



# Pollinate

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A research and strategy agency

May 2022: The Pulse of the Nation



# Pollinate

18 years old

Independently  
owned

Over 20 full-time  
staff members

Offices in Sydney, Canberra  
and Melbourne

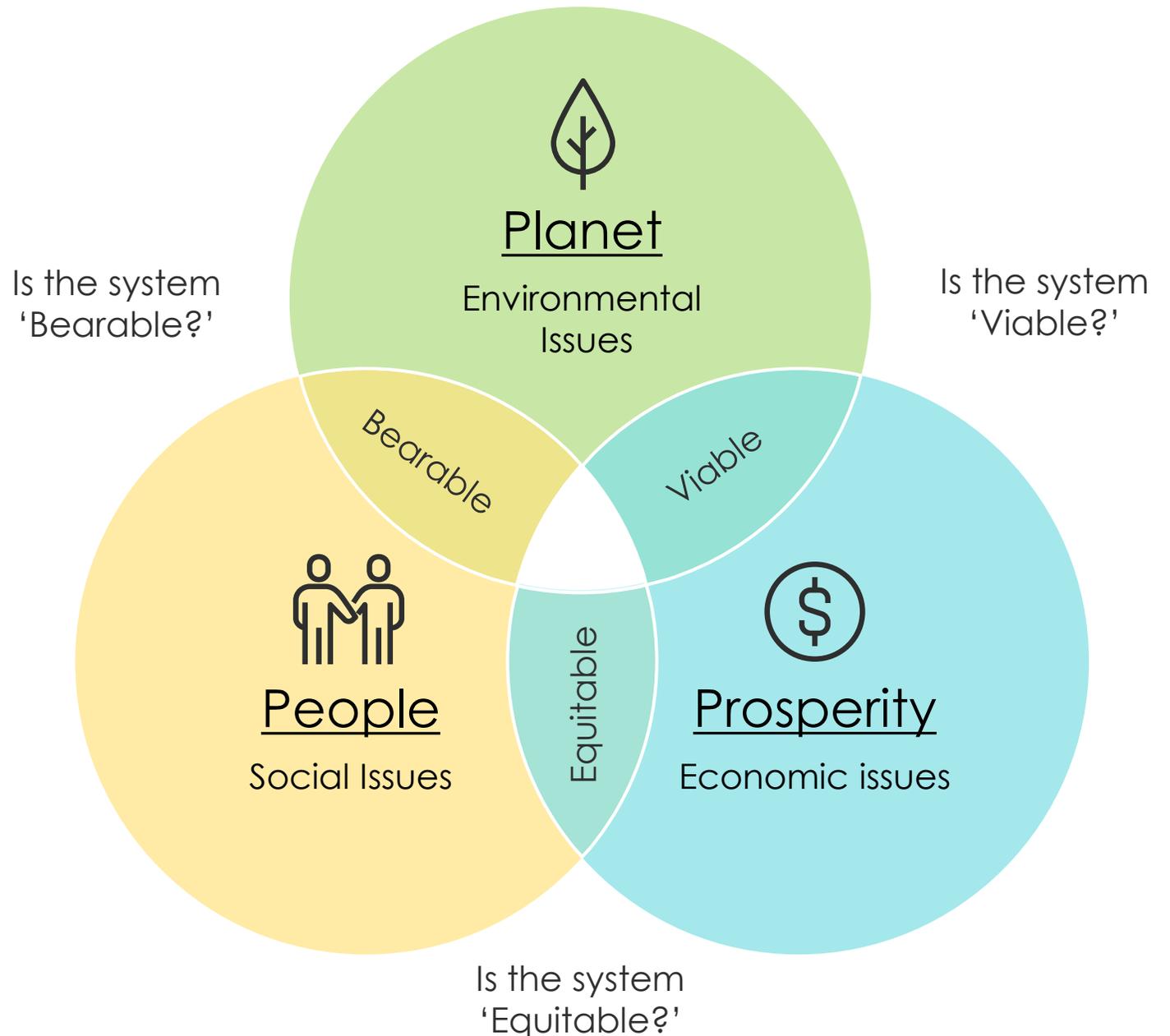
ISO 20252 accredited

Full service brand  
and market research

# Pollinate Pulse

Since 2007, Pollinate has surveyed over 25,000 Australians via The Pulse across three key pillars of sustainability – environment, society and the economy

By applying a systems (rather than a linear) approach, opportunity for transformational change are found in the overlaps between pillars



## Three themes for today ...

Fear about  
cost of living is  
the dominant  
issue

People are spending  
in line with their  
values

Canberrans have  
higher expectations  
than the average  
Australian

# We track 41 issues and here is what is dominant right now...



## Society

Access to affordable education / healthcare  
Ageing population  
COVID-19  
Crime  
Disease outbreak / epidemic  
Escalating international conflicts  
Federal government emergency support  
Fundamentalist left / right-wing movements  
Gender equality  
Immigration  
Online misinformation  
Personal happiness  
Political system  
Quality of education / healthcare  
Refugee resettlement to Australia  
Religious influence over politics  
Social equality  
Use of nuclear weapons  
Women's safety  
Work-life balance



## Environment

Animal extinction  
Bushfires  
Carbon emissions  
Climate change  
Drought  
Floods  
Global warming  
Habitat destruction  
Rising sea levels  
Waste disposal

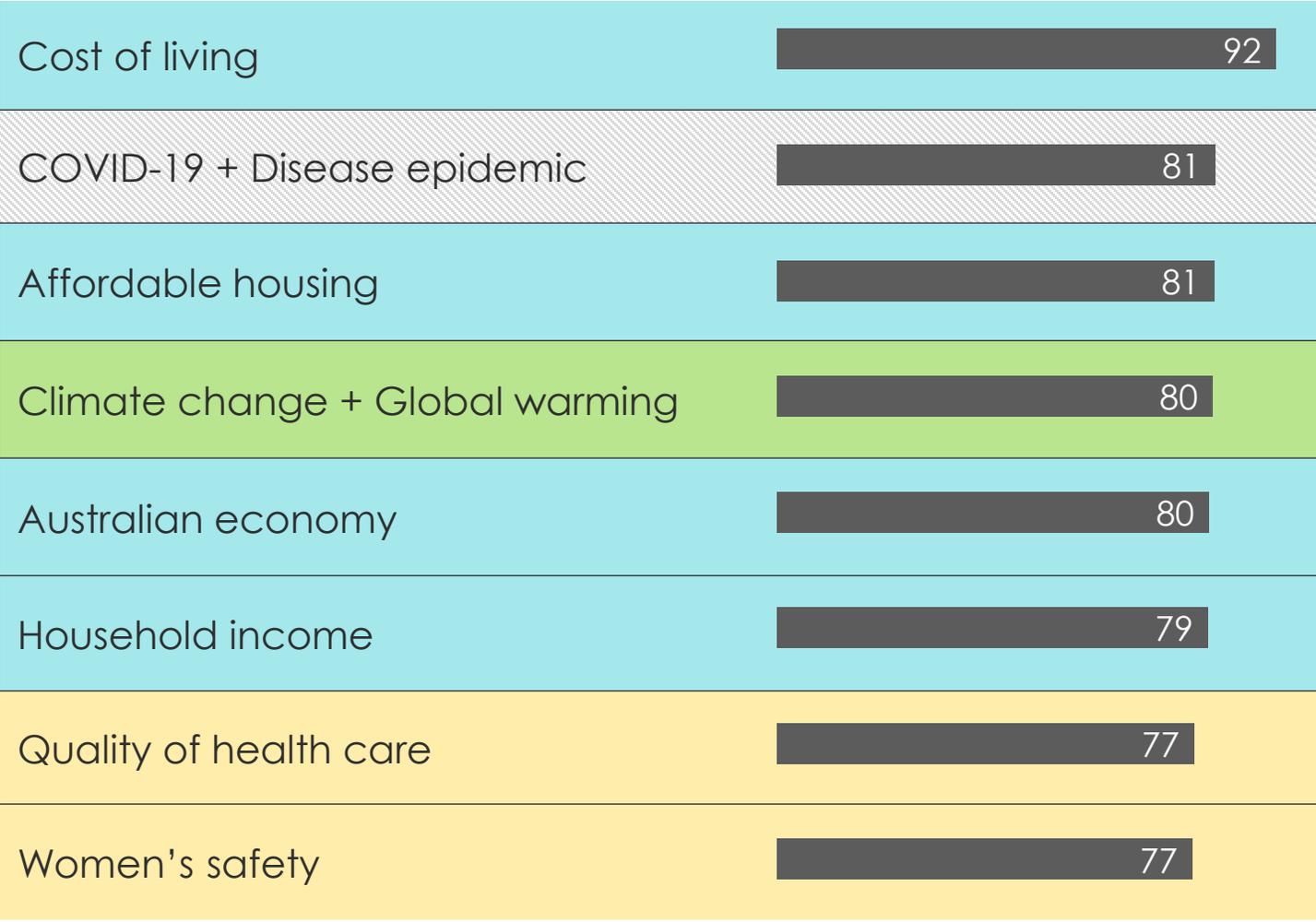


## Economy

Affordable housing  
Household income  
Job security  
Poverty  
The Australian economy  
The cost of living  
The global economy  
Unemployment

Economic issues  
dominate the  
Australian mind  
although COVID  
and climate  
change also  
concern all  
Australians

*Dominant issues of concern*  
*– Mar'22 (%)*



■ Economic      ■ Environmental      ■ Societal

**Federal election: Leaders clash over cost of living as record inflation becomes key election issue**

By Jessica Riga

Posted Thu 28 Apr 2022 at 7:45am, updated Thu 28 Apr 2022 at 2:31 pm

**PM argues inflation rate driven by external factors**

"The inflationary pressures that we're seeing coming from overseas as part of the hangover from the pandemic, and the pandemic continues by the way," he said.

"In addition to that, the war in Europe as we know has significantly increased fuel prices."



**Australian economy**

**Consumer inflation tipped to hit 4.5% in March as Australian cost of living soars**

**Petrol, produce and mortgage costs are rising powered by pandemic shortages, flood damage and the war in Ukraine**

**'Enormous strain on my spending': 9News.com.au readers react to RBA rate hike**

A long time in the making or another nail in the coffin for living costs?

The decision by the Reserve Bank of Australia to lift interest rates yesterday for the first time in 11 years created a storm of opinion over whether enough – or too much – was being done to tackle the soaring cost of living for Australians.

Cost of living is going to be an increasing concern for the rest of 2022

*Rising prices prompted by war, pandemic and natural disasters*

*Cost of living is much more important for Australians than previous elections*

*NAB, CBA, ANZ and Westpac announced an interest rate increase after RBA's decision*

*\$100 extra a month: Home buyers face mortgage hike with interest rates set to climb further*

# Why does cost of living matter? Because finances are a part of our wellbeing

*When it comes to money and finance, where do you sit on each of the scales below? (%)*

My finances are ...

Part of my overall wellbeing



Separate to my overall wellbeing

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Living situation ...

Financially comfortable

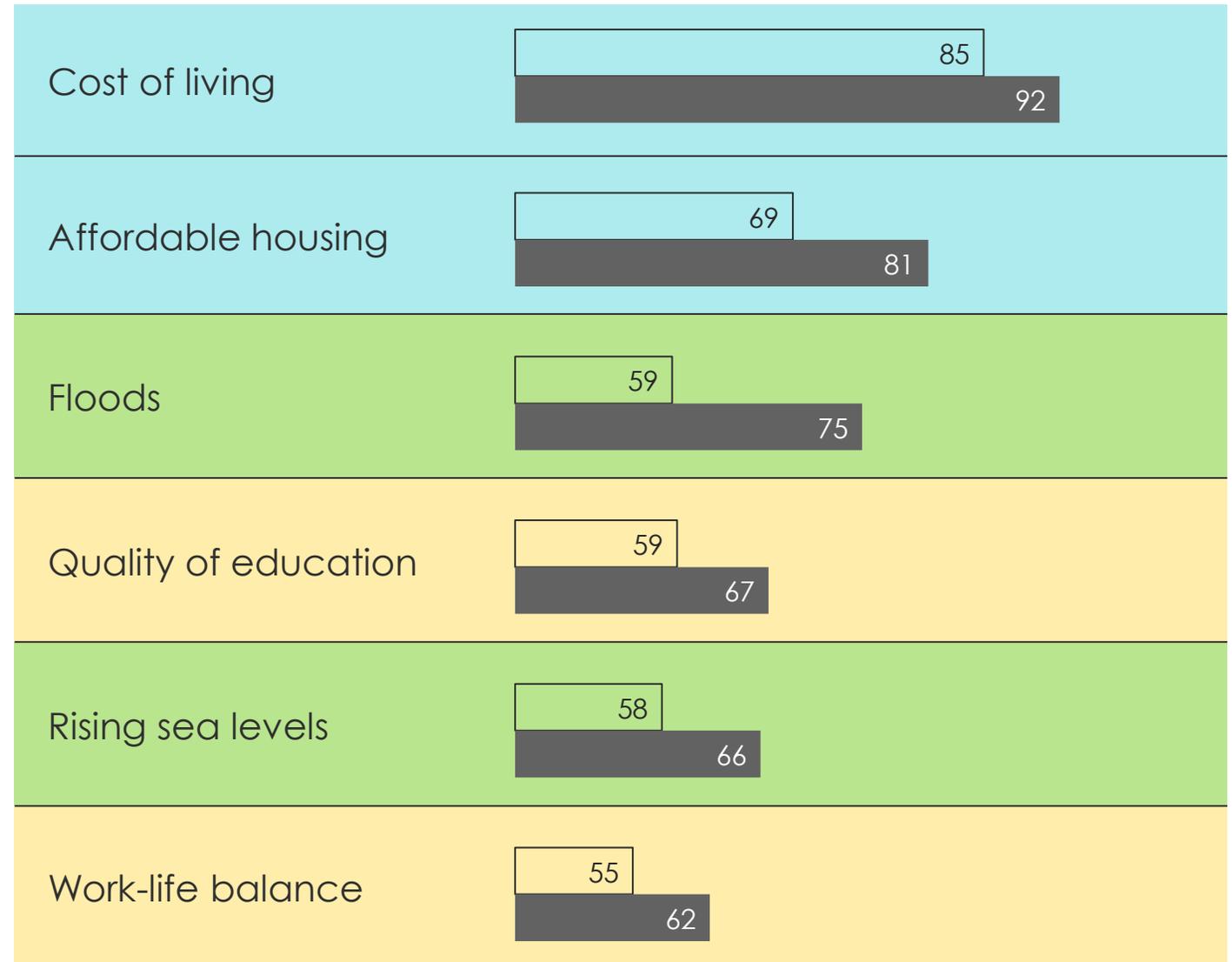


Financially struggling

The emerging issues  
are floods,  
affordability,  
education and  
work life balance

*Emerging issues of concern  
(%) – Mar'20 vs Mar'22*

Environmental,  
economic and social  
issues on the rise



■ Economic  
 ■ Environmental  
 ■ Societal  
 □ March 20  
 ■ March 22

Receding issues:  
COVID, global  
economy,  
'summer' climate  
issues,  
unemployment,  
and immigration

*Receding issues of concern (%)*  
*– Mar'20 vs Mar'22*

Cost of living ≠ global  
 economic issues



■ Economic ■ Environmental ■ Societal □ March 20 ■ March 22

# What concerns us varies depending on our views and outlook on the world

Traditionalists

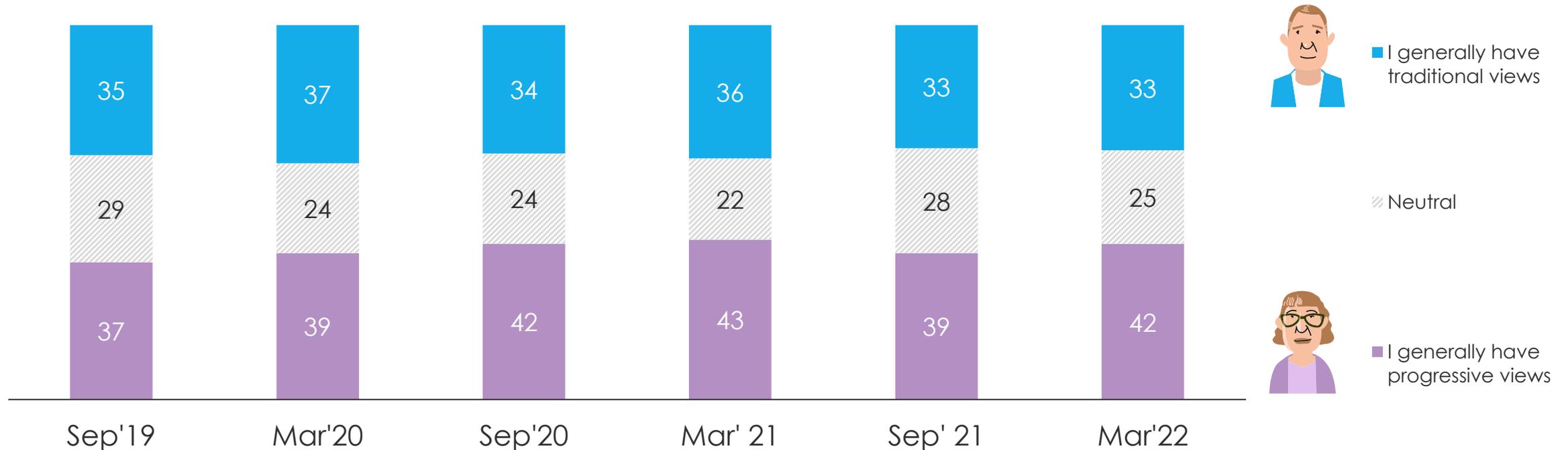


Progressives



# We are a nation balanced or divided between progressive views and traditional views

*Thinking about your views and outlook on the world, where do you sit on the following scale? (%)*

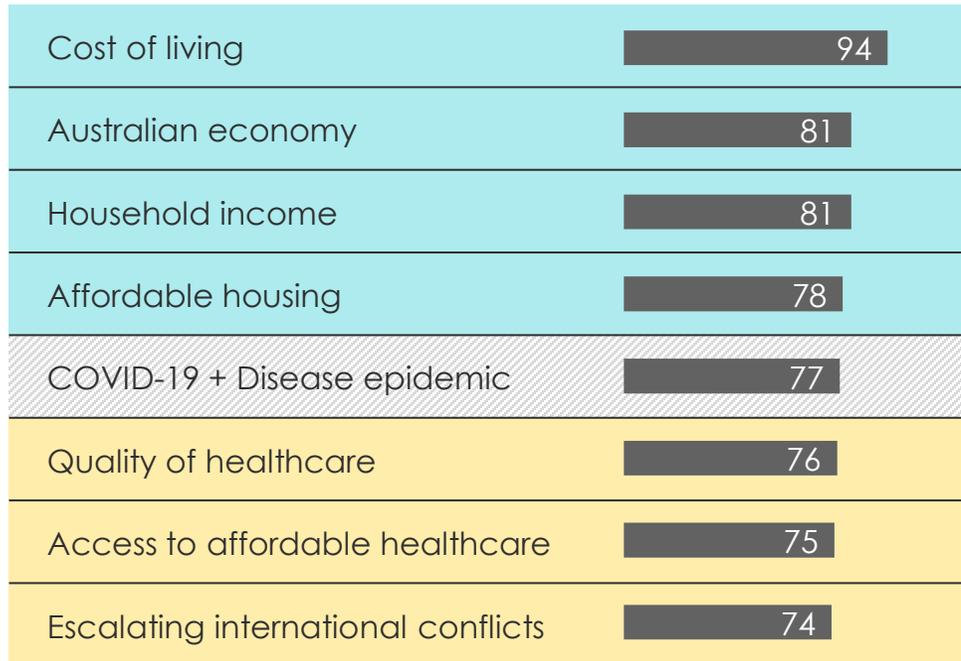


# Cost of living, affordable housing and COVID concern us all, but that is where the synergy stops



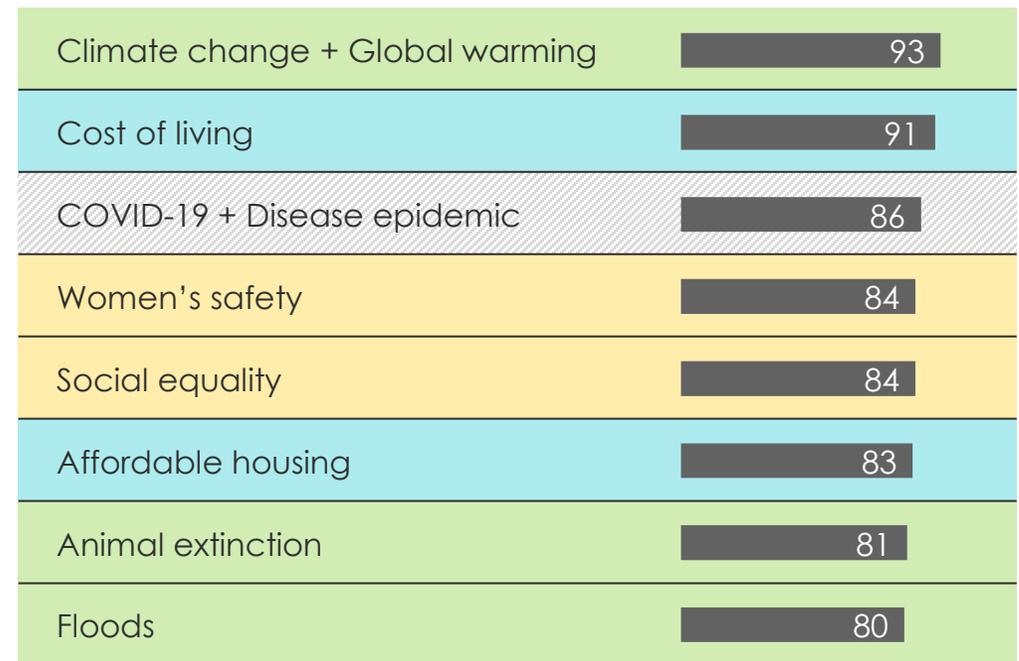
## Traditional

Economic and social (healthcare) issues



## Progressive

Environmental and social (equality) issues



■ Economic   
 ■ Environmental   
 ■ Societal

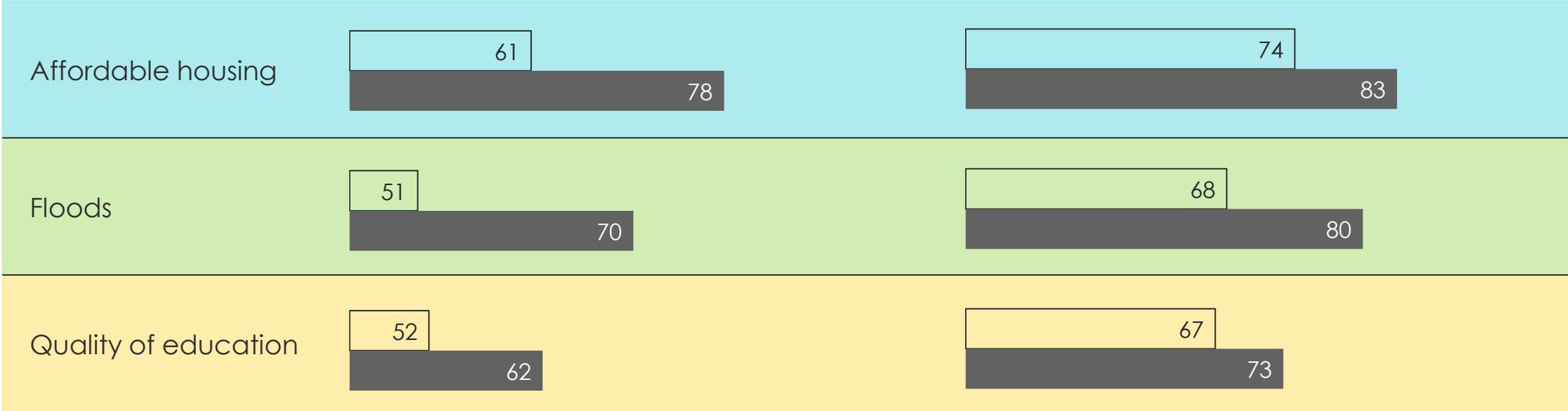
When it comes to emerging issues, there is common concern around on affordable housing, floods and quality of education



Traditional



Progressive



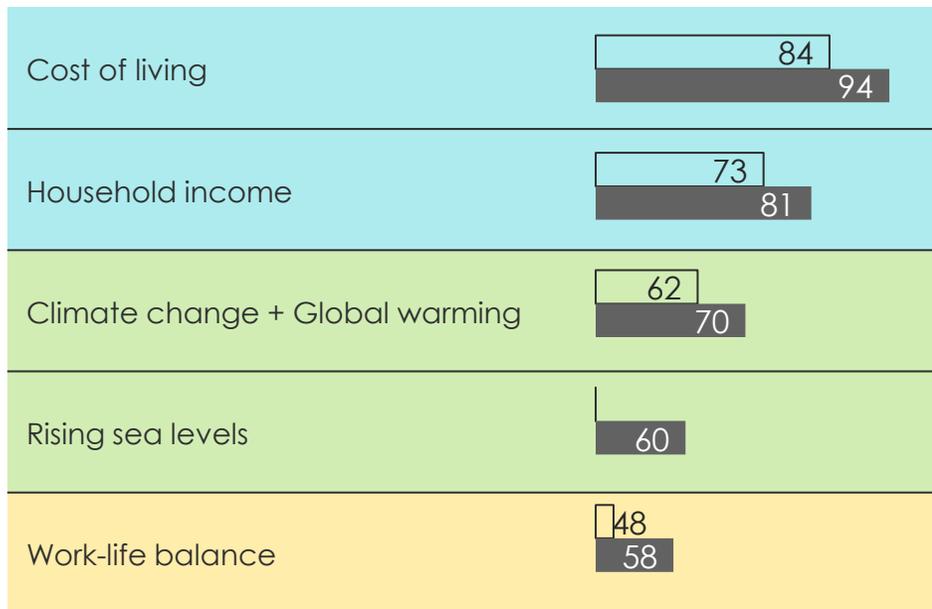
■ Economic   ■ Environmental   ■ Societal   □ March 20   ■ March 22

# Yet there are some differences in emerging concerns among Traditionals and Progressives



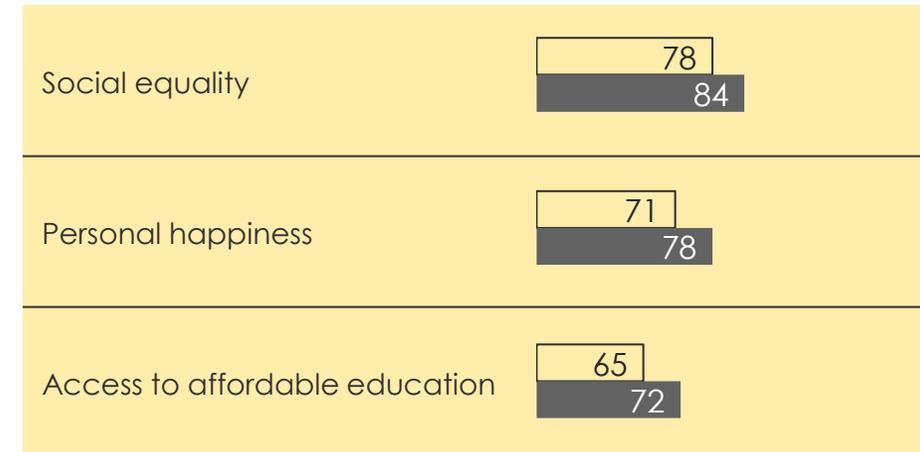
## Traditional

Rising concern about home economics, climate change and work-life balance



## Progressive

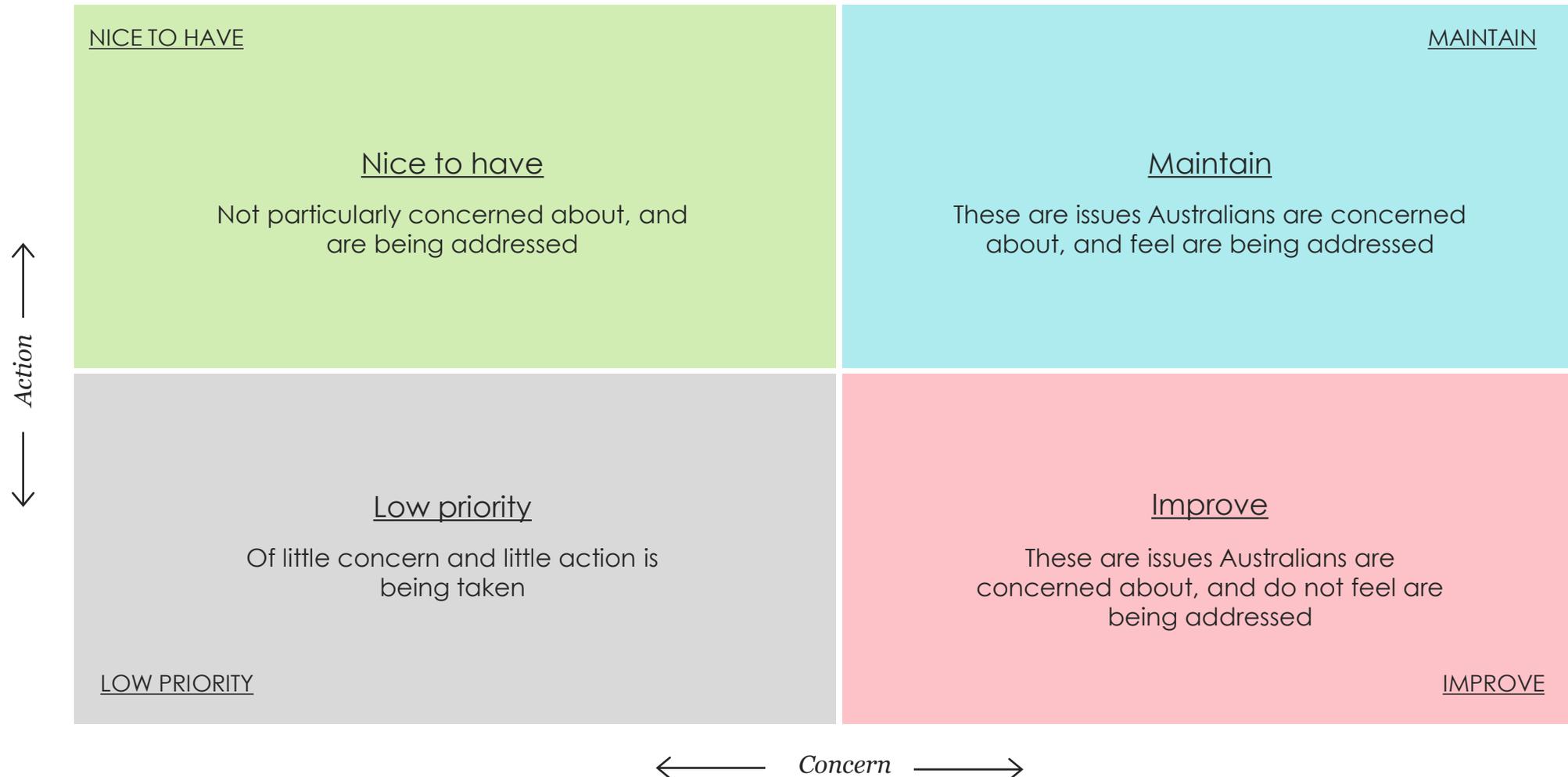
Rising concern about access to affordable education, happiness, social equality



■ Economic   
 ■ Environmental   
 ■ Societal   
  March 20   
  March 22

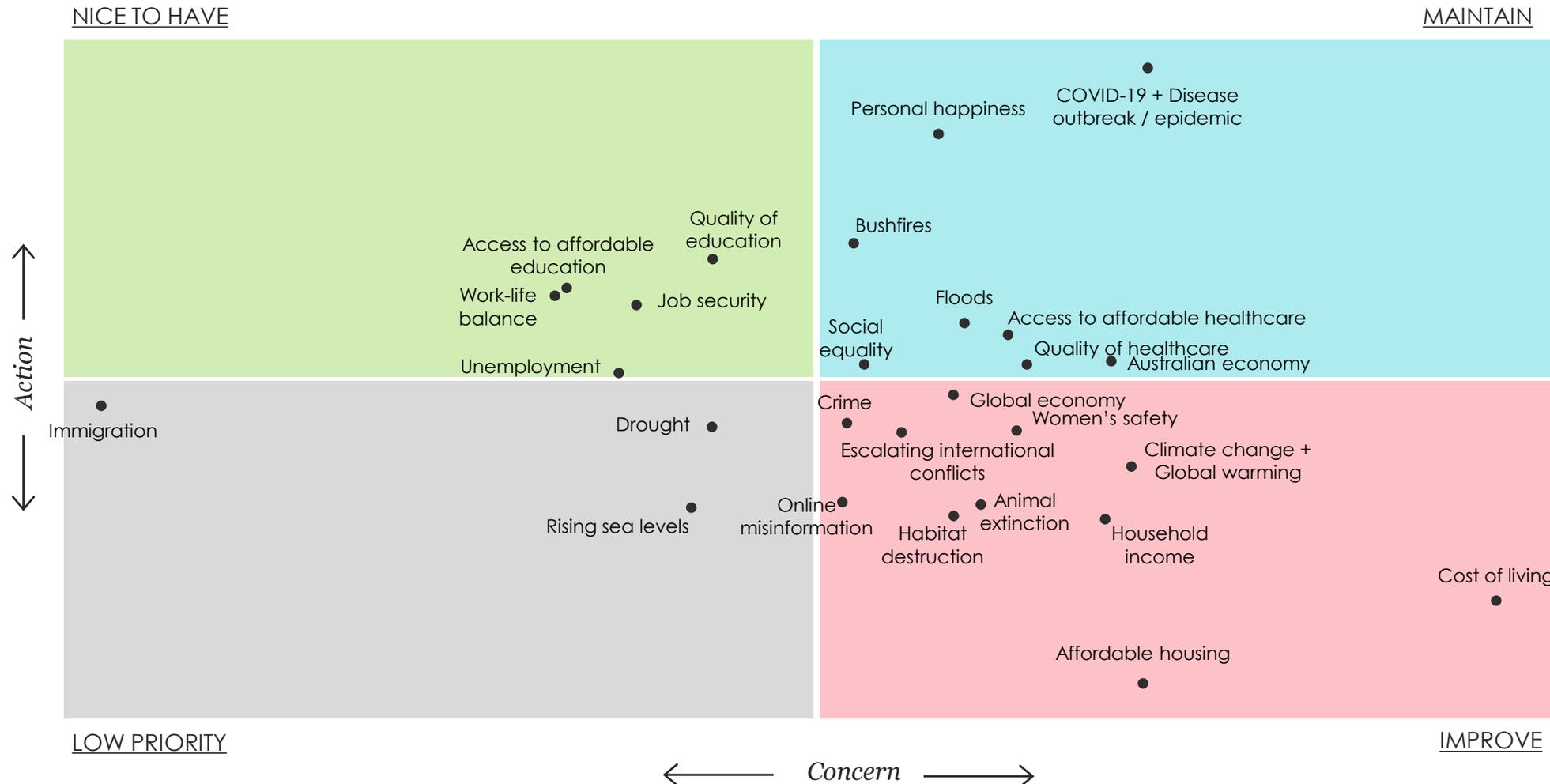
# Is enough being done about these issues of concern?

*These quadrants represent strategic implications for government and organisations*



# However, Australians feel more needs to be done around cost of living and large-scale environmental issues

*Concern x action matrix – Total Australia*

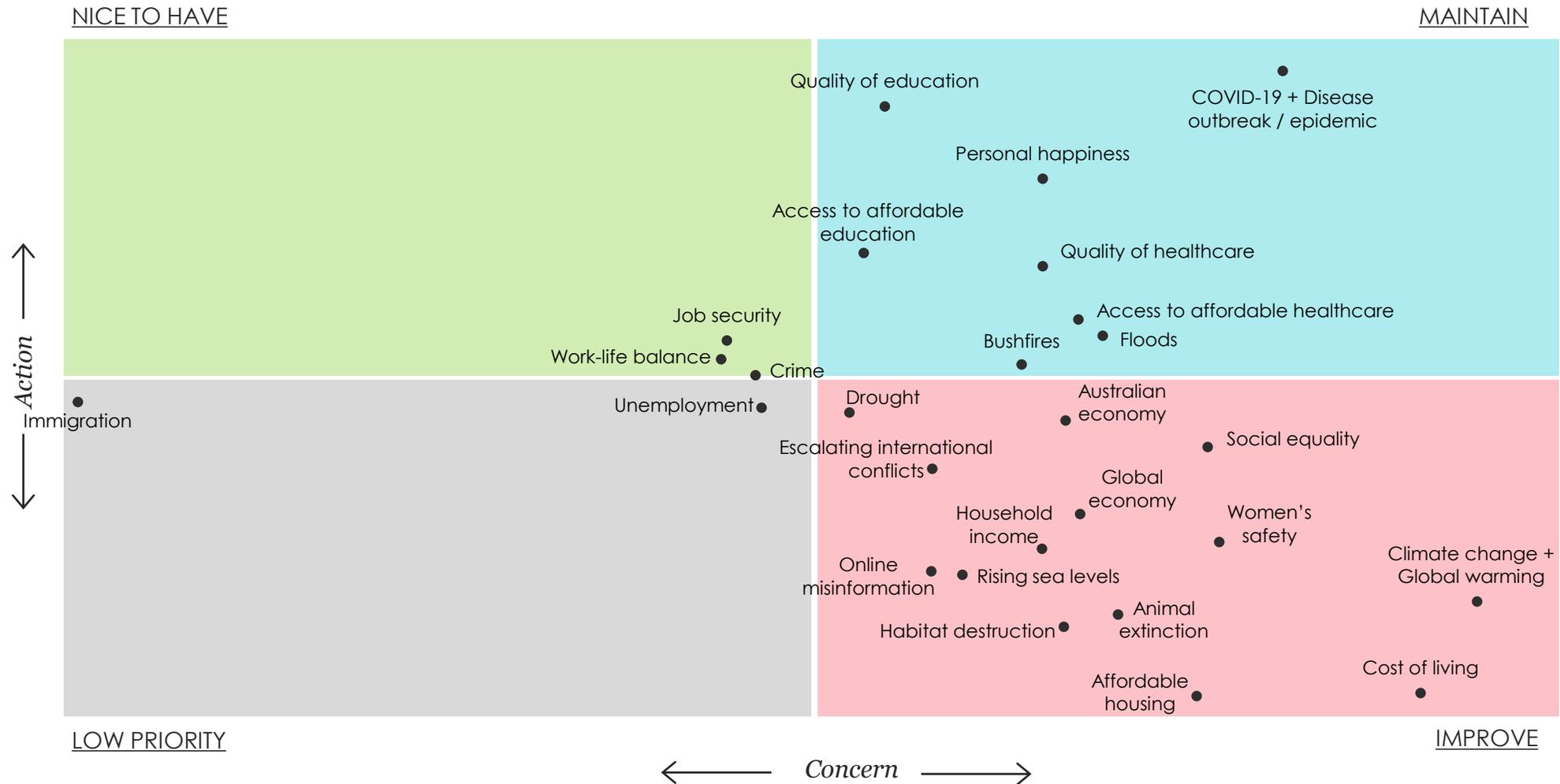


DQ3a/b/c - Please indicate, which of the following currently concern you?

DQ4a - How much do you agree or disagree that enough is currently being done to address these issues? Average agreement Base: Total sample

# Progressives are more concerned about all issues, and want more action on environmental issues

*Concern x action matrix – Progressives*

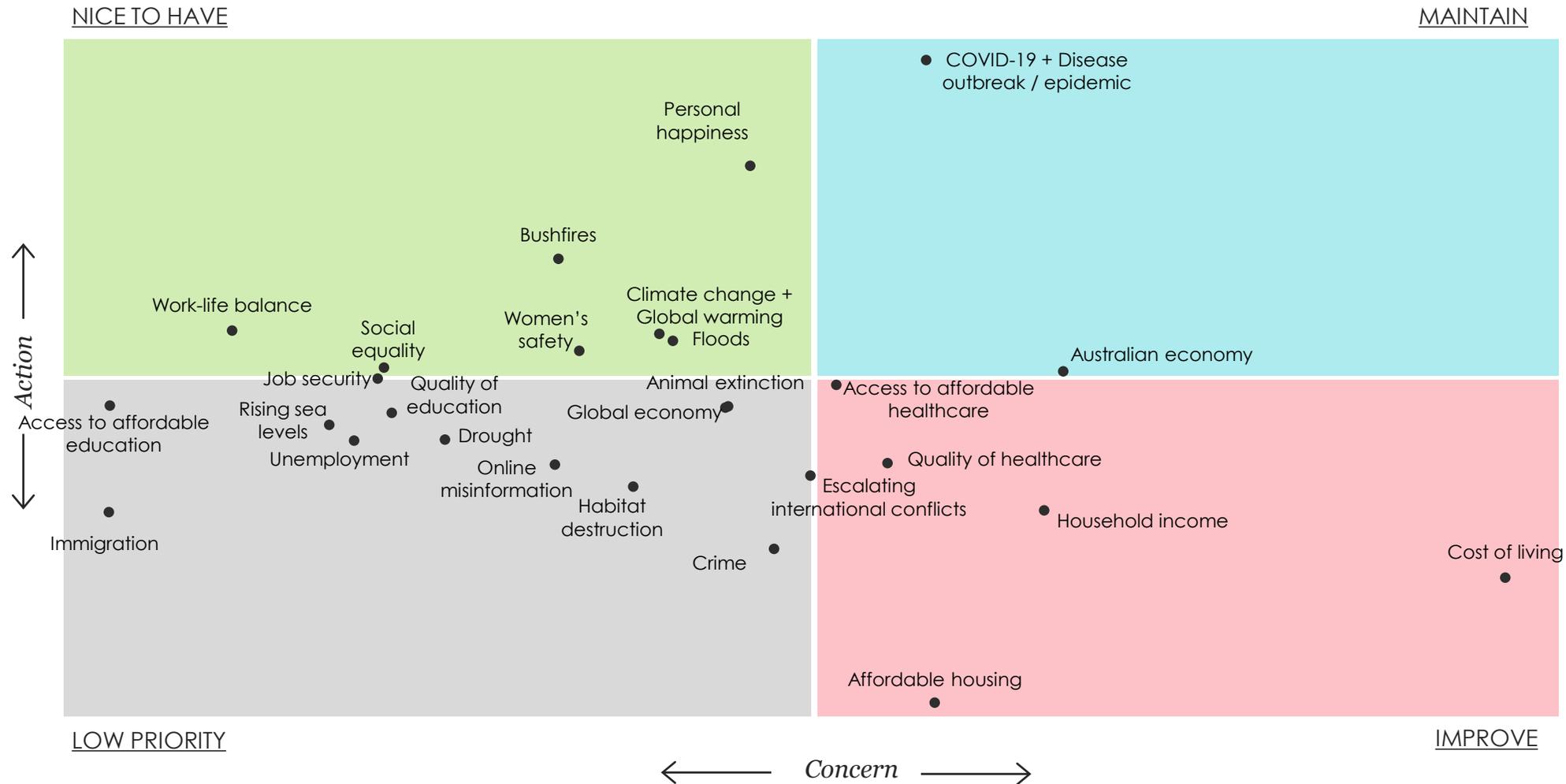


DQ3a/b/c - Please indicate, which of the following currently concern you?

DQ4a - How much do you agree or disagree that enough is currently being done to address these issues? Average agreement Base: Mar'22 Progressive n=417

# While Traditionals are more focused on a singular issue: cost of living + healthcare

*Concern x action matrix – Traditionals*



DQ3a/b/c - Please indicate, which of the following currently concern you?

DQ4a - How much do you agree or disagree that enough is currently being done to address these issues? Average agreement Base: Mar'22 Traditional n=333

Medical



Not for profit



State Govt



Super-annuation



Information technology



Federal Govt



Telcos



Gas and Electricity



Aged Care



Finance



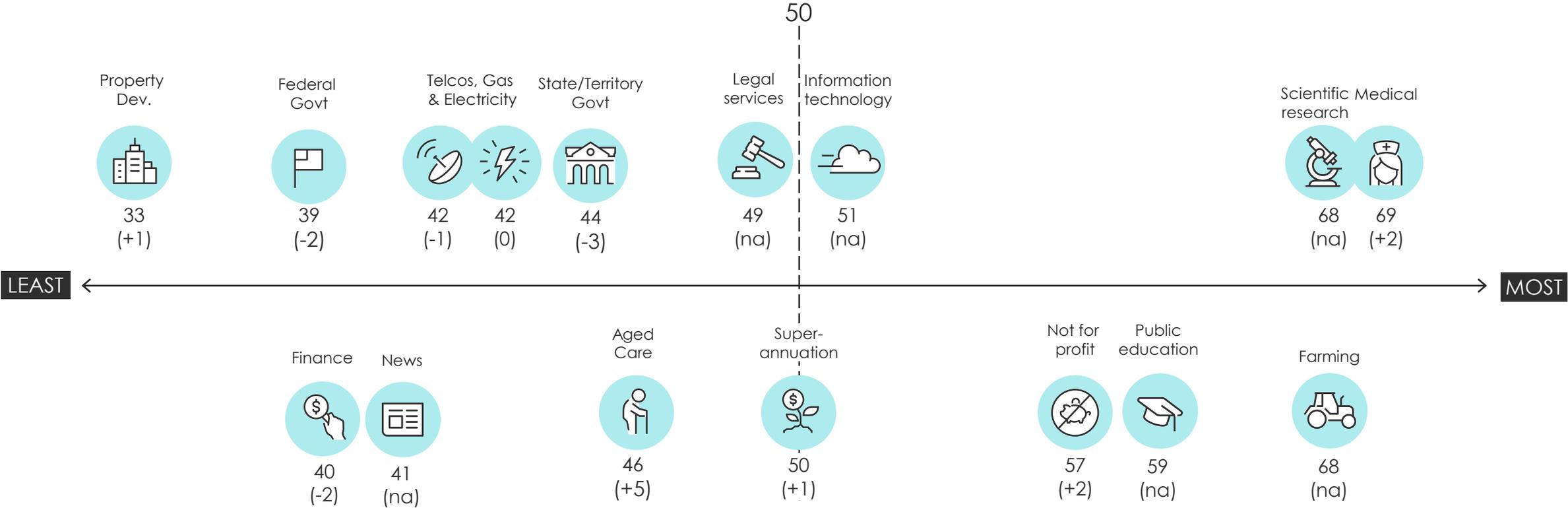
Property Dev.



Which industries are perceived as acting in people's best interests?

# The medical/scientific industry and farming are trusted, but we are skeptical of government, news and service industries

*The spectrum of industry trust (%)*



# What is the wisdom regarding who will be our country's next leader?

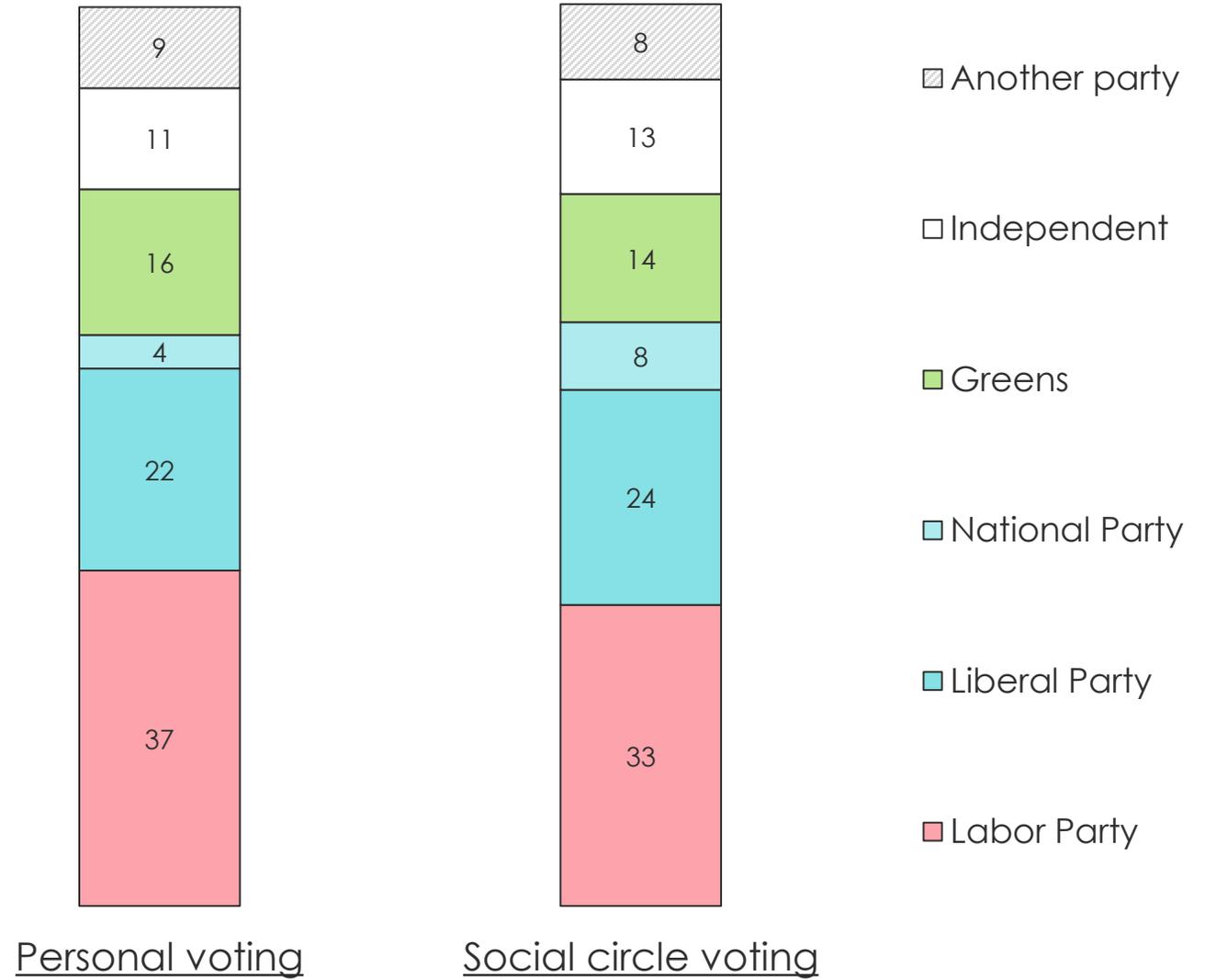


Two approaches:  
Who will I vote for?  
Who will your social circle vote for?

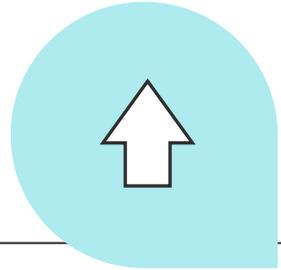
No party has the majority, although Labor is notably ahead of the coalition

*Personal voting vs. Social circle voting (%)*

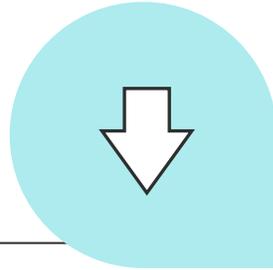
People see their social circle as including less Labor voters, but more Nationals and Independents



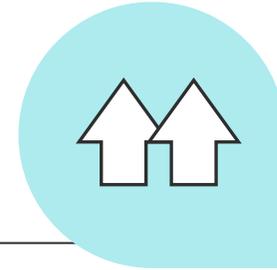
## Where Australians are right now:



Cost of living  
is the dominant  
issue and  
emerging issue



Concern about  
Covid,  
unemployment  
and immigration  
is receding



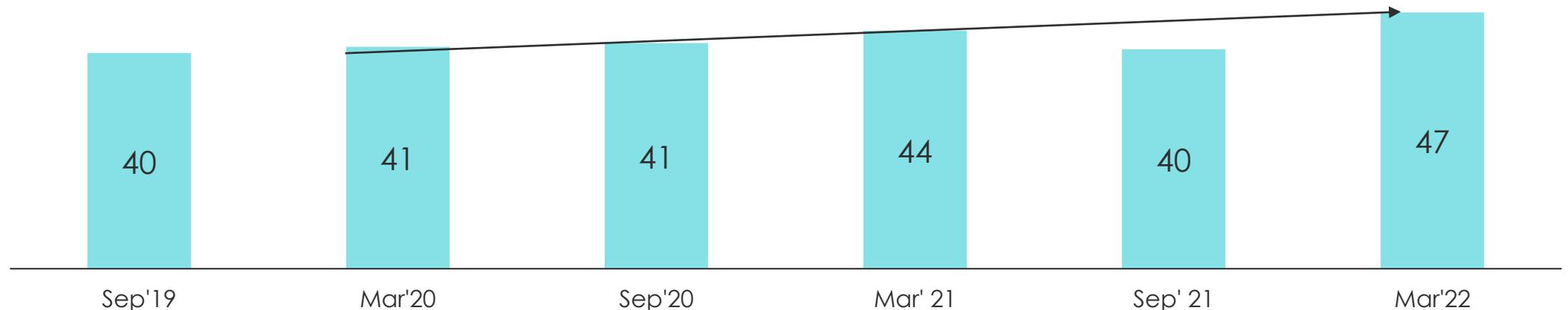
Climate change  
is dominant  
among  
Progressives and  
emerging among  
Traditionals

But what are we doing about it?

People are paying more attention to their decision making: researching more before buying

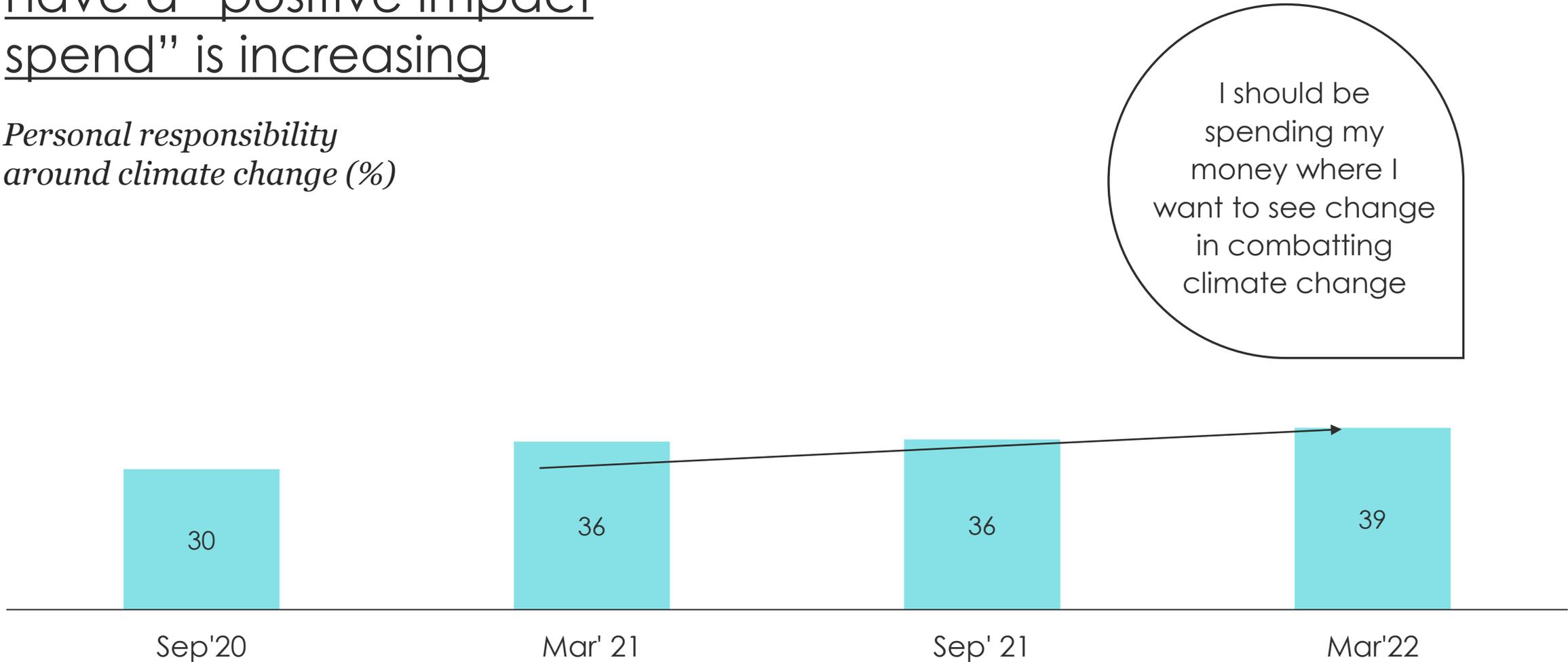
*Thinking about your views and outlook on the world, where do you sit on the following scale? (%)*

When buying things, I research extensively



Its not just about price: The number of people aiming to have a “positive impact spend” is increasing

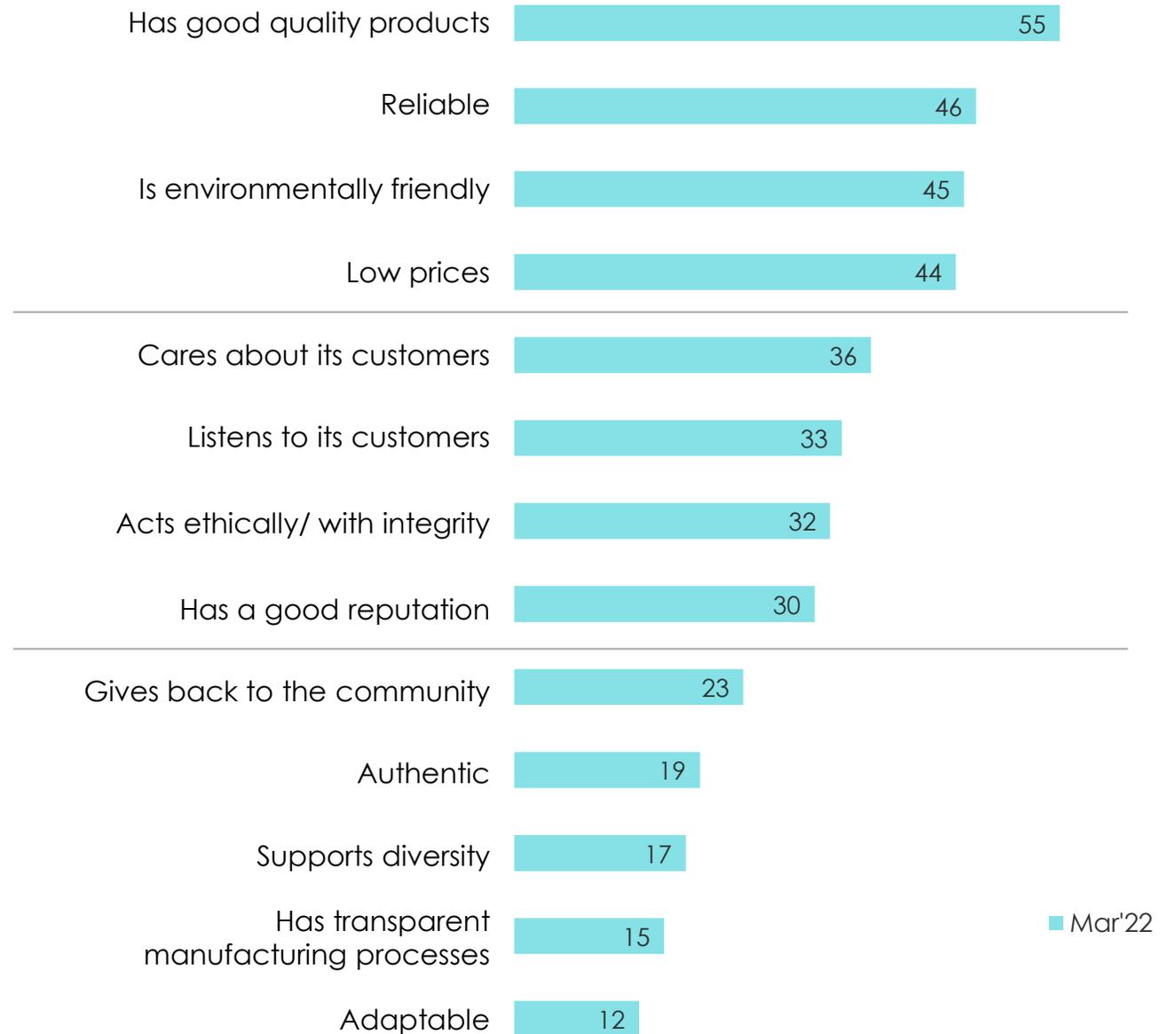
*Personal responsibility around climate change (%)*



# So what is it about?

The most important features are quality, reliability, environmentally friendly and then price

*Most important features of an organisation (%)*



There is a lot of  
cynicism about  
companies  
falsifying  
sustainable  
credentials

*64%: It's hard to figure out  
whether products that are  
labelled as 'sustainable' are  
actually sustainable*



3 in 4

Australians are  
at least  
somewhat  
knowledgeable  
about  
sustainability



## Defining sustainability

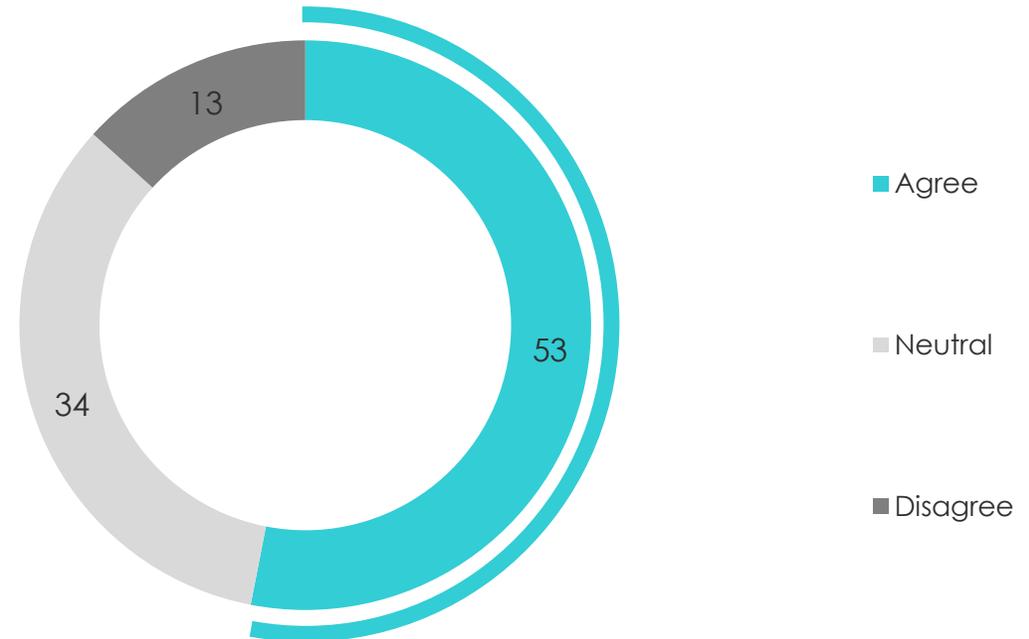
Nearly **1 in 2** think sustainability encompasses the environment, economy and society

But **1 in 4** think its just the environment

If you're not seen as sustainable, Australians want you to pay higher taxes

*Attitudes to sustainability in organisations (%)*

*If a company or organisation is not sustainable, it should pay higher taxes*



# If you are seen as sustainable, you are seen as more trusted and more ethical

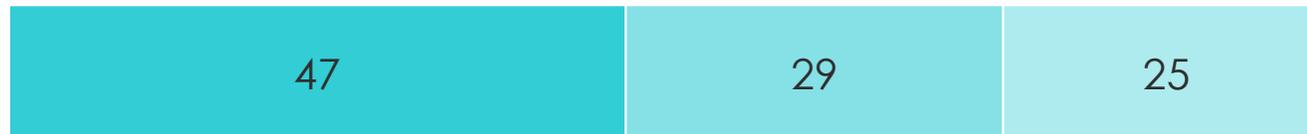
## *Expectations of companies around sustainability (%)*

Companies trying to be sustainable are more trustworthy



There's no link between sustainable and trustworthiness

Companies trying to be sustainable are more ethical



Sustainability makes no difference to how ethical a company is

However, when it comes to Canberra...



# Canberrans have a different mindset to the nation...



More likely to  
have a  
progressive  
mindset...



More likely to  
research things  
extensively...

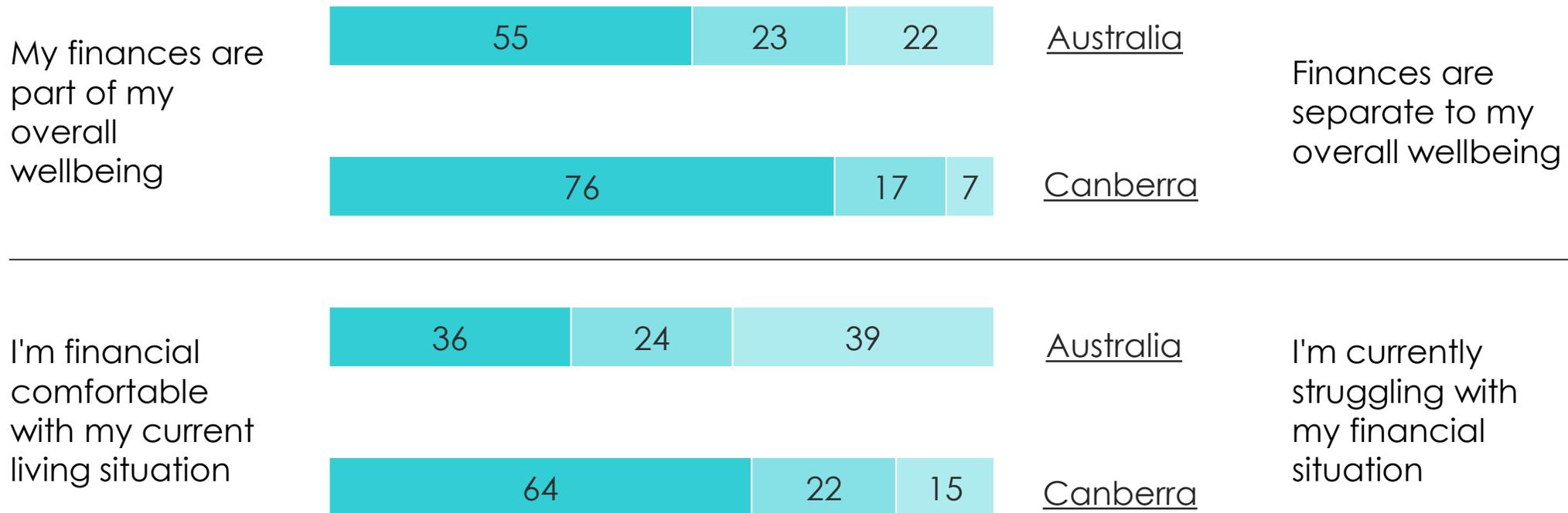


More likely to  
spending their  
money where they  
want to see change  
in combatting  
climate change....

...than the rest of Australia

# Canberrans have a different mindset to the nation

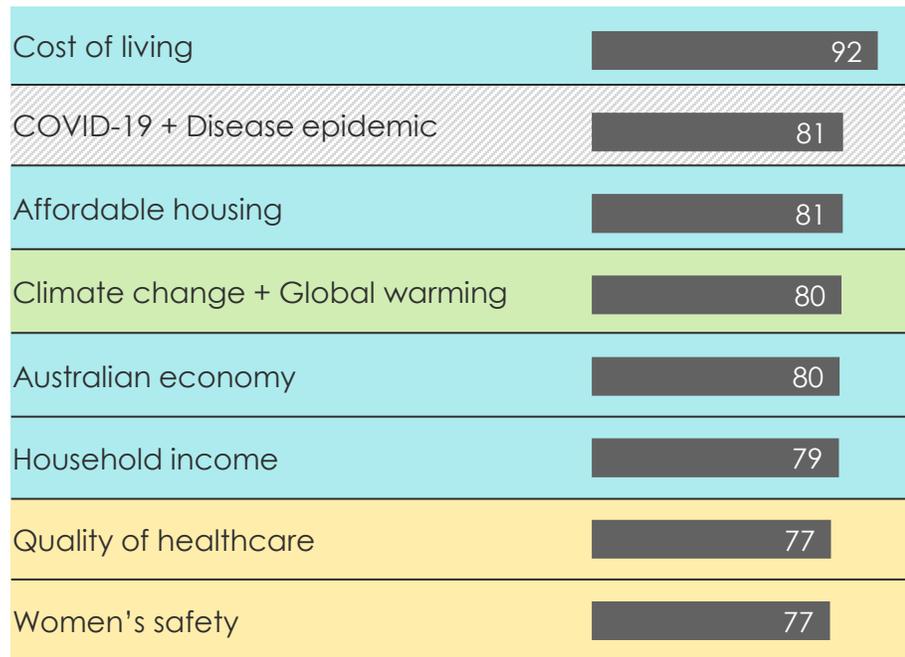
## *Views and outlook on the world (%)*



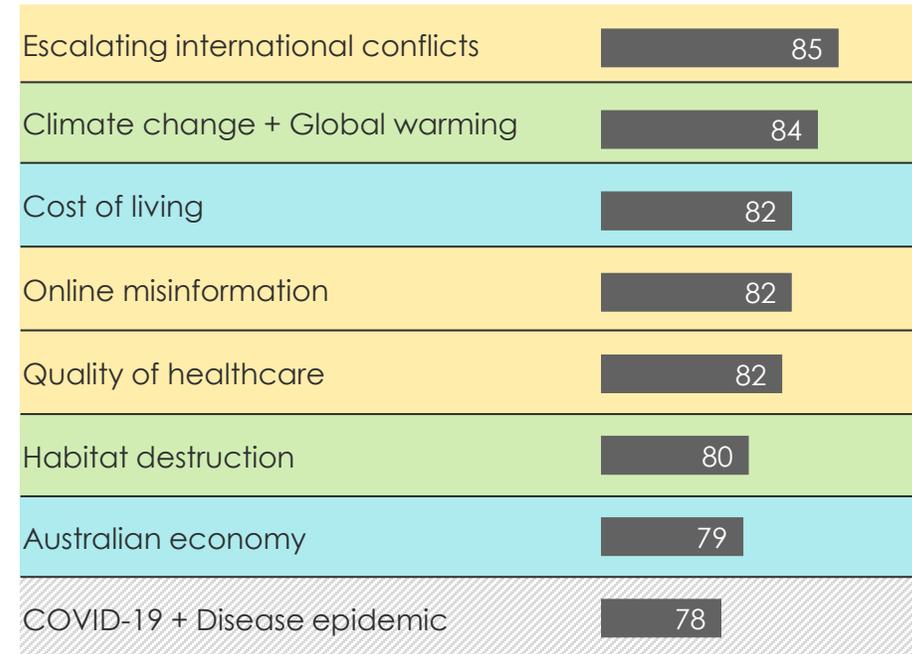
# Dominant issues among Canberrans are quite different, with a greater level of concern for societal issues

## *Dominant issues of concern (%)*

### Total Australia



### Canberra



Concern Type: ■ Economic ■ Societal ■ Environmental

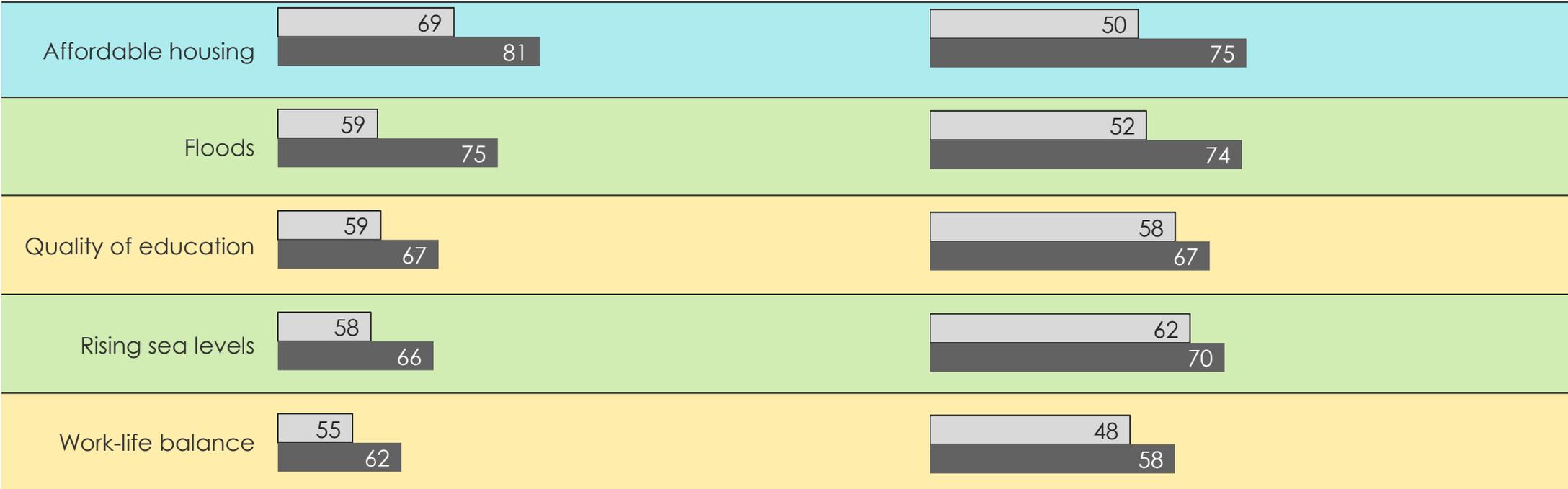
# Emerging issues of concern across Australia resonate here in Canberra, except for the one issue....

## *Emerging issues of concern (%)*

Concern Type: Economic Societal Environmental Wave: Mar'20 Mar'22

### Total Australia

### Canberra

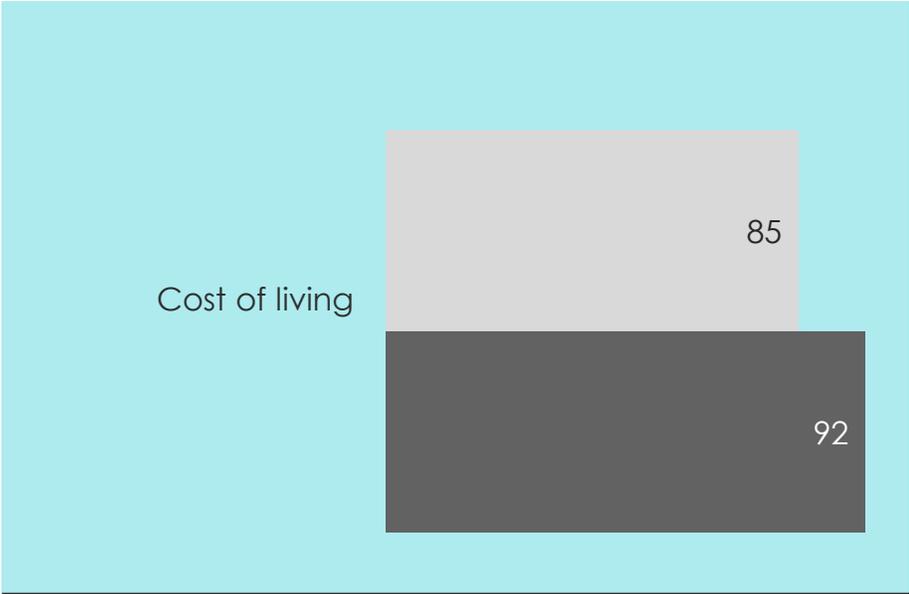


# Cost of living is not an emerging issue in Canberra

## *Emerging issues of concern (%)*

Concern Type: Economic Societal Environmental Wave: Mar'20 Mar'22

### Total Australia



### Canberra



# Canberrans see societal and environmental issues as areas of high concern that need action

*Concern x action matrix - Canberra*

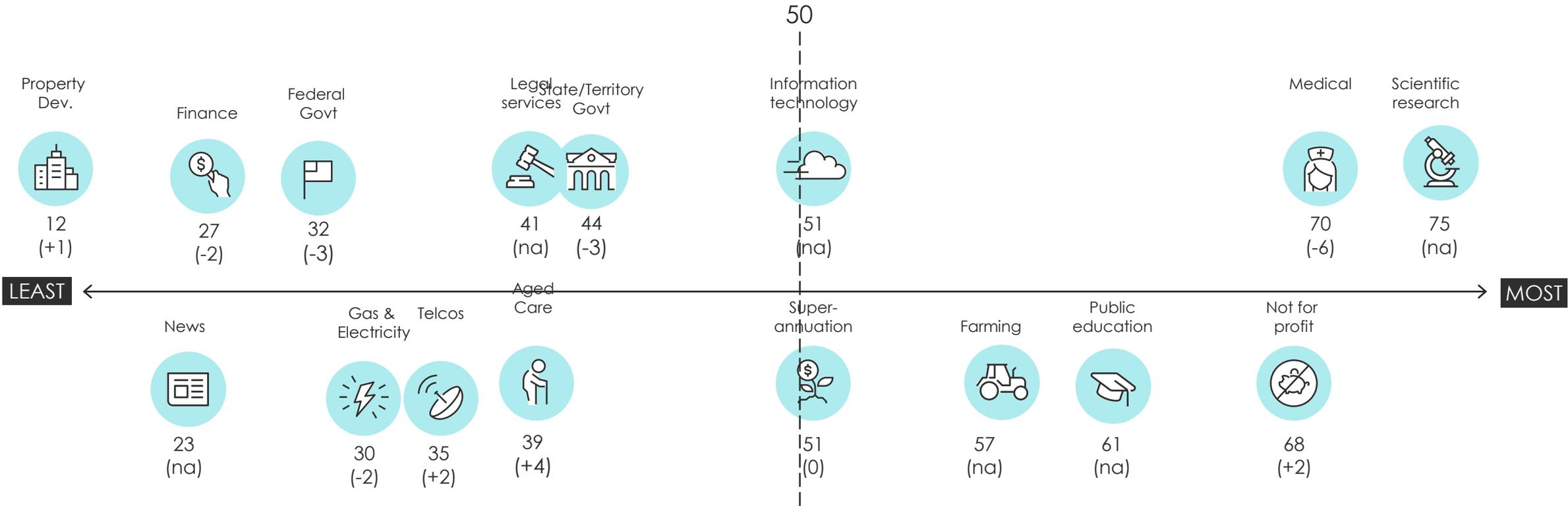


DQ3a/b/c - Please indicate, which of the following currently concern you?

DQ4a - How much do you agree or disagree that enough is currently being done to address these issues? Average agreement Base: Canberra n=176

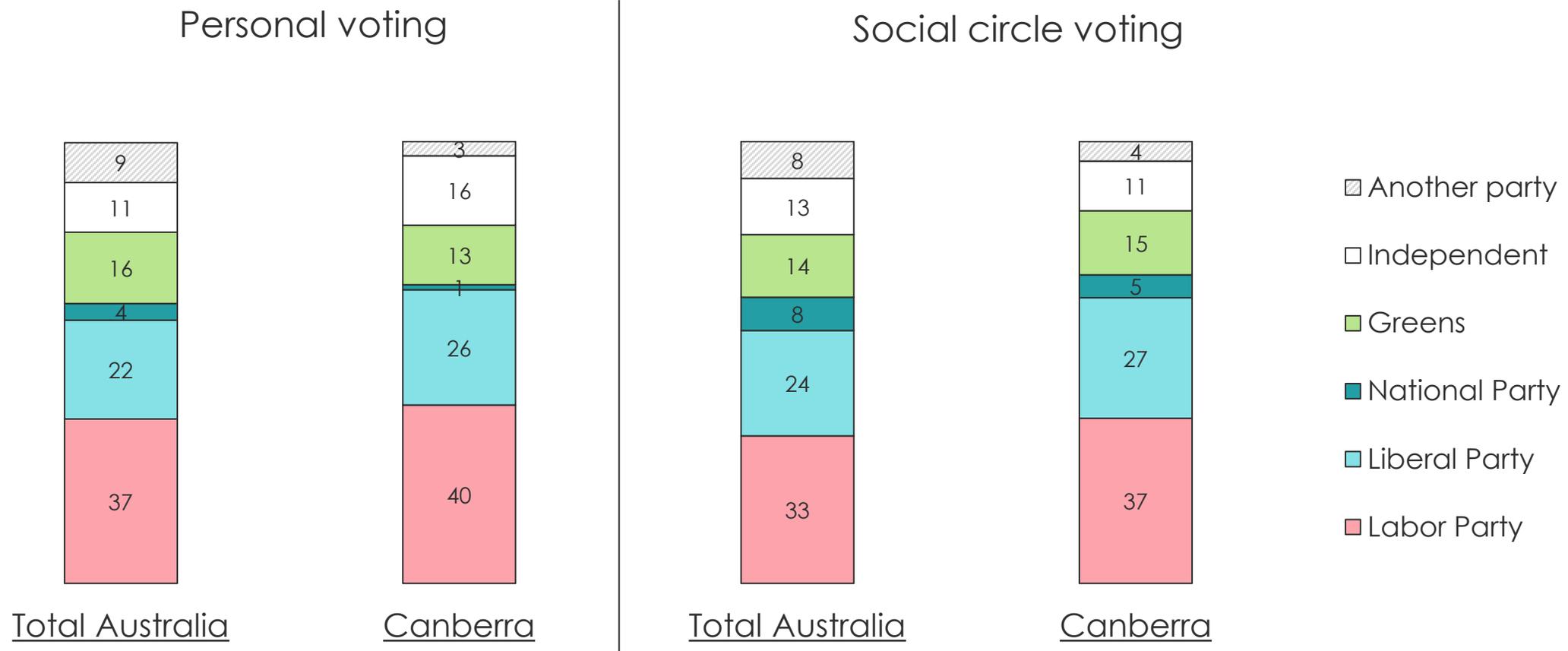
# The medical/scientific industry and not-for-profit remain most trusted among Canberrans

*The spectrum of industry trust (%)*



# Canberrans and their social circle skews slightly more Labor, more independent and less 'another party' than Australia

*Personal voting vs. Social circle voting (%)*



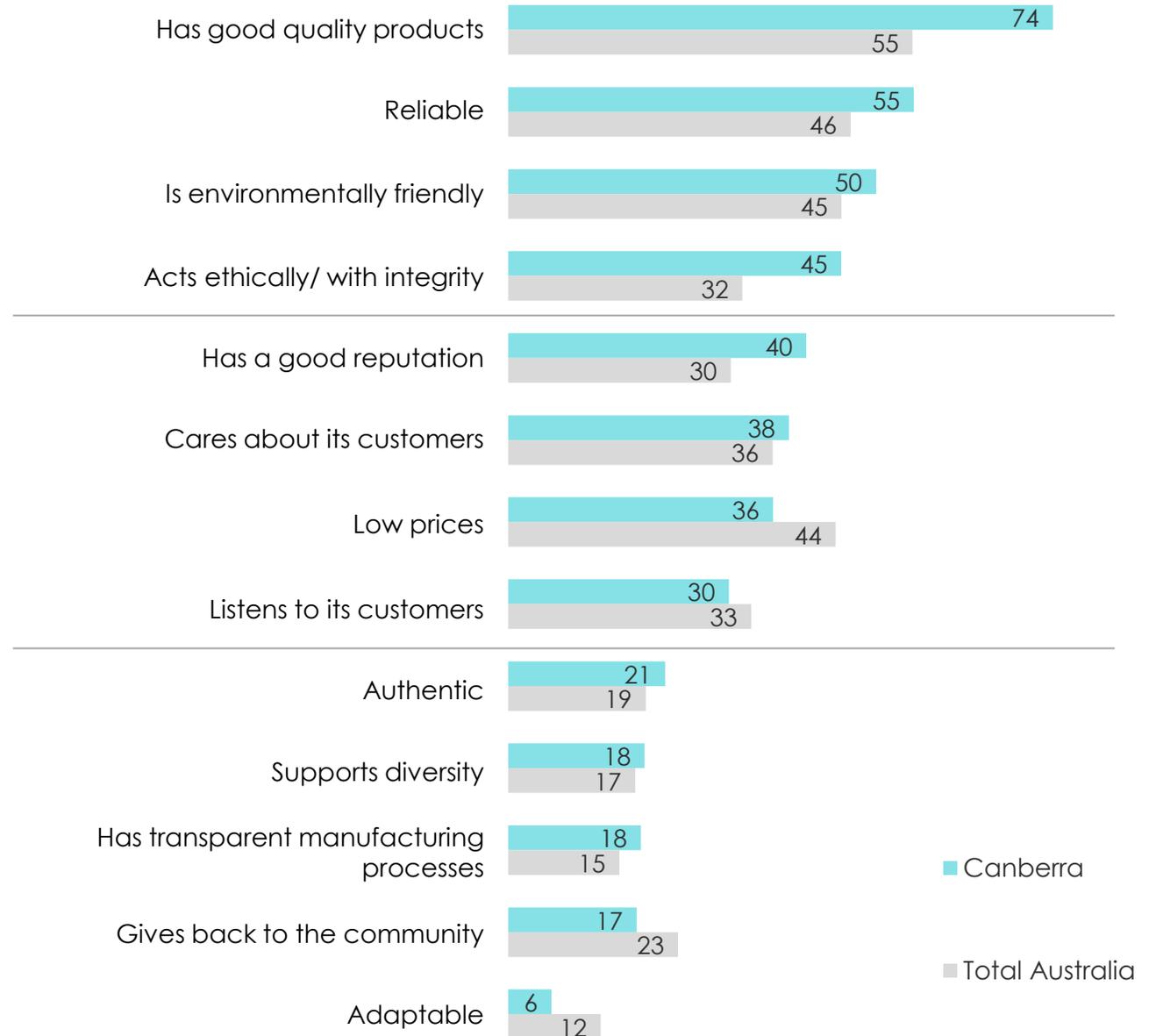
What does this mean for product and service delivery in Canberra?



# Canberrans focus more on quality, reliability, environmentally friendly and acting ethically

*Most important features of an organisation (%)*

The halo effect of being sustainable is also present in Canberra



## How this will effect you

1. Fear of cost of living is going to effect decision making
2. People are spending in line with their values, and they need to understand your values and what you stand for
3. This is even more true for Canberrans, with even higher expectations across quality and integrity

Want to know more? Get in touch with Garrett  
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# Thank you

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