september report 2021.
social and environmental issues research.

Catalyst.

powered by Glow.

What's in this report.

1 **September priority issues**

The issues Australians are most concerned about, right now.

2 **Industry specific issues**

Which issues consumers expect specific industries to address.

3 **Vaxx access**

Perspectives on access to public spaces if not vaccinated.

4 **Travel aspirations**

Where we want to travel, when we can.

5 **Ethical sourcing**

The influence of ethical sourcing on our purchase and investment behaviour.

6 **Views on misinformation**

The extent of the problem and what to do about it.

7 **Catalyst explained**

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

An extra point

Because balance is important.

The headlines.

1 September priority issues

COVID-19 continues to dominate our headspace but is easing back slightly.

2 Industry specific issues

Plastic waste and misinformation are issues that consumers believe specific industries must address.

3 Vaxx access

The majority of Australians will avoid venues that allow the un-vaccinated to enter.

4 Travel aspirations

We are all keen to travel interstate, but Gen Z are primed to get overseas.

5 Ethical sourcing

How products are made is an increasingly important purchase influencer. For investors it is a key decision criteria.

6 Views on misinformation

The majority of Australians see it as a serious problem with shared responsibility to address.

7 Catalyst explained

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

An extra point

Because balance is important.

1

september
priority issues.

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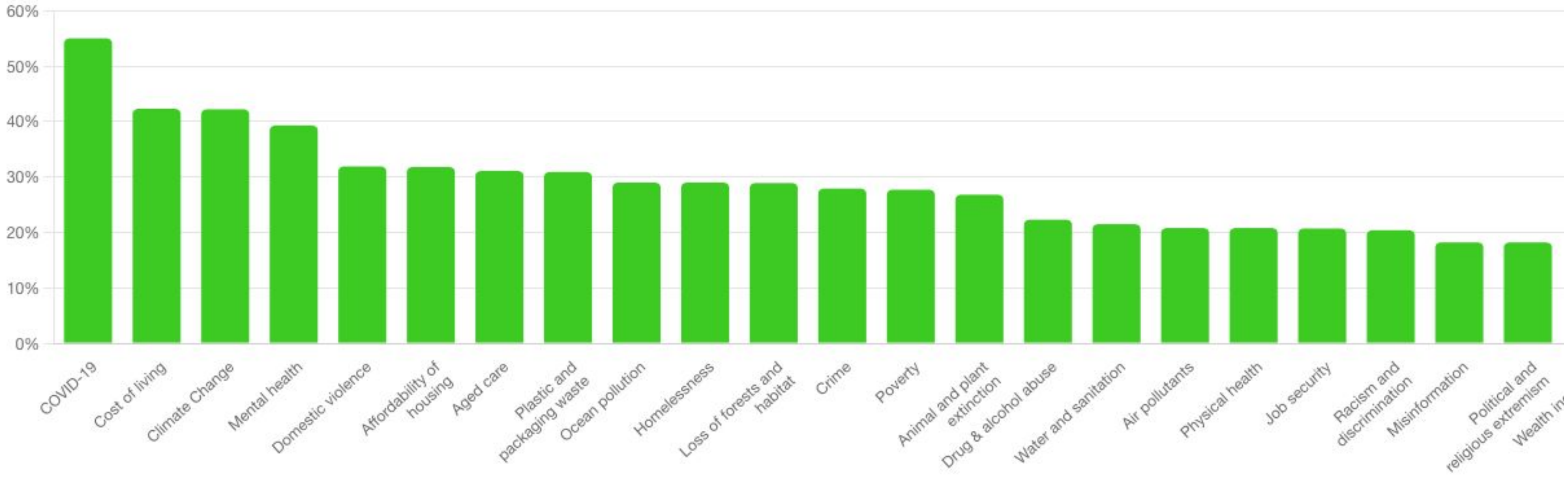
priority issues september 2021.

The pandemic remains top of mind.

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 said they want to see more positive action and attention.

COVID-19 continues to dominate our headspace with 55% of respondents selecting it as an issue requiring immediate attention. This has fallen slightly from 60% in August, perhaps reflecting a slight easing of anxiety as the COVID 'roadmaps' have been deployed. Mental health and cost of living remain prominent social issues. Climate change is the most prominent environmental issue. Around four in ten respondents cite these as key issues.



Source: Catalyst program, September 2021. (n=1244)

priority issues september 2021.

Generational differences in concerns.

Many generational differences occur across the top identified issues. Concern about the **Cost of living** rises to nearly 1 in 2 Australians in the Baby Boomer generation, while only 1 in 3 Gen Z respondents noted the issue as a concern..

When it comes to **Affordability of housing**, concern also increases with age, with 37% of Gen X and 37% of Baby Boomers concerned — compared to only 22% of Gen Z.

Many environmental issues including **Plastic waste, Ocean pollution, Loss of forests and habitat** and **Air pollutants** are issues that Boomers are much more concerned about than other age groups.

Respondents concerned about cost of living:

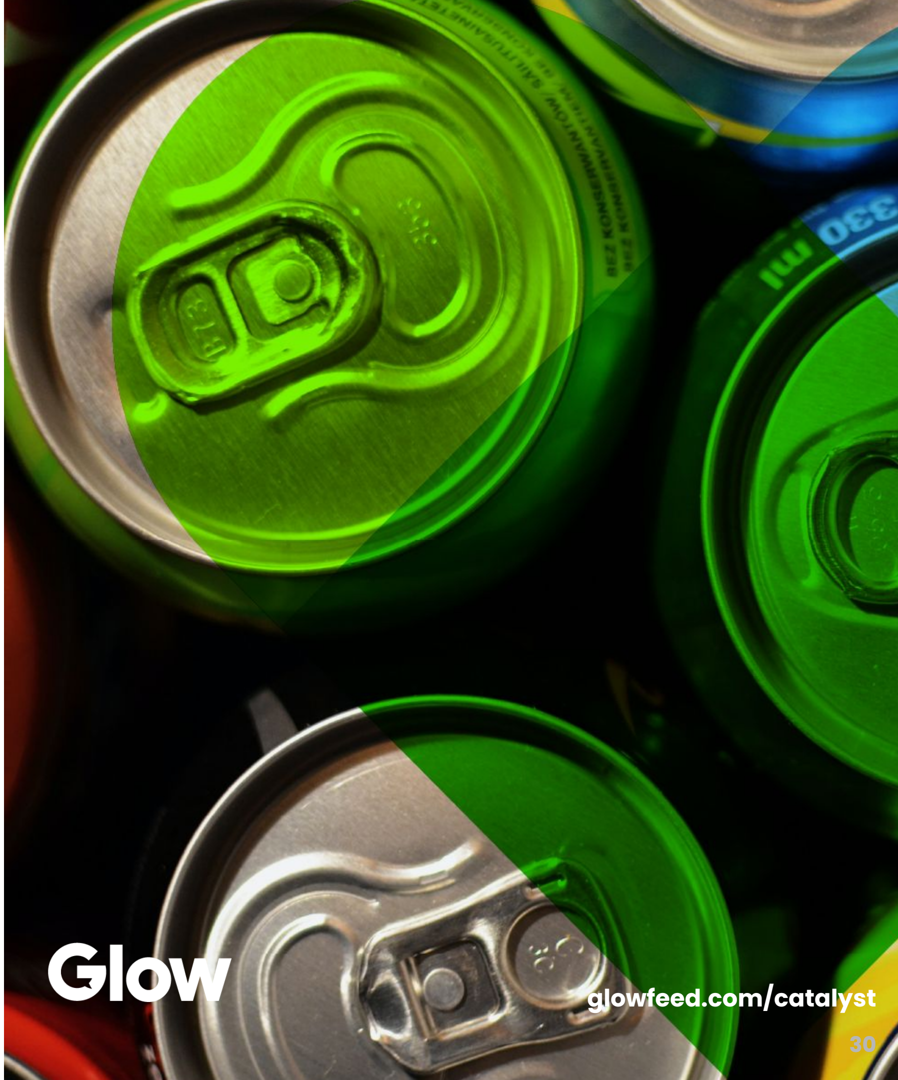
Total	Generation			
All adults	Boomers	Gen X	Millennials	Gen Z
42%	47%	43%	40%	36%

47% of **boomers** are concerned about the **cost of living.**

Source: Catalyst program, September 2021. (n=1244)

2

industry specific issues.



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issues by industry.

This month we investigated which issues Australians believe specific industries should lean in to address.

Consumers have very specific expectations that differ widely across industries. This data provides businesses within those industries a powerful indicator of the rising tide of consumer expectation and guidance on which issue to focus on to elevate their standing with consumers.

Australians agree that the food and grocery, retail, and fast food industries must play a major role in reducing **Plastic and packaging waste**, a clear signal to continue with the positive actions increasingly evident in those industries.

Unsurprisingly, Australians are in agreement that **Misinformation** needs to be addressed by the media and social media sectors as the vehicles for the spread of information.

The issue of **Drug and alcohol abuse** only appeared in the top three issues for two industries: gambling and alcohol manufacturers. While it was not seen as a major concern overall, there is clear directive from consumers for these businesses to address the problems often associated with their offering.

To gain access to the full data set by industry, look out for our Multi-Industry Issues Report released early October.

Source: Catalyst program, September 2021. (n=1244)

priority issues for key industries.

Most prominent issues for selected industries.

	Affordability of housing	Aged care	Air pollutants	Animal and plant extinction	Barriers to education	Climate Change	Comfort in retirement	Cost of living	COVID-19	Crime	Domestic violence	Drug & alcohol abuse	Ethical sourcing	Gender inequality	Homelessness	Job security	LGBTIQA+ inequality	Loss of forests and habitat	Mental health	Misinformation	Ocean pollution	Physical health	Plastic and packaging waste	Political and religious extremism	Poverty	Racism and discrimination	Sexual harassment	Tax inequality	Unfair treatment of indigenous people	Water and sanitation	Wealth inequality	Work-life balance	Workplace inequality
Alcoholic Drink Manufacturers	5%	4%	8%	5%	5%	12%	3%	12%	15%	16%	31%	53%	13%	8%	14%	9%	5%	6%	29%	11%	11%	20%	27%	4%	11%	8%	12%	6%	6%	8%	5%	9%	10%
Fast Food	5%	4%	10%	11%	5%	17%	4%	17%	25%	5%	6%	7%	22%	11%	8%	20%	6%	10%	13%	12%	14%	18%	42%	4%	10%	11%	12%	8%	8%	12%	7%	14%	21%
Food and Grocery Manufacturers	5%	4%	17%	19%	4%	25%	5%	36%	21%	5%	5%	8%	32%	11%	10%	19%	6%	20%	12%	14%	25%	15%	51%	3%	13%	9%	9%	7%	6%	19%	8%	13%	19%
Media	19%	22%	17%	21%	18%	31%	14%	24%	38%	27%	26%	22%	21%	23%	23%	21%	16%	22%	31%	45%	21%	18%	21%	26%	21%	27%	25%	19%	20%	18%	18%	19%	22%
Natural Resource Extraction	7%	4%	41%	31%	5%	46%	6%	11%	17%	5%	5%	6%	25%	8%	5%	13%	5%	39%	9%	12%	39%	8%	22%	4%	8%	6%	6%	12%	12%	34%	10%	12%	13%
Private Health Insurance Providers	6%	33%	4%	4%	4%	10%	12%	18%	31%	4%	12%	23%	4%	6%	8%	6%	4%	3%	48%	8%	4%	44%	4%	4%	8%	4%	6%	5%	6%	5%	7%	8%	4%
Real Estate Agents	45%	7%	5%	5%	4%	11%	10%	28%	16%	6%	7%	4%	8%	9%	26%	11%	5%	11%	10%	17%	5%	5%	6%	4%	15%	10%	7%	11%	8%	7%	12%	11%	10%
Retailers	5%	5%	11%	10%	3%	21%	4%	33%	28%	10%	8%	13%	28%	13%	10%	26%	7%	11%	13%	12%	16%	10%	43%	5%	12%	12%	13%	8%	7%	12%	6%	18%	25%
Social Media Platforms	12%	12%	11%	14%	12%	23%	9%	14%	25%	16%	20%	18%	17%	20%	13%	14%	18%	14%	36%	44%	14%	15%	14%	22%	16%	30%	27%	11%	17%	12%	13%	15%	14%
Universities	9%	7%	13%	12%	40%	25%	6%	15%	24%	9%	13%	16%	13%	23%	9%	17%	14%	11%	28%	24%	13%	12%	14%	16%	12%	20%	19%	7%	16%	12%	11%	16%	16%

Source: Catalyst program, August & September 2021. (n=1241 & 1244)

3

access for the vaccinated.

Access all areas (if vaccinated).

It appears that vaccinated entry requirements at venues or businesses has widespread support.

The majority of Australians (58%) report they would be likely to avoid a business, such as a restaurant, café, or airline, if it allows non-vaccinated people to enter. However, Gen X are slightly less concerned than the other generations.

Parents on the other hand are more concerned. 62% of parents say they would avoid a venue that allows unvaccinated entry, compared to 51% of adults without children.

Would avoid a business if it allows non-vaccinated people to enter

Total	Generation			
All adults	Boomers	Gen X	Millennials	Gen Z
58%	59%	49%	62%	56%

Source: Catalyst program, September 2021. (n=1244)

4

travel aspirations.

Ready to go interstate.

Interstate tensions regarding often-changing border restrictions have not diminished our desire to travel the country. Once border restrictions are lifted, 58% of Australians plan to travel to other states.

Millennials are overwhelmingly more likely to pack their bags and head interstate, with 69% of this generation stating they will travel once the restrictions have lifted. When it comes to the rest of us, approximately 1 in 2 plan to do the same.

Parents are also a group more likely to hop across borders, with 63% of parents stating they plan to travel interstate when possible, compared to 51% of non-parents, likely driven by the desire to reconnect with family interstate.

58% of **Australians** intend to travel interstate when **border restrictions** are lifted.

Source: Catalyst program, September 2021. (n=1244)

Where are we going?

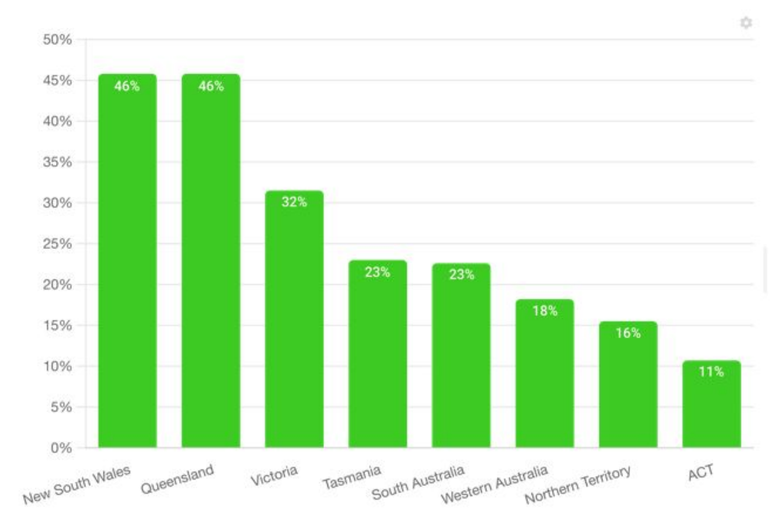
New South Wales and Queensland look set to benefit from our travel aspirations the most with 46% of all Australians planning to visit each state, respectively.

58% of Queensland residents will head to New South Wales, 49% will venture around their home state, and 30% will find themselves in Victoria.

46% of Victorians will be Queensland-bound, while 42% will stay within Victoria, 31% will head to NSW, and 25% will be off to Tasmania.

57% of New South Wales residents intend to travel within their own state, 47% will head to Queensland, and 25% look forward to Victorian travel.

States or territories Australians intend to travel to



Source: Catalyst program, September 2021. (n=1244)

Millennials will lead the return to overseas travel.

While many Australians are prepared to travel interstate, we may not be fleeing the country at the first chance we get. Once the travel ban is lifted, only 28% of Australians intend to travel overseas within the first 6 months. This number rises to 42% within the first 12 months.

If there is anyone truly racing out the gates, it's Millennials: 43% of this age group say they are likely to travel overseas within one month of the travel ban lifting, in sharp contrast to only 6% of Boomers who will do the same.

Predictably, those with (supposedly) a little more disposable income are ready to go the earliest. Of those with a household income of $75k+, 42% will head overseas within 2-6 months. In comparison, only 19% of those with <$75k household incomes will do the same.

Will travel overseas within 1 month of the travel ban being lifted

Total	**Generation**			
All adults	Boomers	Gen X	Millennials	Gen Z
24%	6%	19%	43%	37%

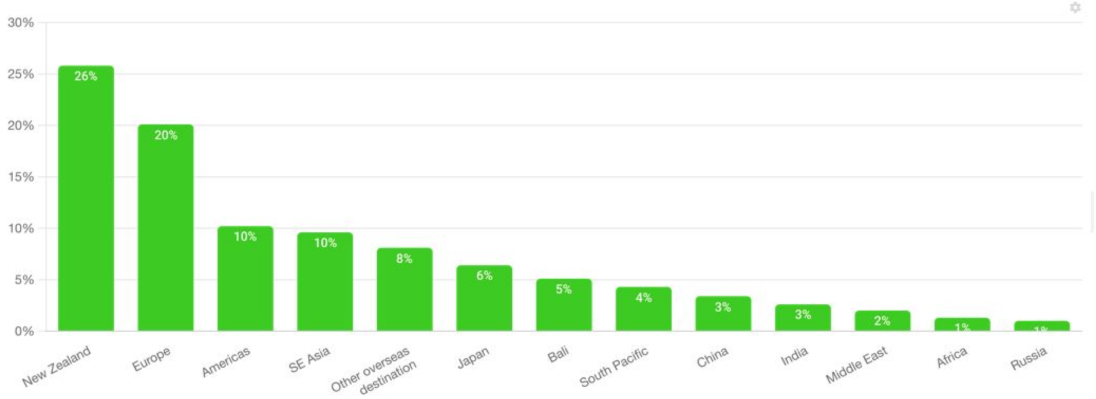
Source: Catalyst program, September 2021. (n=1244)

International destinations of choice.

Australians aspire to travel both near and far for their first international trip after the travel ban is lifted. 26% name New Zealand as their top choice, while 20% plan to head off to Europe, and 10% will find themselves in the Americas.

Bail will be hit hardest when international travel resumes with just 5% of Australians saying the Indonesian island will be the first destination they will travel to. In the year to March 2020 just before COVID-19 took a stranglehold on international travel, Indonesia was the second most popular destination for Australians with 1,223,000 million people travelling there.

First destination Australians intend travelling to when overseas travel resumes



Bali takes a hit as **26%** of people name **New Zealand** as their **first choice** international destination.

Source: Catalyst program, September 2021. (n=1244)

We support conscious Tourism.

Australians believe the travel and tourism industry has a role to play in taking action to solve important social and environmental issues. 44% of Australians have changed the way they travel to be more sustainable — a movement championed by Millennials, with 58% of this group having changed their travel habits, compared to 31% of Baby Boomers — and they are calling on businesses to take action in a similar way.

56% of Australians believe that properly verified carbon offsetting of all flights should be mandatory (an issue once again spearheaded by 62% of Millennials), and 63% of Australians believe that too often the views of local people are not seen as important compared to those of the tourism industry. 64% believe it's no longer enough to just be sustainable — the tourism industry should be making a positive contribution to communities and natural places.

57% expect the tourism industry to play a part in solving big challenges like climate change or social justice, and we are prepared to put our money where our beliefs are. 53% of Australians state they would be prepared to pay 5% more for a holiday if they could be confident that it would truly benefit the planet or communities, a number driven by 63% of Millennials as compared to only 41% of Baby Boomers.

57% expect the **tourism industry** to **play a part** in solving big challenges like **climate change** or **social justice**

Source: Catalyst program, September 2021. (n=1244)

5

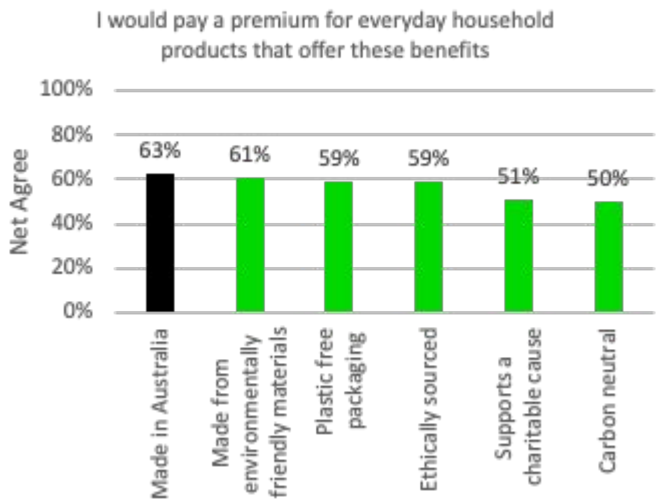
ethical sourcing.

consumers name their price for a premium.

Ethical sourcing justifies a premium price.

In last month's report we highlighted that being Made in Australia is a key driver behind Australians' willingness to pay a premium for a product. However, the data also reinforced the importance of ethical sourcing as an influence on willingness to pay a premium for household goods.

This data supports a body of evidence that creating products responsibly and sustainably is increasingly important in consumer purchase decisions.



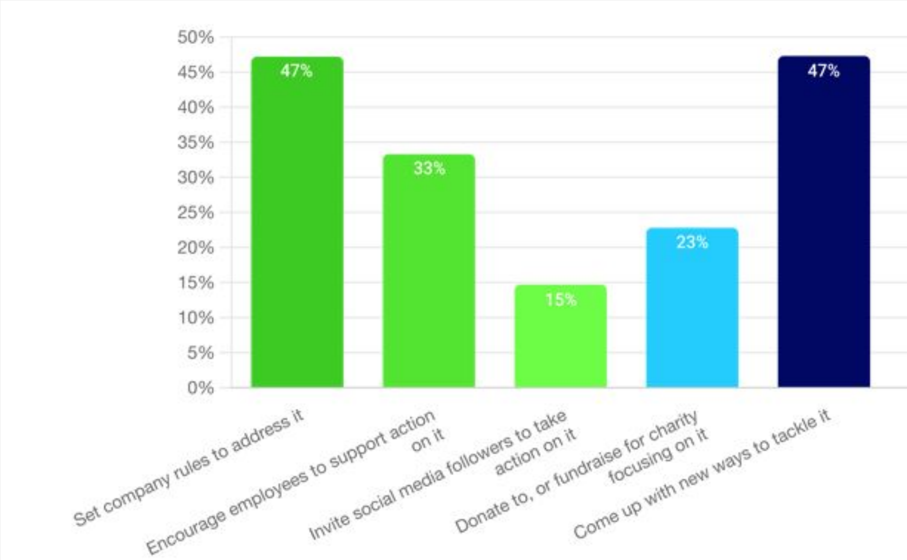
59% of Australians would **Pay a Premium** for a product that is **ethically sourced.**

Source: Catalyst program,, August 2021. (n=1,241)

Embed ethical sourcing.

When asked what businesses should be doing to address ethical sourcing there is strong demand for businesses to set rules such as supply chain protocols. And there is also an expectation to innovate new ways to tackle the issue, with many suggestions in this area from our open ended question relating to more stringent approaches to ensuring transparency and honesty in reporting on sourcing.

Action businesses should take to help solve ethical sourcing



Source: Catalyst program,, August 2021. (n=1,241)

Responsible brands will win the race to capital.

There are some generational groups driving the change towards ethical sourcing much more than others — through a desire to invest in businesses that support the planet.

Those with a household income of over $75,000 per annum were twice as likely to invest in stocks and shares as those below this threshold.

The data shows that they are more likely to invest in responsible brands. 73% of these investors would be more likely to invest in a company that supports ethical sourcing. This is similar to the level of support found in the August data for businesses addressing plastic waste (72%), further evidence of the desire of investors to do good.

However, there is a stark contrast between Gen Z and Baby Boomers. An overwhelming 87% of current Gen Z investors would be more likely to invest in a company that supports ethical sourcing, while only 51% of Baby Boomers say the same.

73% of **investors** would be more likely to invest in a company that takes action towards ethical sourcing

Source: Catalyst program, September 2021. (n=1244)

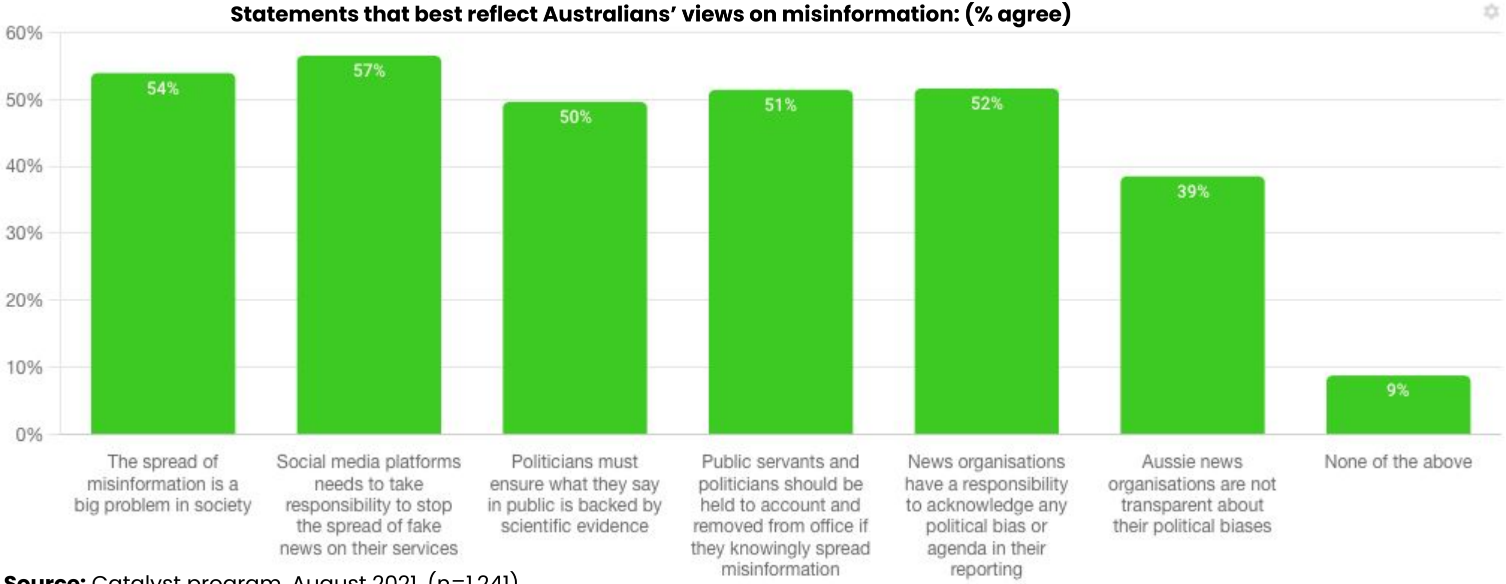
6

views on misinformation.

Responsibility for addressing it is shared.

One in two Australians agree that the spread of misinformation is a big problem in society, but there is no clear solve. Whilst nearly six in ten expect social media platforms to be more active in stopping it, there is also a strong expectation that those who create it need to be more accountable.

Statements that best reflect Australians' views on misinformation: (% agree)



Source: Catalyst program, August 2021. (n=1,241)

7

catalyst explained.

introducing.

Catalyst.

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.

The program involves monthly consumer research gathering the views of a representative sample of Australian adults.

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.

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

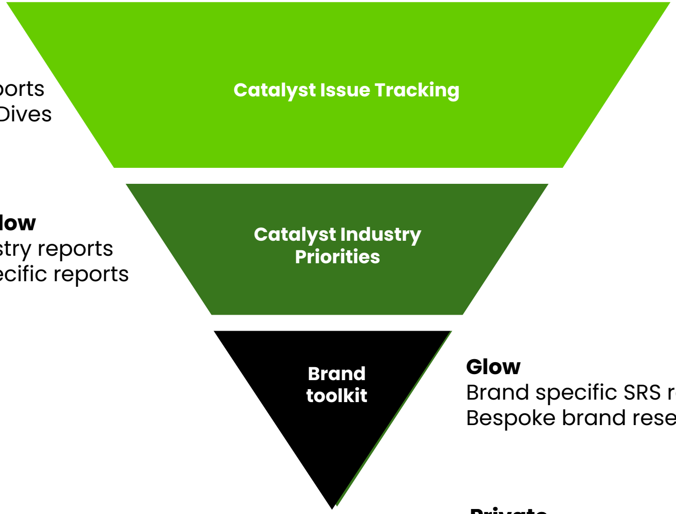
a top-down framework for action and measurement.

Rich data.

Reports:

Catalyst
Monthly Reports
Issue Deep Dives

Catalyst+Glow
Cross-Industry reports
Industry specific reports



Glow
Brand specific SRS reports
Bespoke brand research

Public
(available to Catalyst supporters)

Private
(commissioned by brands)

Structured for impact.

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

This data 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 and each industry's Social Responsibility Score(SRS) is calculated. Industry bodies can use this to assess their performance relative to other sectors. Brands can use it to more confidently invest in emerging solutions that address the issues consumers expect them to tackle.

Brands can privately track their own SRS to identify a deeper strategic advantage.

Contact the Glow team if you would like access to this SRS data.

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

Each month we measure public sentiment towards over 30 different social and environmental issues as a barometer of our collective anxiety.

The focus issues.

In addition, each month we dug deeper into a few issue areas to better understand attitudes, current behaviour and potential actions to create change.

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 10-14 September 2021. Responses were quality assured via multiple protocols and reviewed by a human for quality & consistency.

Catalyst.

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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:

NielsenIQ

Glow

Cadbury

yellow

who gives a crap

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FOCUS INSIGHTS

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Catalyst.

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

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