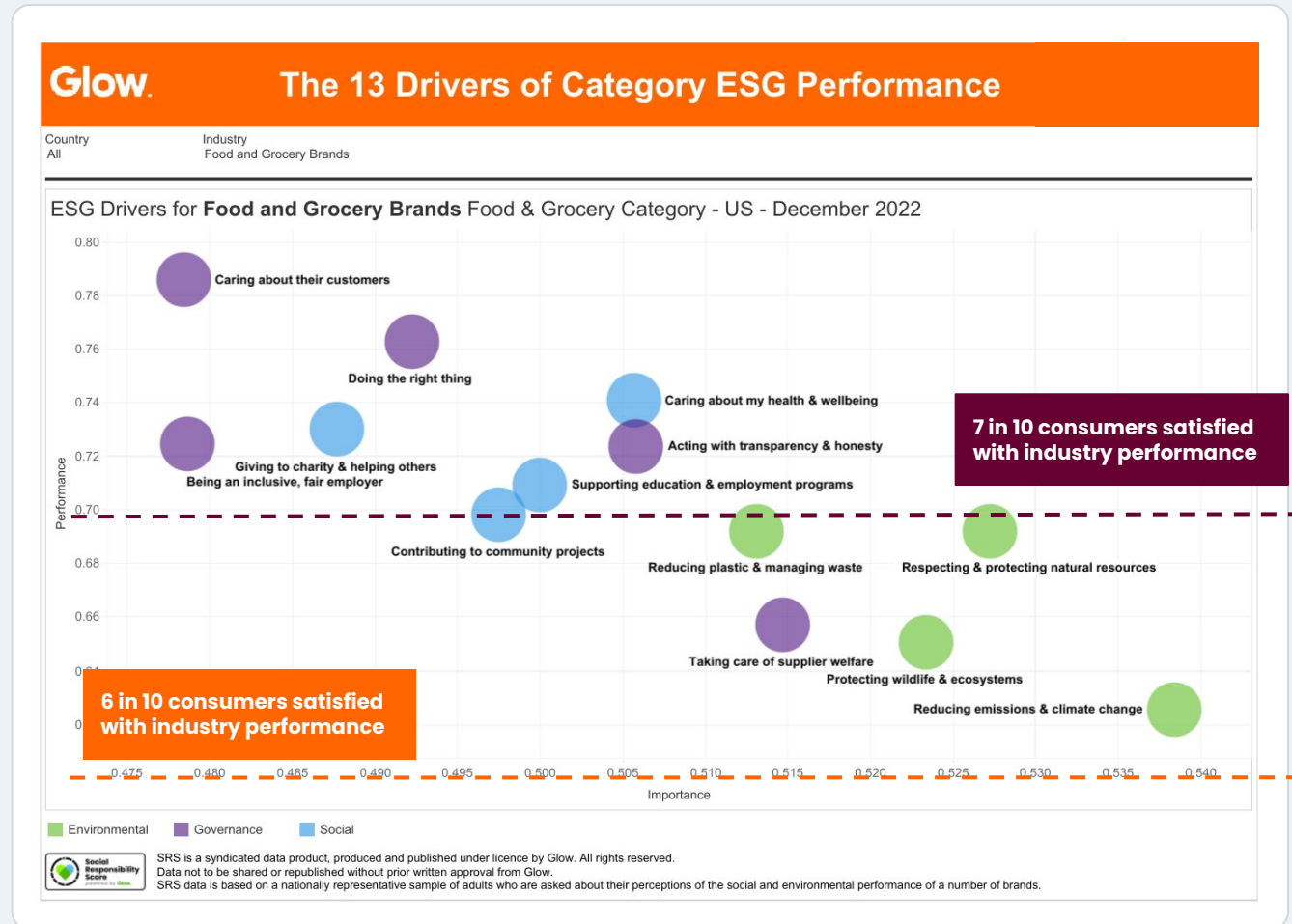
There is a gap between consumer expectation and industry delivery.

The largest opportunity gap for brands in the US F&G industry exists in the Environmental drivers. They are the most important but consumers are the least satisfied with the industry's overall performance across them.

More than 3 in 10 consumers are not satisfied with the industry's performance on any of the four Environmental drivers - with reducing emissions & climate change both the most important AND the lowest scoring driver of satisfaction measured.

Environmental drivers represent a significant opportunity for the Food and Grocery industry to raise their game to meet consumer expectations.

In addition to climate change, there is significant work to do in Protecting Wildlife and in the Governance area of Supplier Welfare. For brands that have initiatives focused in these areas, opportunities exist to further educate consumers.





Social and Governance issues increase in importance within specific departments.

Environmental issues remain important across every department, but we see variations of importance of other drivers.

3 key changes we see within departments are:

Health & wellbeing has increased importance for:

- Beverage
- Health and beauty

This is likely driven from the very different angles of sugar v 'wellness'

Transparency & honesty and **Customer care** become key drivers for Baby care as consumers consider the impact on their most precious family members

Plastic and waste jumps to be of greater importance to the Household department reflecting a focus within these products to move to more sustainable packaging options

	More Importance	Less Importance
Baby care	<ul style="list-style-type: none"> • Transparency & honesty • Customer care • Community contribution 	<ul style="list-style-type: none"> • Supplier welfare
Bakery and bread		<ul style="list-style-type: none"> • Emissions & climate change
Beverage	<ul style="list-style-type: none"> • Doing the right thing • Health & wellbeing 	<ul style="list-style-type: none"> • Supplier welfare
Dairy & Egg	<ul style="list-style-type: none"> • Transparency & honesty 	<ul style="list-style-type: none"> • Plastic and waste
Frozen foods	<ul style="list-style-type: none"> • Doing the right thing 	<ul style="list-style-type: none"> • Supplier welfare
Health and Beauty	<ul style="list-style-type: none"> • Health & wellbeing • Education & employment 	<ul style="list-style-type: none"> • Supplier welfare • Wildlife & ecosystems
Household	<ul style="list-style-type: none"> • Plastic and waste 	
Meat and Seafood		<ul style="list-style-type: none"> • Supplier welfare
Pantry	<ul style="list-style-type: none"> • Community contribution 	<ul style="list-style-type: none"> • Supplier welfare
Pet Food & Pet Products	<ul style="list-style-type: none"> • Charity support 	

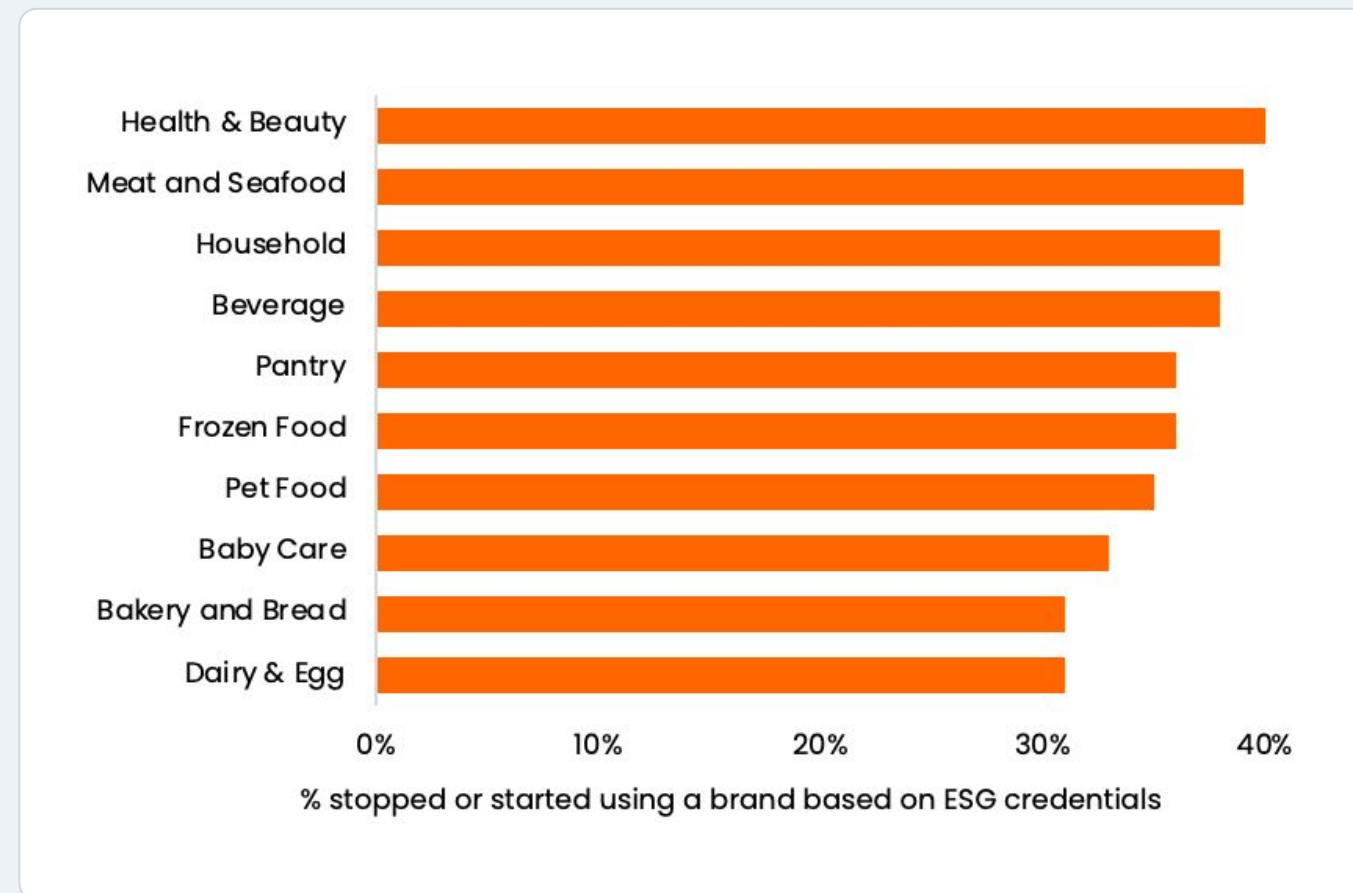


Sustainability is driving switching across all departments.

As we have already seen, 1 in 2 consumers are switching brands within Food & Grocery due to sustainability.

At a **department level** we see rates of between **30 and 40% in every one**. The **risk is even greater in some departments** (H&B, Meat, Beverage & Household) and brands here need to ensure they have an active strategy that consumers are aware of and find relevant.

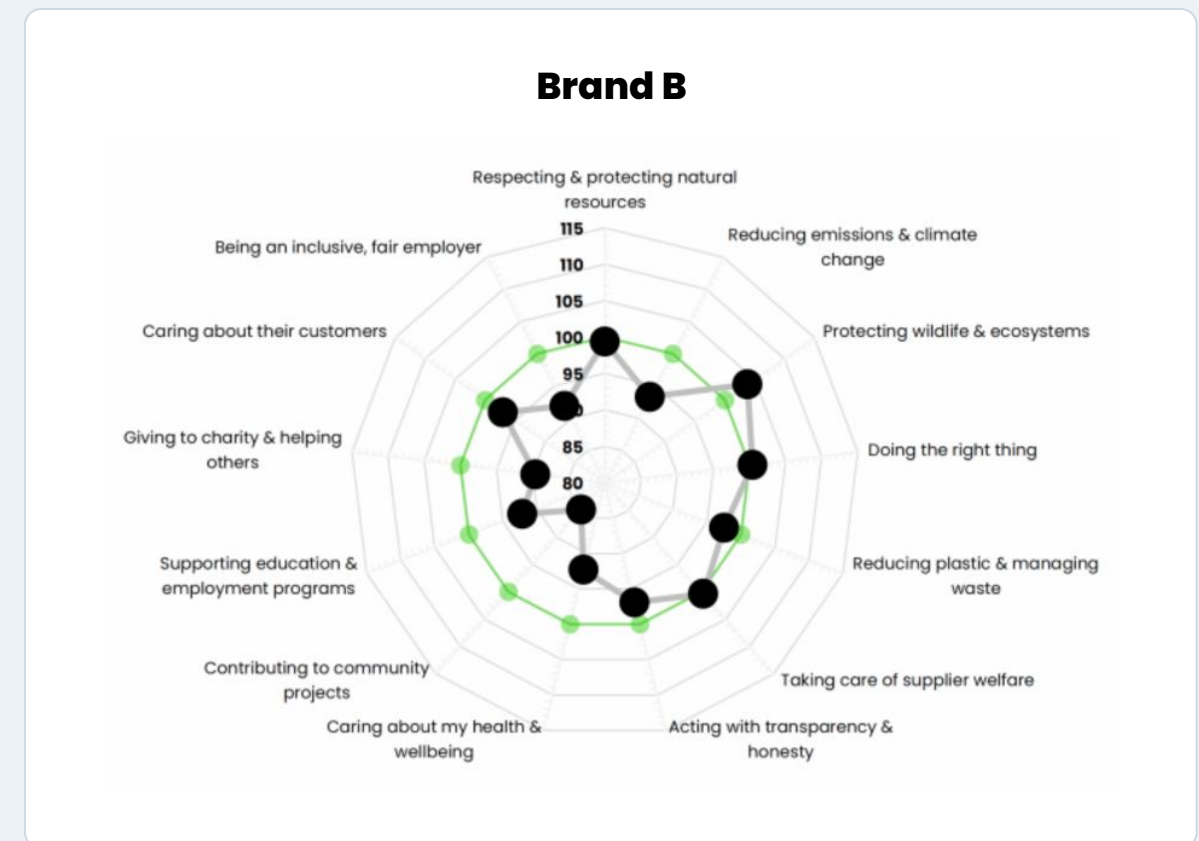
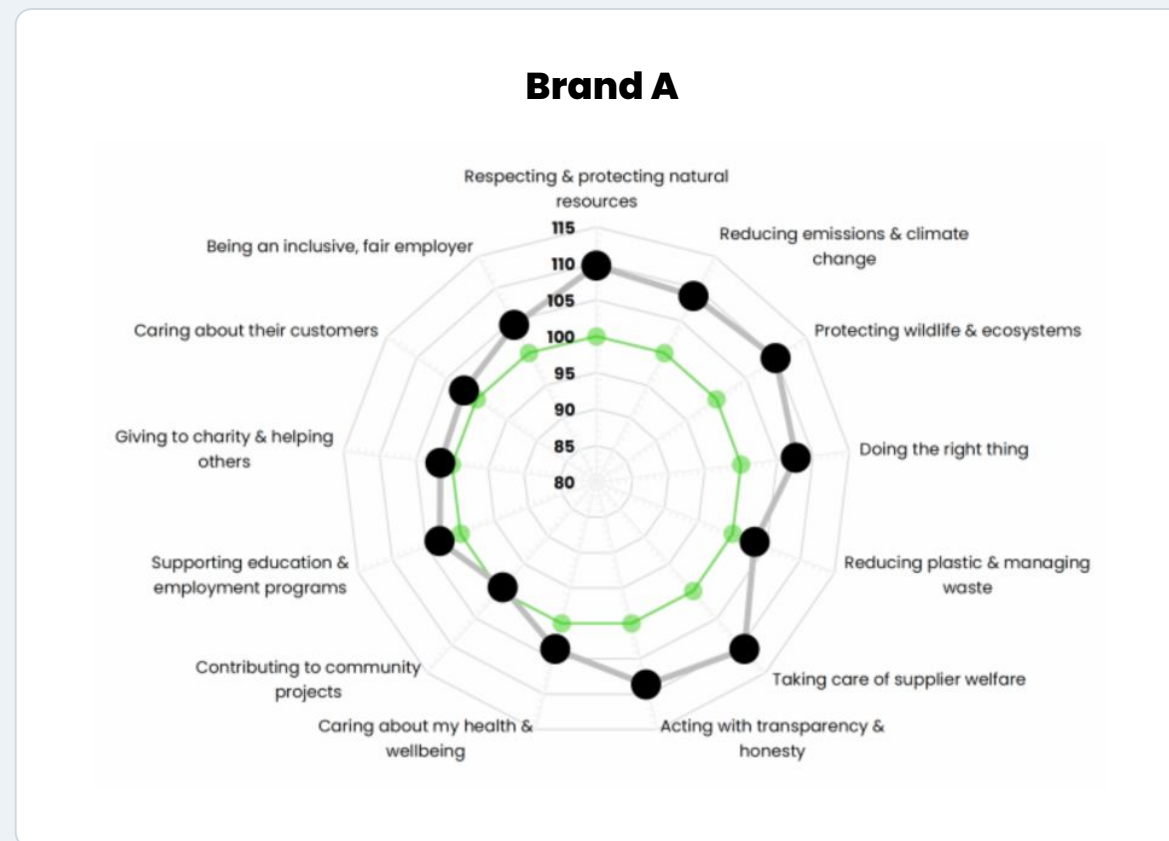
However, this data shows that **no category is immune** from this growing expectation. While the risk in Bakery and Dairy may be lower, **no business can risk losing up to a third of its consumers!**





Identifying brand specific risks & opportunities is vital to capitalize on switching.

Example: Brand A is a leader in the category and this can be seen by the strong overperformance against the industry benchmark (green ring) across a number of the drivers. When comparing to competitor Brand B, we can see they have a significant opportunity to utilise this position of strength in a number of areas, but in particular in relation to “Reducing emissions & climate change’ and ‘Acting with transparency & honesty’ where their strong overperformance is coupled with their competitor’s underperformance.





Are you leading the way in your industry?



Do you know which issues consumers expect you to address?



Does your current ESG strategy align with these issues?



Where are your competitors focused?



Are you ahead (or behind) competitors in these areas?





04. Brands

Leading brands



Consumers already have an opinion about your brand.

Individual consumers have a valid and clear opinion about brand ESG credentials. Two in three (66%) consumers had a strong opinion about the brands they were aware of, with the top brands performing almost twice as well as the bottom brands.

The distribution of scores pivots around an average SRS of 45. However, scores above 50 are reserved for the group of brands that consumers are recognizing as leading in social and environmental responsibility.

66%

2 in 3 consumers have a point of view on your ESG credentials.

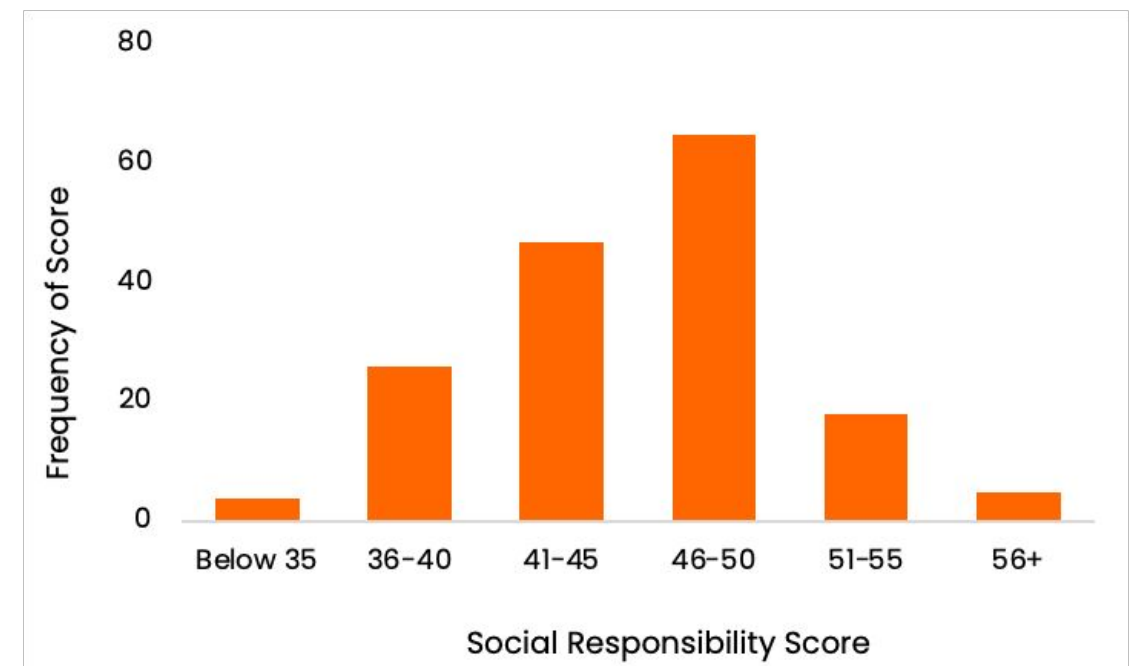
x1.7

The top 10 F&G brands score almost twice as highly as the laggards.

-14%

Gen Z are the harshest critics scoring brands 14% lower on average.

Food and Grocery brand average SRS* = 45





Where does your brand sit?

The chart provides examples of tracked brands in the distribution of scores, using a selection of brands from the 165 currently under measurement in the US.

The leading brands score above 50 with the top 22 detailed on the next two pages.

Brands performing well below average, labelled as 'laggards' have been anonymised.

Are you leading or lagging?





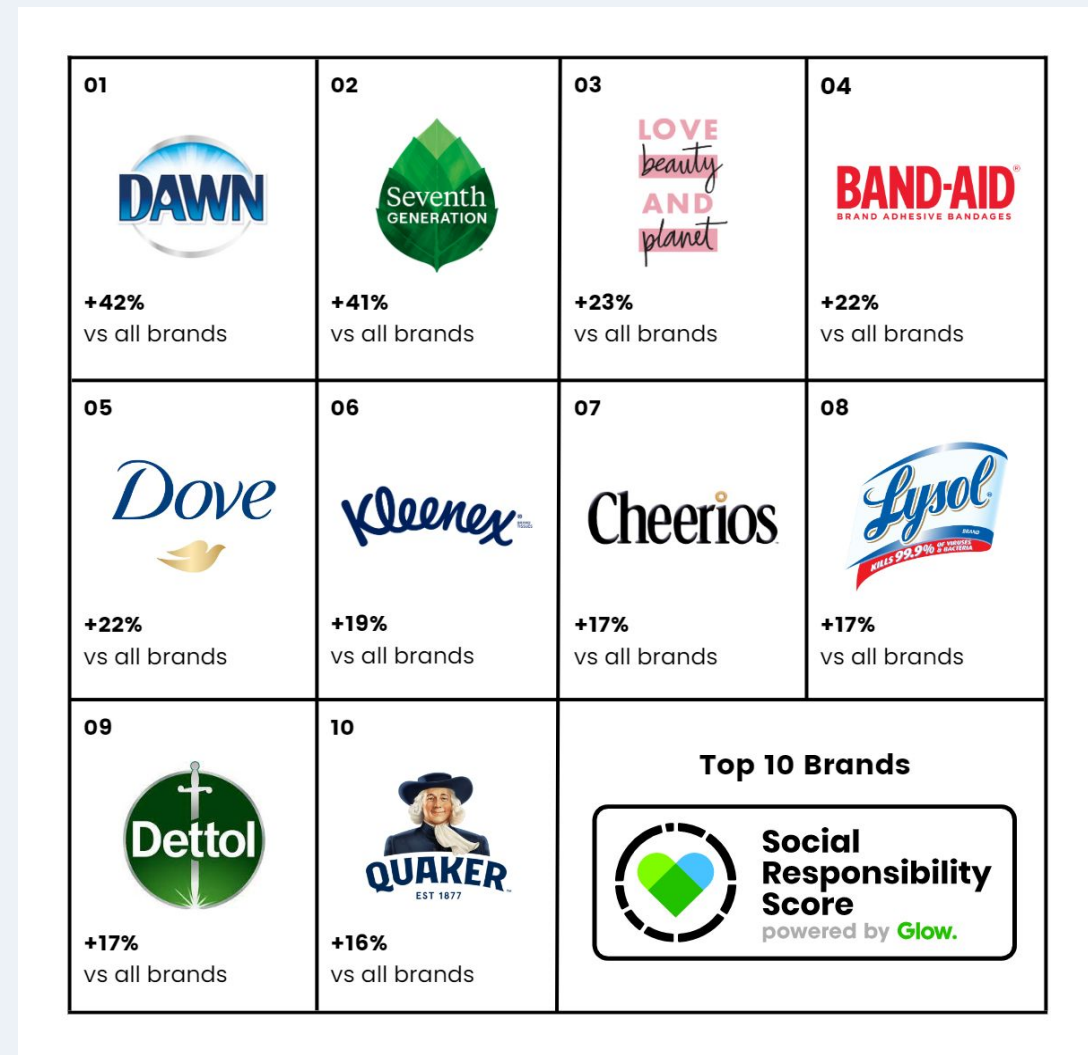
The most responsible F&G brands, according to consumers.

The top 10 most socially and environmentally responsible F&G brands* according to consumers span a range of categories across household, health and beauty, and breakfast.

The majority have strong environmental programs, focusing on efforts to reduce their footprint and avoid chemicals that are toxic to the environment.

However social and governance programs are also represented via Dove (Health & Wellbeing), Quaker (Health & Charity), and Cheerios (Fair & Inclusive) among others.

To find out where your brand stands, contact us at socialresponsibility.com

















Other leading F&G brands.

Another 12 brands have an SRS of over 50, marking them out as brands being recognized by consumers for their efforts in the ESG space.

These brands span the dental hygiene, medicinal, chocolate, pantry, household and juices categories.

To find out where your brand stands, contact us at socialresponsibility.com

11  +16% vs all brands	12  +15% vs all brands	13  +15% vs all brands	14  +14% vs all brands
15  +14% vs all brands	16  +13% vs all brands	17  +13% vs all brands	18  +13% vs all brands
19  +13% vs all brands	20  +12% vs all brands	21  +12% vs all brands	22  +12% vs all brands



Spotlight on #1

Dawn.



Dawn uses partnerships to activate their ESG mission, with a focus on environmental contribution. Dawn engage in long-standing collaborations with organizations that save wildlife, especially those affected by environmental disasters such as oil spills, where the Dawn product is used to clean birds' feathers to prevent them from drowning.

Hear what consumers like about Dawn's social and environmental behavior:



Donations and helps clean up environmental disasters

Male / 35-44 years
Arkansas



They take pride in helping save wildlife

Male / 55-64 years
New Jersey



Cleaning up animals that have been injured by oil spills

Male / 55-64 years
Alaska





Spotlight on #2

Seventh Generation.



Seventh Generation is named after the principle of considering the next seven generations in all decisions and products it produces. The brand epitomises the focus on long-term impact with programs that span the ESG spectrum, but consumer recognition is primarily driven by their actions focussed on reducing their environmental impact.

What people like about Seventh Generation's social and environmental behavior:



Their laundry detergent is biodegradable and made with plant-based materials and safer for the environment

Female / 55-64 year
New Jersey



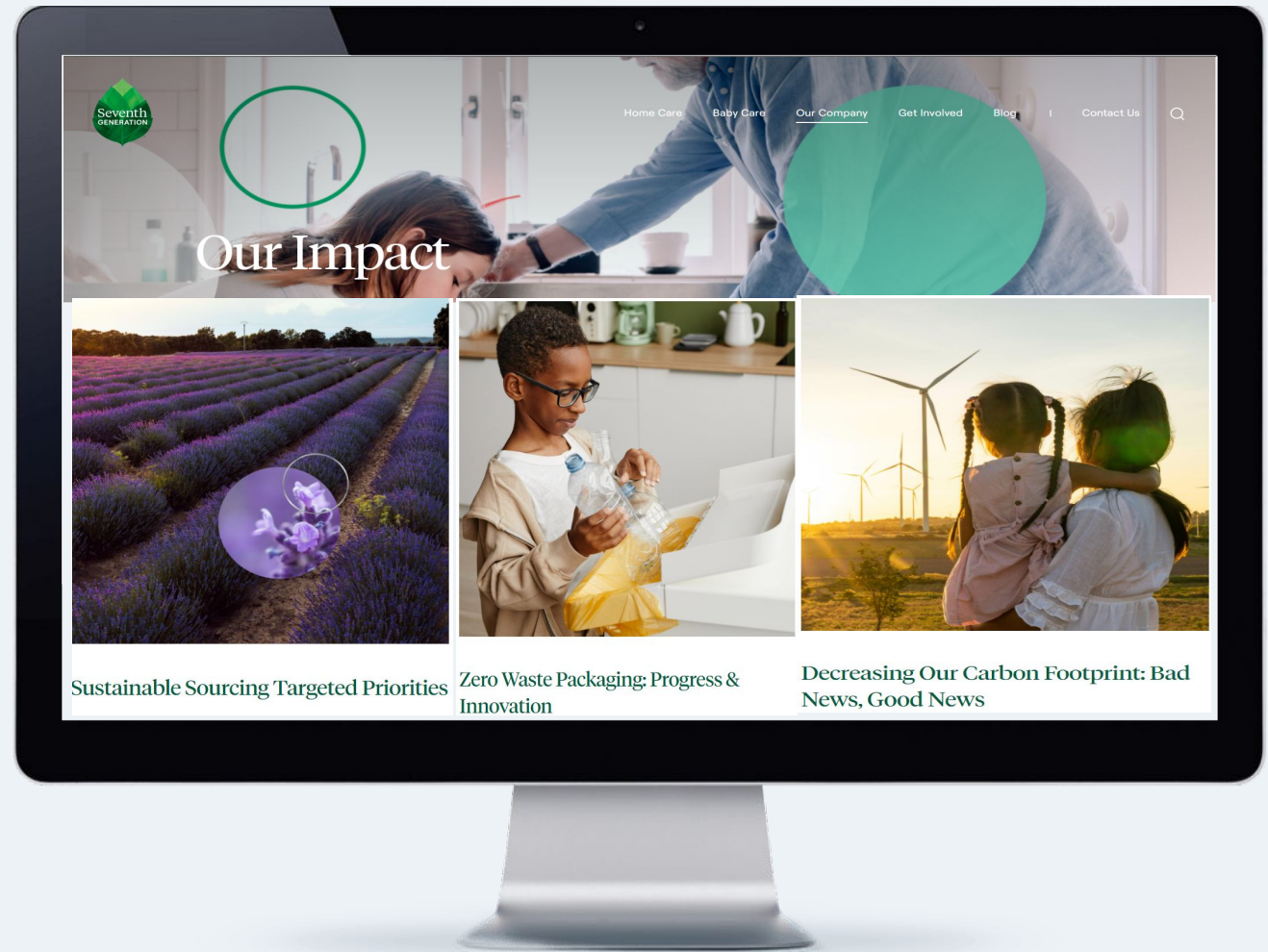
Their products are more natural than others. The containers are recyclable

Female / 65 years or over
Ohio



Reducing harmful practices

Female / 35-44 years
Michigan





Spotlight on #5

Dove.



Dove is an example of a top 10 brand that focuses very clearly on the social element of ESG. Dove is best known for its real beauty initiatives, a range of programs designed to promote positive body image, self-esteem, diversity and inclusion amongst both adults and children. Their work with youth is increasingly pertinent given growing challenges around mental wellbeing, self-confidence and body image amongst this audience.

What people like about Dove’s social and environmental behavior:

“
Going against body shame

Male / 18-24 years
Illinois

“
Helping young girls feel better about themselves

Female / 55-64 years
Pennsylvania

“
They embrace women of all races and sizes. They are totally inclusive

Female / 55-64 years
Alabama





Spotlight on #6

Kleenex.



Kleenex has a multi pillar ESG commitment, with significant programs operating across both environmental and social dimensions.

When it comes to caring for the environment, Kleenex undertake a range of initiatives, including sourcing 100% of wood fibres from sustainable sources and utilising wind energy to power 100% of its tissue production. They also partner with Arbor Day to plant trees. On the social side, their efforts centre around improving educational outcomes for children.

What people like about Kleenex's social and environmental behavior:



Kleenex is destroying less trees and helping plant more for the future

Male / 35-44 years
Georgia



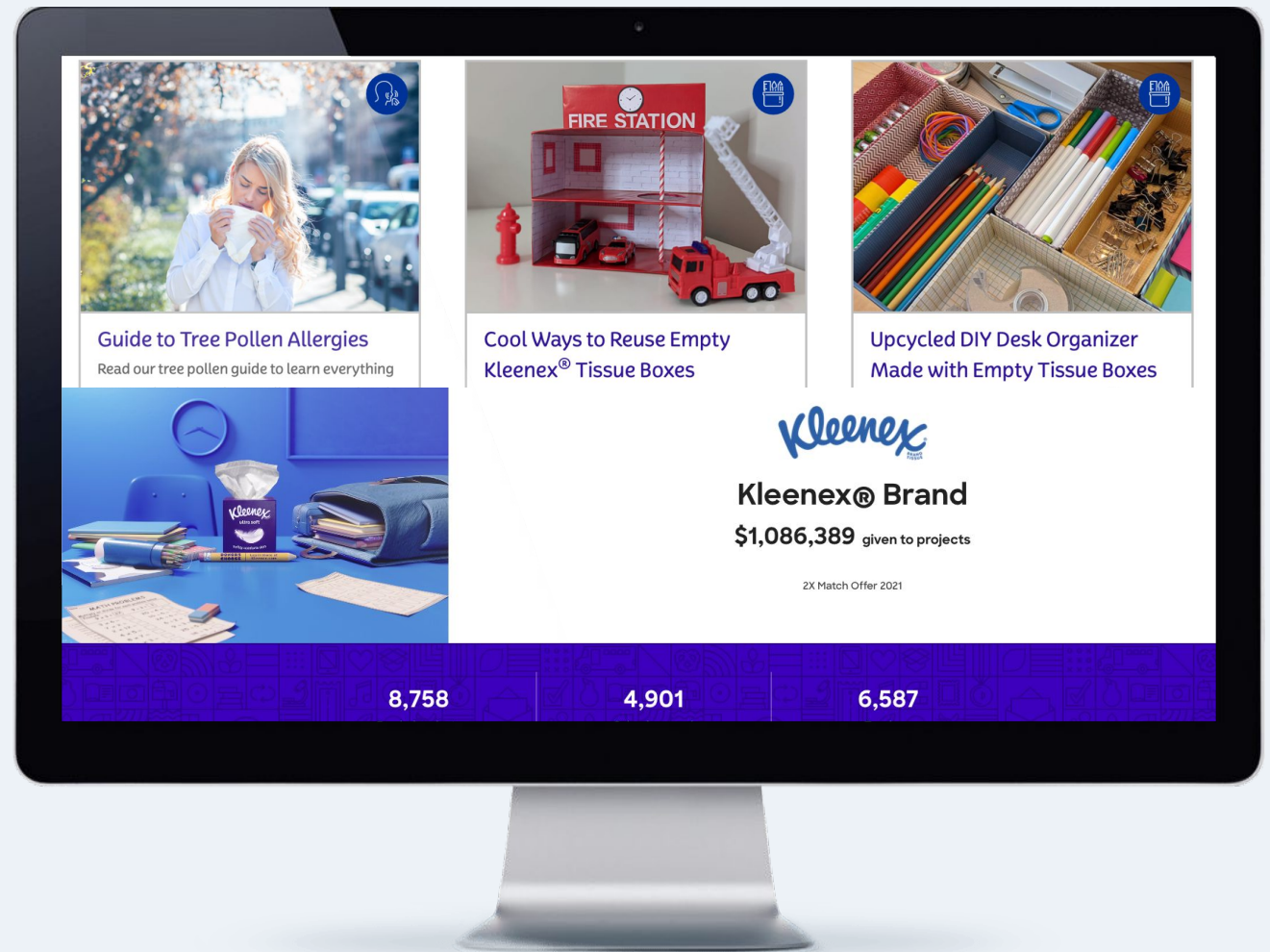
It comes in a paper box and the tissues are paper of which both are biodegradable

Female / 55-64 years
Alabama



They use recycled materials

Female / 55-64 years
Pennsylvania





Spotlight on #10

Quaker.



Quaker's focus on nourishing Americans is at the core of the brand's social contribution. They are enabling this through donations to bring food to those in need across the US (via \$50m and 50m nutritious meals). This is supplemented with the provision of essential relief to over 40 other countries around the globe.

What people like about Quaker's social and environmental behavior:



Is heart healthy and does things for the community

Female / 45-54 years
Illinois



I like their sustainable farming methods

Male / 25-44 years
South Carolina



Reflects back to better eating choices

Female / 45-54 years
Virginia





Even the leading brands have cohorts of fans.

Even amongst the leading brands, there can be differences in perception across demographic groups, making it important to understand who your fans are.

Example: Quaker and Kellogg's are both in the top 15 F&G brands in terms of consumer perceptions of social and environmental responsibility.

Both brands are underperforming when it comes to Gen Z, especially Quaker. But that's where the demographic similarities end.

Boomers are driving Quaker's score while Gen X are driving Kellogg's.

When it comes to household income, there's a slightly more favorable opinion of Quaker among lower income households, whereas there is no difference for Kellogg's.





Social and environmental performance is critical even in an economy with rising cost of living. Now more than ever, if brands want to retain and win consumers, they must stand for something.

All consumers are looking for ways to save money. They will need a compelling reason why they shouldn't walk away from your brand for a cheaper alternative! Along with quality, sustainability is a key barrier to change, especially for Millennials.



Mike Johnston
Managing Director Data Products





Are you reaping the rewards of changing behavior?



Who are your sustainability advocates (and detractors)?



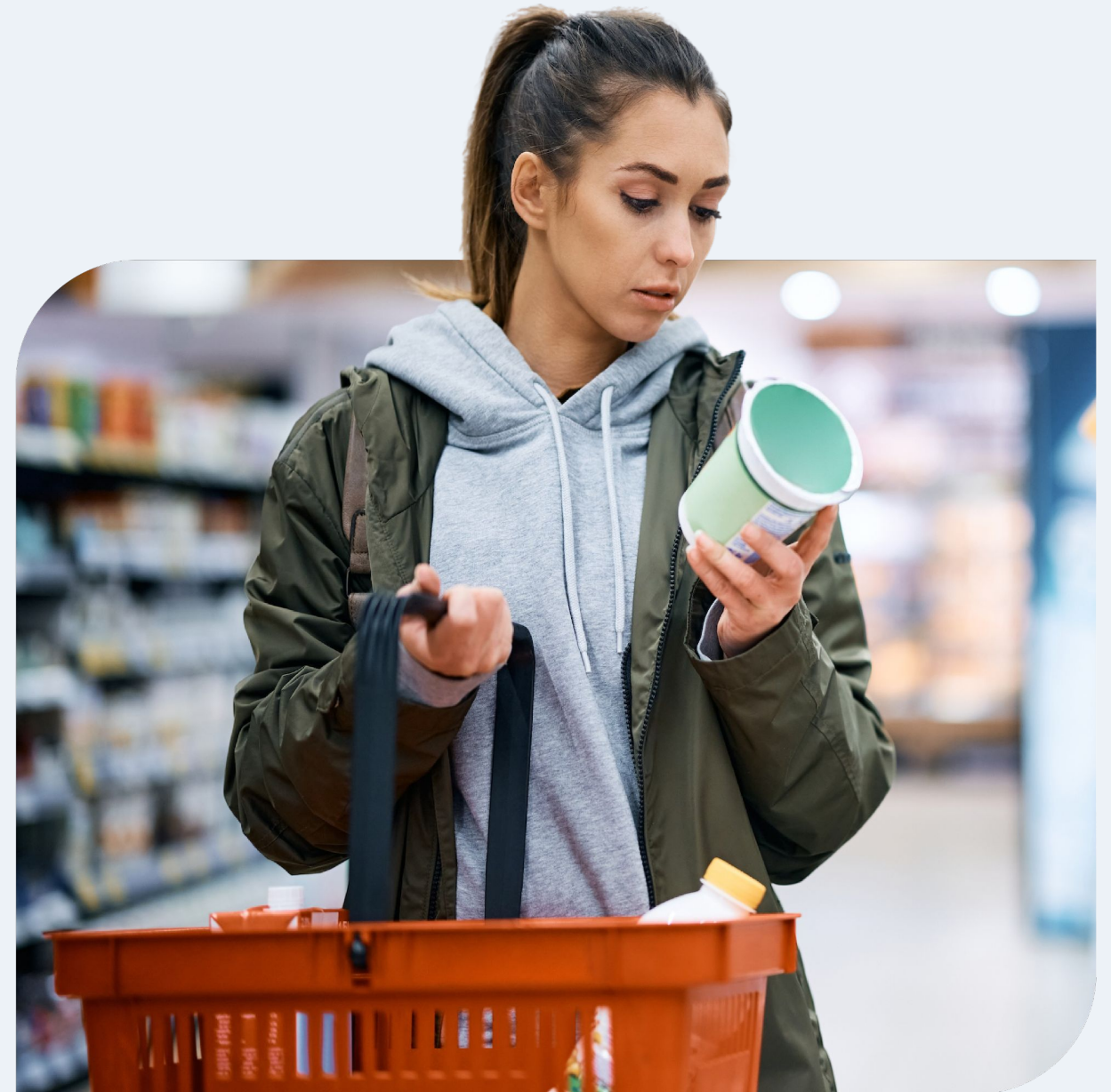
What are they responding to?



Are you benefitting or losing from ESG led switching?



What is driving switching in or out?





05. Communication

Telling your story.



Where you communicate matters.

The most common places where people learn about brands' ESG efforts are via news and media coverage, through advertising and via social networks. When you consider where people would **prefer** to receive ESG information, there are some significant changes. Trusted news sources and advertising remain key, but brand communications on-pack and via brand websites become significantly more important. It is also important to consider target audiences as Gen Z and Millennials view social media as more important than other demographics. Overall, this highlights the need for brands to **leverage their owned assets to tell their sustainability story as well as using marketing campaigns to broaden their reach.**

Where do you **normally learn** about a company or brand's environmental and social programs and behavior?

35%	News & media coverage
31%	Advertising
29%	General social media
27%	Friends/family
23%	Product packaging
18%	Company/brand website
17%	Instore (physical or online)
16%	Company/brand social media activity
11%	Company/brand communications
4%	Events and conferences

Where would you **prefer to learn** about a company or brand's environmental and social programs and behavior?

News & media coverage	28%
Product packaging	27%
Advertising	26%
Company/brand website	22%
General social media	22%
Friends/family	19%
Instore (physical or online)	18%
Company/brand social media activity	15%
Company/brand communications	14%
Events and conferences	5%



Brands with on-pack claims grow faster.

Packaging is a key channel to communicate ESG response and one that consumers want brands to utilize more. But the use of on-pack ESG claims is also linked to clear sales returns.

NielsenIQ's analysis of growth from products across over 30 categories with on pack wellness / sustainability claims showed an average increase of 1.7% points p.a. revenue growth versus those products without.

Products that make environmental, social, and governance-related claims have achieved disproportionate growth.

Retail sales growth, US, CAGR 2018-22, %



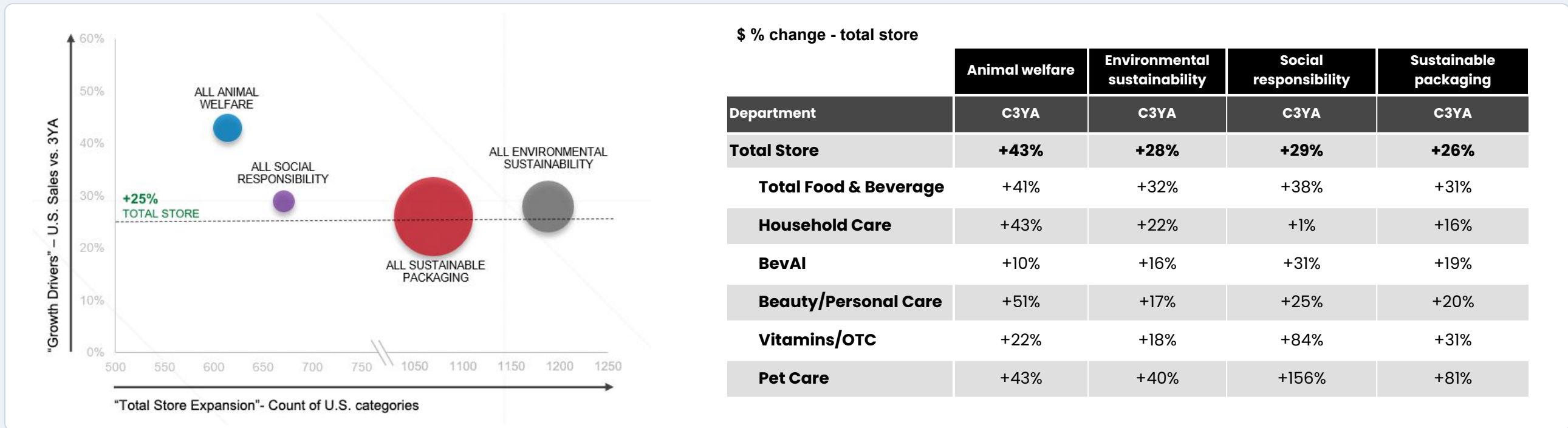
Across **32 categories analyzed**, products with claims have experienced **1.7% points more growth p.a.** (8.1% points cumulative) in the past five years than products without them.



What you communicate on-pack determines the growth impact.

According to NielsenIQ data, Animal Welfare claims are the type of on-pack messages driving the highest growth over a 3 year period - a clear opportunity given these are less prevalent than the other message types.

However, the data reinforces that the messaging also needs to be relevant to the product category itself. For example BevAI, Vitamins and Pet Care have the largest growth from social responsibility message types, while in Pet Care sustainable packaging is more impactful than elsewhere.



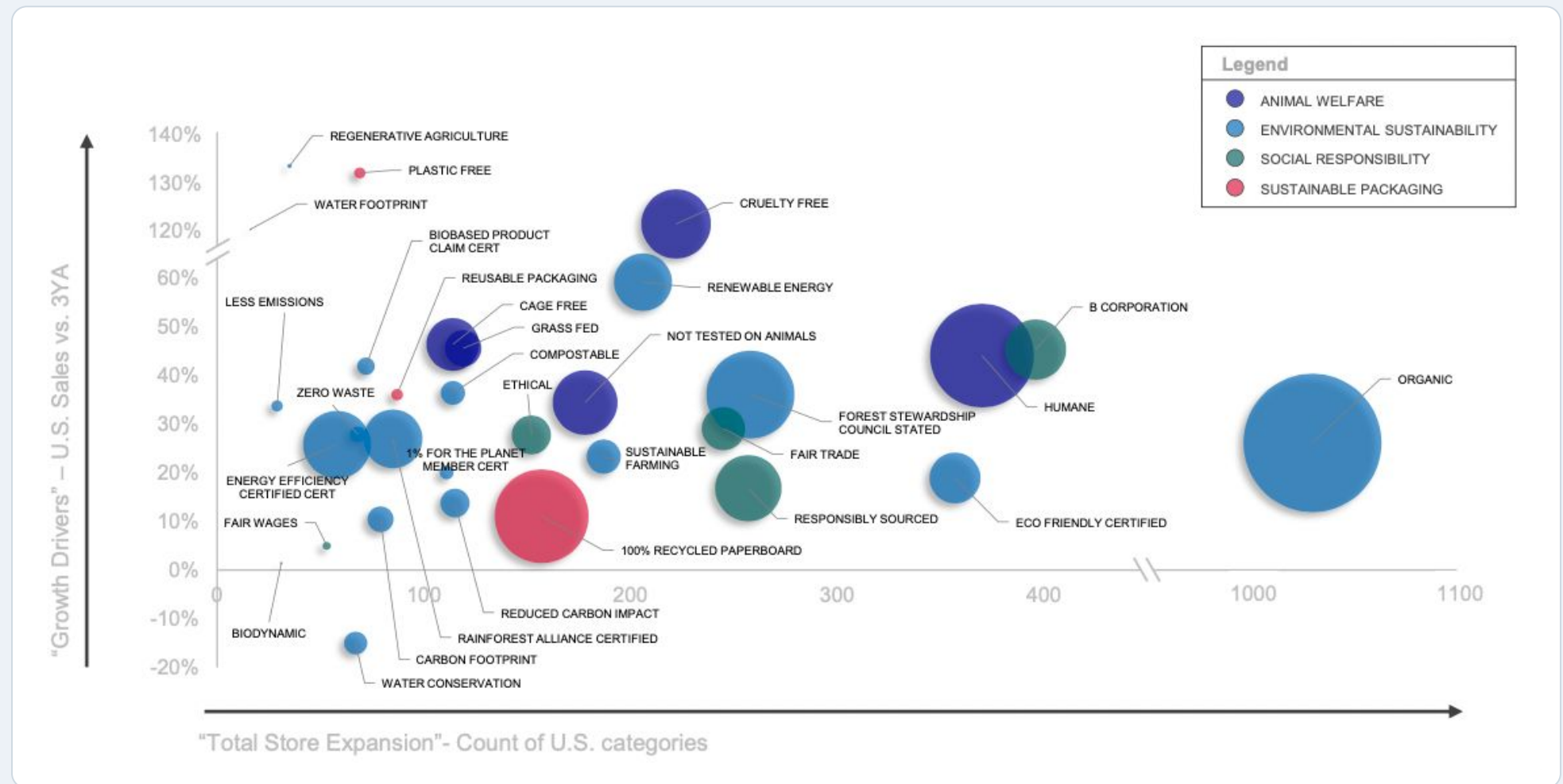


Not all on-pack claims are equal - specific claims see more significant growth.

NielsenIQ analysis of on-pack claims against sales growth shows the largest growth drivers are:

- Regenerative Agriculture
- Plastic Free
- Cruelty Free
- Water Footprint
- Renewable Energy

These claims are currently concentrated to far fewer categories than claims that see lower growth rates such as B Corporation, Eco Friendly Certified and Organic.





Greater breadth of on-pack claim types is associated with higher growth.

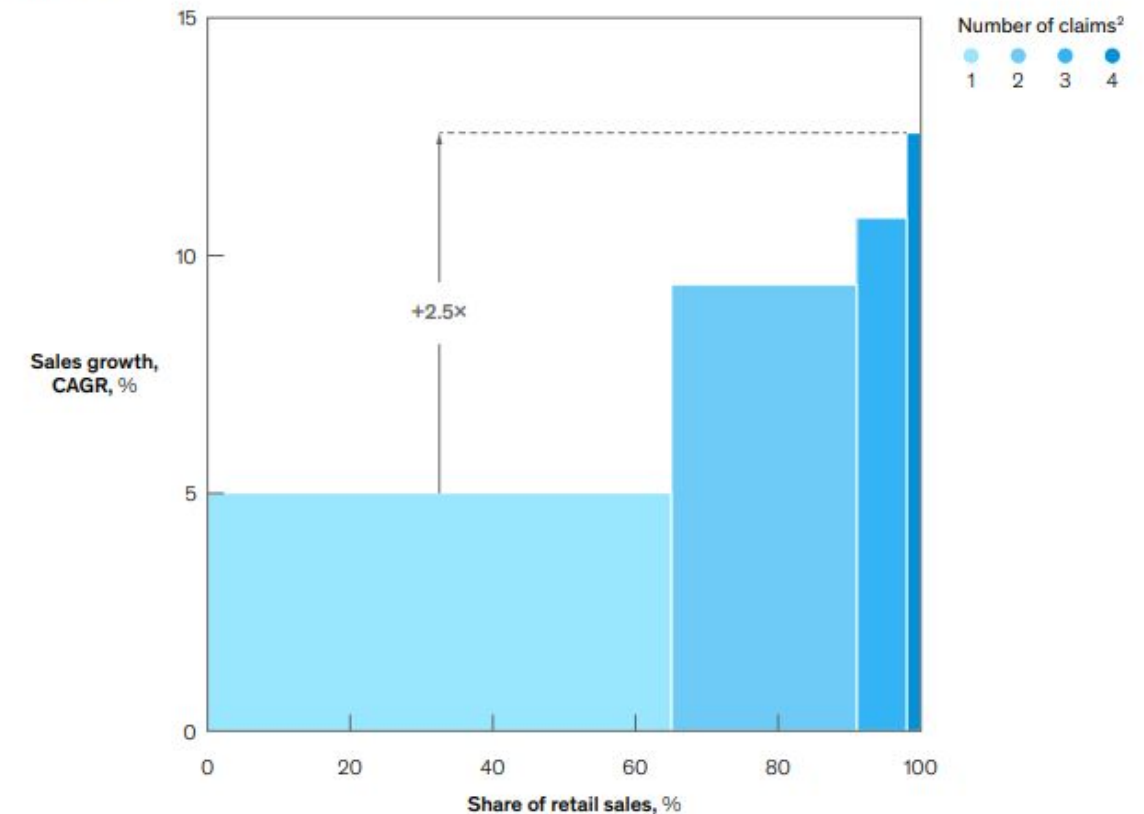
NielsenIQ analysis shows that ‘stacking’ of claims across the 4 types (see previous chart) results in higher long term growth - with each additional claim type the average growth rates increase.

The importance of on-pack messaging is also clear from analysis of the top performing SRS brands. The top 10 have both greater stacking of claims and more claims overall than those ranked 11 to 30:

- 40% of top SRS brands have claims across all 4 types (vs. 10% in brands ranked from 11 to 30)
- 60% of top SRS brands have claims across at least 3 types (vs. 40% in brands ranked from 11 to 30)
- The top 10 SRS brands have on average 50% more claims overall than brands ranked 11 to 30

This analysis suggests that becoming an ESG leader in consumers’ minds requires clear and clever use of on-pack messaging to reinforce your ESG credentials.

Sales growth vs share of retail sales by number of ESG¹-related claims made by a product, US, 2018-22





Measuring opinion supports program optimization.

Mondelez is a leader in their categories and a corporate brand with a purpose (“the right snack for the right moment made the right way”) that puts ESG elements at the core of what they do. Glow partnered with Mondelez to embed SRS within their measurement and insight framework.

Research confirmed that consumers in Australia see the Mondelez chocolate brand, Cadbury, as an ESG leader within its category and pinpointed areas of strength that drove this outperformance.

The program also measured awareness of 6 key ESG programs run locally and globally by Mondelez. The findings showed SRS was a massive 94% higher for people aware of any of the brand’s specific programs compared with people who weren’t.

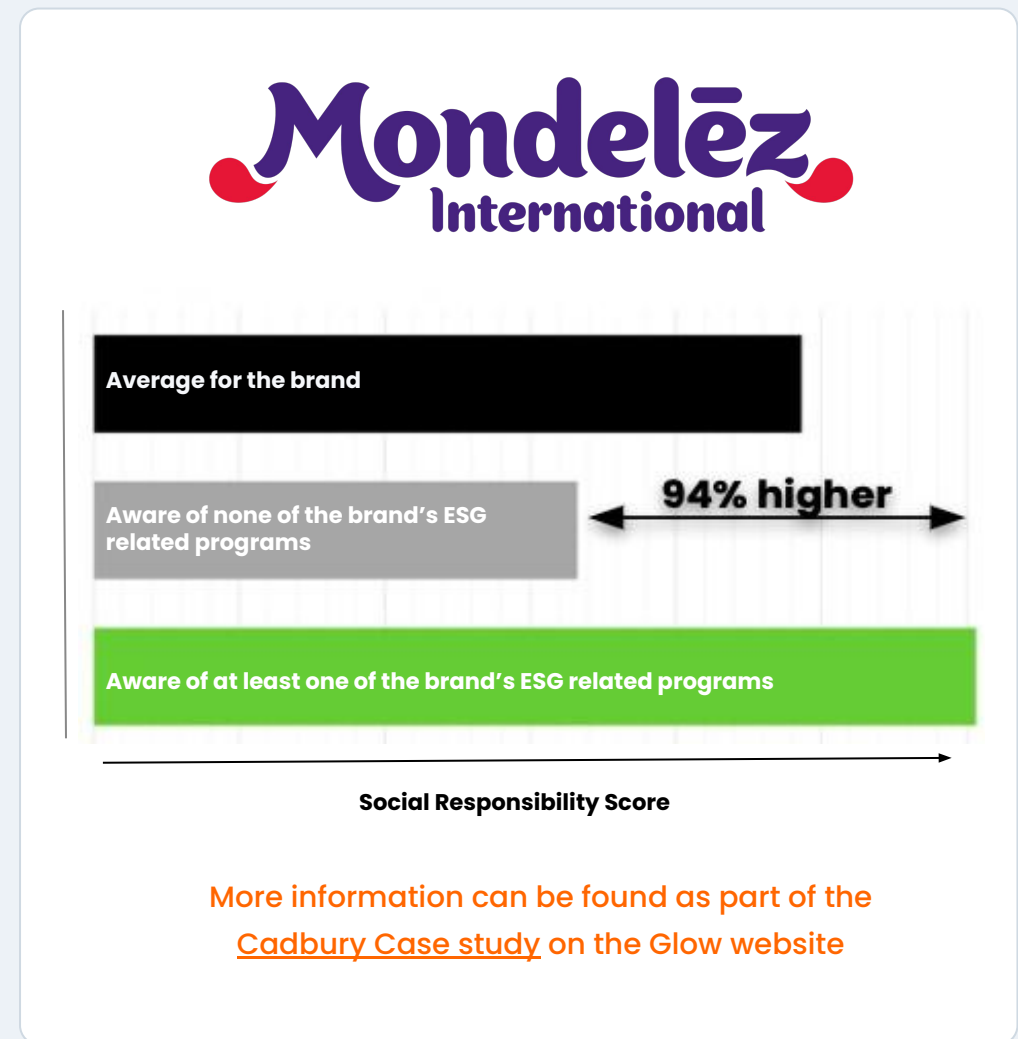
The implication is clear – brands must actively and effectively communicate their program efforts and progress in order to gain the recognition they deserve.



Glow’s ESG program has provided us with fresh and powerful insights into consumer perceptions of our ESG performance that will influence not only our program communications strategy but also our investment approach.



Dion Brogan
Senior Consumer Insights Manager, ANZ





Consumers want to hear about what brands are doing to support people and the planet. And they want that information through credible sources, including close to point of purchase: on-pack and through digital discovery on retailer sites. Brands doing that well can be seen as sustainability leaders and reap the benefits in terms of growth.



Sherry Frey
VP Total Wellness

NielsenIQ



Are you telling your story effectively?



Are you communicating the journey or the destination?



Are you telling your story in the right places?
(especially on-pack)



Are your consumers aware of your specific programs?



Are you maximising the consumer impact of your actions?





06. Next steps

**Your
sustainability
journey.**

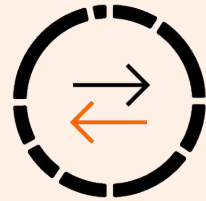


Key outtakes from the report.

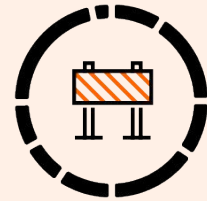
Outtake



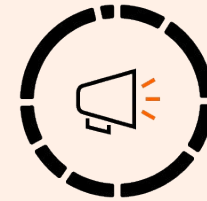
Sustainability is good for business



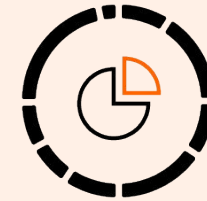
Consumers are switching based on sustainability considerations



Sustainability can be a barrier to trading down



Where and what you communicate matters



F&G leads but an opportunity exists in the expectation / performance gap

Questions to answer

Are your ESG priorities aligned with your consumers' expectations?

Are you ahead or behind the competition?

What is your risk/reward profile?

Who are your fans (and detractors)?

Where are the growth opportunities?

Are you using the right communication channels?

Is your messaging optimal?

Is there an investment or communication gap in the programs that matter most to consumers?

Opportunity

Build or evaluate your strategy to ensure it addresses stakeholder needs, including end consumers

Use your market position to create opportunity or reduce risk

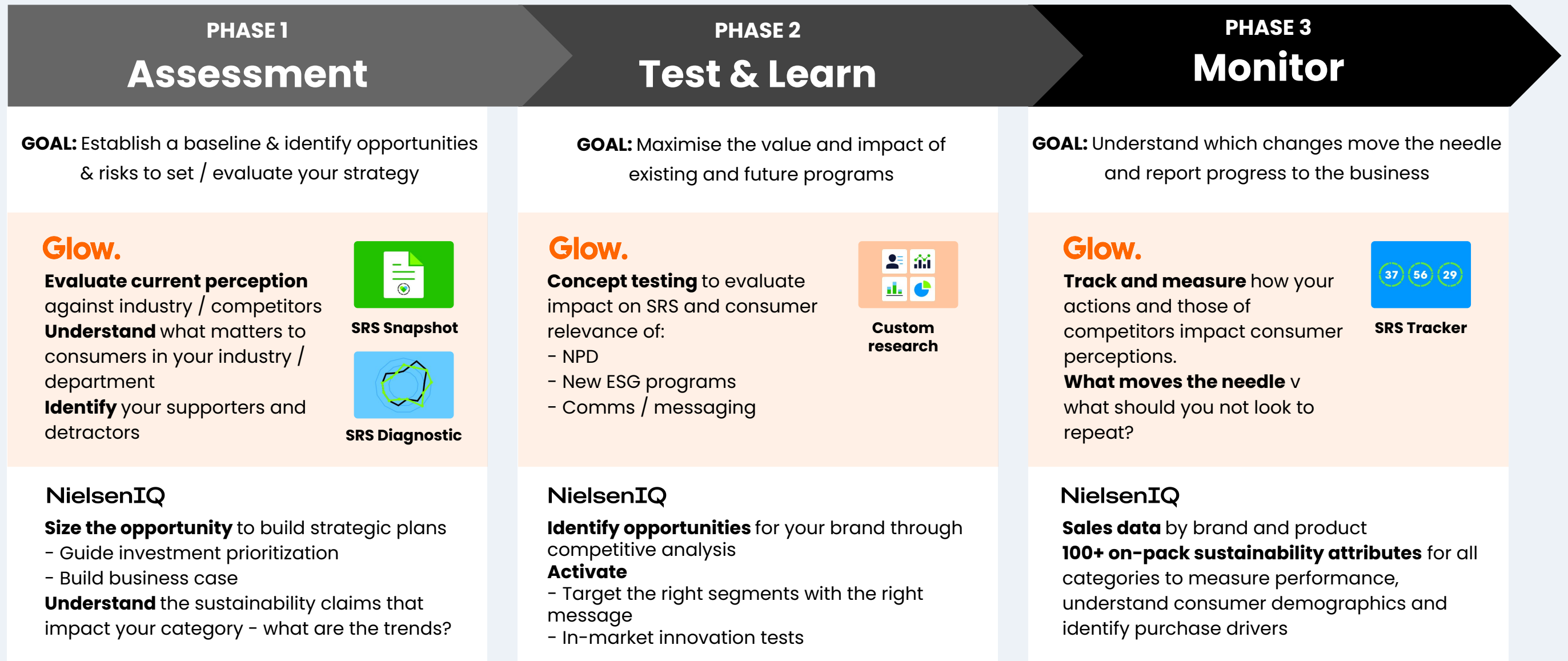
Understand fans to drive faster growth

Optimize your communications to improve ROI

Develop programs designed to create impact



Glow can support your sustainability journey.



Find out more & request a data demo at socialresponsibility.com

Find out more at [NielsenIQ Product Insight](#) or contact your NielsenIQ client team



What next.

1

Watch the explainer video

Social Responsibility Score
in 90 seconds



2

Contact Glow

to discuss your sustainability insights
needs and to learn where your brand
sits.



Request a data demo
socialresponsibility.com



Email
socialresponsibility@glowfeed.com

3

Contact NielsenIQ

to learn more about how
sustainability is playing in your
category.



Contact NielsenIQ nielseniq.com

4

Access the resources

Free reports and data – see next
page.

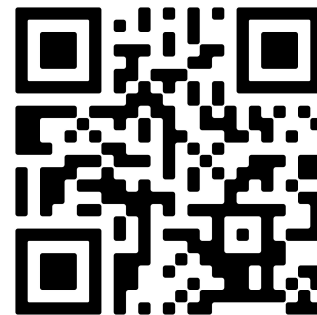
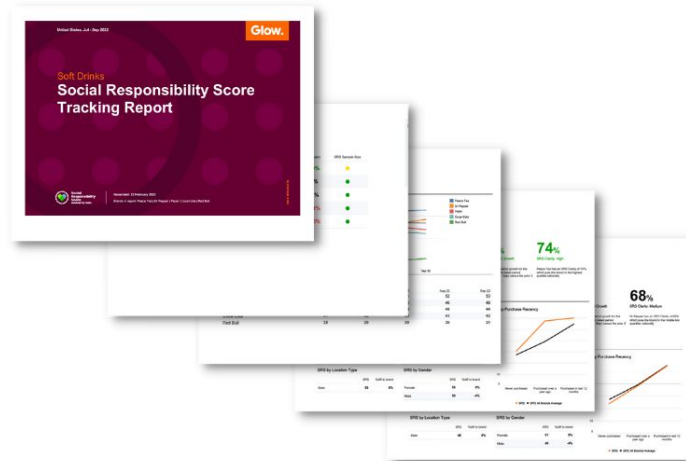


Free Reports.

Learn about the risk and opportunity for your business. Request a free report from Glow:

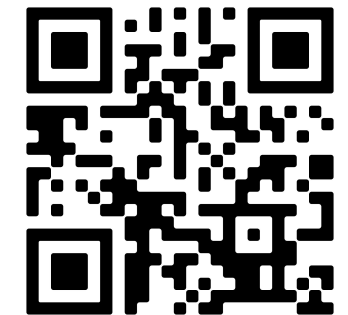
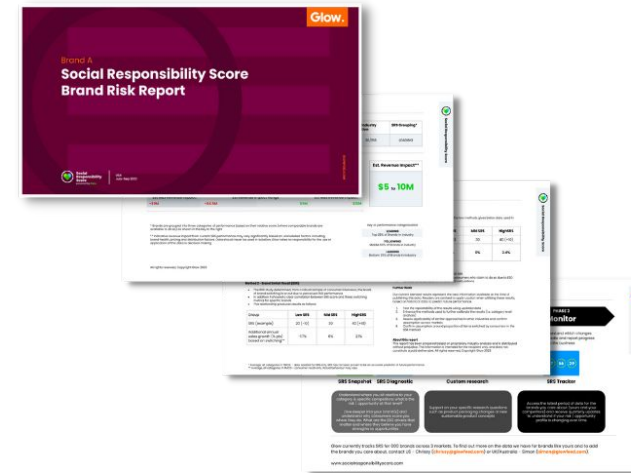
Category Tracking Report

Switching is happening based on sustainability perceptions. This report provides benchmark data from a key set of brands in one category of your choosing. It showcases current brand perception, momentum and strengths/weaknesses across demographic cohorts so you can see how relevant brands are performing.



Brand risk report

There is a relationship between perceived sustainability, consumer switching and brand revenue growth. Brands leading the way can tap opportunity, while those seen as lagging risk being switched out. This report helps quantify the \$ value of consumer ESG risk/reward for your brand.





Resources.

Please find below additional resources that may help inspire and support you and your business on your ESG journey:

Mondelez Case study

How Mondelez used Glow's ESG diagnostic to help gather insights on its sustainability journey.

Catalyst

Multiple pieces of data and analysis on consumer attitudes to a range of social and environmental issues from an open-source research program powered by Glow, Cint and other partners.

NielsenIQ + McKinsey

Joint research study - *Consumers care about sustainability & back it up with their wallets*

The Business of Purpose

Curated ESG stats to support the reasons why an ESG focus is good business strategy.

NielsenIQ

US consumer health and wellness data relevant to F&G brands.

Triple Pundit

News, views and opinion on the business case for sustainability.

If you want to find out what consumers think of your brand's ESG performance, request a data demo at socialresponsibilityscore.com

Glow.

glowfeed.com

USING DATA PROVIDED BY



**Social
Responsibility
Score**

NielsenIQ
