

# THE CONSCIOUS CONSUMER REPORT

AUSTRALIA 2023

*What it means for business leaders in Australia*



## The Corporate Edition

*For CEOs, CSR, Sustainability, Marcomms & HR Professionals working within Corporates, Companies & Brands*

# The Conscious Consumer Report Australia 2023

## Australians want increased action and more authentic communication around **Corporate Social Responsibility**

*What it means for business leaders in Australia*

### **The Corporate Edition**

*For CEO's, CSR, Marketing and Communications professionals within a  
corporate, company or brand setting*

Commissioned by **Cavill + Co.**  
Q&A and analysis by **SenateSHJ.**

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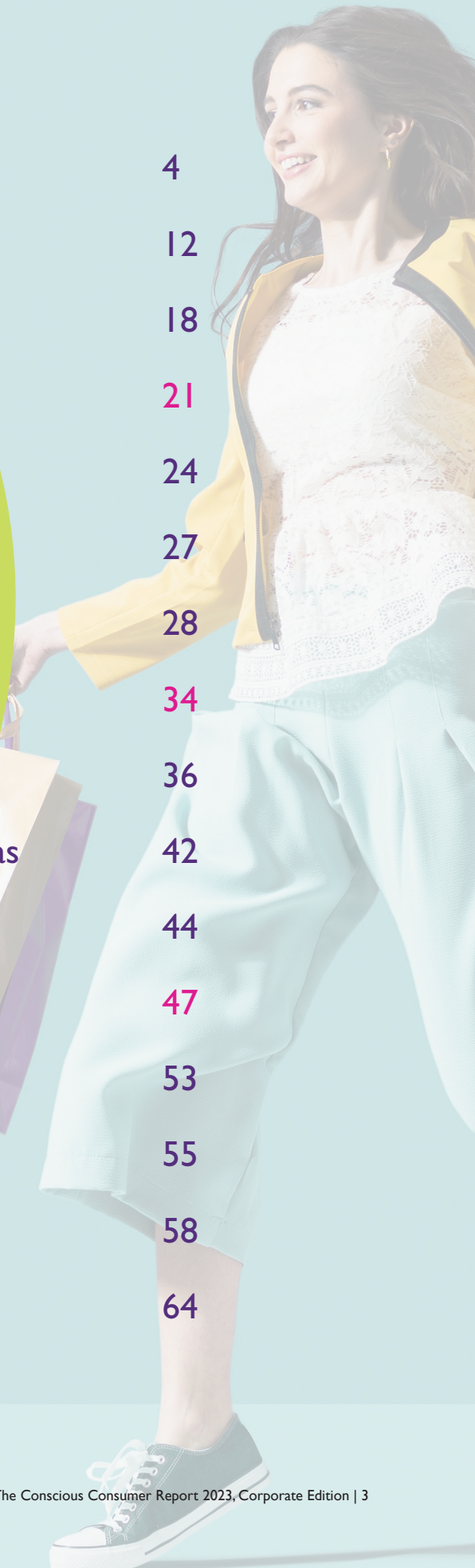


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# Introduction

## Hello!

Pleasure to meet you, I'm Hailey Cavill-Jaspers, Founder and Chief DoGoodologist at Cavill + Co, a boutique consultancy helping companies and brands do good, better.

As I sit down to write this - mid August 2023 - the country is awash with green & gold.... and pink. Of course, I'm referring to the sensational Matildas and the phenomenon that is Barbie the movie, and Barbie the brand. Both have smashed box office records in recent months and in my opinion, have earned their extraordinary success through taking a stand, a willingness to listen, committed action, and then having the courage to evolve. I believe there is much for business to learn here.

## More on that later.





## Instability

Australia has lurched from one crisis to another since 2020 - bushfires and floods, a global pandemic, several lockdowns and fast adaptation to remote working and learning. Tragically, many Australians lost loved ones, businesses, jobs, and homes. It's no wonder the Collins Dictionary's word for 2022 was 'permacrisis'. However, as a nation – compared to the rest of world - we came through it, with a deeper appreciation of friends and family.



## permacrisis

[pɜːməˈkraɪsɪs]

NOUN

an extended period of instability and insecurity  
#CollinsWOTY

Now, in late 2023, we're in the grip of a cost-of-living crisis, where the stress of making ends meet is further escalating mental health problems. The 'no worries' mantra of the laid-back Aussie is diminishing, replaced by an increasingly concerned, stressed and pessimistic Australian. They're worried and overwhelmed by the big issues<sup>1</sup> – climate change, political unrest, social inequality, AI, security threats - as well as day to day stressors of job security, rising interest rates, soaring rent and food costs, increased crime and so on.

## Growing anger at inaction

Our research reveals that Australians' anger at corporate inaction is growing. Inaction around minimising harmful behaviour and impact on people and the planet. If companies do not evolve – and evolve fast – Australians will use all the tools at their disposal, to bring about the societal change that's needed. Tools such as their skills, voice and ultimately their wallet.



<sup>1</sup> Statista 2023, Ipsos 2022, Lowy Institute Poll 2022, , Dynata Consumer Outlook 2023 and Globescan reports.

Many Australians are willing to switch brands to support those companies and brands doing good, and boycott those that are not. Some are even willing to refuse or quit a job if the company has a poor reputation in Corporate Social Responsibility (CSR). Australians are using their voice and leveraging the power of social media to broadcast positive stories about companies doing good – and spread negative stories about those stuck in the old model of ‘profit no matter what’.



Our research reveals that 67% of Australians see corporates as having as much responsibility for solving society’s problems, as government. And an even higher percentage – 76% - believe that companies should step in and help charities amid the cost-of-living crisis.

Australians’ anger is evident across a handful of statistics. 7 out of 10 (70%) Australians think corporates are greedy and ruthless. This is a six percentage point increase on the 2020 research statistic (64%). 88% believe that companies should be made more accountable with bigger fines when causing damage to the environment or society.

## All talk, no action

It’s not only corporate behaviour that Australians are angry about. They have something to say about the way corporates communicate their social and environmental activism, too. 63% say most companies are all talk and no action, rising to 69% among Gen X.

Australians are flexing their muscles at the checkout. Over a quarter of Australians say they’ve switched from their usual product / service to another, to support a cause they care about, in the past year.



However, this rises significantly when it comes to their **intention to switch brands** in the future. 54% say they will definitely / probably switch brands to support a cause they care about in the coming year.

Read further to discover the types of causes that prompt this switching behaviour and in which industry categories most of the actual switching occurred.

## Charity gives credibility

One thing that's come through loud and clear in our research, is that companies should be partnering with non-profits / charities to solve social and environmental problems. A charity partnership can prompt brand switching, but it also adds credibility to any corporate do-gooding. 7 in 10 survey respondents see a corporate CSR or cause activity / campaign as more genuine if there is a charity partner involved.



It makes good business sense to partner with a charity. Australia's charity sector is already working at the frontline tackling some of our toughest social and environmental problems. They are acutely aware of the problem, and already know the solutions required. What they lack, however, is resources. Money, tech solutions, innovative thinking, people-power, creative solutions, campaigning and mass market reach. Things that many companies have, and can offer, in abundance.

When partnering with a charity, a corporate (company or brand) is building on the brilliant and impactful work already done over many years. It means solutions and societal impact can be fast-tracked. It's a no-brainer, isn't it?

## Concrete evidence needed

Tangible impact matters to Australians. With 63% of Australians believing that companies are 'all talk and no action' it's imperative that companies roll up their sleeves, tackle societal problems and show genuine, tangible societal impact. 3 out of 4 Australians think a cause activity is just a stunt – or 'woke washing' – if they cannot see a genuine commitment to the cause. The same percentage of Australians are more likely to believe a company's talk, if they can see the tangible impact achieved.

*"Trust in corporations bounced back during the pandemic, from an all time low in 2019. One way to maintain trust is to put your ESG words into action or better still, act and then speak."*

**Eliza Mielczarek, Integrated Strategy Director, Communicado**

## Partnership is the new black

There's nothing new about partnership. It's the bedrock of many successful companies, including B-Corp Ben & Jerry's, Microsoft, Google, Hewlett Packard, eBay, P&G, Mattel and our very own Atlassian. Collaboration can also inspire truly revolutionary ideas, such as the Wright brothers who brought us flight, Larry Page and Sergey Brin who invented the Internet. Imagine life without the songs of Lennon and McCartney? I'd rather not.



As we confront the task of tackling some of the most challenging societal problems of all time, it appears that people are realising that collaboration is not only desired, but the **ONLY** WAY to go about it.

46% of Australians prefer companies to form a long-term partnership with a charity, providing cash and a range of resources to achieve a specific societal goal. This was far ahead of other strategies, such as setting up a philanthropic foundation, commonly embraced by companies. The word 'partnership' also suggests that a relationship is genuine and substantial, according to 36% of respondents. Only 18% said this to be the case with the word 'sponsorship'.

## No longer a minority

Having tracked consumer sentiment towards Corporate Social Responsibility and investment in charity for over two decades, I've seen these statistics swell from less than 10% to now, the majority. And it's no longer just the activist Millennials and Gen Z, it's across all age groups.



*"Australians want business to evolve. They want to do business with companies that not only take responsibility for their impacts on society, but **vigorously take action to make things better.**"*

**Sally Phelps, Head of Media, ABC**

## The Conscious Consumer Tools of Change

It appears that Australians are realising that they have powerful tools to bring about the social change that's needed. Tools such as their skills, voice and ultimately their wallet.

### Skills



Whilst the Great Resignation didn't impact Australia as much as other countries, employee attitudes have definitely shifted since the pandemic. A study by Work Futures, published in March 2023, reveals that Australian workers are in poorer physical and mental health since the pandemic. A large majority are exhausted and demotivated. Many are resisting returning to the office. This has created a trend called 'The Quiet Quitters'.

The psychological contract between employer and employee has evolved – employees want flexibility, enriching experiences, a sense of social purpose and to make a meaningful contribution to society. People are no longer willing to barter their lives just for material things.

This year we introduced a new question in our survey: whether a company's CSR<sup>2</sup> reputation has an impact on recruitment and retention. It certainly does. 1 in 5 Gen Z said they'd actively refused a job or quit a job in the last year because of an employer's poor reputation in CSR.

### Voice



Social media has helped transfer power from governments and business to everyday Australians. Before it took off around 2008, communication was one way and there were few avenues for consumers to vent, call out bad behaviour and rally their tribe. Now the masses have a megaphone in their hand-held devices, and they're making their voices heard loud and clear. Hashtag activism brings laser focus to an issue or cause, can gather global momentum

like wildfire, putting pressure on governments and business to act and transform. Think #MeToo, #BlackLivesMatter, #LoveWins, #LikeAGirl, #FreeBritney, #BanLiveExport, #ClimateStrike, #StopAdani, #IceBucketChallenge, #RUOKDay.

This year we introduced a new question in our survey: whether Australians are likely to tell others about a company's good work in CSR. 58% said yes they will, rising to 61% amongst Millennials.

<sup>2</sup> Corporate Social Responsibility



## Wallet



Many consumers are making decisions at the checkout, that align with their ethics and values. 36% of Australians say they've boycotted a company / brand / product / service in the last year because of a company's poor CSR<sup>3</sup> reputation. Millennials are even more strident – 45% say they have.

On the flip side, 37% of Millennials say they've actively switched **towards** a product because of its support of a cause or charity they care about.

## Global movement

An analysis of 15 significant global and Australian research reports on trust and consumer trends<sup>4</sup>, reflecting the views of hundreds of thousands of consumers around the world, confirms that the concern and frustration amongst conscious consumers is playing out globally.

**Global citizens are demanding a systemic reset.** To shift the paradigm of business. They want corporates (companies and brands) to not just meet inadequate legal obligations, not just address their impact on society and the environment, but step up to become *active agents of change*.

It's time to revolutionise the core purpose of business. From 'profit at all cost' to a model where humanity profits. From a focus on the balance sheet to a balance of priorities - people, planet, and profit. And if businesses do not embrace this alternate purpose, they will be left behind.

## The opportunity

In 2018, Cavill + Co published an e-book entitled **Talking The Walk<sup>®5</sup>**, an analysis of over 26 research reports on CSR-related consumer behaviour, with recommendations on how to communicate CSR and Social Good to the masses.

As consumers reacted to a decade of corporate scandals, royal commissions, wage rorts and deceptive environmental claims, we predicted a tsunami of consumer activism in the coming years. We even produced an **infographic** about it!

The wave has indeed hit our shores, heightened in velocity by recent health, economic and cost of living crises. It's an immensely powerful wave, with the strength to wash away decades of stale thinking and out-dated modes of doing business.

<sup>3</sup> Corporate Social Responsibility

<sup>4</sup> Who do you Believe? Republic of Everyone / Mobium Group / Bravery, December 2021 / Accenture Life Trends 2023, Accenture, December 2022 / 2023 Gen Z and Millennial Survey, Deloitte, December 2022 / Global Consumer Trends, Dynata, February 2022 / Global Consumer Insights Pulse Survey, PwC, February 2023 / Mintel Global Consumer Trends, Mintel, 2019 – 2023 / 2023 Media Trends, Dentsu, 2022 / Trust Barometer, Edelman, February 2023 / JBWere, The Corporate Support Report, March 2022 / Globescan Sustainability Survey 2022 / Roy Morgan Most Trusted Brands August 2023 / Globescan, Preparing for 2023, January 2023 / Oxford/Globescan Corporate Affairs Survey, April 2023

<sup>5</sup> Talking the Walk<sup>®</sup>. You can download free [here](#). It's a lively read!

We – business, charities, government, and consumers – have been given a once-in-a-lifetime opportunity to reshape society. The old model of self-serving capitalism is no longer valid or accepted by investors, consumers, or the general public. Business must now focus on serving the greater good. An evolved model of business – one that not only considers people and planet but takes **strident action** to enhance both – is required now.

Corporate Social Responsibility must move swiftly to **Corporate Social Action**. It should no longer just sit with the Sustainability Manager, but be at the very core of any business, whether it be a start up or established, private or public.

Evolving is not easy. It requires active listening, fresh thinking, courageous conversations, radical collaboration and determined action.

## Lessons from the Matildas and Barbie

Earlier on, I boldly stated that there is much for business to learn from the success of the Matildas and Barbie. You can read my thoughts on pages 41 and 52.

We hope the statistics and insights contained within this report, provide the impetus for a conversation about Corporate Social Responsibility (CSR), or an assessment of current activity.



Hailey Cavill-Jaspers  
Chief DoGoodologist & Author  
August-September 2023



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# About the Report

Our first Conscious Consumer Report was published in October 2020 and our second in October 2021. The latter can be downloaded [here](#) at the **Cavill + Co** website for comparison.

After yet another tumultuous year, we wanted to check in again to discover how Australians were feeling about companies and their role in solving societal problems.

The **2023 Conscious Consumer Report** includes some previously asked questions and several new questions. To interpret the data, we've drawn on the marketing and media expertise of our team and partners, our analysis of 15 significant global and Australian research reports on trust and consumer trends<sup>6</sup>, vox pop interviews and the deep insights I've gained from matchmaking over 50 corporate-cause partnerships for some of Australia's biggest companies.

If you're reading this and you work for, or lead a non-profit or social enterprise, you'll want to head on over to our other company that serves changemakers, **BePartnerReady.com**<sup>®</sup> and download the Conscious Consumer Report that's written for you.



*"Corporations have historically been part of the problem. There's a real shift now, for society to expect corporations to be part of the solution. And not only that, they're also in the perfect position to be part of the solution"*

**Caitlin, Millennial**

6 Who do you Believe? Republic of Everyone / Mobium Group / Bravery, December 2021 / Accenture Life Trends 2023, Accenture, December 2022 / 2023 Gen Z and Millennial Survey, Deloitte, December 2022 / Global Consumer Trends, Dynata, February 2022 / Global Consumer Insights Pulse Survey, PwC, February 2023 / Mintel Global Consumer Trends, Mintel, 2019 – 2023 / 2023 Media Trends, Dentsu, 2022 / Trust Barometer, Edelman, February 2023 / JBWere, The Corporate Support Report, March 2022 / Globescan Sustainability Survey 2022 / Roy Morgan Most Trusted Brands August 2023 / Globescan, Preparing for 2023, January 2023 / Oxford/Globescan Corporate Affairs Survey, April 2023

## Focus of the Research

There's a lot of research out there already – much of which we have read to provide context for this report. Some of the stats that we felt were relevant are included in the report.

CSR and Social Good is a huge, broad topic. Our research has focused on areas that we felt were missing from the existing research pool and information that we felt was important for our clients: corporates, companies & brands interested in doing good, better.

Our study does not cover specifically packaging, recycling, supply chain, labour standards, diversity and inclusion, human rights, corruption, governance and so on. Our study and statistics concentrated on the following areas:

### Corporate Behaviour

Whether companies should, in fact, solve societal problems, and if so, how should they go about it, whether they are doing enough. We look at accountability, cost of living crisis, and investment in causes and charities

### Corporate Communication

Whether corporate communication around CSR<sup>7</sup> is believed, what makes it believable, and whether consumers conduct research before buying. We look at woke-washing and word of mouth marketing.

### Consumer Behaviour

Whether consumers will switch brands to support a cause they care about, if they have switched in the past year, and what social causes prompt switching behaviour. We've also included new statistics around the common categories for switching brands, and the impact CSR has on job choice.

## Methodology

SenateSHJ conducted an online omnibus survey, with a sample of 1,000 people 18+ across Australia, resembling the population by gender, age, state, and location (sample sourced via reputable online research panel Pureprofile)

The report was commissioned by Cavill + Co. The Q&A design, survey deployment, fieldwork, data analysis and report was completed by SenateSHJ. Field dates were from **14 to 18 July 2023**.

The demographics were:

Metro	67%
Regional/Rural	33%
Male/Female split	50/50

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<sup>7</sup> Corporate Social Responsibility

Questions and statements were prefaced with the following blurb to provide context for the survey participant:

“This set of questions is about the corporate sector in Australia which can be defined as comprising large public and private companies with 200 or more employees selling products or services (rather than small, local businesses).

We'd like to ask you about the corporate sector in Australia, specifically relating to the impact they have on the environment and society and the way in which they pro-actively and positively help to address societal and environmental problems. This is known as Corporate Social Responsibility. We're also going to ask you about the way in which the Corporate Sector communicates such activities. When we say Social, we mean Society, not social media.”

## The Headlines in June/July

When surveying people, it's important to consider what's in the news at the time, as this may influence the answers. Playing out in mainstream news and social media in the months leading up to the survey (June/July) was: the PwC Australia scandal, Voice to Parliament campaigning, blistering heat waves across the northern hemisphere smashing temperature records, melting Arctic sea ice and riots in France prompted by discrimination and poverty.

## Extrapolation

Aside from, perhaps the Census, it's virtually impossible (and very expensive) to interview every Australian. Statisticians routinely interview a random sample of the total population, the sample resembling the population on demographic characteristics like gender, age, state and location, and then make inferences about the overall population. So, when we say '2 in 3 Australians' we have not, of course, interviewed all Australians, we have extrapolated the statistic from the sample size and have applied it to the Australian population. It's common practice in research studies to do this.

## Vox pops

We took to the streets to gain further insight into the statistics. Some of the most perceptive and incisive verbatim comments are featured in this report. Watch our vox pop video featuring Australian Conscious Consumers [here](#).

### A tax scandal prompted PwC to sell a part of its Australian business for \$0.67

The government business generated 20% of PwC Australia's revenue

By Ananya Bhattacharya

Published June 26, 2023





## Thank you to...

Our amazing partners SenateSHJ, especially our brilliant researcher Paul Di Marzio, and the clever and creative team at Communicado - Kerrie, Eliza, Fiona and Kathy.

My awesome team for turning things around so quickly and brilliantly: communications whiz Georgia McIntosh, designer Renée Radisich, Admin Ninja and researcher Danni Price and Jerome Pelletier at Stepping Stone Films for our Conscious Consumer [video](#).

I'm grateful for friend and mentor, Sally Phelps and Dana Ronan. My hubby Tyrone who held my hand during the painful and messy weeks of birthing this report also.

The brave vox-poppers who generously agreed to go on camera after we accosted them in the street, Caitlin, Cynthia, Ed, Jono, Justin, Kathy, Michelle, Milly, Sinead, Emma, Ketan and Tara!

And finally, I am so very grateful for the corporates and non-profits who shared their partnership story with us: Workwear Group: Carly, Suzie and Jacqui. The Big Issue: Simone. Coles: Gabrielle. Hospitals United for Sick Kids: Shilpi, Nicky, Tammy and Kim. The team at rebel and Blinc International. Lifeline: Lisa, James, Ash, Teli and Sophia.



*"The thing is people are now demanding it. Regulators are demanding it. So, if these companies don't make changes, they're going to lose. Goodwill and customers."*

**Michelle, Gen X**

# senate shj

In the late 1990's, before CSR<sup>8</sup> was mainstream, Hailey knew she needed research to prove her theory that consumers wanted companies to get involved in solving social problems. She turned to Di Marzio, a firm founded by Kim Di Marzio and together they created the first study of its kind, called The New Bottom Line.

Over the next decade they collaborated on several other studies and Kim's son, Paul Di Marzio, joined the team. Their shared passion for evidence based strategies, open communication and mutual respect and trust has been the bedrock of this 20+ year collaboration.

Paul Di Marzio has always been Cavill + Co's go-to person for consumer research and analysis. So when Di Marzio Research was acquired by SenateSHJ in 2022, with Paul to head up the Research & Insights unit, it was a no-brainer - Cavill + Co followed Paul there, and so began a new collaboration.

Since 2002, SenateSHJ has helped their clients solve their most challenging business problems. Misinformation, confused stakeholders, rapid change and the collision of transformative health, social and environmental issues are just some of the challenges organisations and governments face. SenateSHJ's thinking is underpinned by research and insights, with experience across health, creative, digital, behaviour change and stakeholder engagement creating influential and impactful strategies.

The SenateSHJ Insights team combine expertise in qualitative and quantitative research with big data and decades of experience delivering communication and change strategies. Each year, they produce the Togetherness Index, a study of the role and impact that communication plays in connecting people. In 2022, the third annual survey revealed an Index of 57; holding steady compared to 2021. Further analysis revealed government communications fatigue, institutions struggling to connect and the influence of social media growing in the wake of COVID-19. The 2023 survey will again examine the impact of communications in the context of The Voice to Parliament.

For more information, visit [www.senateshj.com.au](http://www.senateshj.com.au)



<sup>8</sup> Corporate Social Responsibility

# COMMUNICADO

Wholly independent for more than 30 years, Communicado has been delivering integrated solutions for some of Australia's most loved brands including Dulux Australia, Petstock Carlton & United Breweries, Carlton Premium Beverages, Asahi Premium Beverages, Carpet Court and BabyLove.

With small agency ingenuity and big agency impact, Communicado are more than just an integrated comms agency. They're built on the collective passion of a team that will push the boundaries, create ideas that work and achieve results that actually mean something for companies and brands.

Over two decades ago, Cavill + Co Founder Hailey met Communicado Managing Director Kerrie Ryan and an enduring friendship was formed based on shared values of: dedication to their craft; a desire to make a societal impact and a fiercely independent streak.



Some of the social impact programs that Communicado have steered include: creating a people-powered concert for Earth Hour; taking consumers on a journey away from petrochemicals for Earth Choice; initiating a Sustainability Pledge amongst our team; and encouraging people to adopt rescue pets for Petstock.

It's wonderful to have Communicado on board as partners in the 2023 Conscious Consumer Report. If you have a communications challenge and need a team that goes beyond, look no further than Communicado.

For further information, visit [www.communicado.com.au](http://www.communicado.com.au).



# 3

## Definitions & Context

### Conscious Consumer

Conscious Consumerism is an umbrella term, which simply means having more awareness of how your consumption impacts society at large, and using the power of your purchase to bring about change. Beyond that, it encompasses a broader range of consumer attitudes and resulting behaviour. A truly dedicated Conscious Consumer will first, before purchasing something new, look to repair, re-purpose or recycle an existing product. They'll shop close to home because they'll find products made by locals, with minimal packaging and less transportation.

For those Conscious Consumers choosing to purchase something new, they'll look beyond the label to examine the company behind it. They do research into the background of the manufacturing process, where the product is made, plus the impact the product or service has on the environment and society. Conscious Consumers have an array of resources at their disposal to help them understand how a product or service comes to market – apps like DoneGood, websites like Good on You and Fair & Good. Conscious Consumers know that their purchase counts – because that purchase funds the company and ultimately, it's behaviour and impact.



This discerning mindset can result in an array of consumer behaviours.

#### Positive behaviours such as:

- Supporting companies that align with their ethics and values
- Investing in companies with strong ethics and values
- Purchasing brands that are more sustainable and have less environmental impact – such as those with the B Corp certification
- Switching to brands that partner with, and support, charities
- Buying locally made
- Backing companies that recycle, use green energy, and minimise waste
- Doing business with corporations and brands that stand up for social issues they care about
- Actively promoting and recommending admired companies and brands to family, friends and social media followers

*“When choosing my energy provider, I switched to Power Shop because they’re greener. And so, I was willing to pay a little bit more because that aligned with my values.”*

**Ed, Millennial**

**The other side of the coin includes behaviour that has a negative impact on companies and brands such as:**

- Boycotting companies that contradict their ethics and values
- Shunning brands that appear to plunder the planet
- Avoiding brands made, and profiting, overseas economies
- Banning brands that do harm to people, animals or planet
- Exposing companies that are deceptive or misleading
- Actively protesting against, petitioning and strongly criticising disliked companies and brands to family, friends and social media followers.

## Minimalism

There is also a growing minimalist movement buoyed by campaigns such as The Year of Less, Buy Nothing and the Marie Kondo trend of de-cluttering – in an effort to save money, reduce waste and improve your surroundings. This gained popularity during the pandemic, as shops were closed, and now, due to anxiety around spending.



In stark contrast, we've witnessed the emergence of e-commerce brands like Shein and TEMU, who are using all the tricks of the gambling and gaming industry to encourage young people to buy cheap, low-quality clothing and products. TEMU lacks transparency around issues important to young people such as animal welfare and forced labour. Here's hoping that young Australians can refrain from jumping on the fast-fashion bandwagon and stay true to their values and principles.

## Employment

Conscious Consumers are realising that they also have the power to influence corporate behaviour, by choosing who they work for. Gone are the days when a 20-year career with a single corporation was the dream. More and more talented Australians are choosing to work for companies with a proven track record in social responsibility, for purpose-driven enterprises or even starting their own company with doing good at its core. B2B Companies that don't have 'consumers' who are keen to attract the brightest talent are not immune to the Conscious Consumer movement either. For the first time we included a question about this, and it reveals that a good reputation for CSR<sup>9</sup> does indeed impact recruiting and retaining talent.

<sup>9</sup> Corporate Social Responsibility



## The Generations

This study reveals the attitudes of Australian consumers – from Builders, Baby Boomers, Gen X, Gen Y (Millennials) and Gen Z (Zoomers).

Here's what it means.



### Builders

In 2023, aged 77+  
Born before 1946



### Baby Boomers

In 2023, aged 59-76  
Born 1946 - 1964



### Gen X

In 2023, aged 44-58  
Born 1965 - 1979



### Gen Y Millennials

In 2023, aged 29 - 43  
Born 1980 - 1994



### Gen Z

In 2023, aged 14 - 28  
Born 1995 - 2009



### Alpha

In 2023, aged 13 and under  
Born 2010 onwards

If you'd like more detailed information on what makes the different generations tick, download our free e-book 'The Generations' [here](#).

# Tackling the Big Issues

**In 2021, Workwear Group – which creates specialised uniform and workwear solutions for over one million wearers worldwide – engaged Cavill + Co to find them a flagship cause partner. This is their story.**

## About Workwear Group

Workwear Group, which is owned and backed by Australian-listed company, Wesfarmers, is a leader in specialised uniform solutions. It is the proud owner of iconic Australian workwear brands KingGee, Hard Yakka and NNT Uniforms, and creates bespoke uniform solutions for industry and government customers through Workwear Group Uniforms.

A review of Workwear Group's sustainability strategy – of which community support was an important part – revealed a gap. Whilst they'd supported several relevant charities previously, mostly at the brand level, there was an opportunity to embrace a true long-term partner for Workwear Group, one with aligned goals and mission, that resonated with the company's values and the team.

It was important to Workwear Group that the charity partner was not only able to utilise financial and volunteering support, but also, their products, leadership, skills, and expertise. Team members were super keen to be involved, but they wanted something meaningful. Workwear Group saw an opportunity to showcase their values and support for community in the eyes of current and potential employees as well as customers.



Finding a partner that met all those aspirations was going to be tricky, talk about finding a needle in a haystack! They wanted to avoid any natural biases towards certain cause areas, steer clear of personal favourites, and be challenged in their thinking. This is when Cavill + Co entered the picture.

Workwear Group created a small 'project team' that included leaders and team members from all areas of the business. Then came the development of a Brief, becoming the ultimate blueprint for all future decisions. From this, mandates and exclusions were clarified and SMART<sup>10</sup> business and societal objectives were crafted.

<sup>10</sup> SMART – Specific, Measurable, Achievable, Relevant, Time-bound

Workwear Group defined the specifics of how they wished to support the charity partner: a direct financial investment but also, technical and practical expertise, products, services, skilled volunteering and so on. This was a critical step, because Workwear Group knew they wanted to support a partner with all their resources, not just make a donation.

The next step was to articulate a defined 'cause area', to provide a focus for the charity search. The think tank involved all members of the project team, examined all aspects of the business, and challenged preconceived notions about what the cause should be.

#### “Helping people to work”

The cause area chosen aligned to the company's core business, vision, mission, and values and reflected the desires of all stakeholders. It was Helping People to Work. With unemployment and under-employment becoming an even greater challenge during the COVID-19 pandemic, it was also extremely timely and topical.

The next step involved searching for the perfect partner. Cavill + Co cast its net and gathered EOI's from over 50 non-profits who were actively working to tackle unemployment. After assessment, the list was refined to a shortlist of 10. An invitation to present to the Workwear Group project team was issued to the top five most promising charities.

**The Big Issue was selected for a three year partnership.**

## About The Big Issue

The Big Issue is Australia's longest standing and most successful social enterprise, dedicated to creating work opportunities for people experiencing homelessness, marginalisation, or disadvantage. The Big Issue is well known for providing employment opportunities to vendors to sell *The Big Issue* magazine however, they provide other employment solutions, such as being part of the Women's Workforce and fulfilling jobs such as packing magazines to subscribers of *The Big Issue*, helping with mail outs and letter box drops for government and corporate organisations.



The Big Issue was chosen because they ticked all the boxes in the Brief. Workwear Group's uniform experts could help refresh the iconic fluorescent uniforms, the financial component could help expand the Women's Workforce program, and there were numerous opportunities across Australia for meaningful employee engagement through volunteering.

PROUD PARTNERS



Supporting meaningful work for all.

## The Launch

The partnership was launched in February 2022. Activations included: Workwear Group purchasing a magazine for every employee across Australia and New Zealand; and management and team members joining vendors on the street, selling magazines, as part of **The Big Sell** fundraising event.

## Partnership Impact

Workwear Group employees have been actively involved in The Big Issue partnership since launch: joining women in the workroom, packing magazines; prepping breakfast for vendors across Australia; creating an exercise program for workers between shifts; and playing alongside the Community Street Soccer Program team. In the 2022/2023 financial year alone, over 110 Workwear Group team members provided nearly 270 hours of volunteer activity on behalf of The Big Issue.

what they like and don't like, and what improvements they could make. Using this feedback, the team developed a refreshed and highly functional uniform that vendors are now proudly wearing, to proudly work, across Australia.



In July 2023, Workwear Group was proud to launch a refreshed uniform for *The Big Issue* vendors. Workwear Group's product designers worked closely with The Big Issue team and spent time with magazine vendors on the streets of Melbourne to understand how they wear the uniform,

Workwear Group also created 110 hours of paid work opportunities for The Big Issue's Women's Workforce in the 2022/2023 financial year. As well as offering work through its Melbourne Airport Distribution Centre, Workwear Group is helping The Big Issue explore a new service around decommissioning corporate uniforms to create more clients and paid opportunities for the Women's Workforce program.

More information:

**Workwear Group**  
[www.workweargroup.com.au](http://www.workweargroup.com.au)

**The Big Issue**  
[www.thebigissue.org.au](http://www.thebigissue.org.au)



# 4

## Snapshot of the Stats

### Attitudes on Corporate Behaviour



3 in 4 Australians believe corporates should partner with charities to help solve societal issues in the coming year



58% of Australians believe Corporate Australia has the greatest potential to solve societal problems in coming years



7 in 10 Australians suspect all corporates care about is profit, doing anything to get it, even damage society and environment



67% of Australians think corporates have equal responsibility to government for solving society's problems



88% of Australians feel that government should issue bigger fines when companies damage the environment or society



76% of Australians believe companies should step up and invest more in charities during the cost-of-living crisis



46% of Australians chose 'a long-term partnership to achieve a specific goal' as their preferred way for a company to invest in a charity

## Attitudes on Corporate Communication



75% of Australians believe a company's support of a cause is genuine if they can see the tangible societal impact achieved



72% of Australians consider a company's support of a cause is more credible and genuine if they're partnered with a charity



3 in 4 Australians say it's good when a company uses its promotional channels to amplify a cause, but believe it's a stunt or 'woke-washing' if they can't see a genuine commitment to the cause



2 in 5 Australians do research before purchasing a new product or service, to see if it's doing good for society or the environment



58% of Australians say they're likely to tell others when they become aware of a company's good work in CSR



63% of Australians agree that most companies are all talk and no action



36% of Australians say that 'in partnership with charity x' suggests a genuine and substantial relationship between a company and a cause



## Attitudes on Consumer Behaviour



27% of Australians assert that in the last year, they've actively switched from their usual product / service to another to support a cause they care about



Of those Australians that switched in the last year, 33% switched products in the category of 'Everyday Food Items'



36% of Australians say in the last year they have boycotted a company / brand / product / service because of poor CSR reputation



13% of Australians actively refused a job or quit a job in the last year because of the employer's poor CSR reputation



54% Australians will definitely / probably switch brands this year to support a cause they care about



The **top five** causes that prompt brand switching behaviour: Climate Change / Global Warming (18%); Healthcare – Illness Prevention & Medical Research (18%); Environmental Conservation, Reducing Waste / Pollution (17%); Mental Health Services (16%) and Domestic / Family Violence (16%)

You're welcome to cite any of these statistics. Please reference Conscious Consumer Report 2023, Cavill + Co/SenateSHJ, September 2023.

# 5

## Let's Dive into the Detail

The statistics are divided into three sections:

- Corporate Behaviour
- Corporation Communication
- Consumer Behaviour

The 20 statistics are numbered with a **Q** (for question) or **S** (for statement). Most of the results were consistent across all generations and locations. Statistically significant differences are provided where they exist.



*"A huge one is fashion. I'm a big op shopper in a massive way. Probably 90% of my wardrobe. I do research on where the product is manufactured. I like to buy Australian made clothing."*

**Tara, Millennial**



# CORPORATE BEHAVIOUR





# Corporates should partner with charities to solve societal issues



*“In the coming year, I believe Corporates should partner with charities to help solve societal issues and get Australians back on their feet.”*



**76%**  
**AGREED**

This has increased five percentage points since we asked the same question in 2020. This year's response was consistent across all generations, just slightly higher among Gen X at 79% and Millennials at 78%. The response was also consistent across States, just a little higher in Tasmania at 86% (although the sample size was small, so bear this in mind = 22 people).

## Big opportunity to gain trust and confidence



*“Of all the major institutions, I believe that Corporate Australia has the greatest potential to solve societal problems in the coming years.”*

**58% agreed**

**63% of Millennials agreed**

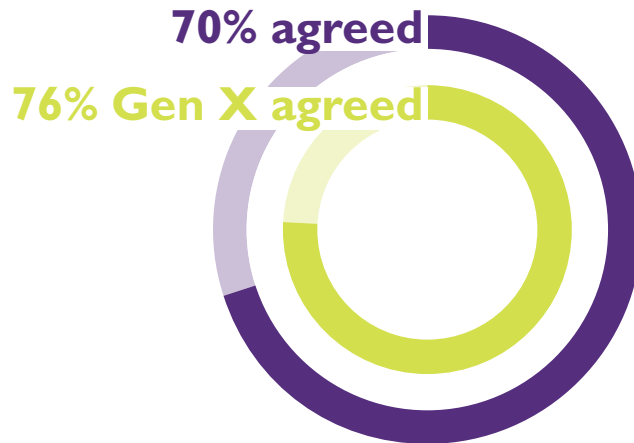
This has declined five percentage points since we asked the same question in 2020 (when it was 63%), and 2021 (when it was 61%). Whilst trust in corporates has bounced back significantly in the past decade<sup>11</sup>, thanks in part to their performance during COVID, it appears that Australians are losing hope in corporates to step up and solve societal issues. Millennials are still hopeful, coming in at five percentage points higher than the average.

<sup>11</sup> Edelman Trust Barometer 2023, 2022, 2021

# Australians think Corporates are greedy and ruthless



*“In general, all Corporates care about is profit and they’ll do anything to get it, even damage society and the environment in the process.”*



This has increased significantly since we asked the same question in 2021 when it was 65%, and in 2020 when it was 64%. Gen X are particularly strident being six percentage points higher than the average.

This finding is reinforced by Deloitte's global 'Gen Z & Millennial Survey'. 6 in 10 Gen Z's and Millennials believe business has no ambition beyond making money.



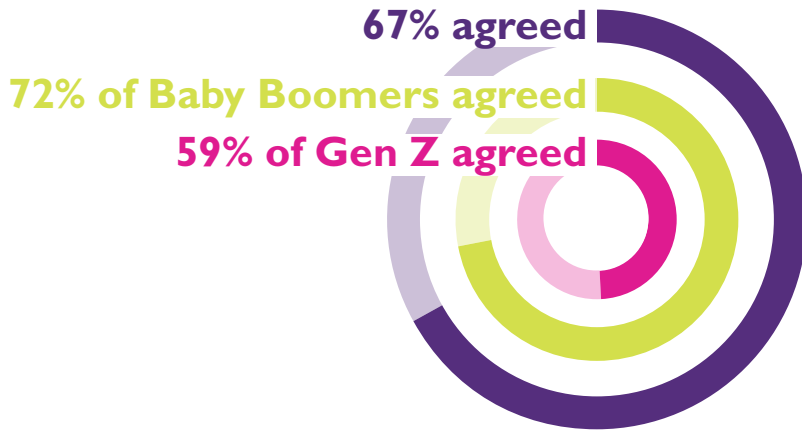
“Companies have their own agenda. They’re answerable to shareholders. They need to keep afloat themselves. But they also have their corporate image to consider. So, they must be seen like they’re doing something. How much they do, how much is token gestures? Who knows?”

**Justin, Gen X**

# Corporates are as responsible as government



*“Corporates have equal responsibility to government for solving society’s problems.”*



*This is a new question in the 2023 survey so there are no comparisons to prior studies or prior years. When 3 in 5 Australians put corporates on equal terms with government, it suggests that Australians see the old model of corporates operating purely for profit is outdated. Baby Boomers are particularly strident, being five percentage points above average.*



*“Corporates are part of the problem - a lot are creating products causing waste and carbon emissions. Therefore, they should share some of the responsibility in either mitigating those issues or fixing them.”*

**Ed, Millennial**



## Harsher punishment for corporate wrong doings



*“When companies damage the environment or society, government should make them accountable with bigger fines and exposure of wrongdoing.”*



*This is a new question in the 2023 survey so there are no comparisons to prior studies or prior years. This is the highest level of agreement in the entire survey, so Australians feel very strongly about accountability.*

Almost 9 in 10 Australians think Government should step in when self-regulation isn't effective. It appears that Australians are fed up with companies getting away with societal damage and the punishment should be harsher, especially Baby Boomers who are five percentage points above the average. Even Gen Z, who were less in agreement that companies are equal to government for solving social problems (S4) believe punishment is inadequate with 4 in 5 agreeing with this statement.

## Companies must help charities during cost-of-living crisis



*“It seems that everyday Australians are struggling with the cost of living, and donating less to charity. Now more than ever, companies should step in and invest more in charities.”*



**76%  
AGREED**

*This is a new question in the 2023 survey so there are no comparisons to prior studies or prior years. Majority agreement was evident across the board including in all generations and States.*

# Australians champion corporate-cause partnerships



*“Which, if any, of the following are ways you prefer a company or brand to support or invest in a charity?”*

## Top 3



**46%**  
**SAID**

A long term partnership giving cash and a range of resources to achieve a specific societal goal (ie. to plant a million trees, to build a hospital, to fund a crisis line).



**36%**  
**SAID**

Providing products to a charity (ie. food, computers, office space, transport).



**28%**  
**SAID**

Providing a percentage (%) of sale of their product or service to a charity.

In this question, eight options were provided – being the eight most common ways that companies invest in charities/non-profits. Creating a philanthropic foundation – a common tactic for companies to ‘give back’ - was in the bottom three.

Other statistics in this report show clearly that Australians want corporates to partner with non-profits to help solve society's problems. Of course, companies need to start with mitigating damage caused by their daily operations, first.

Almost half of Australians want companies to invest their full resources with a clear social goal in mind. Over a third of Australians want companies to provide valuable products and over a quarter are keen to see a product promotion – otherwise known as Cause Related Marketing. Females were 12 percentage points above the average for Option 2 – Providing products to a charity (42%). There was very little variance across generations or States.



# Rebel for a Cause

A brilliant example of a corporate that's bringing its full resources to bear for a cause, is that of **rebel**. Partnering with **Lifeline** since 2021, they've made a significant financial commitment, initiated campaigns, and leveraged their digital channels, retail outlets, suppliers, and sporting ambassadors to champion mental health and raise funds.

Like any good partnership, both organisations were united on their goals and aspirations. **They were:**

- To create a healthier Australia
- To demonstrate the positive impact sport has on mental wellness
- To promote help-seeking behaviour
- To generate cash for Lifeline to power their telephone, text, and chat services 24 hours a day, 7 days a week



**rebel** – Australia's leading sports retailer – believes in the transformative power of sport. To rebel, it's more than just fitness - it's about holistic well-being. Sport can build confidence, swim off a bad day and slam dunk stress. They express this belief in three simple words: 'Sport is Calling'.

As a torchbearer for well-being, it made sense to partner with a leader in mental health – Lifeline. It was a perfect match – both iconic brands, with national reach, serving a young adult audience.

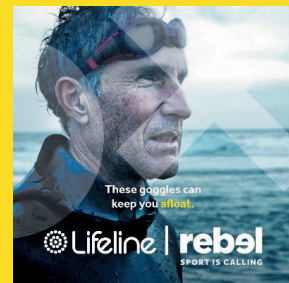
Not to mention that 'Sport is Calling' neatly aligns to a helpline that answers over 3,000 calls a day from Australians in crisis.

rebel's upfront commitment of **\$750,000** across three years proved they meant business. In just two years this was surpassed and to date rebel has contributed over **\$1m** to Lifeline.

The partners' tactical goals were also aligned: to illustrate the unifying concept of sport in strengthening mental health, reach new audiences and engage employees and ambassadors.

The 'Mental Health is a Team Sport' campaign kicked off in October 2021 to coincide with Mental Health Awareness week. It featured sporting greats Mary Fowler and Ellie Carpenter of the Matildas, former NRL player Ian Roberts and GWS Giants player Alicia Eva. The campaign included paid and organic PR and digital media. Together with partners, \$590,000 was raised for Lifeline.

It was essential to depict and include everyday people as well as elite athletes, so several rebel staff stepped up to feature in the digital campaign. You can view the campaign [here](#).



**MENTAL HEALTH IS A TEAM SPORT**

# Lifeline | rebel

## SPORT IS CALLING

In year two, the campaign evolved and rebel mobilised their retail partners including Nike and Adidas, to join in to raise funds. Lifeline enrolled existing partner AFL. rebel ran an in-store activation with \$1 per product going to Lifeline. In collaboration with rebel partners and significant customer donations, rebel was able to generate almost \$650,000.

**This is a brilliant partnership because it's a real world demonstration that validates many of the findings in this report.**

rebel partnered with a cause that makes sense to its brand. A cause that deeply resonates with many Australians. rebel made a significant up-front cash commitment and utilised all its resources including 150 retail stores.

Behind the scenes they're also making great strides to be more sustainable and minimise their environmental impact. rebel partnered with Game On Recycling to re-purpose sports balls, with drop off bins in store. They've partnered with Tread Lightly to recycle sports shoes into mats & playgrounds.

rebel walk the talk when it comes to elevating women in sport, by supporting grassroots participation through to elite athletes, investing across all sporting codes. They sponsor the AFLW, City2Surf Fun Run, and the Matildas.

Diversity and Inclusion is not just a tick the box exercise. rebel have a permanent Pride landing page on their website featuring a range of unisex rainbow products.

They also create opportunities and pathways for First Nations communities through investment in Indigenous sporting foundations.

Superb work by all involved: Lifeline, Rebel, and its agency Blinc International.

More information on the rebel/Lifeline partnership:  
[www.rebelsport.com.au/lifeline](http://www.rebelsport.com.au/lifeline)

More information on rebel's CSR activities:  
[www.rebelsport.com.au/conscious](http://www.rebelsport.com.au/conscious)





# CORPORATE COMMUNICATION



## Tangible results & social impact = credibility



*“When seeing a company or brand promoting its support of a cause, I’m more likely to believe it when I see what they’re doing and the tangible societal impact achieved.”*



This statistic is consistent with the 2021 finding. This year, slightly fewer Gen Z agree (at 68%) but agreement is higher among Builders at 86% (although the sample size was small = 38 people). Perhaps age and experience mean the Builders are more cynical?

## Partnering with a charity = credibility



*“When seeing a company or brand getting behind a cause, it’s more credible and genuine if they’re partnering with a charity or non-profit to effect social change.”*



**72%**  
**AGREED**

This statistic has remained the same since 2021. There’s consistency across generations and significantly less agreement in WA at 63% (Sample size = 100 people).





# Australians can spot a PR stunt when they see it



*“It’s good when a company or brand uses its promotional channels to amplify a topical cause or issue, but if I can’t see a genuine commitment to that cause, it’s just a PR stunt or ‘woke washing’ in my view.”*



**76%**  
**AGREED**

**81%**  
**OF MILLENNIALS**  
**AGREED**

To ensure this question was clearly understood, we defined two things:

- Promotional channels: “advertising and social media”
- Woke Washing: “when a company jumps on a popular social issue to improve its reputation, without demonstrating a real commitment to that issue”

Social issues, causes and charities all need publicity and increased awareness. It’s vital to attract donations, volunteers, and support especially when advocating for positive behaviour change. But when a company jumps on board an issue just for a headline or for positive PR, it will backfire. Giving a cause a voice is fabulous – but commit other resources as well - for the long haul.

We can see a significant increase - eight percentage points - since we asked this question in 2021, when it came in at 68%. Millennials are significantly more strident at 81%, five percentage points above the average. Builders were ten percentage points below the average - at 66%.



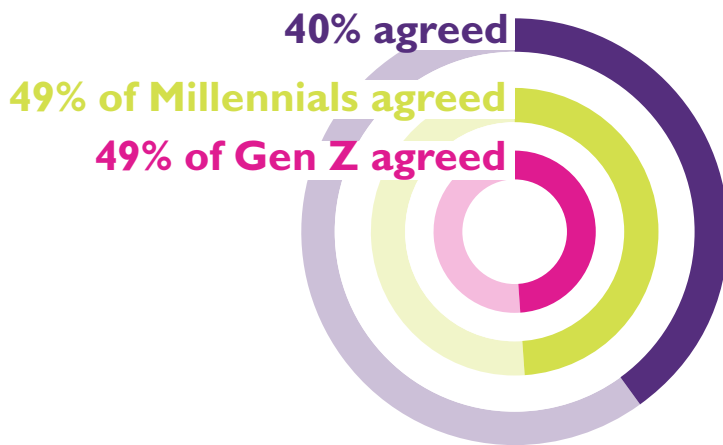
Corporate regulators ASIC and ACCC announced that greenwashing activities are an enforcement priority for 2023, to protect consumers from the increase in greenwashing claims. Legislative changes are anticipated.

Clyde & Co, Global Law Firm

# Millennials and Gen Z research companies prior to purchase

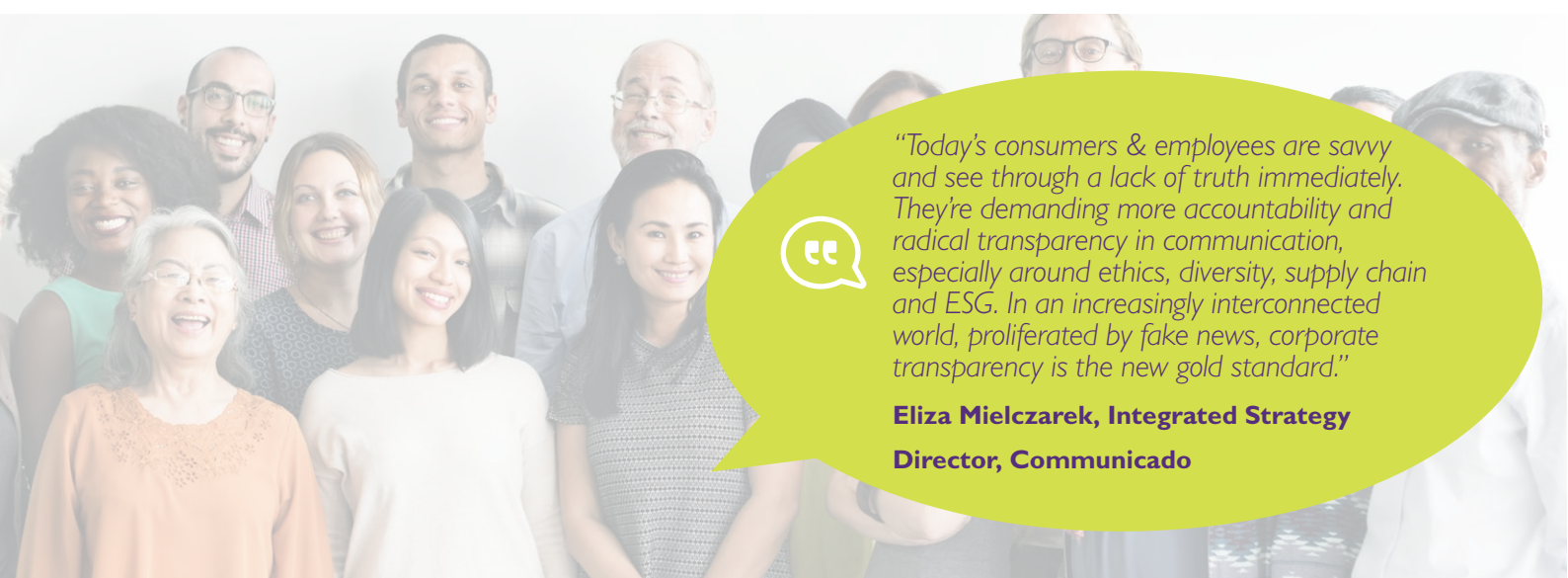


*“When considering purchasing a new product or service, I do research on the company to see if it’s doing good for society and the environment, before making the purchase.”*



*This is a new question in the 2023 survey so there are no comparisons to prior studies or prior years. Over a third of Australians conduct research on a company’s social and environmental credentials before making a purchase and almost half of Millennials and Gen Z’s do this. Baby Boomers are far less likely to do research (28%) as well as Builders (17%), although the Builders sample size was small = 35 people.*

With the internet at our fingertips, more activist groups than ever before, and numerous apps providing immediate fact-checking on company’s sustainability claims (ie DoneGood, Good On You, Happy Cow, Greener) checking a company’s credentials is easier than ever, and it shows that Australians are committed to making their purchase count.



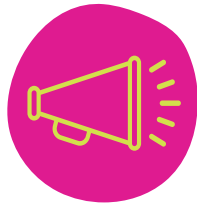
*“Today’s consumers & employees are savvy and see through a lack of truth immediately. They’re demanding more accountability and radical transparency in communication, especially around ethics, diversity, supply chain and ESG. In an increasingly interconnected world, proliferated by fake news, corporate transparency is the new gold standard.”*

**Eliza Mielczarek, Integrated Strategy  
Director, Comunicado**

## Doing good sparks positive word of mouth

**S12**

*“When I become aware of a company’s good work in the field of Corporate Social Responsibility (CSR), I’m likely to tell others about it.”*



**58%**  
**AGREED**

*New question therefore no comparison.* This is consistent across the age groups, although Builders are less likely to tell others (43%) but sample size is small = 35 people.



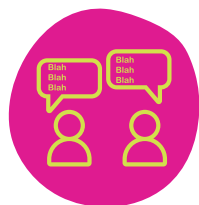
*“Never mind the sizzle, where’s the sausage?”*

**Hailey Cavill-Jaspers**  
**DoGoodologist**

## Lots of talk, not enough action

**S13**

*“Most companies are all talk and no action.”*



**63%**  
**AGREED**

**69%**  
**OF GEN X**  
**AGREED**

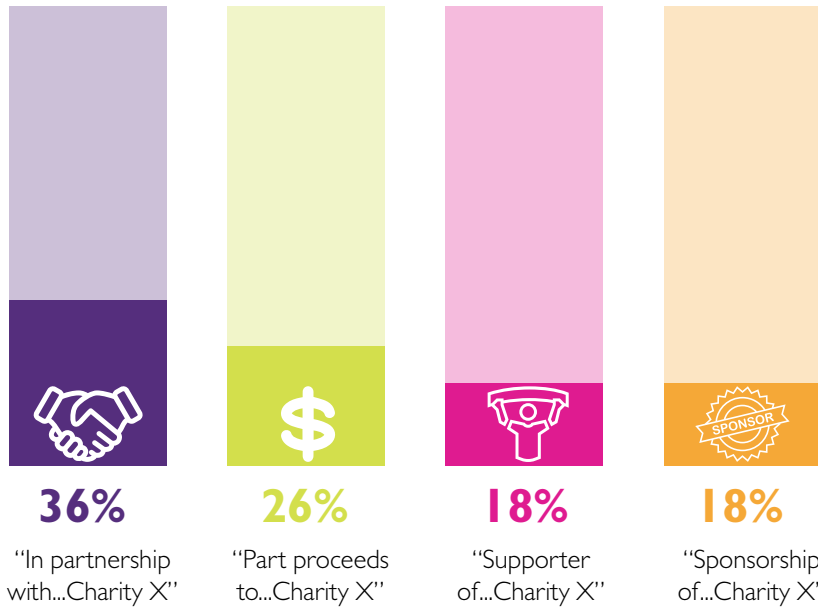
*New question therefore no comparison.* When almost two thirds of Australians agree with this simple statement, it shows that companies that are not doing enough need to do more, and those that are doing good need to communicate it more effectively. Specifically, they need to provide substance, evidence, tangible societal impact, and data. And not just in a once-a-year Sustainability Report.

Gen X are especially sceptical of corporate spin - at 69%, they are six percentage points above the average.

# Partnership = Genuine and Substantial



“When you see a company or brand promoting its connection to a cause or charity, which of the following words suggest that the relationship is genuine and substantial?”



New question therefore no comparison. Four options were offered along with ‘Something Else’ which scored 2%. This statistic reinforces the importance of partnership, with the wording of **partnership** being the clear winner for communicating a connection between a company and charity. It also demonstrates the importance of language – words matter.

This doesn't mean that all communications should switch to partnership, or something that isn't a partnership should be re-labelled! A genuine partnership is one of mutual exchange, long term, not a tokenistic gesture or donation. Consider the correct terminology when communicating your charitable endeavours.



“While I dislike ‘Part proceeds to...Charity X’ due to its ambiguity - the fact that this came in at No. 2 suggests that money talks (even when the amount is vague!)”

**Hailey Cavill-Jaspers**  
DoGoodologist

# What we can learn from the Matildas

## What triggered such widespread adoration seemingly out of the blue, especially for never-before sports fans? And what lessons can business leaders learn from the Matildas journey to success?

What a phenomenon the Matildas are. Not only the first Australian soccer team to reach the semi-finals of a World Cup, but they've galvanised and united a nation. They smashed stadium<sup>12</sup> and broadcast<sup>13</sup> records and inspired thousands of young girls across Australia to pursue their dreams. I was captivated, finding myself watching a soccer match for the first time in 40 years. And I know I'm not the only one.

They made a stand. They put in the hard work. They showed leadership. But the road to success was long and rough. In the early years, the Matildas

had to fundraise to pay for kits, training equipment and even air fares to represent Australia on the world stage. They handed out home-made flyers to encourage punters to attend matches and begged TV stations to broadcast their matches. In 2015 they went on strike to confront the FFA (Football Federation Australia) and draw attention to their contracts worth \$21,000, below the country's minimum wage.

Their backers took risks and invested, for the long term. Australia and NZ took a leap of faith in their investment as hosts. They reinforced their commitment by plastering bus stops and billboards in green and gold. Adidas invested in enormous murals of Mary Fowler and Caitlin Foord on the sides of Sydney's CBD buildings. In 2016 CBA boldly terminated its contract with men's cricket yet continued its sponsorship of women's soccer. In 2021, CBA then announced a four-year sponsorship package with the Matildas, worth \$1-2m. The investment is reaping returns – of increased brand awareness, reach and most importantly engagement in a positive setting.





Alas positive goodwill earned by the bank was probably eroded when announcing a \$10 billion profit weeks later. The announcement coincided with media reports of corporate profiteering fuelling inflation and the cost of living crisis. And the bank's own research detailing which Australian generations were suffering the most. This simply added to the media chorus accusing corporate Australia of being 'tone deaf'.

**The Matildas persistent pursuit of a goal, their dedication and discipline, resourcefulness, inclusive culture and kindness** on and off the field has inspired us to join their tribe and follow their journey – no matter where it leads or how long it takes to get there.

**Positive behaviour** is the way to create connection and inspire a nation. Psychologists call it 'emotional contagion', the spontaneous spread of emotions and behaviour through groups and crowds, reaffirming the hard-wired human need for connection.

**Actively solving social problems is a powerful way to create connection and inspire Australians.** Instead of relying on Annual & Sustainability Reports to tell a sanitised story, companies need to embrace radical transparency and share the challenges as well as the vision, milestones and achievements on their CSR & Social Good journey. When you bring Australians (customers, staff, shareholders, community) on the adventure and make them an integral part of it, they'll share the ups **and the downs**.

Just as we did with Sam Kerr's injury, the crushing defeat of Nigeria, the electric drama of the penalty shoot out against France.

The journey may not be an easy one, it could be rough like the Matildas. Companies need to **make a stand** and put in the hard work. Whether you're at the start or well down the road, remember, it's an adventure. Show leadership.

You'll need to take a leap of faith, although if you gather the evidence (reports like this and others) and survey customers and staff, it will be an informed leap. You'll need a bold vision and clear goals and **invest for the long term**. You'll need Tillies-like **discipline and dedication** to stay on course and bring all your resources to bear. And include people, *enrol* people until you achieve your goals.

This research report validates that Australians want corporates, companies & brands to work with them to solve social problems. Indeed, 58% of them believe that of all the institutions, your sector has the **greatest potential to do it**.

Widespread adoration may not be a realistic goal, but it's clear that a lot is at stake: customer loyalty, investor confidence, positive reputation, inspired culture and workforce, increased market value, community trust, continued licence to operate, to name a few.

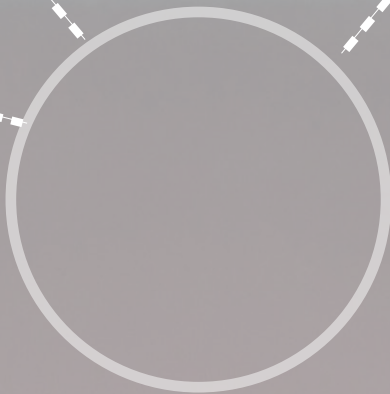


<sup>12</sup> 1.77 million tickers sold for the Women's World Cup – a record figure

<sup>13</sup> The Matildas semi-final was watched by 7.13 million people – the highest rating sporting event since Cathy Freeman's gold-winning run at the Sydney 2000 Olympics (OzTAM data)



# CONSUMER BEHAVIOUR



# Millennials will switch products to support a cause

**S15**

*“In the last year, I have actively switched from my usual product/service to another because of its support of a cause or charity I care about.”*



**27%  
AGREED**

**37%  
OF MILLENNIALS  
AGREED**

This finding is consistent with 2020 and 2021 statistics, so the cost-of-living crisis does not appear to have impacted brand switching to support causes. Millennials are 10 percentage points above the average, meaning they are the biggest switchers. Boomers, at 19%, are less likely to make the switch.

*“I’ve switched brands to ones who support charities, because I want to support people who are doing good in the world. And I’m far more conscious of reading labels, doing research.”*

**Kathy, Gen X**



## Australians switch most on grocery and fashion



*“From which of the following categories was the type of product or service that you made the switch?”*

Top 5	
Everyday Food Items	33%
Fashion / Clothing	30%
Fast Food / Takeaway	25%
Health / Beauty	24%
Energy / Utilities	19%

*New question, therefore no comparison. In this question, 16 categories were provided, and only those respondents that answered S15 were surveyed (Sample Size = 270 people).*

Every company and brand desires loyalty. But it's hard won. This statistic shows that Australians will reward brands that are doing good, especially in everyday food items, fashion/clothing and fast food/takeaway. Given these categories are very cluttered with so much choice, companies and brands should consider bringing their CSR<sup>14</sup> and Social Good to the forefront at the point of purchase.

Not surprisingly, 33% of females switched their health/beauty product, nine percentage points higher than the average. Health and beauty brand managers, take note!

*“The biggest difference I can make personally is in my purchase power. I think long and hard about the products that I buy. I do a degree of looking online, but then how much of that is made up?”*

**Justin, Gen X**

**Click here if you would like to know where your product category sat in the ranking.**

<sup>14</sup> Corporate Social Responsibility

# Sauce of Inspiration

Our research reveals that Australians are most inclined to switch brands to support a cause in the 'everyday food items' category.

An excellent example of an everyday food item that's changing the lives of sick kids, is **Mum's Sause**, sold through more than 800 Coles supermarkets across Australia.

Every time customers purchase a bottle of the pasta or pizza sauce, 50c goes to the charity, **Hospitals United for Sick Kids** (formerly Curing Homesickness), an alliance of hospitals, foundations, and pediatric services, that's all about getting kids home from hospital and back to the things they miss. The money generated goes towards purchasing state of the art equipment, investing in ground-breaking research and funding support programs for children in hospitals across Australia. Money generated in each state through sales of Mum's Sause, goes directly back to fund areas of greatest need prioritised by the state-based hospital.

The Mum's Sause product was developed by Coles in 2019, in collaboration with the team at Hospitals United for Sick Kids. The Sause idea came about after it was revealed what kids miss most about home, when they're in hospital. They miss friends, pets and of course, meals with the family.

The product is as wholesome as it is delicious, contains real, natural ingredients (95% tomato and vegetables) with no added sugar or artificial nasties, and enjoys a 4-star health rating. It's also competitively priced to provide everyday value to Coles shoppers.

Not only do Coles cover the manufacturing and distribution costs, they also run an annual card campaign that invites customers to purchase a \$2 donation card at the checkout. Funds raised support programs that aim to help sick kids get out of hospital and back to things they miss.





Since the first pasta sauce was introduced, Coles have added three more varieties - tomato basil, garden vegetable and pizza sauce.

To date over 4.46m jars have been sold generating over \$2.3m for sick kids. In addition, store fundraising has increased the total income to over **\$6.8m**. This income has funded over 71 projects, treatments and life-saving equipment, making life a little easier for the 430,000 kids in hospitals across Australia.

This partnership is excellent, built from strong insights and research, it provides a source ('scuse the pun) of sustainable, predictable funding for the charity and offers consumers a simple way to contribute towards a great cause as part of their grocery shop.

Superb work by all involved: Coles, Hospitals United for Sick Kids and agency partner CHEP Network.

Visit [www.hospitalsunitedforsickkids.org.au](http://www.hospitalsunitedforsickkids.org.au) for more information.





# Millennials are the biggest boycotters of poor behaviour

**S17**

*“In the last year, I have actively boycotted a company / brand / product / service because of their poor reputation in social responsibility.”*



**36%**  
**AGREED**

**45%**

**OF MILLENNIALS  
AGREED**

This is consistent with 2020 and 2021 statistics. Millennials are nine percentage points higher than the average to boycott, and given they are also most likely to do research prior to purchasing a product (see **S11**) it means CSR actions and results must be easily found.

To ensure this question was clearly understood, we defined boycotting as: ‘Refused to purchase or petitioned against.’



*“Corporates really play an important role in creating solutions to address social issues. They’ve got the capacity; they’ve got the intelligence AND the expertise.”*

**Cynthia, Boomer**

# Gen Z will quit or refuse a job due to poor CSR reputation



*“In the last year, I have actively refused a job or quit a job because of the employer’s poor reputation in social responsibility.”*



**13%**  
**AGREED**

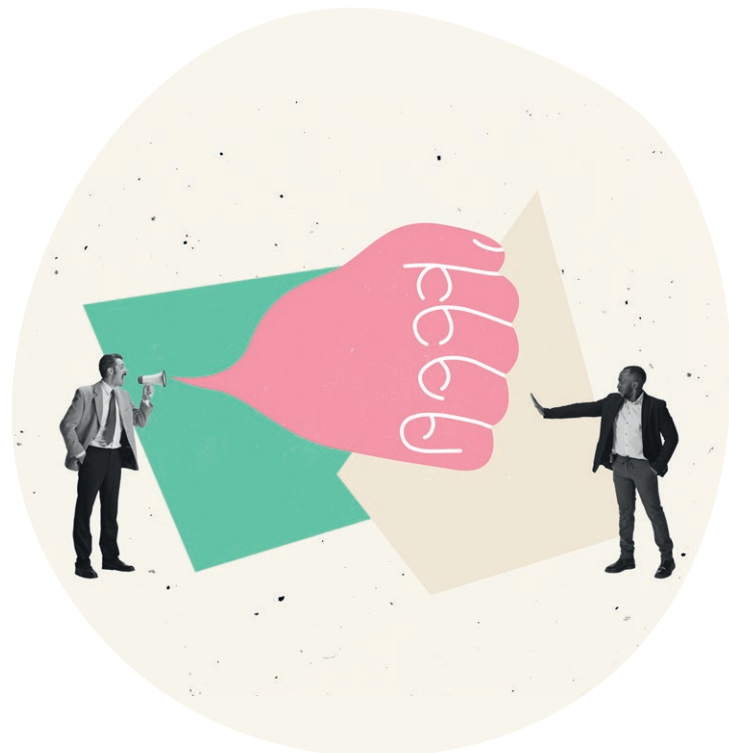
**22%**  
**OF GEN Z  
AGREED**

*New question, therefore no comparison.* Whilst this statistic is the lowest of all statistics for the general population, what’s interesting is that it rises to 22% amongst Gen Z, nine percentage points above average. Other research reveals that Gen Z are most concerned about job security, and yet their conviction is so strong, more than one in five will quit or turn down a job based on the employer’s CSR credentials. 19% of Millennials also agreed, six percentage points above average.

For People and Culture professionals working within corporates and companies, it’s vital that CSR credentials are communicated through talent channels, recruitment firms and to existing employees, who are more effective at recruitment than any advertising campaign. Promoting CSR credentials can really help to attract Gen Z talent.

Our finding is supported by a global statistic featured in the Accenture Life Trends Report 2023. 55% of Gen Z and 54% of Millennials said they research a brand’s environmental impact and policies before accepting a job.

It’s also reinforced by Deloitte’s global ‘Gen Z & Millennial Survey’. 4 in 10 Gen Z say they’ve rejected an assignment due to ethical concerns and 39% of Gen Z have turned down a job that doesn’t align to their values.



# Over half of Australians *intend* to switch to support a cause this year



*“In the coming year, when purchasing a product or service that you would normally purchase, how likely would you be to choose one that supports a cause or charity you care about, assuming the product / service, quality and price are equal?”*



**85%**

Definitely/Probably  
/Possibly Would



**54%**

Definitely/Probably  
Would

Over half said they will switch in the coming year to support a cause, and we know from prior research and anecdotal evidence that survey responders that state Definitely/Probably are very likely to follow through in actual real-life situations. Over four in five Australians have an intention to switch brands, influenced by a cause. This is consistent across all generations, and a little higher amongst females (59% saying Definitely / Probably, five percentage points higher than the average).

The 'Definitely / Probably' statistic is on an upward trend, from 48% in 2020, to 53% in 2021 and now 54%.



# Climate Change and preventative health care prompt brand switching



“Which of the causes or social issues listed do you care about enough to motivate you to switch product / services?”

Top 5	
Climate Change / Global Warming	18%
Healthcare: Illness Prevention & Medical Research	18%
Environmental Conservation, Reducing Waste and Pollution	17%
Mental Health Services	16%
Domestic / Family Violence	16%

This question was asked of those that said they'd switch. This statistic clearly shows that Australians are concerned about a myriad of issues. From the big issues like global warming, to preventative health, environmental conservation, mental health, and family violence.

The top five have remained consistent since 2020, with the exception of 'Domestic / Family Violence' that has entered the top 5 for the first time. 'Disaster Response & Relief in Australia', was in the Top 3 in 2020, and has now dropped to 11th place. This is likely because bushfires and floods were top of mind in 2020, and we have added six new categories to the list of options this year; meaning ALL options have scored slightly less than previous years.

In this question, a total of 19 cause categories were provided, and only those respondents that answered Q19 were surveyed (Sample Size = 854).

[Click here if you would like to know about other cause rankings.](#)

You're welcome to cite any of these statistics. Please reference Conscious Consumer Report 2023, Cavill + Co/ SenateSHJ, September 2023.

# What we can learn from Barbie

## How did an outdated brand transform itself into a hip cultural icon? And what lessons can business leaders learn from Barbie's metamorphosis?

When the Barbie movie first came out, I thought about going, simply because I love Ryan Gosling. I fell in love with him in 'Lars and the Real Girl', long before he was the 'photoshopped'<sup>15</sup> leading man! My scepticism kicked in and I forgot about it. But then friends – from ages 14 – 70 - kept saying "Have you seen Barbie? It's fantastic! It's not what you expect!"

The Barbie movie has broken 17 box office records. The biggest opening by a female director, highest grossing film by a female a director and the highest grossing movie of 2023 to name just three.

Aside from the hundreds of millions of dollars invested in pink-saturated marketing and over 100 brand collaborations to create hype, why has this movie, starring a 64 year old doll created such a buzz?

I believe it's got a lot to do with the brand's willingness to **listen to its customers, adapt its product to reflect consumer attitudes** and **evolve the brand** to remain contemporary, in demand and relevant.

When Barbie first launched in 1959, she was a girl with an unattainable figure and lifestyle. She was the brainchild of Mattel co-founder Ruth Handler, who named the toy after her daughter, Barbara. 'Ponytail Barbie' was influenced by 1950s movie stars, with red lips and eyeliner. Her hair came in just two colours – blonde or brunette.



Back then, dolls were often babies, reinforcing the role of mother. Ruth's insight was that girls wanted to be more than just wives and mothers. Whilst Barbie has been consistently criticised from day 1 for being stereotypical and unrealistic, Ruth's intent was to create an aspirational toy that reflected a woman's ability - and desire - to work.

**"Through the doll, little girls could be anything they wanted to be. Barbie always represented the fact that a woman has choices."** Ruth Handler, 1994

<sup>15</sup> A reference to a pivotal scene in 'Crazy, Stupid, Love'



Ruth got push back from the mainly male Mattel executives when she first introduced her idea. And the head of an advertising agency said “You’re joking. It has no chance of succeeding”.

But Ruth knew there was a gap in the market and she pushed her idea through, by convincing the R&D department to make a doll that would be sold at cost, with profits coming from the sale of accessories. This was a revolutionary idea at the time. Ruth also sold her doll directly to consumers when the big buyers at the New York International Toy Fair refused to buy any.

Had it not been for her **vision, leadership and persistence**, Barbie may have disappeared.

Instead Barbie has survived through an ever changing world, with culture shifts, denormalisation of stereotypes and a world that values diversity.

As the popularity of Barbie grew, so did the criticism of what she represented. Unrealistic beauty standard. Sexist. Materialistic. Stereotypical.

**Mattel listened and showed that it was willing to adapt.** They introduced dolls with different skin tones, careers, weight, abilities and ethnicity. The first doll in a wheelchair copped criticism for being inaccessible (it didn’t fit through the door of Barbie’s mansion) but again Mattel listened, withdrew the doll and later launched a new accessible version. Barbie has an impressive career – she’s been an astronaut, a doctor, a CEO and a firefighter amongst other things.

These changes reflect a conscious effort to ensure that every child can find a Barbie that they can relate to.

The Barbie movie encapsulates Mattel’s **evolution**, featuring a diverse cast of characters, delivering a strong message of female empowerment. Mattel even pokes fun at its mistakes. The movie references some of the more controversial aspects of the past, turning them into self-effacing humour. This shows the company is not afraid to **confront its history** and **take accountability**, something that resonates with today’s conscious consumer.

Mattel’s journey from perpetuating a narrow standard of beauty to becoming a beacon of empowerment and leading conversations about important societal issues, demonstrates the power of embracing change.

Corporates and brands could benefit from taking a page from Mattel’s playbook. **Listen to customers, adapt and evolve, take risks and innovate, show leadership and form relevant alliances. Get involved in discussing - and acting on - the issues that are important to today’s consumer.**





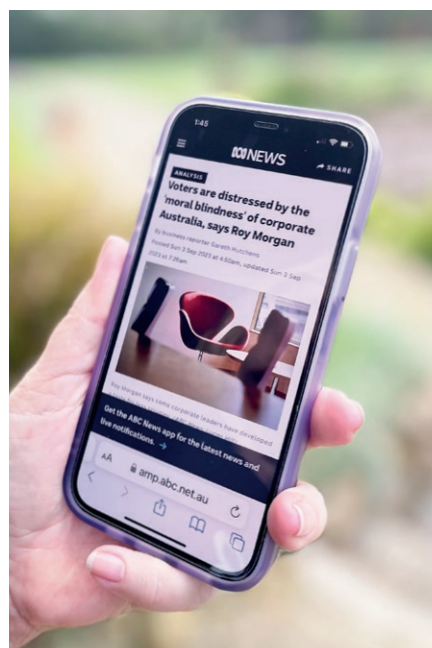
# Conclusions

## Deepening fury

As I complete the writing of this report – mid September – the headlines are dominated once again by corporate scandals. The deepening PwC saga, eclipsed only by the dramatic fall of the once beloved icon, Qantas. The embattled airline's share value has plummeted, after public outrage over selling already cancelled flights, poor service, and staff sackings. The outgoing CEO has been paid \$21m for his last year in the chair, despite leaving the airline's brand in tatters and facing penalties from the ACCC watchdog.



In the same week Roy Morgan released new research showing the plummeting trust in Corporate Australia, stating that consumers are distressed by the 'moral blindness' of corporate leaders.



And no matter where you look or what you read, it's hard to avoid the alarming statistics about the climate crisis<sup>16</sup>, natural disasters, erratic weather, and the UN declaration that we've entered the era of global boiling<sup>17</sup>.



Despite decades of warnings, politicians and corporates are not responding decisively enough.

Fearful of the future, stressed by the present, exhausted from overwork and anxious about making ends meet, **no wonder Australians are furious at Corporate Australia.** And whilst it may be just a few rotten apples, **the fury is aimed at the corporate sector as a whole.** It's not just in Australia, many of the 15 Reports we've analysed<sup>18</sup> show that this frustration and anger is playing out globally.

## It's time for Business to Evolve



It's been a devastating couple of years for us all, including many companies. Whether your business is booming, doing well, or doing it tough, it's time to fully embrace Doing Good.

People are looking for hope and they're looking to business and the corporate sector to provide it. Especially now. Doing Good is the perfect antidote to feelings of helplessness, stress, and anxiety - it provides a strong sense of belonging.

<sup>16</sup> [Climate Ambition Summit UN](#)

<sup>17</sup> [UN story, News Ltd](#)

<sup>18</sup> Who do you Believe? Republic of Everyone / Mobium Group / Bravery, December 2021 / Accenture Life Trends 2023, Accenture, December 2022 / 2023 Gen Z and Millennial Survey, Deloitte, December 2022 / Global Consumer Trends, Dynata, February 2022 / Global Consumer Insights Pulse Survey, PwC, February 2023 / Mintel Global Consumer Trends, Mintel, 2019 – 2023 / 2023 Media Trends, Dentsu, 2022 / Trust Barometer, Edelman, February 2023 / JBWere, The Corporate Support Report, March 2022 / Globescan Sustainability Survey 2022 / Roy Morgan Most Trusted Brands August 2023 / Globescan, Preparing for 2023, January 2023 / Oxford/Globescan Corporate Affairs Survey, April 2023

<sup>19</sup> Often mis-attributed to Charles Darwin, but it was Professor Leon Megginson, Professor of Management & Marketing at Louisiana State University

Companies must evolve at their very core, to embrace a new role. To become a beacon of hope, to connect, inspire and empower people.

People want to do something to make the world better, but often, aren't sure what to do. Imagine if companies and brands could be a resource and galvanise them into action? If you're looking for a way to bond emotionally with customers, **this is it**.

In my 40 year career I've rarely seen a strategy as potent as Corporate Social Responsibility and Social Good – because it enhances numerous aspects of your business. This includes attracting the best talent, increasing staff pride and retention, stimulating brand differentiation, increasing sales, boosting customer loyalty. Social Good stories that evoke strong positive emotion cut through and create deeper engagement on social media – and get more shares. These days potential investors consider ESG<sup>20</sup> performance and risk profile, before buying shares.

Doing Good is no longer just good for business – it's *crucial* for business. It will be beneficial for your business, but it'll also strengthen the non-profit sector who, in turn, will provide better opportunities for vulnerable people.

Australia can only prosper if both the economy AND society are flourishing.

Hailey

Hailey Cavill-Jaspers  
Chief DoGoodologist and Author  
August-September 2023



You're welcome to cite any of these statistics. Please reference Conscious Consumer Report 2023, Cavill + Co/SenateSHJ, September 2023.

# 7

## A Few Pointers

As well as the things we can learn from the Matildas (p 41) and Barbie (p 52), here are some pointers, that you can consider, as a springboard for evolution:













### Corporate Behaviour

*"A well done is better than a well said."*

**Benjamin Franklin**

- ✓ Minimise your negative impact on environment and society - *always* do this first before going public
- ✓ Survey customers and employees on what societal problems they want to see tackled
- ✓ Listen to community and consumers – leave the office and get amongst the people
- ✓ If it's authentic for your brand to address those problems, then do research on the scale of the problem
- ✓ Clarify the 'cause' first before seeking a 'charity' (see Workwear story page 21)
- ✓ Partner up with relevant non-profits, for at least three years, to tackle the problem – build on the work they've already done (let us help you find the perfect partner)
- ✓ Distinguish what you can offer your non-profit partner beyond money (not *instead of* money, money will always be needed).
- ✓ What gifts and assets do you have that can make radical change? Look to your employees, look to your marketing, your expertise, goods & services, your brilliant creative agencies, channels, and massive reach (see Rebel story page 33)
- ✓ Set big hairy audacious goals with your partner, and small less hairy tangible milestones
- ✓ Integrate CSR into your everyday business practice, make it part of your mission – not a bolt-on or sitting in one department



-  Don't set up your own charity or Foundation that invites consumer donations - ultimately you're competing with charities that already exist. Use a Foundation to disseminate *your company's* money
-  Don't deprioritise CSR due to economic pressures – it will come back to bite you
-  Don't jump on the bandwagon of a topical cause publicly, unless its authentic to your brand / company **and** you're taking tangible action for that cause
-  Avoid tokenism, utilise employees for the litmus test
-  Don't made price the only incentive – people want hope & inspiration as well as a bargain
-  Don't see CSR and doing good as a 'luxury' or 'peripheral' activity for boom-times only. Your customers and employees see it as an integral part of doing business.
-  Don't be misguided by old-fashioned and stale thinking
-  Actions must come before words
-  Show tangible, easy to understand societal impact – proof
-  Show leadership – bold leadership
-  Be consistent
-  Look beyond pure philanthropy and setting up a Foundation – there are restrictions, and it limits your company's full potential to forge societal change

## Corporate Communication

*"Being all talk speaks volumes about you."*

**Frank Somenberg**



Be willing to have uncomfortable conversations about where your company is having a negative impact and what you can do to fix it



Investigate how you can use your voice, your reach, your channels to educate, inspire and forge change. But do this after you have committed resources and done the work, not at the start



Communicate to inform, enrol and inspire - not to mislead or win favour



Use plain English and visuals where possible – infographics are fabulous



Adopt an optimistic, warm, and honest tone of voice – be real



Embrace radical transparency



Share the challenges – it's going to be a difficult ride – bring consumers and employees on the journey





Talk about – and show – what you've done – tangible societal impact – to avoid scepticism



Utilise storytelling techniques to create rapport and engagement



Communicate jointly with your non-profit partner – they're a trusted voice

-  If doing a consumer campaign or CRM, don't make the money the key message – make the societal goal the main message (See Coles story page 46 for inspiration)
-  Don't use your promotional channels to amplify a cause unless you're investing in the cause – in a significant way
-  Avoid communication that is full of technical descriptions or jargon
-  By the way, the word 'sustainable' is jargon – it's overused
-  Don't use polished, curated content, they want unfiltered and relatable content
-  Take a third of the thousands or millions you spend on advertising and invest it in doing good. Within three years your customers will be doing your advertising for you
-  Ensure your CSR credentials are easy to find in the places your customers and staff hang out (don't expect anyone, aside from shareholders, to read your 80-page CSR report)
-  Identify existing consumer touchpoints to tell your story of what you've been doing and what you've achieved
-  Get off the 'purpose' bandwagon. Purpose without proof is just a puff-piece
-  Be bold, take risks in communication
-  Show vulnerability & humility, use humour - Aussies love it
-  Have a clear societal goal and milestone in mind – communicate that

Read my book *Talking the Walk* @ [here](#) which has ten practical tips for CSR & Social Good messaging including a new model for communication and numerous illustrative examples of best practice comms.

## Consumer Behaviour

*"There is only one boss: the customer. They can fire everybody in the company from the chairman on down, simply by spending their money elsewhere."*

**Sam Walton, Walmart Founder**



Communicate your social good at the point of consumer purchase to encourage loyalty, and on channels to attract talent as well as with existing employees



Involve customers – show leadership and enrol them to join you on the journey



Make the customer the hero – not your company



Customers are motivated by price, but never make it JUST about the price, making the world better is just as motivating. Add value in the form of hope and inspiration



Don't ask the customer for a donation unless your company is matching it (yes, plenty of retailers do it and then claim the donation as their achievement – it's shameful)



Avoid green washing, pink washing, cause washing or woke washing. Your customers will see through it, and it'll damage your brand





Bring joy and belonging to customers, co-create the future with them – the ultimate engagement

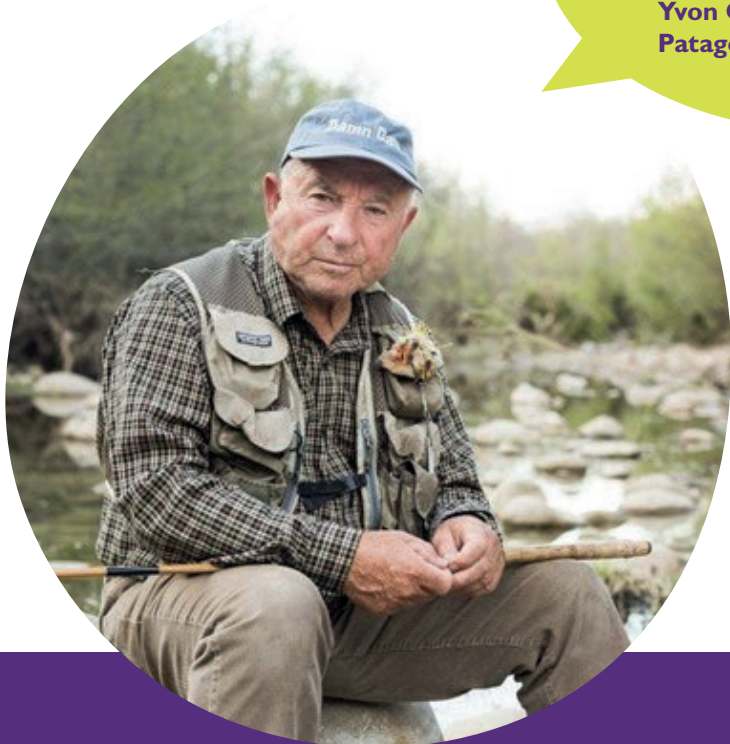


Be a source of information, tools, and resources – consumers are looking for guidance. Empower them



*“At Patagonia, making a profit is not the goal because the Zen master would say profits happen ‘When you do everything else right.’”*

**Yvon Chouinard, Founder of Patagonia**







# Let's Talk

We do hope this Report has provided a spark for conversation and evolution of your business.

For 28 years, my company **Cavill + Co** has helped corporates, companies, and brands, of all shapes and sizes, do good, better. We've developed robust processes that have worked for numerous organisations and industries. Please reach out if you think we may be able to help you and your company.

We provide three distinct services:



### FIND YOUR PERFECT CAUSE PARTNER

We're renowned for being the brains behind matchmaking Australia's most enduring corporate-cause partnerships. We've done it for Disney, SEEK, Mondelez, Vodafone, MLC, Contiki, Kellogg's + many more.



### DESIGN YOUR CSR & DOING GOOD FRAMEWORK

We refine and reshape disorderly or strategically misaligned portfolio of CSR activities and we create a new structure from scratch. We've done it for Qantas, ING, Kmart, BetEasy + more.



### UNEARTH YOUR AUTHENTIC VOICE

We help you discard the corporate jargon and show Australians what you stand for through authentic communication. Our advice is informed by more than 28 years of consumer research and insights.



If you'd like to know more about me personally, check out my story charting my journey to becoming a DoGoodologist [here](#).

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