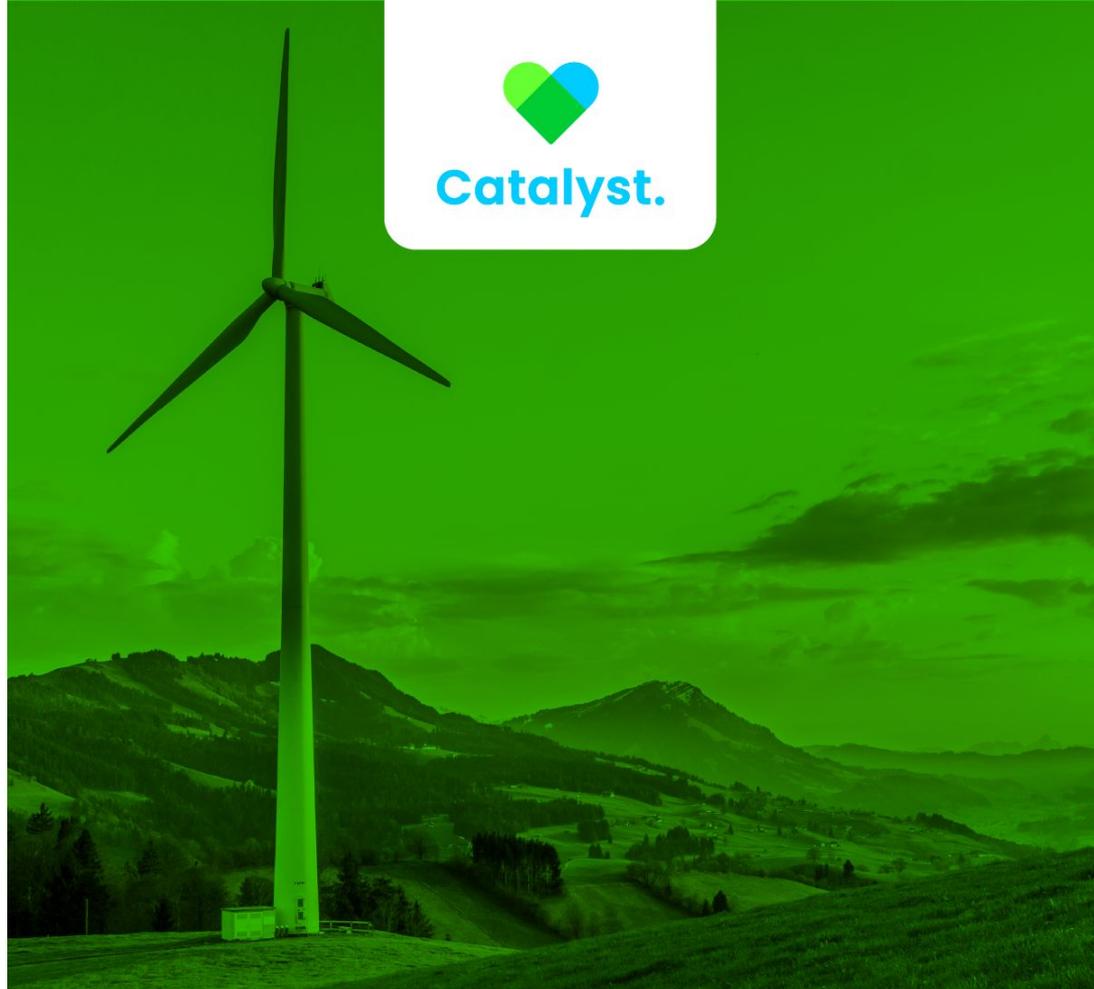


Catalyst.

Social and Environmental Issues Research.

**August 2021
Topline report.**

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research for good.
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In this report.

1 The Catalyst program

Overview of how the program works and what data is collected.

2 August priority issues

Which issues we are most concerned about, right now.

3 Coping with lockdown

Our views on whether lockdown will linger into 2022.

4 Vaccination blues

The vax state of play and perspectives on vaccination passports for public spaces.

5 Investing in the future

Are we willing to invest in businesses doing the right thing or just for short term gain?

6 Australian Made

What product claims really matter when buying everyday household goods.

7 Are we racist?

Exploration of our perspectives on racism in Australian society.

8 Sustainability matters

Validation that sustainability influences product choices.

1

Making an **impact.**



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Research for good

The Catalyst program 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 seek.

global warming	ocean pollution
plastic and packaging waste	animal and plant extinction
COVID-19	domestic violence
poverty	homelessness
drug and alcohol abuse	unfair treatment of indigenous people
crime	job security
physical health	affordability of housing
water and sanitation	comfort in retirement

air pollutants	droughts, floods and storms
loss of forests and habitat	bushfires
racism and discrimination	Ethical sourcing
mental health	sexual harassment
gender inequality	LGBTIQ+ inequality
aged care	cost of living
work-life balance	political and religious extremism
wealth inequality	workplace inequality

introducing.



Purpose trumps profit for consumers

Individuals are starting to vote with their wallets. A recent study by ad agency network Havas found that 64% of people (up 10% from 2019) prefer to buy from companies with a purpose other than just profit*.

Investors are demanding more

Investments that are subject to strict ESG criteria have now reached **\$17Tn**. One third of global assets under management will be subject to ESG criteria by **2025** – \$53Tn in total.

Prioritise your resources for impact

Catalyst surfaces important data that helps business leaders understand the issues we face and identify priority areas for action. It also makes it easy for them to explore issues in more depth and test ways they can make an impact by asking their own questions in the monthly survey.



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this month.

The sparkline.

Environmental	climate change	ocean pollution	air pollutants	
	plastic and packaging waste	animal and plant extinction	loss of forests and habitat	
Social	COVID-19	domestic violence	racism and discrimination	ethical sourcing
	poverty	homelessness	mental health	sexual harassment
	drug and alcohol abuse	unfair treatment of indigenous people	gender inequality	LGBTIQA+ inequality
	crime	job security	aged care	cost of living
	physical health	affordability of housing	work-life balance	political and religious extremism
	water and sanitation	misinformation	wealth inequality	workplace inequality

We measured public sentiment towards over 30 different social and environmental issues as a barometer of our collective anxiety.

The focus issues.

In addition this month we dug deeper into a few areas to better understand attitudes, current behaviour and potential actions to create change. Issues included COVID-19, ethical sourcing, mental wellbeing, racism, ethical investment and more.

Methodology.

Responses from industry-leading online research panels via the Glow platform. 1,241 interviews with a representative sample of Australians aged 18+. Fieldwork was conducted w/c August 16 2021. Responses reviewed by a human for quality & consistency.

2

Overall **priority** issues.



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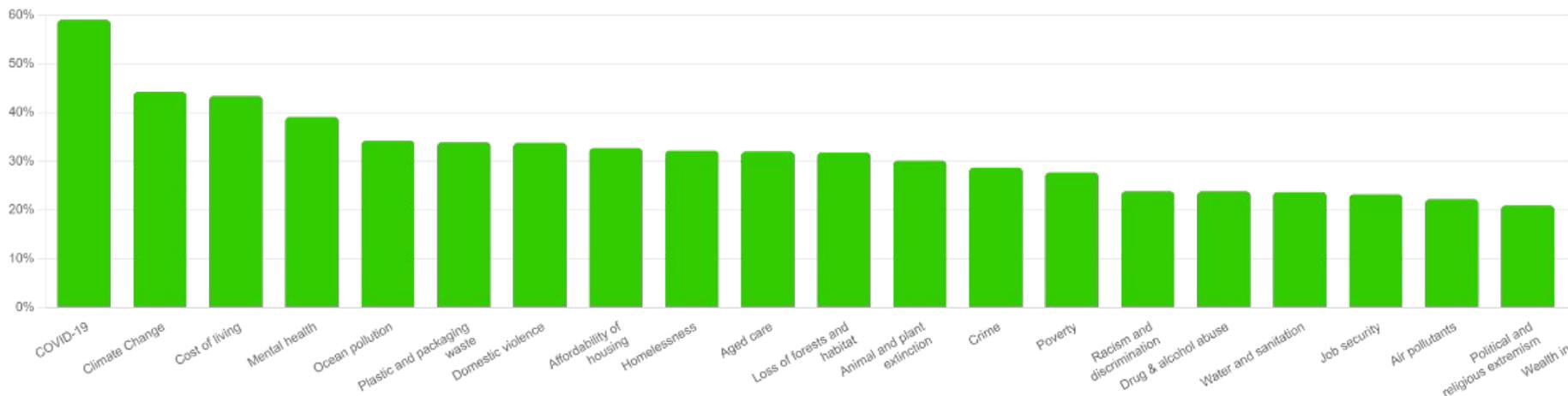
The pandemic weighs heavily on us all.

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.



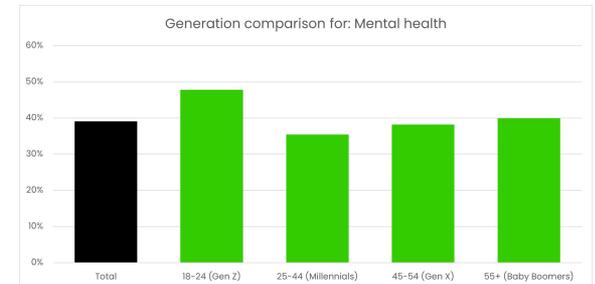
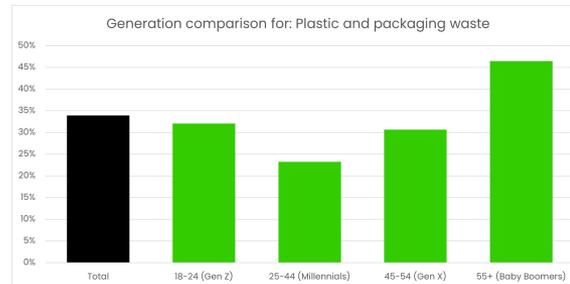
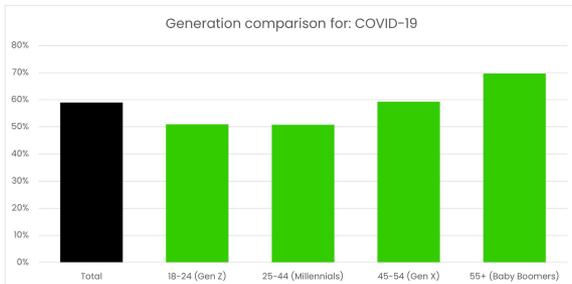
Source: Catalyst program, August 2021. (n=1241)

Generational differences in concerns.

Here we can see the generational differences for respondents in three of the top issues: **COVID-19**, **Plastic and packaging waste** and **Mental health**. Each month additional 'deep dive' data is captured on a rotating set of priority issues.

Anxiety about the pandemic is universal but concern increases with age, reflecting the vulnerability of older members of the population. **Plastic waste** is also an issue that Boomers are more concerned about than other age groups.

Mental health is an ongoing and growing concern for younger people in Australia, selected by respondents as the fourth most important issue. Mental health is clearly further impacted by a number of the other major issues such as the pandemic and the cost of living.



3

Coping with lockdown.



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our responses to lockdown.

Youth in trouble.

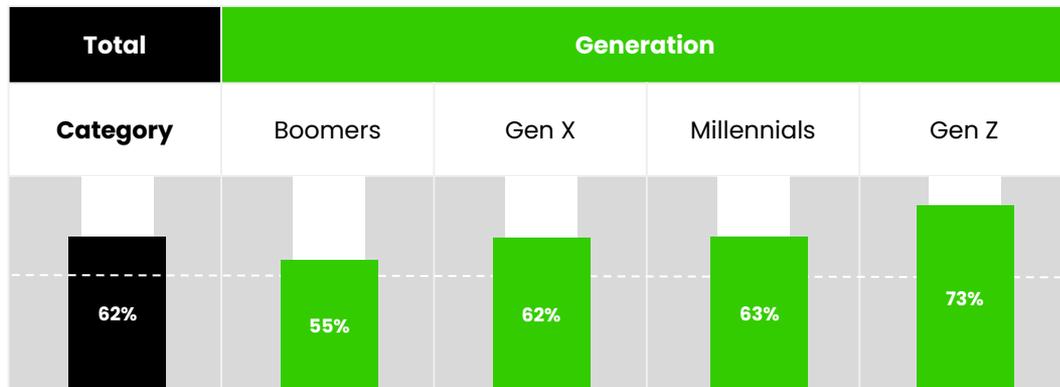
The current COVID outbreaks in Australia are sending young people into a spiral of pessimism, with nearly **three-quarters** of **Generation Z** believing our **lockdowns will endure** into 2022.

The August Catalyst survey found that **62%** of respondents believed lockdowns will continue next year – a figure that swells to **73%** among 'Gen Z' (those aged between 18 and 24).

There was some positive signs from **Millennials** who are the most optimistic when it comes to the end of lockdowns, with **19% believing there will not be a lockdown in their state in 2022**. That compared to 10% of Baby Boomers, 12% of Gen Xers, and 11% of Gen Z.

73%

Of Gen Z believe lockdowns will continue in 2022



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

our responses to lockdown.

We feel for businesses

Australians felt the most sympathy during lockdowns for affected businesses (58%), followed by their immediate families (54%), themselves (40%), and their extended families and friends (both 34%).

Self-Pity from the younger generations

Gen Z felt sorrier for themselves (50%) than any other age group, with Millennials at 47%, Gen X at 43%, and Baby Boomers at just 29%. Baby Boomers were much more likely to worry about affected businesses (74%), compared to Gen X at 57%, Millennials at 46%, and Gen Z at 52%.

Lockdowns unleashing a selfish gene

Those living in areas worst affected by lockdowns are more selfish and less conciliatory according to the data. Respondents living in metro areas are more concerned about the impact of lockdowns on themselves (44%) than those living in regional areas (33%). People are seemingly putting the needs of themselves first as we all battle to stay positive and hopeful in the face of widespread lockdown fatigue.



Associate Professor and Head of Suicide Prevention at the youth mental health organisation Orygen, Dr Jo Robinson, said people understand the need for lockdowns, but are fatigued by them.

“To give everyone confidence on the path forward, there needs to be clear messaging from federal and state govts with clear and transparent milestones in terms of vaccinating the whole population, especially the young,” she said.



4

Vaccination blues.



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to vax or not to vax.

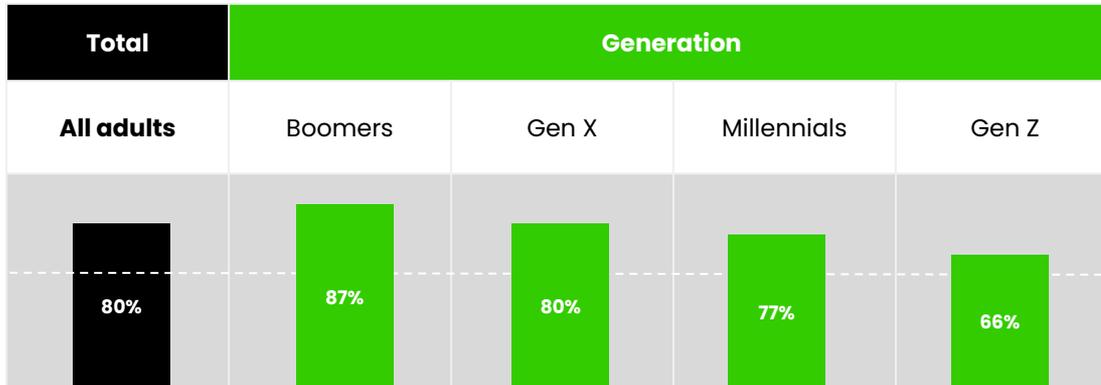
Vaccination hesitancy a genuine concern?

Catalyst data has shown that the government's vaccination targets are seemingly achievable with **80%** of all Australians saying they **would get vaccinated this year** with only 11% saying they wouldn't, and 10% saying they didn't know whether they would or

not. However, the young are proving to be the battleground for policy makers. While anecdotal evidence suggests that Gen Zs – or '**Zoomers**' – may be rushing to get vaccinated, the Catalyst survey showed that 17% of this age group actually have no intention of getting

vaccinated this year, with **only 66%** intending to get the jab by year's end.

Already vaccinated or intend to be by year end



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

compulsory workplace vaccinations.

Zoomers most against workplace vaccinations.

In a worrying sign for employers, more than 1 in 10 Australians (11%) say they would leave their job if their employer made COVID vaccinations compulsory – a figure that rises to 18% among Zoomers.

That compared with just 9% of Millennials (those aged 25 to 44), 13% of Gen Xers (45 to 54), and 10% of Baby Boomers (over 55s).

On the positive side, 78% of respondents said they would stay with their employer if COVID vaccinations were mandatory.

Law firm Gilchrist Connell principal Joel Zyngier said for many businesses, it will be lawful and reasonable to require workers to be vaccinated. He also said that if workers don't comply, they may be lawfully dismissed unless they have a reasonable excuse.

“Mandatory vaccination is a reasonably practicable step, so it’s something that employers must consider as part of their occupational health and safety or work health and safety duties,” Mr Zyngier said.



11%

Of Australians would **leave their job** if their employer made COVID-19 vaccinations **mandatory**.

give me back my social life.

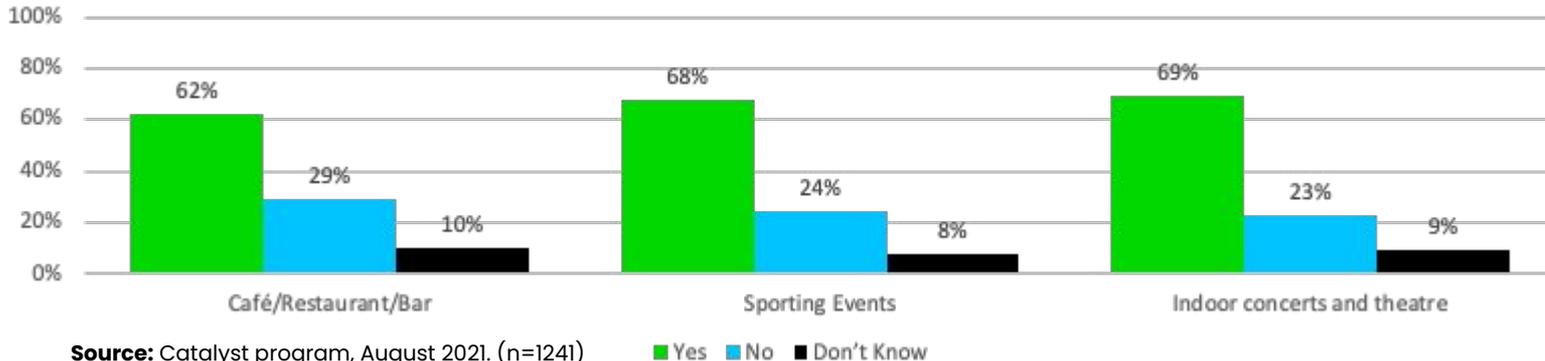
Divergent perspectives on vaccine passports.

In a sign of growing lockdown weariness, and an enduring divide on the issue of **mandatory vaccinations**, the data tells us nearly **one-third** of Australians don't believe you should have to be vaccinated to go into a café, restaurant or bar, whilst around a quarter feel the same for sporting events and indoor concerts.

Generation Z are the most 'anti-passport' with 45% saying you shouldn't have to be vaccinated to visit a café, restaurant or bar, 36% to attend a sporting event, and 35% to go to an indoor concert or theatre.

In stark contrast, Baby Boomers were the most likely to support mandatory vaccinations in cafés, restaurants and pubs (71%), sporting events (77%), and indoor concerts and theatre venues (79%) indicating a generational war on mandatory vaccination.

Support mandatory vaccinations to be able to access



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

5

Investing in the future.

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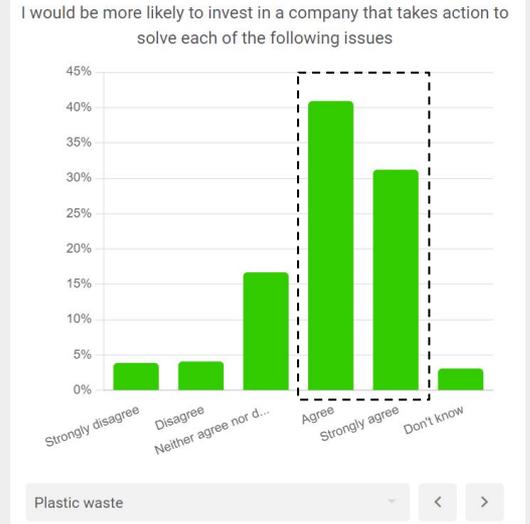
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mum and dad investors seek out responsible brands.

Responsible brands will win the race to capital.

Around one third of respondents to our study hold investments in stocks and shares. Those with a household income of over \$75,000 per annum were twice as likely to invest as those below this threshold. And the data shows they are also willing to make

positive investment choices to support the planet. 72% of current investors said they'd be more likely to invest in a company that is addressing a key concern, plastic waste. Investors are increasingly vigilant regarding clean investments, applying pressure on their fund managers, brokers and direct investments to comply with a range of Environmental and Social Governance (ESG) criteria.



72%

Of consumer investors would be more likely to invest in a company that takes action to solve **plastic waste**.

Source: Glow Social Responsibility study, August 2021. Subset of respondents investing in stocks and shares (n=413)

6

Australian **made
really matters.**



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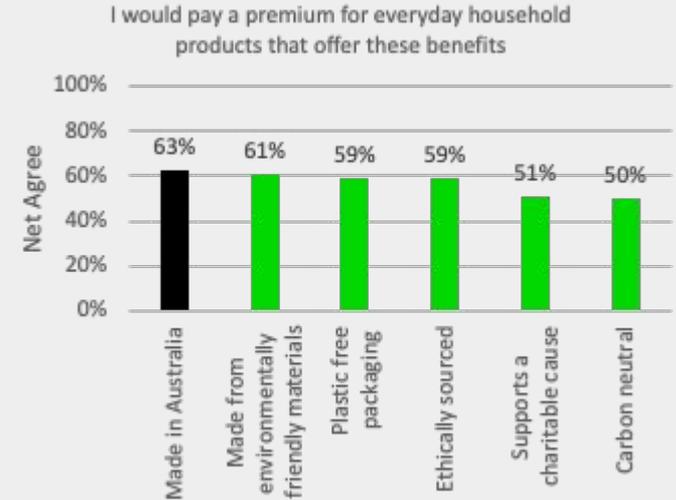
consumers name their price for a premium.

We are willing to pay for Aussie made.

Aussie made brands can be optimistic about the future of their domestic markets with **63%** of Australians willing to pay a premium for a product if it is **Made in Australia**.

Other product benefits that support premium pricing include being **Made from environmentally friendly materials** (61%), being **Ethically Sourced** (59%), **Plastic Free Packaging** (59%), **Supporting a charity** (51%) and being **carbon neutral** (50%).

How does your product stack up and communications reflect these desires?



63%

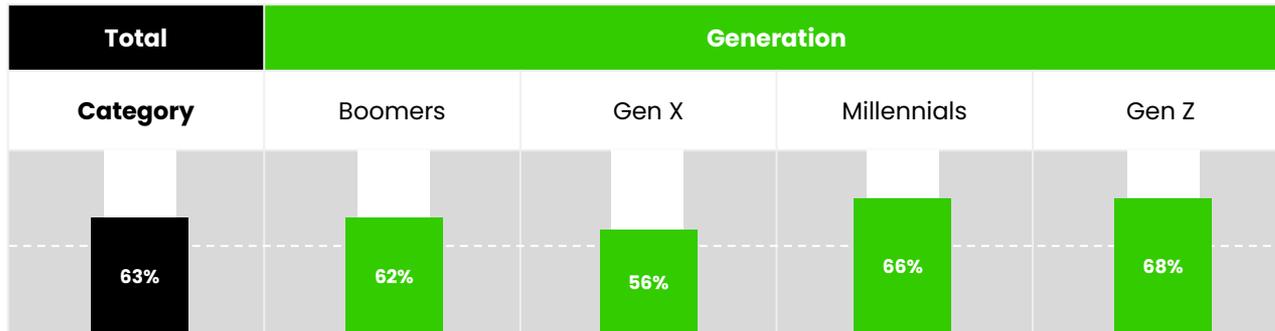
Of Australians would **Pay a Premium** for a product if it is **Made in Australia**

Australian made matters to the young.

The younger generations are waving the flag for Australian business with 68% of Gen Z citing **Made in Australia** as the **most important factor** in paying a premium, followed by Millennials (66%).

Baby Boomers (62%) and Gen X (56%) follow behind, less patriotic than their successors, a positive signal for the future of Australian products.

I would pay a premium for Australian made



7

Racism stops with you.



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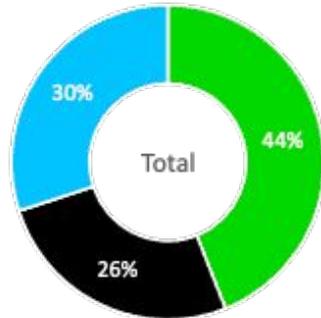
Older generations in denial of racism.

This month's data has shown that the older generations are fostering a culture of denial when it comes to the prevalence of **racism** in Australian society with **Baby Boomers** about **2.5x** as likely to claim that Australia is *not* a racist country compared with Millennials.

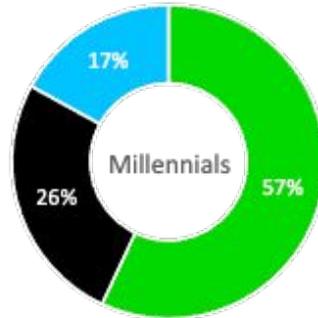
Only 17% of Millennials disagree with the statement that 'Australia is a racist nation' compared to 41% of Baby Boomers. Conversely, 57% of Millennials agree with the statement compared to only 32% for those aged 55+. Worryingly, 44% of all respondents believe that we are a racist nation.

The perspective divide between Millennials and Boomers demonstrates the importance of raising awareness and discussing what constitutes racism, because denial is a common response - racism is always something else, or somewhere else, or both at the same time. How are you discussing racism in your workplace?

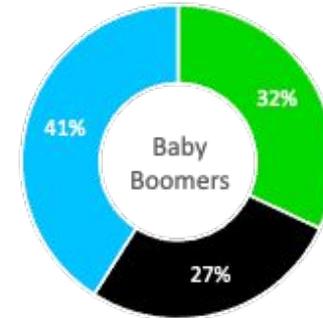
Extent to which you agree with statement 'Australia is a racist nation'



■ Net agree ■ Unsure ■ Net Disagree



■ Net agree ■ Unsure ■ Net Disagree



■ Net agree ■ Unsure ■ Net Disagree

8

Social responsibility matters.

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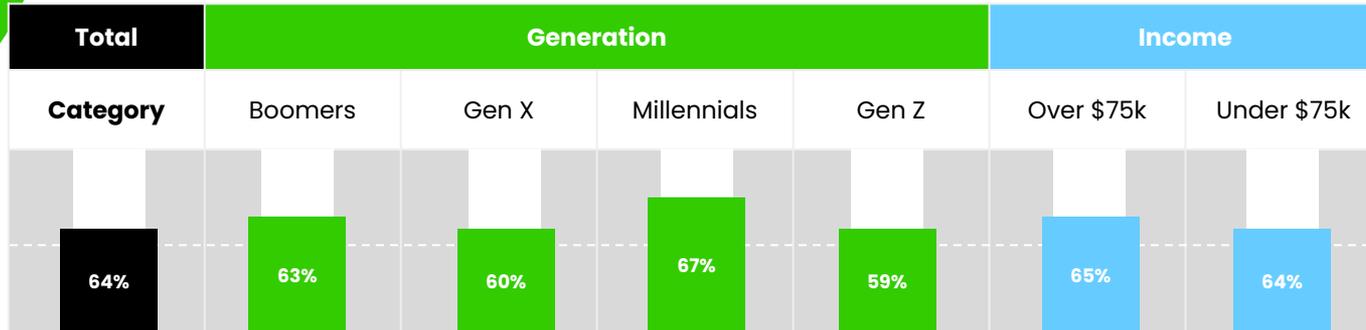
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and to finish.

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

64%

of Australian consumers state that **Social Responsibility** is important to them when choosing a brand. To see how your **industry** or **brand** benchmarks against our unique Social Responsibility Score (SRS) contact catalyst@glowfeed.com.



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the Catalyst program.**

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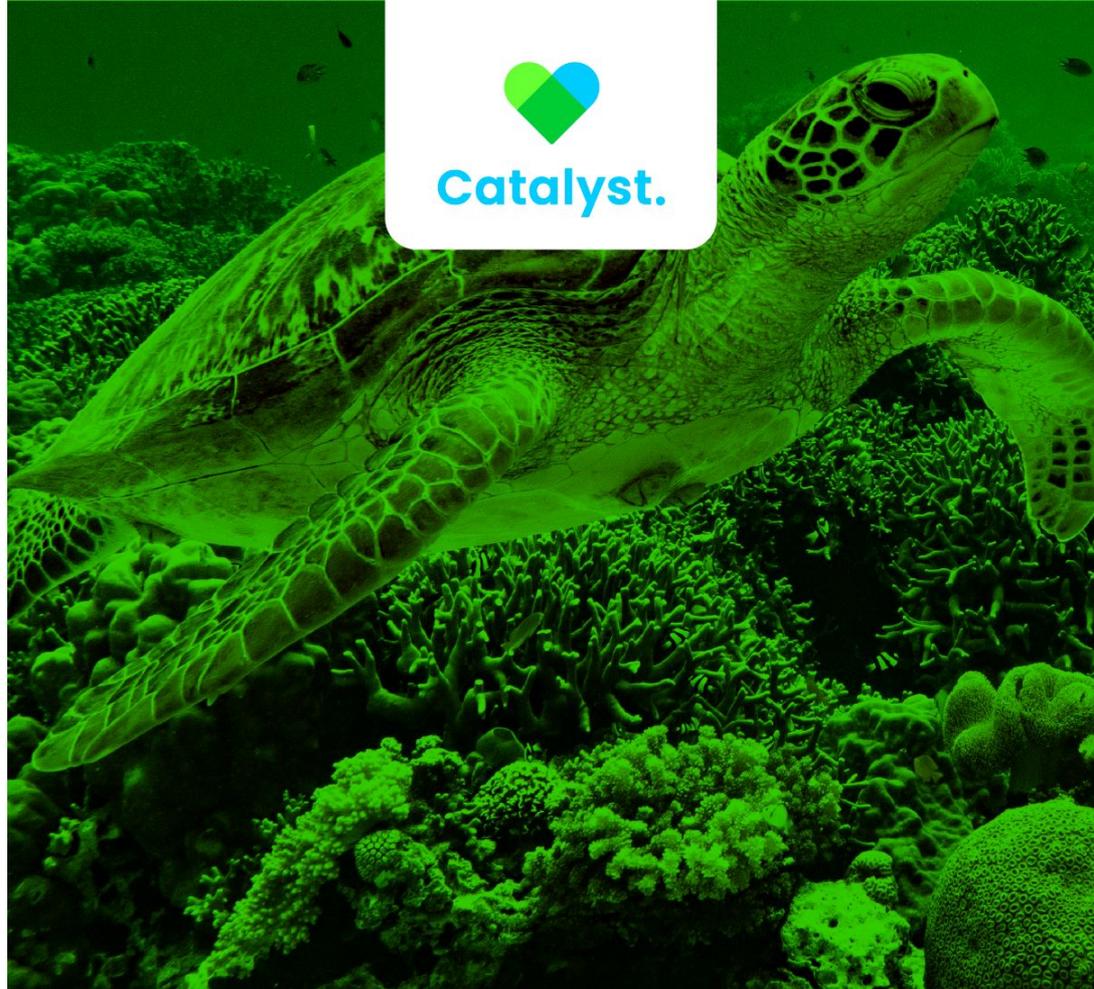
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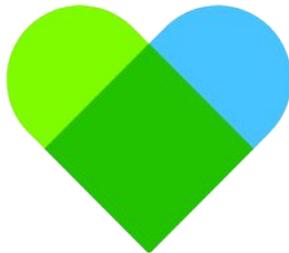


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