



September 2021

# food and grocery industry social and environmental responsibility report.

## Glow.

powered by **Catalyst** data.

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our first industry report for food and grocery.

## Message from **Tim**, our Chief Executive Officer.

Hi, I'm Tim the founder of on-demand consumer research platform **Glow**.

Glow is delighted to bring you this inaugural social responsibility report as a founding partner of **Catalyst**, an open source research program it launched in July this year.

The release of this report marks an important milestone in the progress and development of the **ESG / CSR agenda**. Increasingly investors, employees, customers and consumers want to see more action in the areas in scope of this report.

This report covers two areas in detail - the Catalyst program, and what the key issues are for Australia and the Food and Grocery industry, plus the role and measures of Social Responsibility

in developing brands people trust and are willing to pay a premium to use.

We introduce Catalyst, an innovative open-source research program that is on a mission to democratise access to data around the biggest issues humanity faces. We explain why we're doing it, how it works, and invite you to follow it, free.

We then focus on the issues consumers expect FMCG companies to be focusing on - namely **plastic and packaging waste** and **ethical sourcing**. Both of these issues were over-indexed for the industry versus the whole of Australia view.

We introduce the newly-developed and validated **Social Responsibility Score** metric from Glow which provides a benchmark for industries, categories and brands in terms of the external perception of their social and environmental performance.

We find out that **the Food and Grocery industry tops the list of industries as the number one #1 ranked industry for Social Responsibility** from 30 industries in Australia, and we shine a spotlight on how **Cadbury**, a partner of the Catalyst Program, compares against the industry and peers by revealing their impressive score.

**Tim Clover**  
Founder and CEO, Glow





# What's in this **report.**

## 1 The Catalyst program

Introducing the issues that matter to Australians

## 2 A framework for impact

How to overlay broader social issues with your ability to make an impact

## 3 Industry issues

Which issues the food & grocery industry need to address

## 4 Social Responsibility Score

Why it matters, how it works and who cares about it

## 5 Industry Score

How food and grocery performed in the industry tracker

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## introducing the **catalyst** program.

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introducing.



## A new breed of research program

Catalyst is an open-source research and insights program that allows its community to engage in quality market research to interrogate the **major environmental and social issues** that we face.

The program is building a body of knowledge that fuels conversation, action and behaviour change in all areas of society, led by businesses using it to support their own programs of action.

Catalyst is powered by Glow, a commercial research technology business that combines its proprietary software platform with quality panel data and research expertise to deliver rapid, robust and cost effective consumer research for clients across a range of industries around the world.

With better data, businesses can be courageous with less risk, turn a profit with reduced impact and create the positive change that their **customers, employees** and **investors** expect.

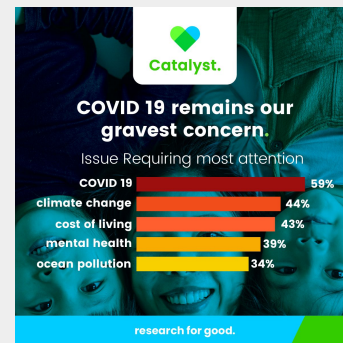
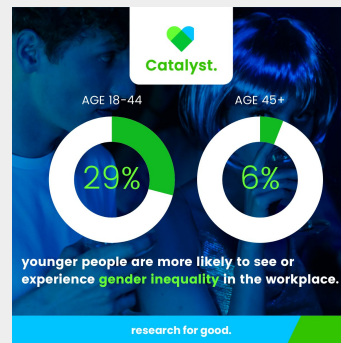
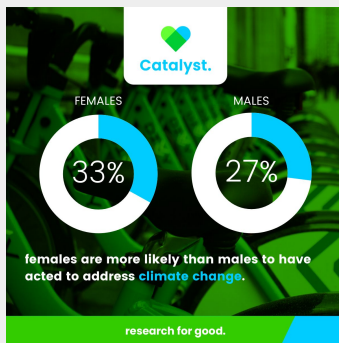
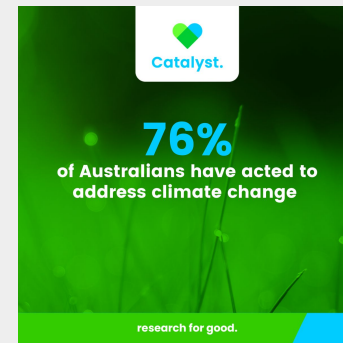
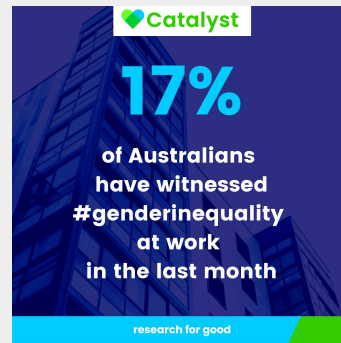
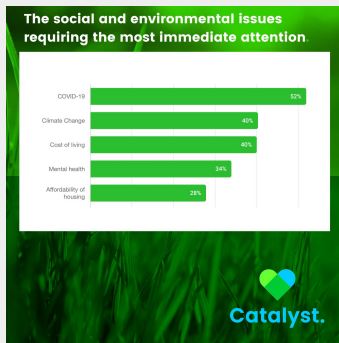
climate change	ocean pollution
plastic and packaging waste	animal and plant extinction
air pollutants	work-life balance
loss of forests and habitat	workplace inequality
affordability of housing	aged care
cost of living	COVID-19
drug and alcohol abuse	ethical sourcing
job security	LGBTIQA+ inequality
physical health	poverty
tax inequality	unfair treatment of indigenous people
comfort in retirement	domestic violence
homelessness	misinformation
sexual harassment	wealth inequality



**catalyst** summarises and publishes fresh new data and insights every month.

## Program content and reports are published regularly.

[Access images here](#)



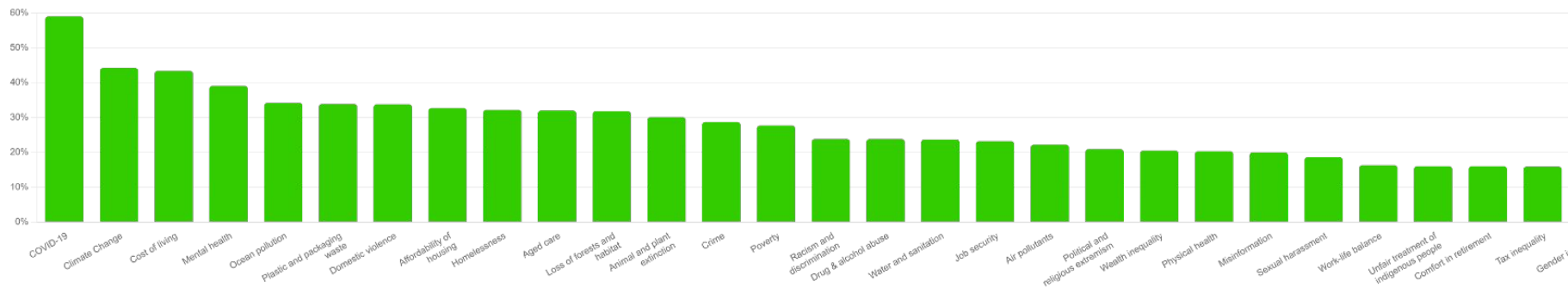
priority issues for australians – august 2021.

## National issues of highest priority to Australians.

**Catalyst captures an evolving list of priority issues that are being actively explored by the program. The chart below depicts the areas in which Australians have selected they want to see more action and attention.**

Each month, responses are collected from a nationally representative sample of 1,200+ Australian respondents. COVID-19 continues to dominate the issues, with almost 60% of respondents selecting it as one of the

issues requiring the most immediate attention. This is closely followed by climate change, cost of living and mental health, all of which were selected by around 40% of survey respondents.



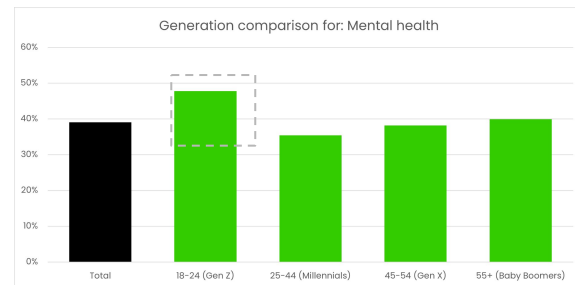
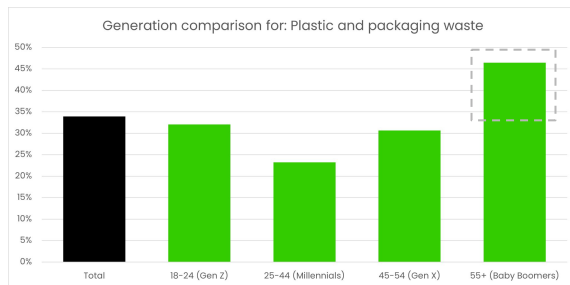
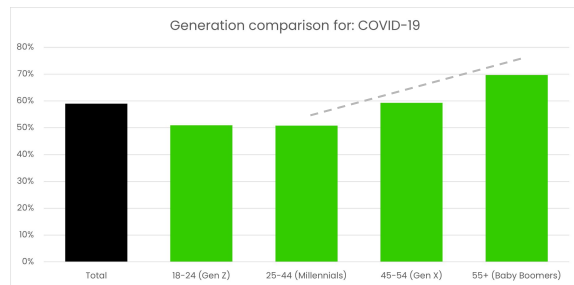
**Chart source:** Catalyst program, August 2021. (n=1241)

## Generational differences for COVID-19, Plastic and Mental Health.

There are generational differences for respondents in three of the top issues: **COVID-19, Plastic and packaging waste and Mental health.** Through the program, additional 'deep dive' data is captured on a rotating set of priority issues.

Priority of **COVID-19** as an issue increases with age past the youth 'gen Z' cohort. **Plastic waste** is something that Baby Boomers are significantly more concerned about than younger generations. Plastic use has increased more than 20-fold since 1960 in Australia, with the average Australian

using 130 kg of plastic each year, and only 12% being recycled\*. **Mental health** is a growing concern for younger people in Australia, increasing each month in those states experiencing lockdowns.





millions of data points at your fingertips.

## Get into the data.

### Millions of data points at your fingertips.

Catalyst utilises the Glow research platform, an easy-to-use, yet powerful, consumer research system. The data collected can be interrogated on-platform using Glow's intuitive data visualisation and filtering tools to ensure speed to insight, while data can be extracted in a multitude of formats including CSV, images and one-click powerpoint export to save you time.



**Intuitive  
interface**

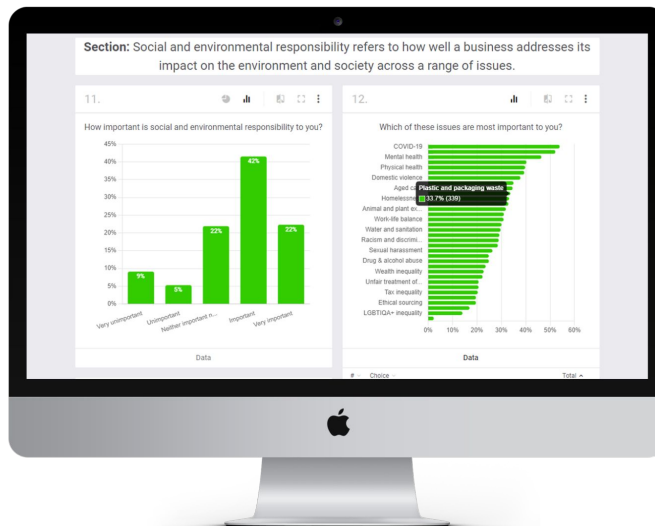


**Powerful data  
visualisation**



**Easy export**

[Access the Catalyst data](#)

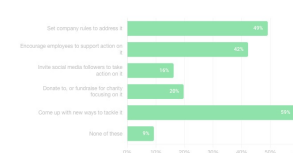


To what extent do you agree or disagree with the following statements?



As part of our research, we are keen to understand how Australians are feeling about the future. When you think about the future of society and the environment 5-10 years from now, what thoughts and feelings come to mind? Please feel free to share as much (or as little) as you want to.

australia things government  
feel worse  
world environment  
hope change covid  
climate worried  
bad life years future due  
worry good society people  
live concerned economy global control  
living care time make back



# 2

## a **framework** for data impact.

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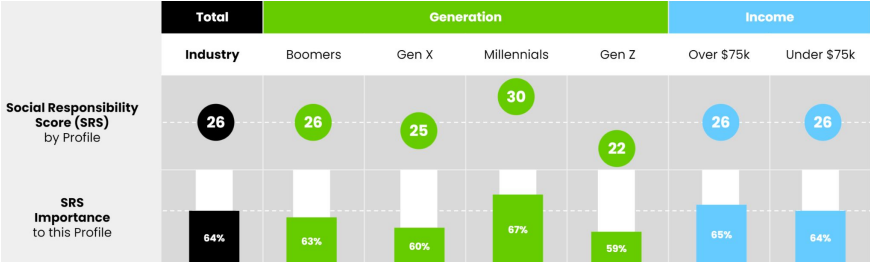
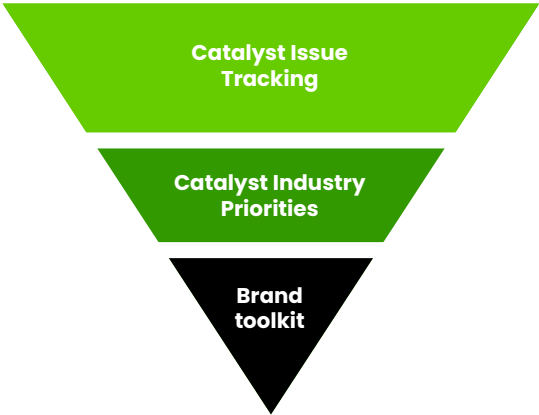


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a top-down framework for action and measurement.

Rich data.



Structured for impact.

Catalyst surfaces public sentiment and priorities in a structured, repeatable way. This helps identify the issues people care most about.

The data we capture is published for the benefit of industry, academia, charities and investors to aid in the development of improvement programs and provide performance benchmarks.

Industry level data is captured to join issues to industries.

Brands can then more confidently invest in emerging solutions and developing products and solutions that can address the issues we face.

Each industry's Social Responsibility Score will be released each quarter, providing a useful tracking benchmark.

Brands can privately track their Social Responsibility Score to identify a deeper strategic advantage. These are captured on an ongoing basis.

your brand toolkit awaits.

## A simple toolkit to help your brand thrive in a sustainable, measurable way.



**Partner with Catalyst to learn more about the issues people care about the most.**

An open-source research program investigating consumer sentiment towards over 30 social and environmental issues.

A simple way to explore the big issues we face across a range of topics – submit your own questions to the program.

Recognition as a partner on our website and other publications.

Share and present program data in your various marketing, employee, investor and other stakeholder channels.



**Track your Social Responsibility Score to support your ESG agenda and impact investment priorities**

Hundreds of brands measured on a repeating basis providing a strong benchmark for success.

Track the consumer perception of your brand through time using Glow's Social Responsibility Score (SRS).

Compare with competitors – select the brands you want to track.

Perform deep dive analysis on your own private Glow account.

catalyst as your compass for measurable action.

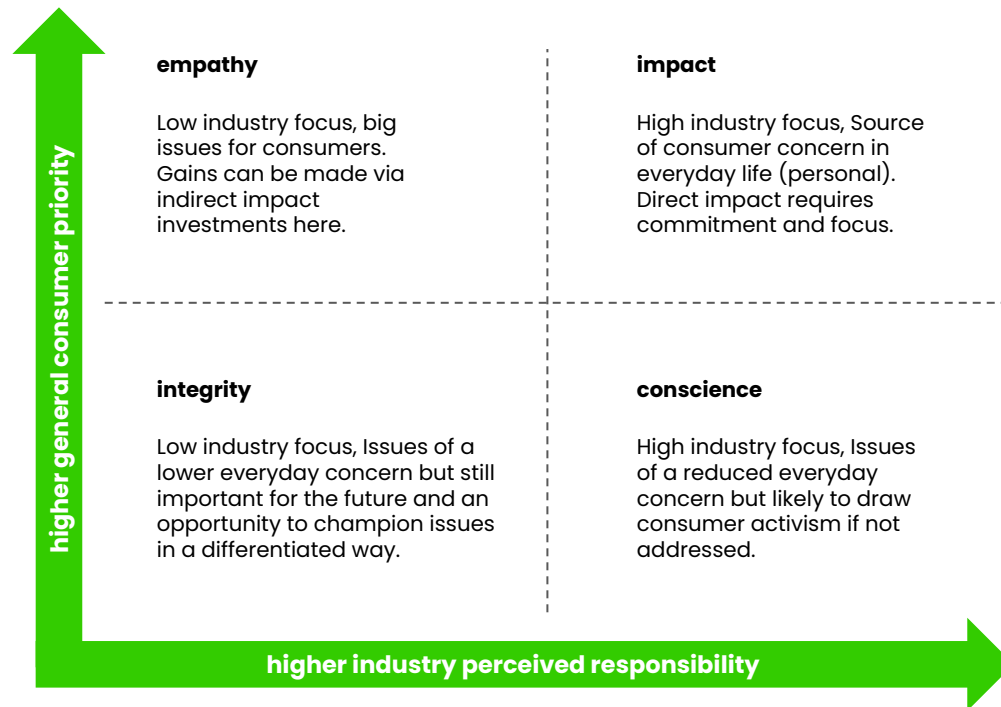
## Pick portfolio activities.

Catalyst overlays the issues that consumers care the most about with the issues that consumers think your industry should invest in solving as a priority.

As a result, issue data is plotted into **four broad segments** – which can be helpful when developing your own strategy for selecting, investing in and measuring your impact on key issues.

Whichever strategy you adopt, don't greenwash. If you pretend to be something you're not, consumers will find out. This can have a large impact on trust and equity in the long term. Act with integrity and only address issues you're committed to impact.

## Act with...



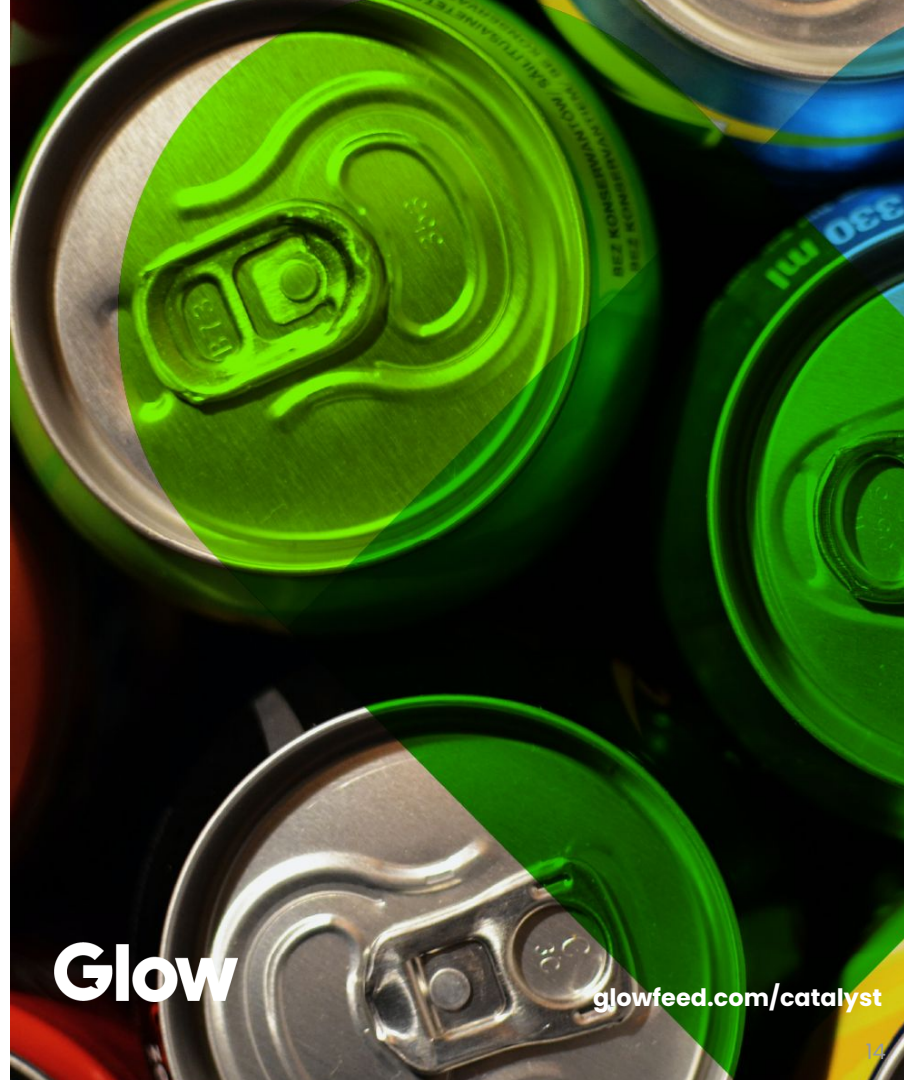
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## food and grocery **top** issues.

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catalyst as your compass for measurable action.

## Priority national issues X food and grocery.

When comparing the issue priorities from an overall perspective with those issues that respondents believe Food and Grocery brands should be focusing on, the following plot can be observed.

Larger bubbles represent issues that are both generally important as well as important for the industry to address.

Important for the Food and Grocery industry to address are **Plastic and packaging waste** and **Ethical sourcing**. The population also believes the industry has an important role to play in addressing the growth in the **Cost of living**, especially important for younger Australians.

Priority Issues for Respondents Vs Priorities for Food and Grocery Brands

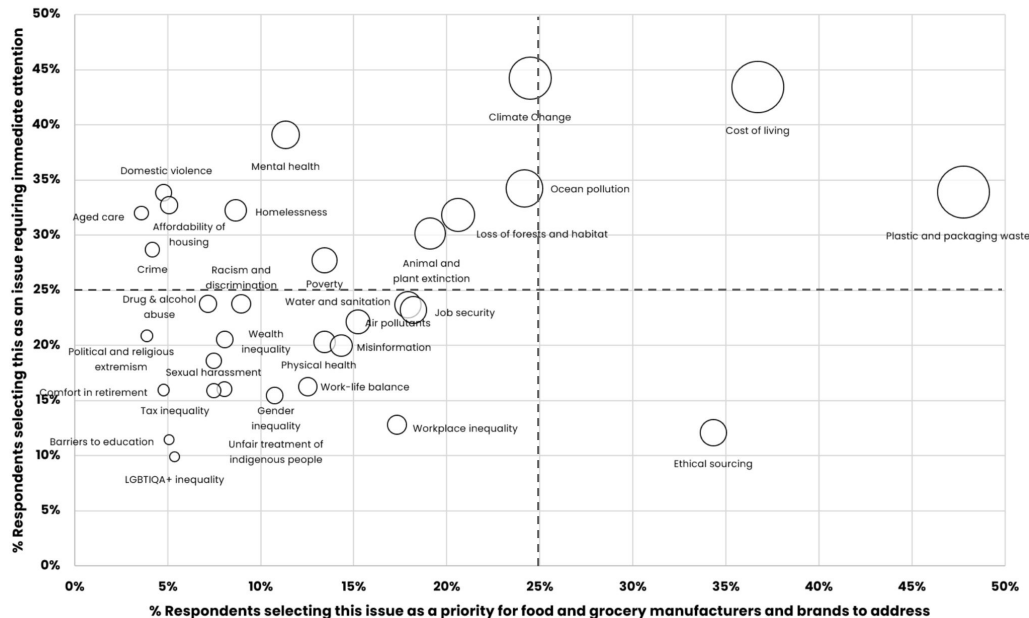


Chart source: Catalyst program, August 2021. (n=1241)

food and grocery manufacturers and brands.

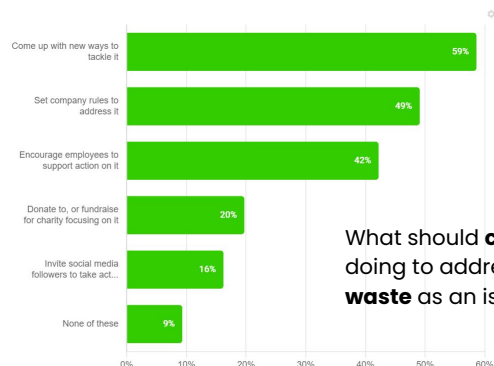
## Priorities for food and grocery brands.

These are the top five issues consumers believe the Food and Grocery industry should be prioritising its efforts to address. Plastic and packaging waste is the highest priority area that needs to be addressed, according to consumers.

When it comes to **plastic waste**, consumers believe the most important action brands can take is to “come up with new ways to tackle it”. This translates to an expectation to see innovation around this issue.

The second and third most important actions brands can take are setting appropriate **corporate policies** and **encouraging employee support**. The focus on corporate action is evident in the responses received.

Food and Grocery Manufacturers - Top Issues	General Priority % (A)	Priority for Food & Grocery % (B)	Difference in Priority (A-B)
Plastic and packaging waste	34%	48%	+14%
Cost of living	43%	37%	-6%
Ethical sourcing	12%	34%	+22%
Climate change	44%	25%	-19%
Ocean Pollution	34%	24%	-10%



What should **companies** be doing to address **plastic waste** as an issue?

Table source: Catalyst program, August 2021. (n=1241)

# 4

## introducing the **social responsibility** score.

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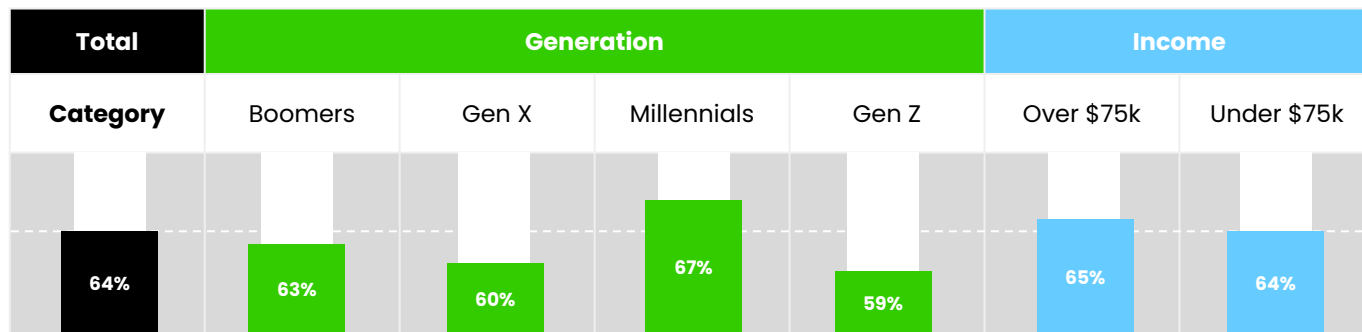
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why social responsibility is important.

## Social and environmental responsibility is a key decision driver for two thirds of consumers.

“Social and environmental responsibility refers to how well an organisation addresses its impact on the environment and society across a range of important issues...”



64% of Australian consumers state that **social and environmental responsibility** is important to them when choosing a brand. It's important for more Millennials than other cohorts.

Source: Glow Social Responsibility study, August 2021. (n=1,006)

social responsibility score.

# Social Responsibility Score – a new metric that matters.

Glow has developed a valuable new measure for the insights armoury of brands, categories and industries.

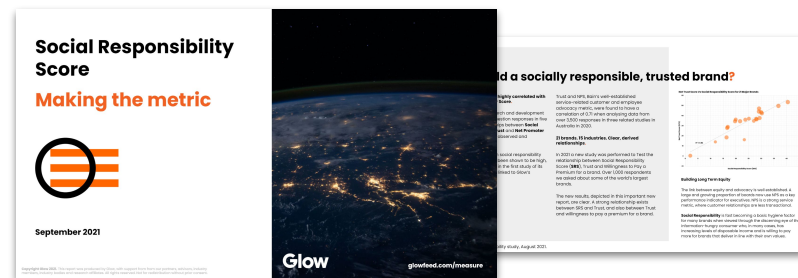
The **Social Responsibility Score** (SRS), in development since 2019, was developed by Glow from a set of proprietary studies to support organisation leaders with a helpful compass when developing their own brands. It is strongly correlated with Trust and Willingness to Pay a Premium for a brand.

## How it works

Consumers who are aware of the brand or organisation in scope of the study are invited to rate how environmentally and socially responsible they consider the brand to be. A bipolar scale is used to measure both social responsibility and social irresponsibility via a single question.

To create the Social Responsibility Score, we assign a score to each rating, such that the further from the centre, the larger the score (both positive and negative).

In this way, strongly held views carry more weight than neutral ones. Using this methodology, **the highest attainable score is 100, while the lowest is -100.**



The new report outlines the background to the metric and why it's so important for brands wanting to lead their categories. The study finds that consumers are willing to pay a premium for brands that are socially responsible. They trust them more, too.

Get the social responsibility report

spotlight on cadbury.

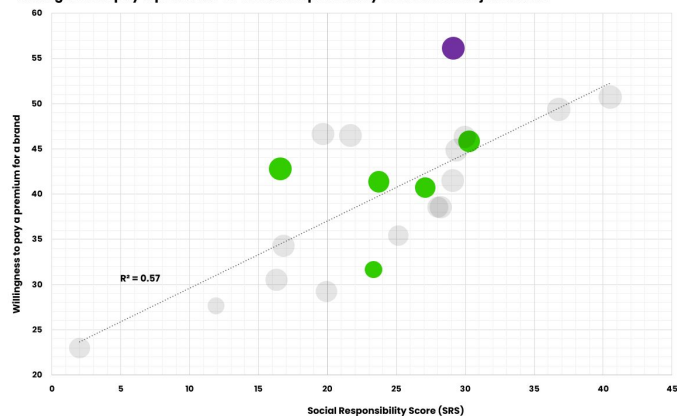
## Developing a responsible brand.

Cadbury's dominance of the confectionery category is the result of almost 200 years of research, development, distribution and a focus on quality.

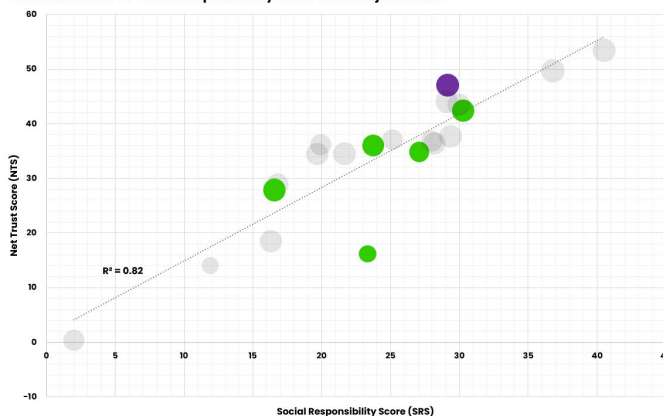
**Mondelez** have kindly granted Glow permission to publish their **Social Responsibility Score** data for Australia. Our study found Cadbury commands the strongest advantage when it comes to the stated willingness for

respondents to pay a premium for the brand. When it comes to trust, Cadbury was the strongest non-retail participant behind Woolworths and Coles. Cadbury's score is also three points ahead of the food and grocery industry score, which is already leading the pack for the industries in scope of the study.

Willingness to pay a premium Vs Social Responsibility Score for 21 Major Brands



Net Trust Score Vs Social Responsibility Score for 21 Major Brands



*Cadbury*

Food &  
Grocery  
Responsibility  
Score (SRS)

Cadbury  
Social  
Responsibility  
Score (SRS)

26

29

**Chart source:** Glow Social Responsibility study, August 2021. (n=1,006). [Get the report](#)



## Social responsibility matters.

Sustainability has been a major focus for Cadbury and parent company Mondelez in recent years, with a number of major programs in play that have been reducing plastic and packaging waste and addressing challenges in supply chains.

Progress to achieve recyclable packaging and on-pack recycling information across 100% of its range by 2025 is on-track, while investment in new technologies such as its world-first 100% recyclable paper-flow wrap trial in Tasmania are contributing to address Australia's waste challenge.

Mondelez has managed to reduce its packaging waste significantly over recent years, with over 95% of paper and cardboard packaging made from recycled material, while recycled plastic packaging and reduction projects have diverted hundreds of tonnes of plastic from landfill in just the last 12 months.

These measures are just the beginning – there is still a long way to go with consumer groups pressing for [more urgent action](#) to reduce packaging waste.

Since 2011, Cadbury has also backed an innovative cocoa sustainability program, Cocoa Life. Since the start of 2021, 100% of the cocoa used to make Mondelez branded products in Australia – including Cadbury Dairy Milk – has been sourced via Cocoa Life, giving consumers confidence this key ingredient is sourced the right way. Mondelez recognises climate change is the biggest threat facing the planet. Since the start of this year, the company has transitioned to 100% renewable electricity for three of its Victorian factories, halving the carbon footprint of its operations in ANZ.



**Paul Chatfield, Senior Marketing Director, ANZ:**

*"Since the Cadbury family founded their iconic business back in 1824, we've always had a strong purpose. This remains the case today where the challenges faced by our planet are clear for us to see, and our consumers have never been better informed or enjoyed so much choice on supermarket shelves. Cadbury fans rightly expect us to be making a positive contribution to address the challenges they see in their communities."*



5

**food and grocery**  
**social responsibility**  
**score.**

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## Food and grocery **leads** on social and environmental responsibility.

Industries - Top 5 by Social Responsibility Score	Social Responsibility Score (SRS)
Food and grocery manufacturers	26
Arts, culture and music	25
Universities	24
Restaurants, cafes and bars	21
Retailers (e.g. supermarkets, liquor stores, department stores)	19

Industries - Bottom 5 by Social Responsibility Score	Social Responsibility Score (SRS)
Real estate and property agents	1
Media and news networks	1
Social media platforms (e.g Facebook)	-1
Natural resource extraction (e.g. oil & gas extraction, mining)	-8
Gambling and sports betting	-19



Industry Social  
Responsibility Score

26

Industry  
Rank

#1 / 30

Average Score  
(all industries)

10

### Leading the pack: food and grocery

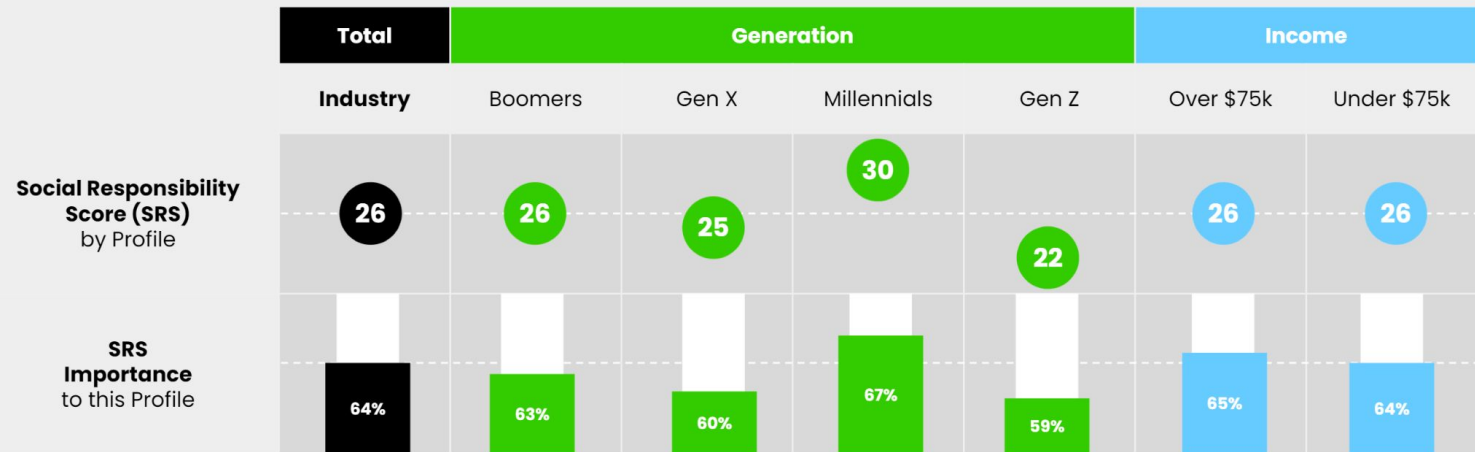
The food and grocery industry 'leads the pack' when it comes to social responsibility performance, according to August's Social Responsibility study of 30 industries in Australia.

The biggest issues the industry can address, according to the Catalyst study in August 2021 include Plastic and Packaging Waste, Cost of Living and Ethical Sourcing.

Cross-Industry scores will be tracked and published on an ongoing basis for the benefit of industry members. Individual brands are able to monitor and track their own scores through time in parallel with industry, category and competitor data.

comparisons across key demographic groups.

# Food and grocery SRS **varies** across segments.



**Social Responsibility scores consistently high across generations and income brackets with some minor variances.**

- The youngest generation (GenZ) scores Food and Grocery the lowest with a score of 22
- There is little difference between household income brackets - the SRS holds for income
- Millennials rated the industry highest of all of the demographics reported at 30
- The key issue raised by all groups for the industry to focus on is Plastic and Packaging Waste

get on board.

## Catalyst. Supported by members. Powered by Partners.

**Since launching in July 2021, Catalyst has gained significant support from the public, investor groups, industry members and peak bodies across a range of industries and sectors.**

Join Catalyst free of charge to get regular updates on the issues that matter most to Australians.

A range of benefits are also available to industry members, brands and organisations that want to partner with us to increase the impact of the program.

Join Catalyst free today

Program partners include:



If you'd like to find out more about the benefits of becoming a Catalyst partner, please email [catalyst@glowfeed.com](mailto:catalyst@glowfeed.com)



**Get into the issues that  
matter with Catalyst in your  
inbox every month.**

**Register at:**

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who we are.

**Glow. right. now.**

## **The company behind Catalyst.**

# Glow.

### **The leading on-demand consumer research platform.**

Glow helps businesses make better decisions by delivering robust consumer insights, fast.

[Visit the Glow website](#)

We're using our technology to help address some of the major social and environmental issues we face by surfacing what consumers think about these issues. We have produced this report as a founding partner of Catalyst, an open-source research program we launched in July this year.

access to 100m+ consumers.

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