CORE|DATA

Choosi

The Choosi Modern Choices Report

January 2017

KEY FINDINGS

Are modern conveniences really making our lives better?

- Technology, particularly the Internet, is clearly a valued part of the modern Australian life
- While modern conveniences and their accessibility appear to make lives easier for most Australians, some claim that they can be more of a hindrance than a help and can make lives more stressful
- With the pros and cons of technology and modern conveniences, the more traditional real life connections with friends and family also play an important part in making lives easier

Wearables could face an uphill battle to reach mainstream status

- Wearables have not yet reached mainstream status in Australia, with the majority of Australians having never used them previously citing their lack of relevance and usefulness
- Furthermore, although wearables can help Australians achieve their health goals, many admit it is hard to maintain the commitment to using such devices long term

Be intimate with me, but not too intimate!

- Online security and privacy concerns are prevalent among Australians
- Interestingly however, despite these concerns, most Australians still expect some degree of online personalisation and companies to be 'digitally intimate' with them
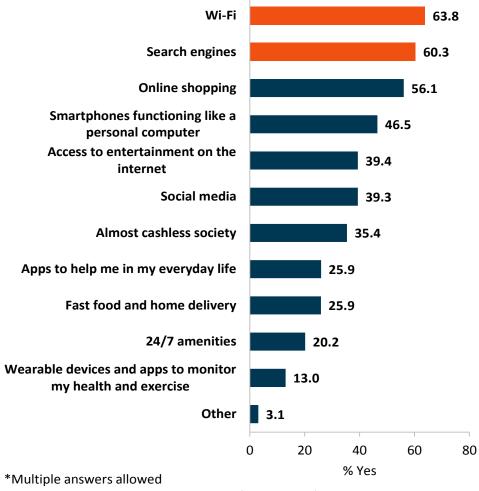
Is 'ethical' just lip service?

- Most Australians are concerned with environmental, social and governance issues and view ethical considerations as important in purchasing decisions, to a point where they would shun brands they deem to be unethical
- However, Australians are generally reluctant to fork out extra for a more ethical purchase
- Most do not take a product's ethical claims at face value and some even question their legitimacy and whether they are just 'marketing'

MAIN FINDINGS

MODERN CONVENIENCES

- Technology, particularly the Internet, is clearly a valued part of the modern Australian life
- While modern conveniences and their accessibility are making lives easier for most Australians, some claim that they can be more of a hindrance than a help and can make lives more stressful

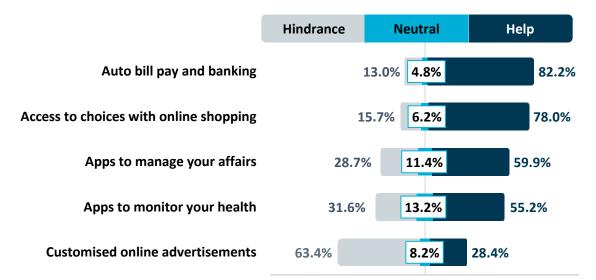**What are your favourite and most valued modern conveniences?**

Convenience	% Yes
Wi-Fi	63.8
Search engines	60.3
Online shopping	56.1
Smartphones functioning like a personal computer	46.5
Access to entertainment on the internet	39.4
Social media	39.3
Almost cashless society	35.4
Apps to help me in my everyday life	25.9
Fast food and home delivery	25.9
24/7 amenities	20.2
Wearable devices and apps to monitor my health and exercise	13.0
Other	3.1

% Yes

*Multiple answers allowed
Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What are your favourite and most valued modern conveniences?

Technology, particularly the Internet, is clearly a valued part of the modern Australian life, with respondents most commonly citing Wi-Fi (63.8%), search engines (60.3%) and online shopping (56.1%) as their favourite and most valued modern conveniences.

With so much technology now being introduced to make our lives 'easier', what do you find more of a help than a hindrance?

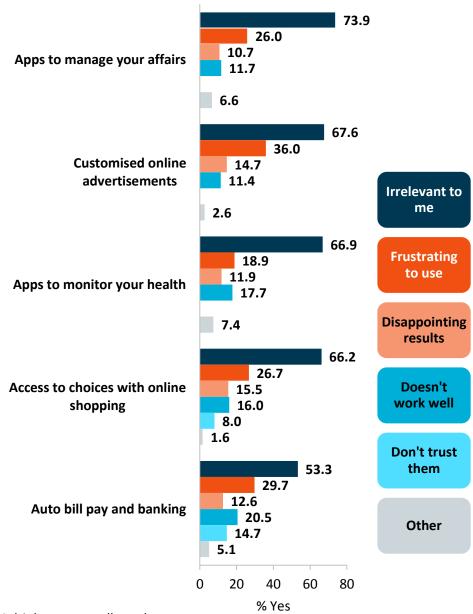|	Hindrance	Neutral	Help
Auto bill pay and banking	13.0%	4.8%	82.2%
Access to choices with online shopping	15.7%	6.2%	78.0%
Apps to manage your affairs	28.7%	11.4%	59.9%
Apps to monitor your health	31.6%	13.2%	55.2%
Customised online advertisements	63.4%	8.2%	28.4%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: With so much technology now being introduced to make our lives 'easier', what do you find more of a help than a hindrance?

The vast majority (82.2%) of respondents find auto bill pay and banking and access to choices with online shopping (78.0%) more of a help than a hindrance.

Although most find apps to manage affairs or health more of a help than a hindrance (59.9% and 55.2% respectively), around three in 10 hold the opposite view (28.7% and 31.6% respectively). The majority (63.4%) view customised online advertisements as more of a hindrance than a help, with less than three in 10 (28.4%) holding the opposite view.

The younger Gen Ys and Gen Xs are more likely to find the aforementioned pieces of technology as more of a help than a hindrance, particularly access to choices with online shopping (85.4% and 80.5% respectively).

On the other hand, Pre-Boomers are the most likely to hold the opposite view, particularly in regards to customised online advertisements (77.4%) and apps to manage their affairs (59.6%).
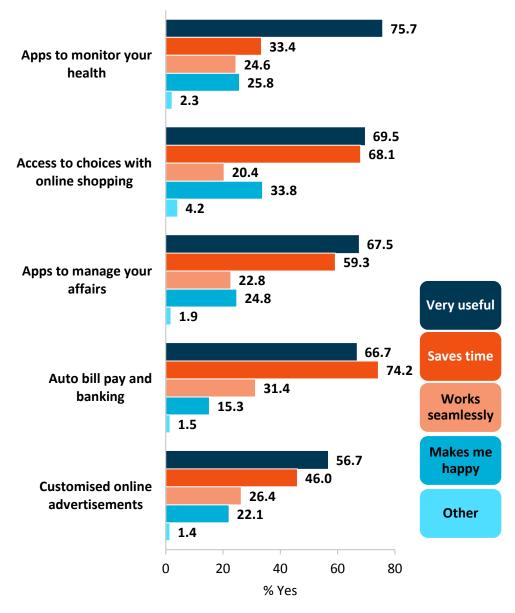
Why do you find *the following technology* <u>more of a hindrance</u> than a help?

Apps to manage your affairs
73.9
26.0
10.7
11.7
6.6

Customised online advertisements
67.6
36.0
14.7
11.4
2.6

Apps to monitor your health
66.9
18.9
11.9
17.7
7.4

Access to choices with online shopping
66.2
26.7
15.5
16.0
8.0
1.6

Auto bill pay and banking
53.3
29.7
12.6
20.5
14.7
5.1

0   20   40   60   80

% Yes

Legend:
- **Irrelevant to me**
- **Frustrating to use**
- **Disappointing results**
- **Doesn't work well**
- **Don't trust them**
- **Other**

*Multiple answers allowed

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Why do you find the following technology more of a hindrance than a help?

For respondents who find the aforementioned pieces of technology more of a hindrance than a help, they cite irrelevance as the main reason for their view. Some also say these pieces of technology are frustrating to use or do not work well for them.
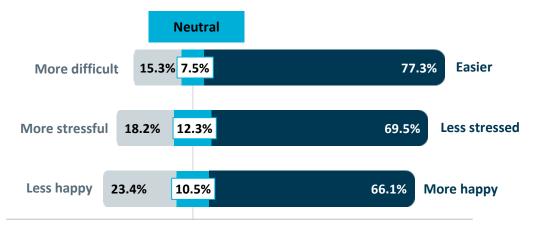
Why do you find *the following technology* <u>more of a help</u> than a hindrance?

Apps to monitor your health
- 75.7
- 33.4
- 24.6
- 25.8
- 2.3

Access to choices with online shopping
- 69.5
- 68.1
- 20.4
- 33.8
- 4.2

Apps to manage your affairs
- 67.5
- 59.3
- 22.8
- 24.8
- 1.9

Auto bill pay and banking
- 66.7
- 74.2
- 31.4
- 15.3
- 1.5

Customised online advertisements
- 56.7
- 46.0
- 26.4
- 22.1
- 1.4

Legend:
- **Very useful**
- **Saves time**
- **Works seamlessly**
- **Makes me happy**
- **Other**

% Yes (x-axis: 0, 20, 40, 60, 80)

*Multiple answers allowed
Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Why do you find the following technology more of a help than a hindrance?

For respondents who find the aforementioned pieces of technology more of a help than a hindrance, they most commonly cite usefulness and the time savings as the main reasons for their view.

Thinking about modern conveniences and the easy access we have to them, do you think they make our lives...

Neutral

More difficult	15.3%	7.5%	77.3% **Easier**
More stressful	18.2%	12.3%	69.5% **Less stressed**
Less happy	23.4%	10.5%	66.1% **More happy**

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Thinking about modern conveniences and the easy access we have to them, do you think they make our lives…

The large majority (77.3%) of respondents say modern conveniences and their accessibility make their lives easier. The majority also say they are less stressed (69.5%) or happier (66.1%) from having access to modern conveniences.

However, close to one in five (18.2%) claim modern conveniences make their lives more stressful, while close to one in four (23.4%) claim they are less happy from having access to modern conveniences.

Gen Ys are the most likely to say modern conveniences make their lives easier (84.7%), while Gen Xs are the most likely to say these conveniences make them less stressed (76.4%) or happier (72.8%).

On the other hand, Pre-Boomers are the most likely to say modern conveniences make their lives more difficult (27.7%), more stressful (24.7%) or make them less happy (35.6%).

How is your life <u>different than 10 years ago</u>, now that there are so many products and services available to make things more convenient?

How do you think your life will be <u>different in the future</u> (i.e. 10 years from now), with ever increasing amounts of products and services available to make things more convenient?

	10 years ago	**10 years from now**
Save a lot of time	48.6	36.7
I can make choices quicker	41.3	31.8
Avoid a lot of hassles	28.7	24.0
Overwhelmed with choice	26.9	33.3
Less stressful	20.2	19.9
Little difference	18.2	20.3
Other**		5.4

% Yes

*Multiple answers allowed
**No 'Other' option for '10 years ago' question
Source: CoreData Ethical Purchasing Survey (January 2017)
Questions: How is your life different than 10 years ago, now that there are so many products and services available to make things more convenient?
How do you think your life will be different in the future (i.e. 10 years from now), with ever increasing amounts of products and services available to make things more convenient?

Close to half (48.6%) of respondents say the abundance of products and services available compared to 10 years ago saves a lot of time, while more than two in five (41.3%) claim the increase in options helps them make choices quicker.

Looking ahead 10 years however, the proportion of those who hold these views drops to 36.7% and 31.8% respectively, with one in three (33.3%) claiming the ever increasing amounts of available products and services will make them overwhelmed with choice. This is higher than the 26.9% who hold this view regarding the present compared to 10 years ago.

How much do you agree with the following statements?

| Strongly agree | Agree | % Agree |

Statement	Strongly agree	Agree	% Agree
An easier life doesn't necessarily mean a better life	27.2	60.1	87.3
Having so much choice and accessibility these days has made us less loyal to brands than in the past	16.8	63.0	79.8
Having so much choice and accessibility these days doesn't mean we are getting better value	23.9	54.3	78.2
Having so much choice and accessibility these days just makes it harder to choose what I want	12.8	48.0	60.8

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How much do you agree with the following statements?

Although there is a widely held view that modern conveniences make lives easier, the vast majority (87.3%) of respondents agree or strongly agree that an easier life does not necessarily equate to a better life.

Four in five (79.8%) agree or strongly agree that having so much choice and accessibility has led to reduced loyalty to brands than in the past. However, a similar proportion (78.2%) agree or strongly agree that having so much choice and accessibility does not necessarily equate to better value for consumers.

More than three in five (60.8%) agree or strongly agree that having so much choice and accessibility just makes it harder to choose what they want.
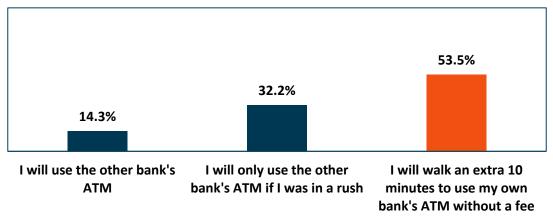
How has the way you purchase things changed over the last 5 years?

	Less	No change	More

Research before buying	3.9%	38.0%	58.1%
Online shopping	6.1%	38.3%	55.6%
Purchasing through apps	10.6%	67.1%	22.4%
Guided by peer reviews	10.6%	65.9%	23.6%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How has the way you purchase things changed over the last 5 years?

There has been some change in consumer purchasing behaviour over the last five years. Close to three in five respondents say they have been doing more research before purchasing or more online shopping (58.1% and 55.6% respectively).

Close to one in four (23.6%) have been more guided by peer reviews, while a similar proportion (22.4%) have been purchasing more through apps, although neither of these holds true for the majority (65.9% and 67.1% respectively).

If you needed some cash and were right in front of an ATM of another bank, would you use it and pay a fee of $2.50 or walk for an extra 10 minutes to use your own bank's ATM and avoid the fee?
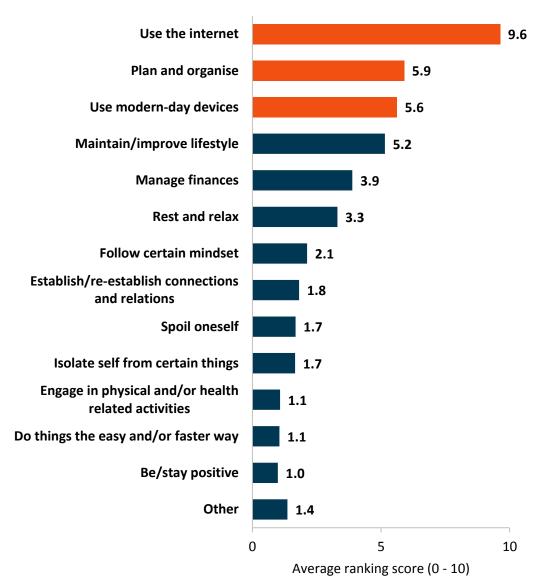

	14.3%	32.2%	53.5%
	I will use the other bank's ATM	I will only use the other bank's ATM if I was in a rush	I will walk an extra 10 minutes to use my own bank's ATM without a fee

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: If you needed some cash and were right in front of an ATM of another bank, would you use it and pay a fee of $2.50 or walk for an extra 10 minutes to use your own bank's ATM and avoid the fee?

More than half (53.5%) of respondents say they would walk an extra 10 minutes to use their own bank's ATM if they needed some cash and were in front of an ATM of another bank. Close to a third (32.2%) would only use another bank's ATM if they were in a rush, while only one in seven (14.3%) claim they would pay the $2.50 fee to use another bank's ATM.

Pre-Boomers are the most likely to be willing to walk an extra 10 minutes to avoid the extra ATM fee (65.7%), while Gen Ys are the most likely to have no issues in using another bank's ATM (23.5%).

WHAT REALLY MAKES LIFE EASY?

- The Internet as a modern convenience is making lives easier for Australians
- However, real life connections with friends and family are also important in making lives easier
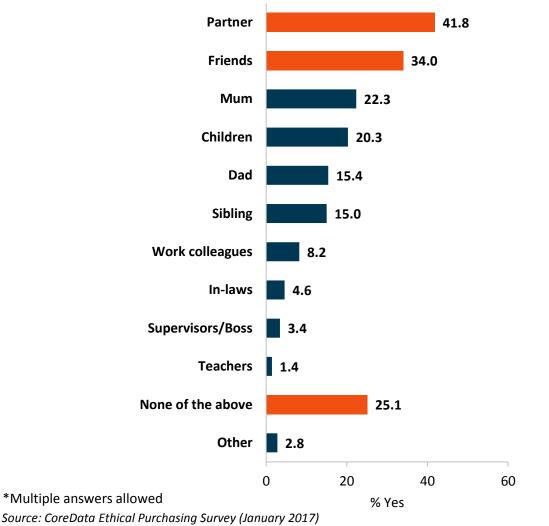
What are the top three things you do to simplify things in your life?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What are the top three things you do to simplify things in your life?

Using the Internet is by far the most commonly cited way for respondents to simplify their life, with an average ranking score of 9.6 out of 10. Planning and organising (5.9) and using modern-day devices (5.6) round out the top three.

Which people in your life tend to make things easier for you?

Category	% Yes
Partner	41.8
Friends	34.0
Mum	22.3
Children	20.3
Dad	15.4
Sibling	15.0
Work colleagues	8.2
In-laws	4.6
Supervisors/Boss	3.4
Teachers	1.4
None of the above	25.1
Other	2.8

*Multiple answers allowed
% Yes

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Which people in your life tend to make things easier for you?

More than two in five (41.8%) respondents say their partner tends to make things easier for them, while more than a third (34.0%) point to their friends and more than one in five (22.3%) point to their mum.

Interestingly however, one in four (25.1%) claim no one tends to make things easier for them.

How do they tend to make your life easier?

"My partner is always looking out for me as I am for them. My children ground me and bring me joy and happiness. My GP brings me peace of mind. All very important and all hard earned relationships. See the good in every relationship. If there is none then rethink if you need that person in your life. I only have happy, positive people in my life." (56 years old, Female, QLD)

"I ask my 43 year old son who lives with me, to do some things around the house. He has taken over the mowing and the vegetable garden landscaping. He and my daughter (who does not live with me) make my life easier by being there." (69 years old, Female, VIC)

"My husband helps me keep our home clean and in order, sees to the maintenance of my car, helps in the kitchen and other household chores. My friends are always there for me should I need emotional support." (61 years old, Female, NSW)

"My partner looks after the finances & bill paying, the cooking, some of the cleaning, and some of the grocery shopping. My son puts his things away after use so I don't have to." (54 years old, Female, WA)

"My Mum accepts me unconditionally. She seems to know things before I do. She bails me out and takes the pressure off when I have any pressures in life." (39 years old, Female, QLD)

"The children help with technology when I don't know how to use it and my partner helps with things around the house." (70 years old, Female, WA)

"Help me by driving me to shops or medical appointments and GP's. They have useful suggestions to help me." (74 years old, Female, NSW)

"Because they play an important role in your life. They are my happiness and they make my life easier." (19 years old, Male, WA)
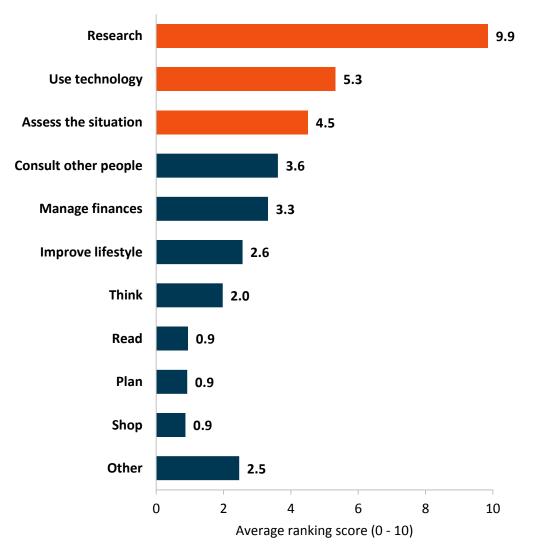
"Both friends and children tend to give good advice when I need it or point me in the right direction." (73 years old, Female, WA)

"They understand life changes and adapt to them." (68 years old, Male, QLD)

"Provide a 'sympathetic ear' to listen to issues/problems affecting me, provide physical/emotional support if/when required and tend not to be judgemental." (69 years old, Male, SA)

"As an invalid, my wife helps me immensely." (57 years old, Male, WA)
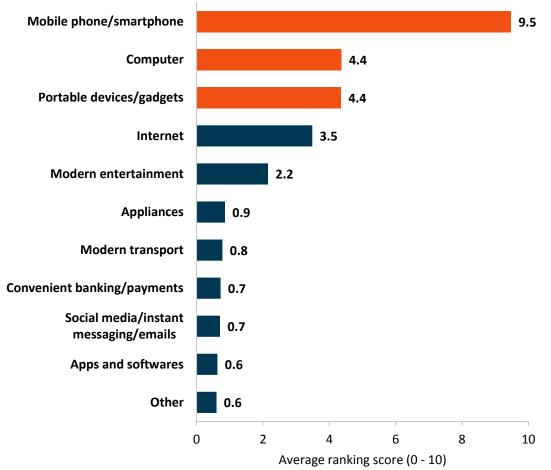
Considering all the choices we have today, what are the top three things you do to help make smart decisions in your life?

Category	Average ranking score
Research	9.9
Use technology	5.3
Assess the situation	4.5
Consult other people	3.6
Manage finances	3.3
Improve lifestyle	2.6
Think	2.0
Read	0.9
Plan	0.9
Shop	0.9
Other	2.5

Average ranking score (0 - 10)

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Considering all the choices we have today, what are the top three things you do to help make smart decisions in your life?

With the choices available, researching is by far the most commonly cited way for respondents to make smart decisions in life, with an average ranking score of 9.9 out of 10. Using technology (5.3) and assessing the situation (4.5) round out the top three.

We all tend to use a range of technology-based items in our everyday lives, what would you say are the three items that have the greatest impact on your life?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: We all tend to use a range of technology-based items in our everyday lives, what would you say are the three items that have the greatest impact on your life?

Among respondents, mobile phone/smartphone is by far the most commonly cited piece of technology that has the greatest impact on their lives, with an average ranking score of 9.5 out of 10. Computer and portable devices/gadgets (both 4.4) and the Internet (3.5) are the other key pieces of technology that have had the greatest impact.

PERSONAL MONITORING DEVICES

- Wearables have not yet reached mainstream status in Australia, with the majority of Australians having never used them, previously citing their lack of relevance and usefulness
- Furthermore, although wearables can help Australians achieve their health goals, many admit it is hard to maintain the commitment to using such devices long term
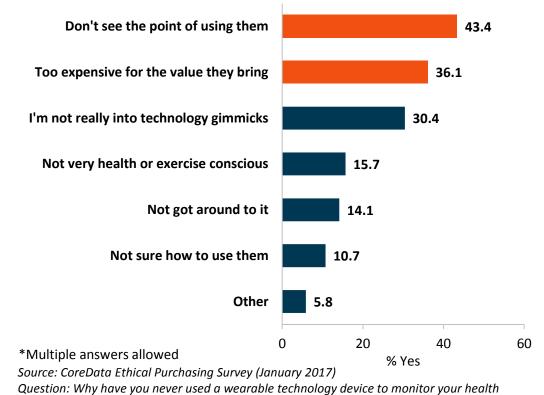
Have you ever used a wearable technology device to monitor your health and exercise?

16.1 %, Yes, currently using

11.9 %, Yes, in the past

72.0 %, No, never

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Have you ever used a wearable technology device to monitor your health and exercise?
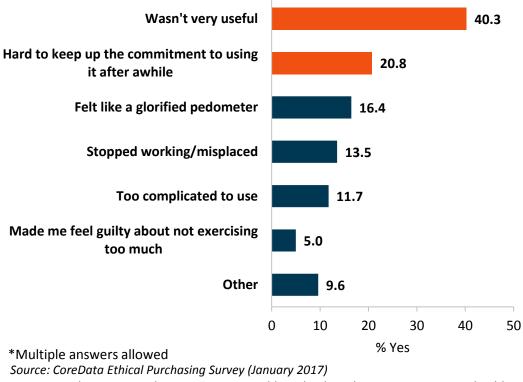
Only one in six (16.1%) respondents say they are currently using a wearable technology device to monitor their health and exercise. One in nine (11.9%) have done so in the past, while the large majority (72.0%) have never used wearable technology devices for monitoring their health and exercising.

Gen Ys are the most likely to be currently using or have used wearable technology devices to exercise and monitor health (42.4%), while Pre-Boomers are the most likely to have never used such devices (81.9%).

Why have you never used a wearable technology device to monitor your health and exercise?

Response	% Yes
Don't see the point of using them	43.4
Too expensive for the value they bring	36.1
I'm not really into technology gimmicks	30.4
Not very health or exercise conscious	15.7
Not got around to it	14.1
Not sure how to use them	10.7
Other	5.8

% Yes

*Multiple answers allowed
Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Why have you never used a wearable technology device to monitor your health and exercise?

For respondents who have never used wearable technology devices to monitor their health and exercise, more than two in five (43.4%) say they do not see the point of using them, while more than a third (36.1%) say these devices are too expensive for the value they bring. A further three in 10 (30.4%) claim they are not really into these technology gimmicks.

Why are you no longer using a wearable technology device to monitor your health and exercise?

*Multiple answers allowed
*Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Why are you no longer using a wearable technology device to monitor your health and exercise?

For respondents who stopped using wearable technology devices to monitor their health and exercise, two in five (40.3%) claim they were not very useful, while one in five (20.8%) admit they found it hard to keep up the commitment. One in six (16.4%) say such a device felt like a glorified pedometer.

Which of the following functions is/was the wearable device useful for?

*Multiple answers allowed
Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Which of the following functions is/was the wearable device useful for?

The large majority (73.1%) of respondents who are currently or previously used wearable technology devices say they are useful for tracking their progress, while close to half (47.7%) say such devices encourage them to reach their goals. More than a third (36.6%) say such devices provide them with important data.

Do you find it hard to maintain your commitment to using wearable devices long term?

14.5% Yes, within days
18.9% Yes, within weeks
9.2% Yes, within months
9.5% Yes, eventually
47.8% No

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you find it hard to maintain your commitment to using wearable devices long term?

For respondents who are currently using or have used wearable technology devices, close to half (47.8%) do not find it hard to maintain the commitment to using them long term. However, more than half (52.1%) admit to difficulties in maintaining the commitment to using them long term, with a third (33.4%) saying their commitment only lasted weeks.
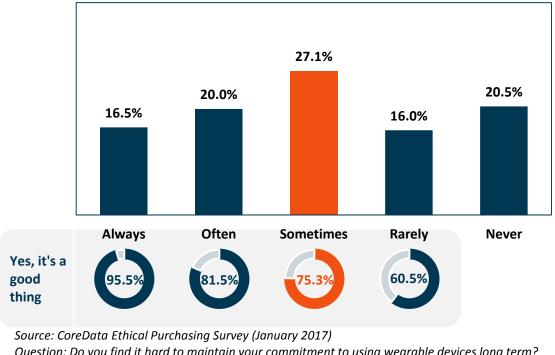
Do these wearable devices ever make you feel bad when you are not meeting your goals? Is that a good thing?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do these wearable devices ever make you feel bad when you are not meeting your goals? And is that a good thing?

Most (60.8%) respondents who are currently or have previously used wearable technology admit such devices make them feel bad when they are not meeting their goals at least sometimes. The majority say this is a good thing, particularly those who always feel bad for not meeting their goals (76.9%).

Do wearable devices tend to make you feel more competitive?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you find it hard to maintain your commitment to using wearable devices long term?
And is that a good thing?

The majority (63.6%) of respondents who are currently or have previously used wearable technology admit such devices tend to make them feel more competitive at least sometimes. The majority say this is a good thing, particularly those who always feel more competitive (95.5%).

Do you find it annoying seeing other people posting their exercise routines and health improvements to social media with these devices?
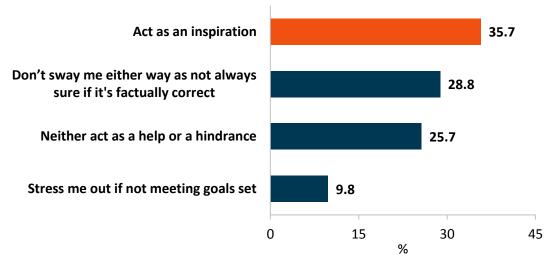
Do you find it annoying seeing other people posting their exercise routines and health improvements to social media with these devices?	14.3%	10.1%	24.1%	16.7%	34.8%

■ Always ■ Often ■ Sometimes ■ Rarely ■ Never

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you find it annoying seeing other people posting their exercise routines and health improvements to social media with these devices?

Respondents are on the fence regarding other people's social media posts on exercise routines and health improvements with wearable technology devices. While more than half (51.5%) are rarely or never annoyed by such posts, close to half (48.5%) find them annoying at least sometimes.

Do wearable devices make you feel more stressed out by always reminding you of these goals you have set or do they inspire you to push harder?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do wearable devices make you feel more stressed out by always reminding you of these goals you have set or do they inspire you to push harder?

More than a third (35.7%) of respondents who are currently or have used wearable technology devices say these devices act as an inspiration to push harder.

However, close to three in 10 (28.8%) say these devices do not sway them either way as they are not always sure of their factual correctness. More than one in four (25.7%) say these devices are neither a help nor a hindrance.

DIGITAL INTIMACY

- Online security and privacy concerns are prevalent among Australians
- Interestingly however, despite these concerns, most Australians still expect some degree of online personalisation and companies to be 'digitally intimate' with them

How much do you agree with the following statements about <u>customised advertisements</u> on the internet?

Statement	Strongly agree	Agree	% Agree
I am concerned about online security and privacy	37.4	48.4	85.8
I worry about having all my information stored by others	34.0	47.5	81.5
It feels like once I buy or just 'like' something I tend to keep seeing similar things in my feed	29.9	50.4	80.3
I get annoyed when they get it wrong and put irrelevant advertisements and stories in my feeds	28.8	45.4	74.2
If I have to remember another password my head will explode	28.0	41.9	69.9
With all the technology these days I expect companies I interact with to know me and my preferences	8.5	44.4	52.9
I appreciate the greater digital intimacy we tend to have with brands these days	6.7	43.8	50.5
Things are much easier now since companies get to know me better and remember who I am	6.5	41.3	47.8

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How much do you agree with the following statements about customised advertisements on the internet?
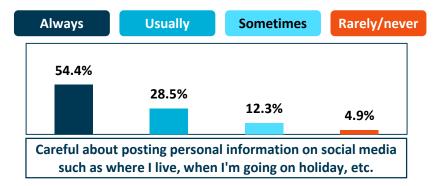
The vast majority of respondents agree or strongly agree that they are concerned about online security and privacy (85.8%), they worry about having all their information stored by others
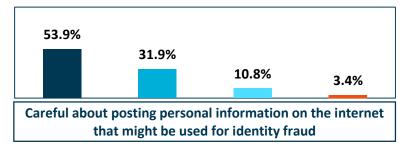
(81.5%) or feel like once they buy or 'like' something, they tend to keep seeing similar things in their feed (80.3%).
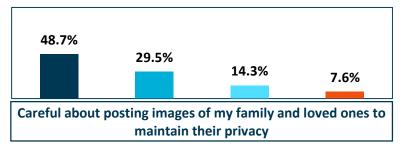
This is despite more than half (52.9%) of respondents agreeing or strongly agreeing that they expect companies they interact with to know their preferences.

The majority of respondents also agree or strongly agree on getting annoyed when websites get it wrong and put irrelevant advertisements or stories in their feeds (74.2%) or when they have to remember another password to the point of feeling their heads will explode (69.9%).
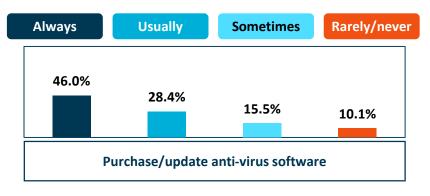
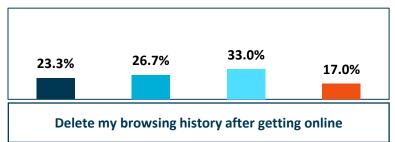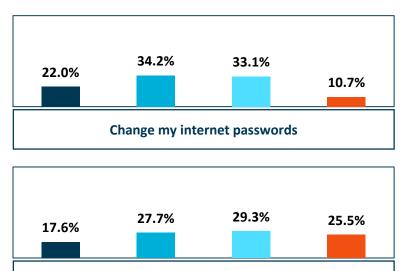**Do you do any of the following to maintain your digital privacy?**

Always	Usually	Sometimes	Rarely/never

54.4% **28.5%** **12.3%** **4.9%**

Careful about posting personal information on social media such as where I live, when I'm going on holiday, etc.

53.9% **31.9%** **10.8%** **3.4%**

Careful about posting personal information on the internet that might be used for identity fraud

48.7% **29.5%** **14.3%** **7.6%**

Careful about posting images of my family and loved ones to maintain their privacy

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you do any of the following to maintain your digital privacy?

| Always | Usually | Sometimes | Rarely/never |

Purchase/update anti-virus software

- 46.0%
- 28.4%
- 15.5%
- 10.1%

Delete my browsing history after getting online

- 23.3%
- 26.7%
- 33.0%
- 17.0%

Change my internet passwords

- 22.0%
- 34.2%
- 33.1%
- 10.7%

Surf the internet in private browsing mode

- 17.6%
- 27.7%
- 29.3%
- 25.5%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you do any of the following to maintain your digital privacy?

The large majority of respondents are always or usually careful about posting personal information on the internet that might be used for fraud (85.8%), personal information on social media (82.9%) and images of their families/loved ones (78.2%) to maintain their digital privacy. Three in four (74.4%) also always or usually purchase or update their anti-virus software.

To a lesser degree, many also change their internet passwords (56.2%), delete their browsing history (50.0%) or surf the internet in private browsing mode (45.3%) at least usually.

ETHICAL CHOICES

- Most Australians are concerned with environmental, social and governance issues and view ethical considerations as important when making purchasing decisions, to a point where they would shun brands they deem to be unethical
- However, Australians are generally reluctant to fork out extra for a more ethical purchase, with most not taking a product's ethical claims at face value and some even questioning their legitimacy and whether they are just 'marketing'
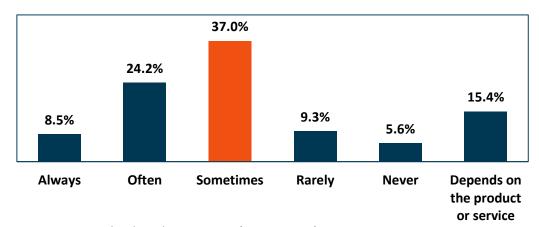
How important is having these ethical alternative choices available to you as a consumer?

How important is having these ethical alternative choices available to you as a consumer?	20.8%	41.2%	29.5%	8.5%
	Extremely important	Very important	Somewhat important	Not really important

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How important is having these ethical alternative choices available to you as a consumer?

The overwhelming majority (91.5%) of respondents say having ethical alternative choices available to them as consumers is at least somewhat important, with one in five (20.8%) claiming it is extremely important.

If there is an option available, do you usually consider an alternative purchase choice because of ethical considerations?
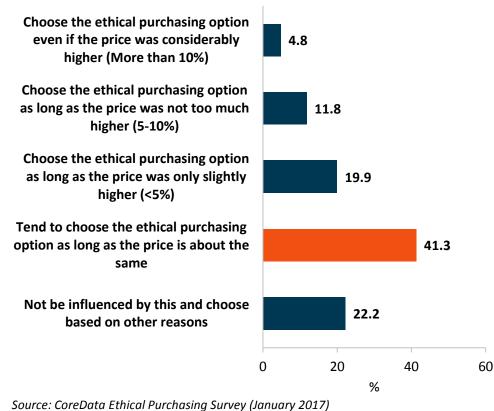

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: If there is an option available, do you usually consider an alternative purchase choice because of ethical considerations?

Seven in 10 (69.7%) respondents say they consider an alternative purchase choice because of ethical considerations at least sometimes, while similar proportions claim they rarely or never do (14.9%) or would consider this depending on the product or service (15.4%).

Gen Ys are the most likely to consider an alternative purchase choice due to ethical considerations at least sometimes (77.3%), while Pre-Boomers are the least likely to (56.4%).
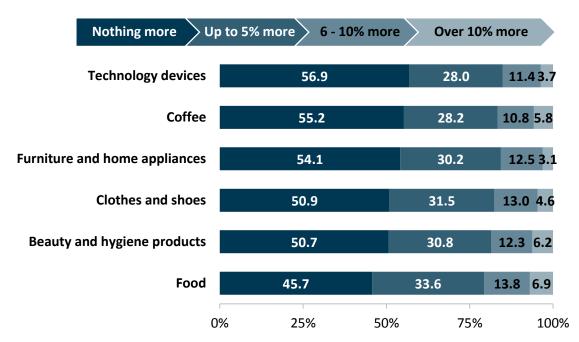
Generally speaking, if you could choose between two products of equal value, except one was a more ethical purchasing option, would you most likely...

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Generally speaking, if you could choose between two products of equal value, except one was a more ethical purchasing option, would you most likely…

When given the choice between two products of equal value but one was a more ethical purchasing option, more than two in five (41.3%) respondents say they would tend to choose the ethical purchasing option as long as the price is about the same. More than a third (36.5%) would choose the ethical purchasing option even if the price was higher, although only 4.8% would choose this option if the price differential was greater than 10%.
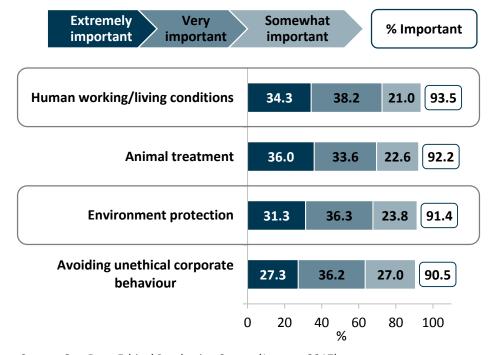
However, more than one in five (22.2%) claim they would not be influenced by ethical considerations and would choose based on other reasons. Pre-Boomers in particular, are the most likely to claim this is the case (35.6%). Gen Ys on the other hand, are the most likely to claim they would choose the ethical purchasing option even if the price was higher (48.7%).

What products would you pay more for in order to make a more ethical purchase?

	Nothing more	Up to 5% more	6 - 10% more	Over 10% more
Technology devices	56.9	28.0	11.4	3.7
Coffee	55.2	28.2	10.8	5.8
Furniture and home appliances	54.1	30.2	12.5	3.1
Clothes and shoes	50.9	31.5	13.0	4.6
Beauty and hygiene products	50.7	30.8	12.3	6.2
Food	45.7	33.6	13.8	6.9

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What products would you pay more for in order to make a more ethical purchase?

The majority of Australians are clearly reluctant to fork out more to pay for a more ethical purchase. More than half of respondents would not pay more for a more ethical purchase across most categories, particularly technology devices (56.9%), coffee (55.2%) and furniture and home appliances (54.1%). Furthermore, only around three in 10 would pay up to 5% more across all categories.
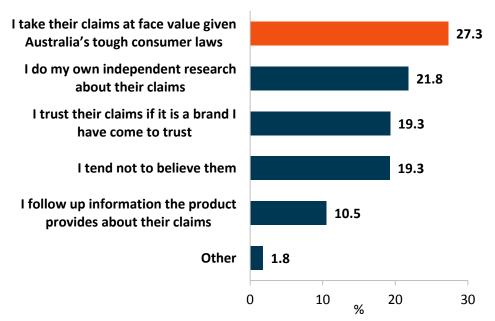
What are the most important reasons to you for ethical purchasing?

	Extremely important	Very important	Somewhat important	% Important
Human working/living conditions	34.3	38.2	21.0	93.5
Animal treatment	36.0	33.6	22.6	92.2
Environment protection	31.3	36.3	23.8	91.4
Avoiding unethical corporate behaviour	27.3	36.2	27.0	90.5

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What are the most important reasons to you for ethical purchasing?

The overwhelming majority of respondents find human working/living conditions (93.5%), animal treatment (92.2%), environment protection (91.4%) and avoiding unethical corporate behaviour (90.5%) as at least somewhat important reasons for ethical purchasing.

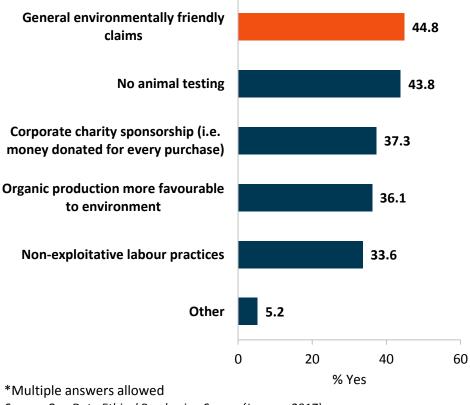How do you assess whether a product's ethical claims are backed up?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How do you assess whether a products ethical claims are backed up?

When asked how they assess whether a product's ethical claims are backed up, more than one in four (27.3%) respondents say they take the product's claims at face value given Australia's tough consumer laws, while a further one in five (19.3%) trust the claims of trusted brands.
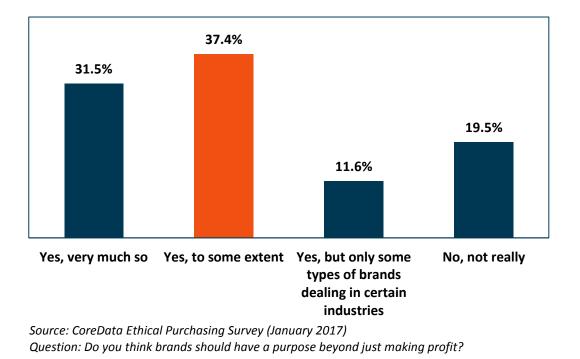
On the other hand, one in five (21.8%) do their own independent research and one in 10 (10.5%) follow up on the information provided. Close to one in five (19.3%) however, tend to not believe a product's ethical claims.

What types of ethical purchasing claims do you tend to question most?

Category	% Yes
General environmentally friendly claims	44.8
No animal testing	43.8
Corporate charity sponsorship (i.e. money donated for every purchase)	37.3
Organic production more favourable to environment	36.1
Non-exploitative labour practices	33.6
Other	5.2

% Yes

*Multiple answers allowed
Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What types of ethical purchasing claims do you tend to question most?
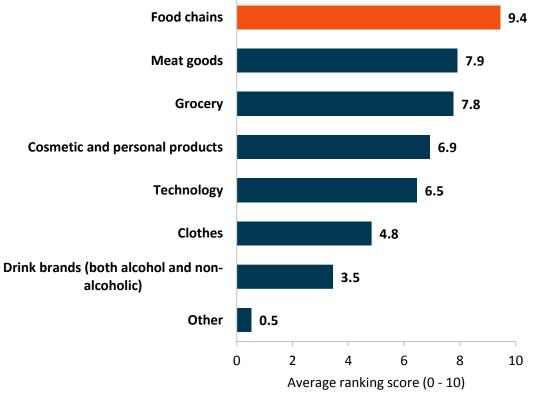
The most commonly questioned ethical purchasing claims are general environmentally friendly claims (44.8%), 'no animal testing' (43.8%) and corporate charity sponsorship (37.3%). More than a third of respondents also tend to question claims on organic production (36.1%) or non-exploitative labour practices (33.6%).

Do you think brands should have a purpose beyond just making profit?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you think brands should have a purpose beyond just making profit?

More than two-thirds (68.9%) of respondents think brands should have a purpose beyond just making profit at least to some extent, while one in nine (11.6%) think it should only be limited to some types of brands in certain industries. However, one in five (19.5%) say they do not think brands should have a purpose beyond making profit.

What types of brands do you think should have a purpose beyond just making profit? Please rank your top 3, with the top option being your most important.
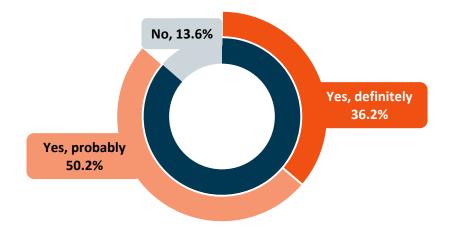

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What types of brands do you think should have a purpose beyond just making profit?

Respondents most commonly cite food chains (average ranking score of 9.4 out of 10), meat goods (7.9) and grocery (7.8) as the types of brands that should have a purpose beyond just making profit.

If you discovered a brand was being unethical in their practice would it deter you from purchasing from them in the future?

No, 13.6%

Yes, definitely
36.2%

Yes, probably
50.2%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: If you discovered a brand was being unethical in their practice would it deter you from purchasing from them in the future?

The vast majority (86.4%) of respondents would definitely or probably be deterred from purchasing from a brand if they discovered the brand was engaging in unethical practices.

How much do you agree with the following statements about ethical considerations when purchasing?

| Strongly agree | Agree | % Agree |

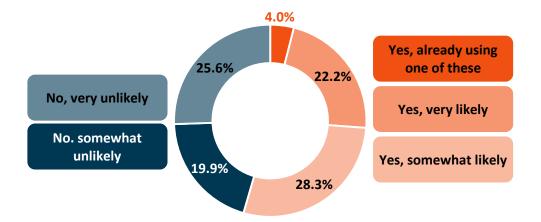| Statement	Strongly agree	Agree	% Agree
I tend to make purchases from brands I have loyalty to or that offer a loyalty/rewards scheme as opposed to taking ethical considerations into account	13.0	55.6	68.6
I like to research the internet to inform my ethical purchase decisions	13.9	52.0	65.9
I tend to make purchases based on current consumer trends as opposed to taking ethical considerations into account	5.4	41.1	46.5
I am influenced by lifestyle choices I see on social media networks as opposed to taking ethical considerations into account	6.0	28.2	34.2

0   30   60   90
%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How much do you agree with the following statements about ethical considerations when purchasing?

Although close to two in three (65.9%) respondents agree or strongly agree that they like to research the internet to inform their ethical purchase decisions, close to seven in 10 (68.6%) tend to make purchases from brands they have loyalty to or from brands that offer loyalty/rewards schemes as opposed to taking ethical considerations into account.

Close to half (46.5%) tend to make purchases based on current consumer trends as opposed to taking ethical considerations into account, while more than one in three (34.2%) claim to be influenced by lifestyle choices they see on social media as opposed to ethical considerations.

Would you consider using a technology app that can help you make better informed ethical purchasing decisions day to day (e.g. when shopping or choosing restaurants)?

Source: CoreData Ethical Purchasing Survey (January 2017)
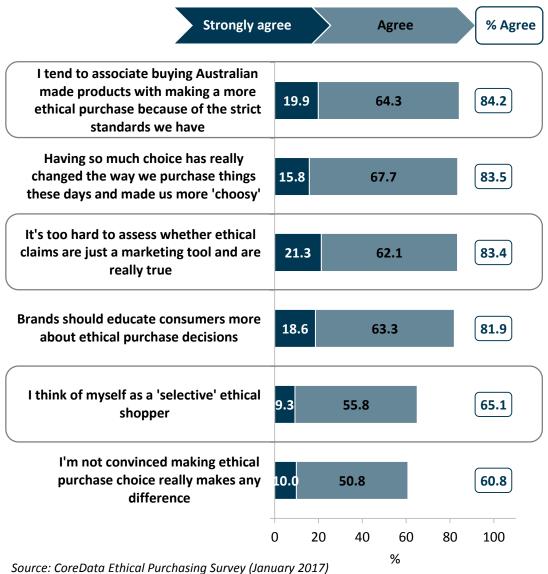*Question: Would you consider using a technology app that can help you make better informed ethical purchasing decisions day to day (e.g. when shopping or choosing restaurants)?*

Half (54.5%) of all respondents are already using or at least somewhat likely to consider using a technology app that can help them make better informed ethical purchasing decisions day to day. However, close to half (45.5%) are somewhat or very unlikely to consider using such apps.

How much do you agree with the following statements?

	Strongly agree	Agree	% Agree

Statement	Strongly agree	Agree	% Agree
I tend to associate buying Australian made products with making a more ethical purchase because of the strict standards we have	19.9	64.3	84.2
Having so much choice has really changed the way we purchase things these days and made us more 'choosy'	15.8	67.7	83.5
It's too hard to assess whether ethical claims are just a marketing tool and are really true	21.3	62.1	83.4
Brands should educate consumers more about ethical purchase decisions	18.6	63.3	81.9
I think of myself as a 'selective' ethical shopper	9.3	55.8	65.1
I'm not convinced making ethical purchase choice really makes any difference	10.0	50.8	60.8

%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How much to do you agree with the following statements?

The vast majority (84.2%) of respondents agree or strongly agree that they tend to associate buying Australian made products with making a more ethical purchase due to the strict standards.

However, a similar proportion agree or strongly agree that it is too hard to assess whether ethical claims are just a marketing tool (83.4%) or that brands should educate consumers more about ethical purchase decisions (81.9%).
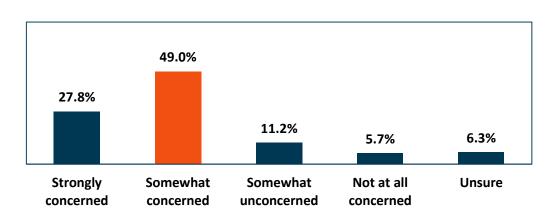
Interestingly, close to two in three (65.1%) agree or strongly agree that they think of themselves as a 'selective' ethical shopper, with a similar proportion (60.8%) claiming they are not convinced making an ethical purchase choice really makes any difference.

How strongly do you believe that human activity contributes substantially to climate change?

38.4% **35.6%** **10.8%** **8.1%** **7.0%**

| Strongly believe | Somewhat believe | Somewhat disbelieve | Strongly disbelieve | Unsure |

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How strongly do you believe that human activity contributes substantially to climate change?

The large majority (74.0%) of respondents somewhat or strongly believe that human activity contributes substantially to climate change.
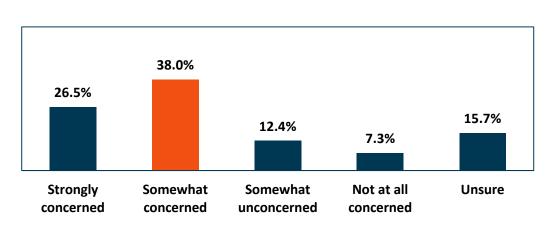
How concerned are you about how products are produced with respect to social responsibility (e.g. labour exploitation and community health)?

27.8% **49.0%** **11.2%** **5.7%** **6.3%**

| Strongly concerned | Somewhat concerned | Somewhat unconcerned | Not at all concerned | Unsure |

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: How concerned are you about how products are produced with respect to social responsibility (e.g. labour exploitation and community health)?

The large majority (76.8%) of respondents are somewhat or strongly concerned about how products are produced with respect to social responsibility.

How concerned are you about the quality of leadership in the companies in which you invest?

26.5% 38.0% 12.4% 7.3% 15.7%

Strongly concerned **Somewhat concerned** **Somewhat unconcerned** **Not at all concerned** **Unsure**

Source: CoreData Ethical Purchasing Survey (January 2017)
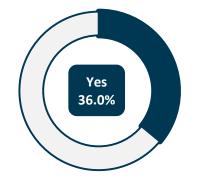*Question: How concerned are you about the quality of leadership in the companies in which you invest?*

The majority (64.5%) of respondents are somewhat or strongly concerned about the quality of leadership in the companies in which they invest.

UPCYCLING

- Upcycling is a foreign concept for most Australians. With only some understanding the concept however, there is a wide acknowledgement of upcycling as an important thing to do in today's society
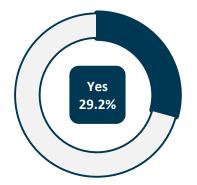
Have you ever heard of upcycling?

Yes
36.0%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Have you ever heard of upcycling?

Only around one in three (36.0%) respondents have ever heard of upcycling. Gen Ys are the most likely to have heard of upcycling (40.7%), while Pre-Boomers are the least likely to (23.3%).
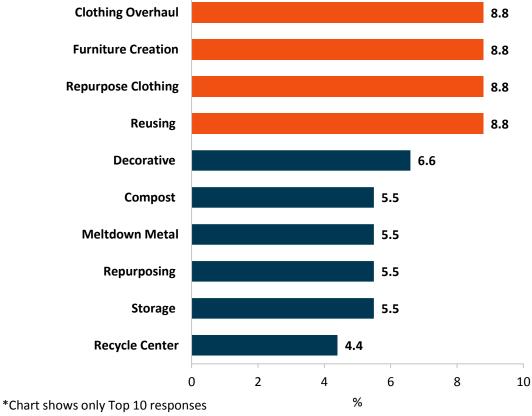
Have you upcycled anything in the last year?

Yes
29.2%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Have you upcycled anything in the last year?

Among those who have heard of upcycling, less than three in 10 (29.2%) have upcycled in the last year.

What is the best example of you upcycling in the last year?

	%
Clothing Overhaul	8.8
Furniture Creation	8.8
Repurpose Clothing	8.8
Reusing	8.8
Decorative	6.6
Compost	5.5
Meltdown Metal	5.5
Repurposing	5.5
Storage	5.5
Recycle Center	4.4

*Chart shows only Top 10 responses

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What is the best example of you upcycling in the last year? (recoded)

''Buying a fence panel from dump shop to make a garden.'' (68 years old, Male, QLD)

''Passing on objects I no longer use to others who can, either as they are or to be used in a different way, rather than throw them away.'' (65 years old, Female, SA)

''I reuse bottles for storage, food scraps for worm farm and compost, and buy second-hand household items.'' (64 years old, Female, NSW)

''We use discarded timbers and convert it into wooden boxes for garden edging or retaining walls.'' (58 years old, Female, VIC)
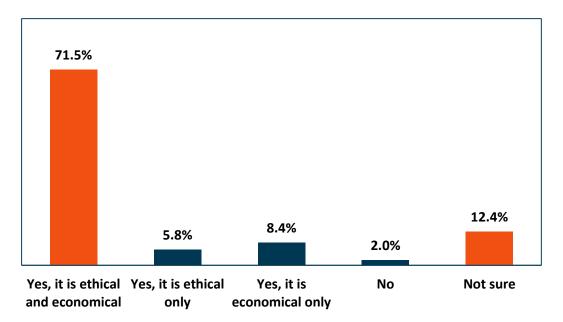
''I found all my unused and old phones and dropped them into a recycle centre.'' (54 years old, Female, QLD)

''Use of second-hand building materials for repairs around the property and home.'' (71 years old, Male, QLD)

''Buy fabric/remnants of fabric from charity shops to make items for myself and my family/friends.'' (60 years old, Female, NSW)

''Reusing bags for shopping, using empty milk bottles for other uses.'' (53 years old, Female, QLD)

''Plastic containers for plants, glass jars for storage.'' (56 years old, Female, QLD)

Do you consider upcycling to be ethical as well as economical?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you consider upcycling to be ethical as well as economical?

Among those who have heard of upcycling, the large majority (71.5%) think it is ethical and economical.
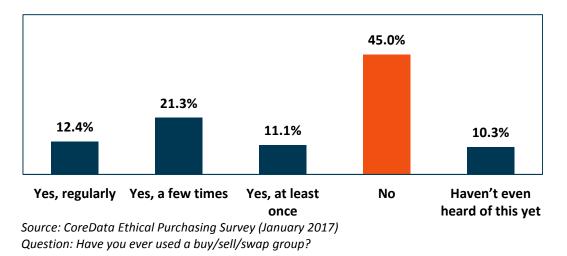
Have you ever engaged in the following upcycling activities?

Repurposing objects for clever storage purposes	27.5
Repurposing clothes or accessories	26.4
Repurposing objects as cleaning utensils	15.3
Repurposing objects for decorations, light fixtures, art, etc.	15.1
Repurposing objects into furniture	13.2
Repurposing objects into toys	10.2
Repurposing objects as cooking utensils	8.1
None of the above	51.9

% Yes

*Multiple answers allowed

Source: CoreData Ethical Purchasing Survey (January 2017)
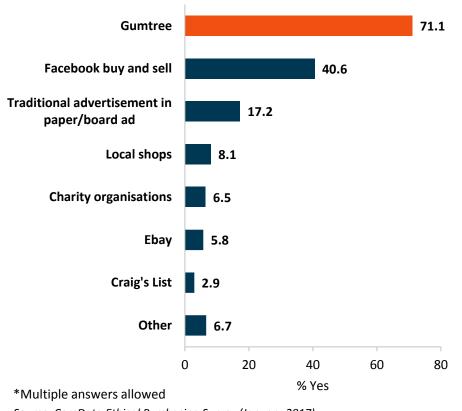*Question: Have you ever engaged in the following upcycling activities?*

The most commonly cited upcycling activities among respondents are repurposing objects for clever storage purposes (27.5%) and repurposing clothes or accessories (26.4%). However, more than half (51.9%) have not engaged in any of the listed upcycling activities.

Have you ever used a buy/sell/swap group?

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Have you ever used a buy/sell/swap group?

More than two in five (44.8%) respondents have used a buy/sell/swap group at least once. However, a similar proportion (45.0%) have not, while one in 10 (10.3%) have never heard of such a group before.
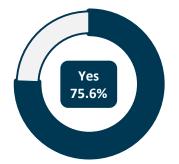
What platforms have you used to upcycle?

Platform	% Yes
Gumtree	71.1
Facebook buy and sell	40.6
Traditional advertisement in paper/board ad	17.2
Local shops	8.1
Charity organisations	6.5
Ebay	5.8
Craig's List	2.9
Other	6.7

% Yes

*Multiple answers allowed
Source: CoreData Ethical Purchasing Survey (January 2017)
Question: What platforms have you used to upcycle?

Gumtree is by far the most commonly used upcycling platform (71.1%), followed by Facebook buy and sell (40.6%).

Do you think upcycling is an important thing we should all try and do these days?

Yes
75.6%

Source: CoreData Ethical Purchasing Survey (January 2017)
Question: Do you think upcycling is an important thing we should all try and do these days?

With some understanding of upcycling, the large majority (75.6%) of respondents think that it is an important thing to do these days.

DEMOGRAPHICS

Gender	
	Valid Percent
Female	54.1
Male	45.9
Total	100.0

Area	
	Valid Percent
The capital city of my state / territory	67.8
A regional centre	22.7
A rural area	9.5
Total	100.0

State	
	Valid Percent
ACT	1.3
NSW	20.4
NT	0.2
QLD	18.9
SA	15.6
TAS	3.1
VIC	19.9
WA	20.6
Total	100.0

Age Generation	
	Valid Percent
Generation Y (36 years old & below)	30.4
Generation X (37 - 51 years old)	27.0
Baby Boomers (52 - 71 years old)	35.8
Pre-Boomers (72 years old and above)	6.8
Total	100.0

Educational Attainment	
	Valid Percent
Primary	0.6
Part of high school	11.3
Completed high school	22.1
Diploma or certificate qualification	32.0
Degree qualification	22.3
Postgraduate qualification	11.7
Total	100.0

Relationship Status	
	Valid Percent
Single	24.9
Living with partner/married	60.6
Separated/divorced/widowed	13.9
Other	0.6
Total	100.0

Work Status	
	Valid Percent
Full-time paid employment	32.4
Part-time paid employment	13.6
Self-employed	6.2
Casual employment	3.9
Transitioning to retirement and working part time	0.6
Fully retired	19.1
Full-time home duties	9.5
Maternity leave	0.2
Unemployed / not in paid employment	6.3
Student	3.5
On a disability pension	4.7
Total	100.0

Occupation	
	Valid Percent
Business owner	7.7
Manager	15.6
Professional	25.9
Technician	1.5
Trades worker	4.3
Community and personal service worker	5.6
Clerical and administrative worker	18.8
Sales worker	6.2
Machinery operators and driver	2.4
Labourer	8.8
Other	3.1
Total	100.0

Living Arrangement	
	Valid Percent
Living alone (never had children)	13.7
Living with flatmate(s) (never had children)	3.2
Living with parents/siblings (never had children)	8.8
Living with partner only (never had children)	11.9
Living with your children (under 18 years) at home	22.6
Living with your children (over 18 years) at home	8.2
Living with your children (both over and under 18 years) at home	2.5
Children have all left home	25.5
Other	3.5
Total	100.0

Investment Portfolio	
	Valid Percent
I have no investments	45.0
$50,000 or less	15.3
$50,001 to $150,000	11.3
$150,001 to $250,000	6.9
$250,001 to $350,000	6.0
$350,001 to $450,000	2.5
$450,001 to $550,000	4.3
$550,001 to $650,000	2.3
$650,001 to $750,000	1.5
$750,001 to $1 million	2.9
More than $1 million to $3 million	1.7
More than $3 million to $5 million	0.1
Total	100.0

Household Income	Valid Percent
$50,000 or less	40.5
$50,001 to $75,000	19.5
$75,001 to $100,000	18.3
$100,001 to $125,000	8.1
$125,001 to $150,000	7.2
$150,001 to $200,000	4.5
$200,001 to $250,000	1.3
$250,001 to $350,000	0.4
$350,001 or more	0.3
Total	100.0

Personal Income	Valid Percent
$20,000 or less	31.7
$20,001 to $30,000	17.1
$30,001 to $40,000	10.1
$40,001 to $50,000	7.5
$50,001 to $60,000	9.3
$60,001 to $70,000	5.9
$70,001 to $80,000	4.7
$80,001 to $90,000	3.1
$90,001 to $100,000	2.0
$100,001 to $125,000	4.5
$125,001 to $150,000	2.9
$150,001 to $200,000	0.7
More than $200,000	0.5
Total	100.0

Wealth Segment	Valid Percent
Mass Market	60.3
Mass Affluent	29.3
Core Affluent	8.0
HNW	2.4
Total	100.0

COREDATA

ABOUT US

CoreData Research is a global specialist financial services research and strategy consultancy. CoreData Research understands the boundaries of research are limitless and with a thirst for new research capabilities and driven by client demand; the group has expanded over the past few years into the Americas, Africa, Asia, and Europe.

CoreData Group has operations in Australia, the United Kingdom, the United States of America, South Africa and the Philippines. The group's expansion means CoreData Research has the capabilities and expertise to conduct syndicated and bespoke research projects on five different continents, while still maintaining the high level of technical insight and professionalism our repeat clients demand.

With a primary focus on financial services CoreData Research provides clients with both bespoke and syndicated research services through a variety of data collection strategies and methodologies, along with consulting and research database hosting and outsourcing services.

CoreData Research provides both business-to-business and business to-consumer research, while the group's offering includes market intelligence, guidance on strategic positioning, methods for developing new business, advice on operational marketing and other consulting services.

The team is a complimentary blend of experienced financial services, research, marketing and media professionals, who together combine their years of industry experience with primary research to bring perspective to existing market conditions and evolving trends.

CoreData Research has developed a number of syndicated benchmark proprietary indexes across a broad range of business areas within the financial services industry.

- Experts in financial services research

- Deep understanding of industry issues and business trends

- In-house proprietary industry benchmark data

- Industry leading research methodologies

- Rolling benchmarks

The team understands the demand and service aspects of the financial services market. It is continuously in the market through a mixture of constant researching, polling and mystery shopping and provides in-depth research at low cost and rapid execution. The group builds a picture of a client's market from hard data which allows them to make efficient decisions which will have the biggest impact for the least spend.

CORE|DATA

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