



Pollinate

A research and strategy agency

Part of

the
influence
group

Pollinate acknowledges all Aboriginal and Torres Strait Islanders
Traditional Custodians of Country and recognises their
continuing connection to land, sea, culture and community.
We pay our respects to Elders past, present and future.



Pulse #31:

**Actions speak
louder than words**



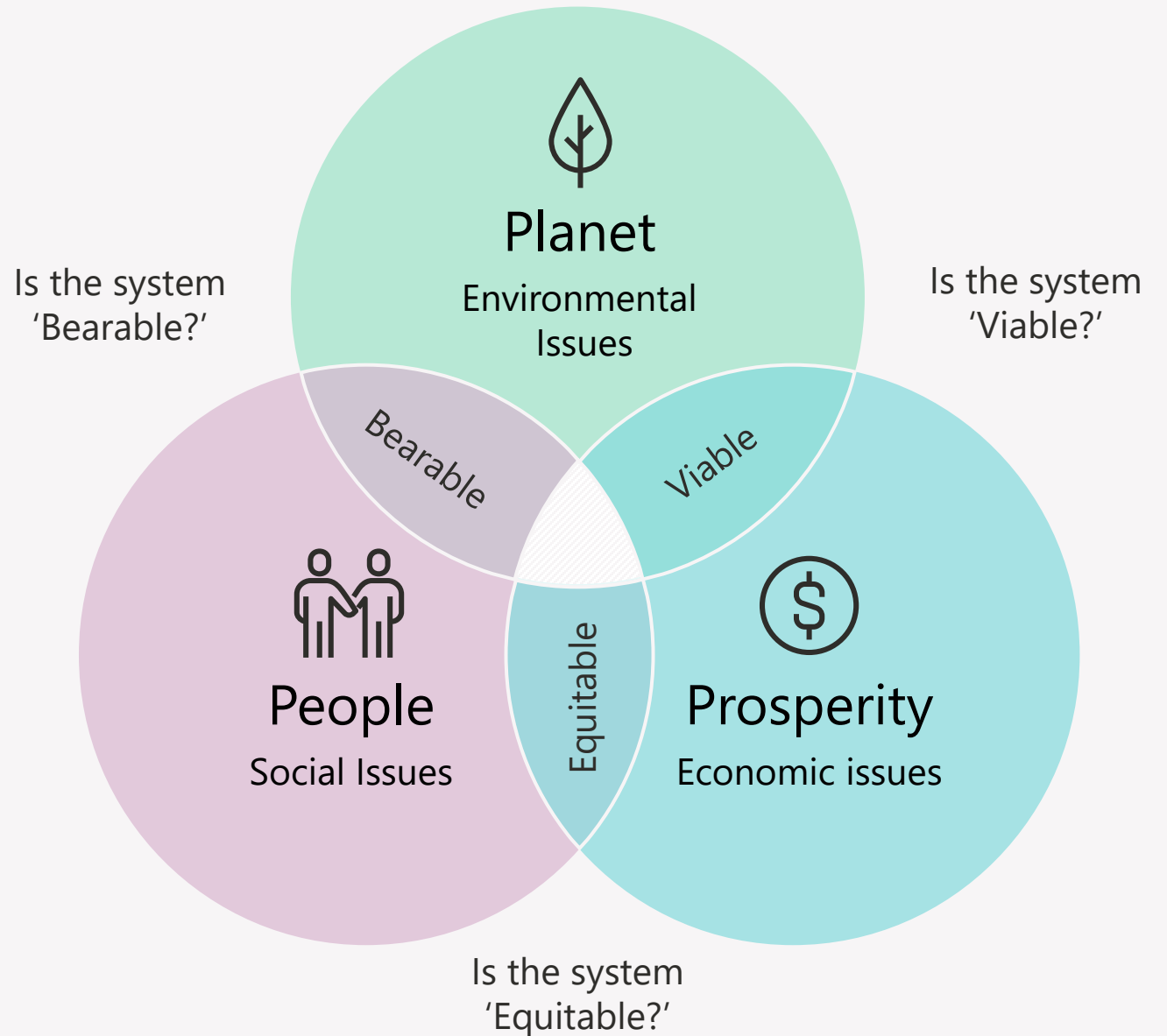
Pollinate

is delighted to be recognised as one of AFR's Sustainability leaders for 2022


Pollinate Pulse

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

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



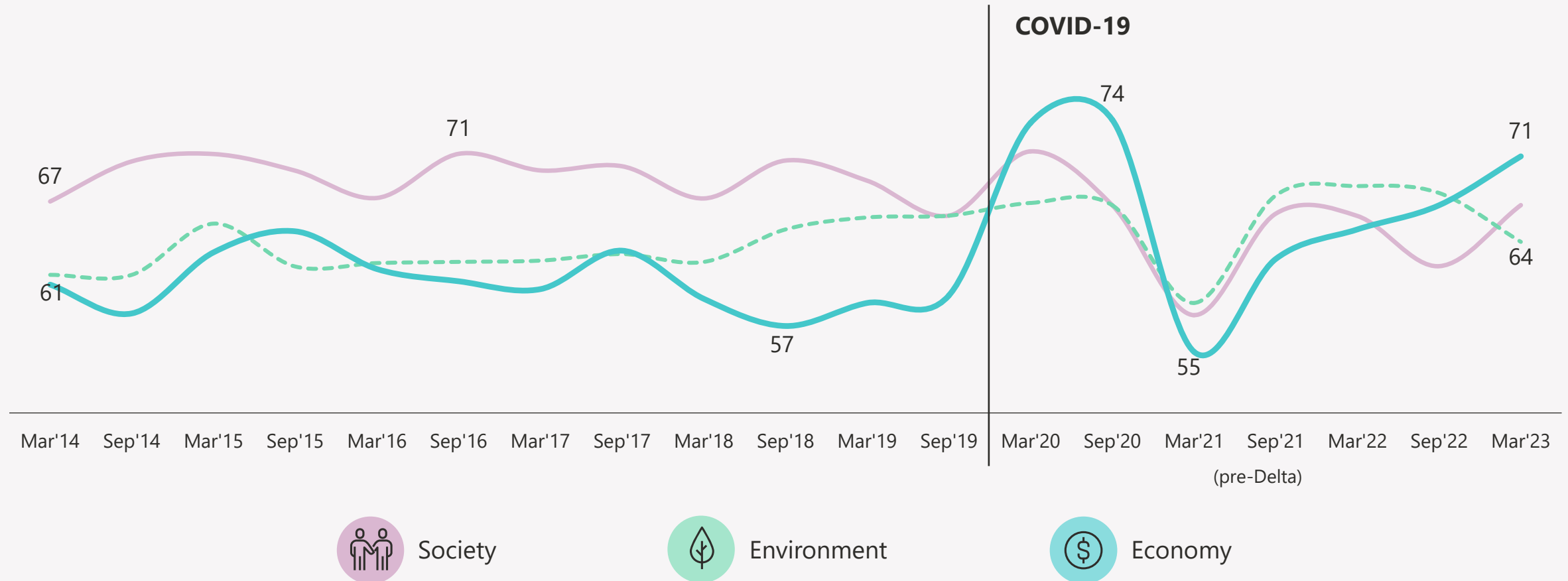
Cost of living remains the
dominant concern

A close-up, profile view of a woman with blonde hair, looking down at a smartwatch on her left wrist. She is outdoors, likely on a beach, with a warm, golden sunset background. The watch screen displays a grid of data. The overall mood is contemplative and focused.

Possibility of a
recession
is causing
concern ...

Economic concerns continue to grow (but yet to hit highs of 2020 Covid induced fear) and environmental concerns dip to pre-2018 levels

Concern about society, economy and the environment (T2B %)



Society



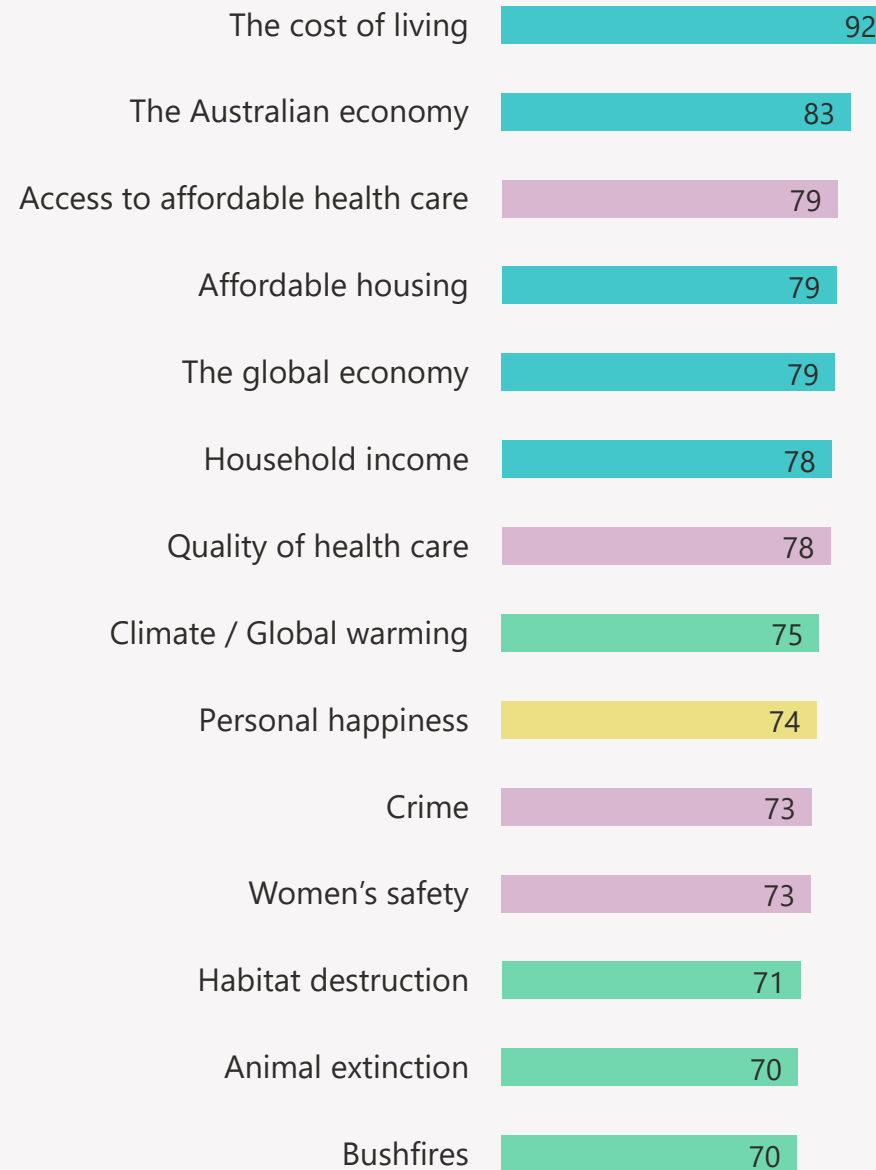
Environment



Economy

Overall concerns are mostly economic in nature

Top 14 current concerns (%)

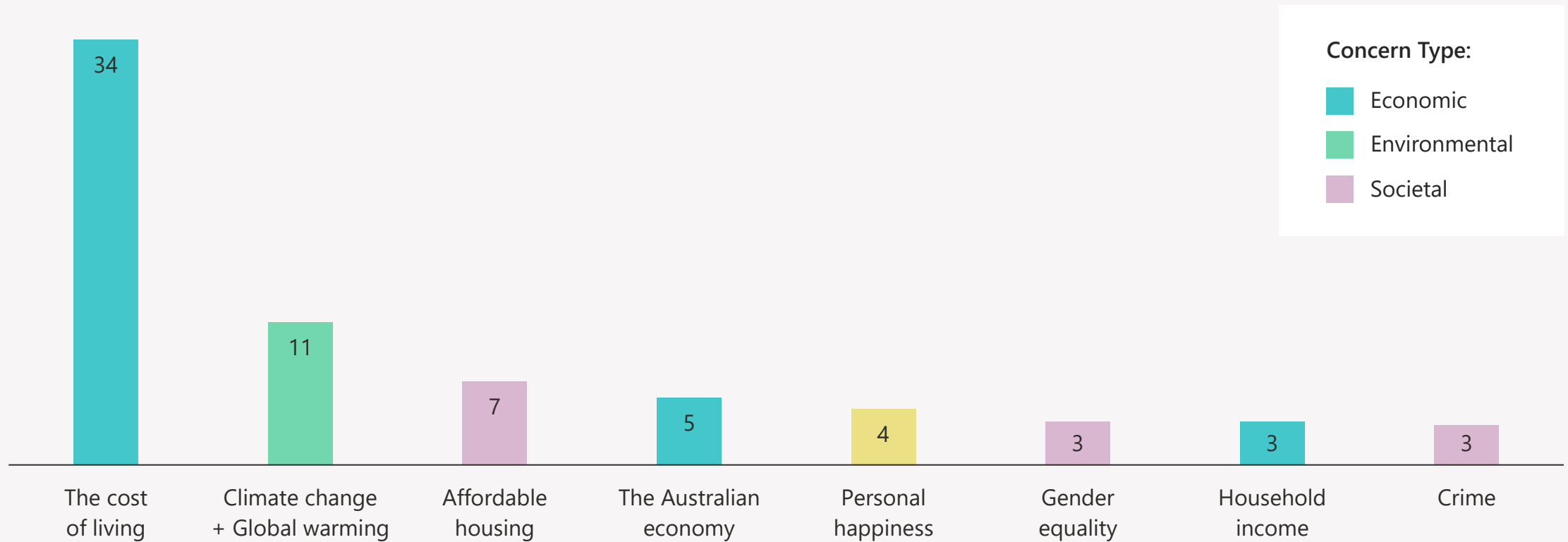


Concern Type:

- Economic
- Environmental
- Societal

Cost of living is overwhelmingly the *most concerning issue*

Greatest concern (%)



Most people don't think enough is being done to address cost of living or economic concerns

Enough is being done to address (%)

NET Disagree 69%

NET Agree 17%



NET Disagree 56%

NET Agree 22%



■ Strongly disagree

■ Slightly disagree

■ Neither

■ Slightly agree

■ Strongly agree

IT'S THE ECONOMY, STUPID.



Right now
everything is
framed in terms
of cost-of-living

Despite the economic
concern most Australians say
they are happy

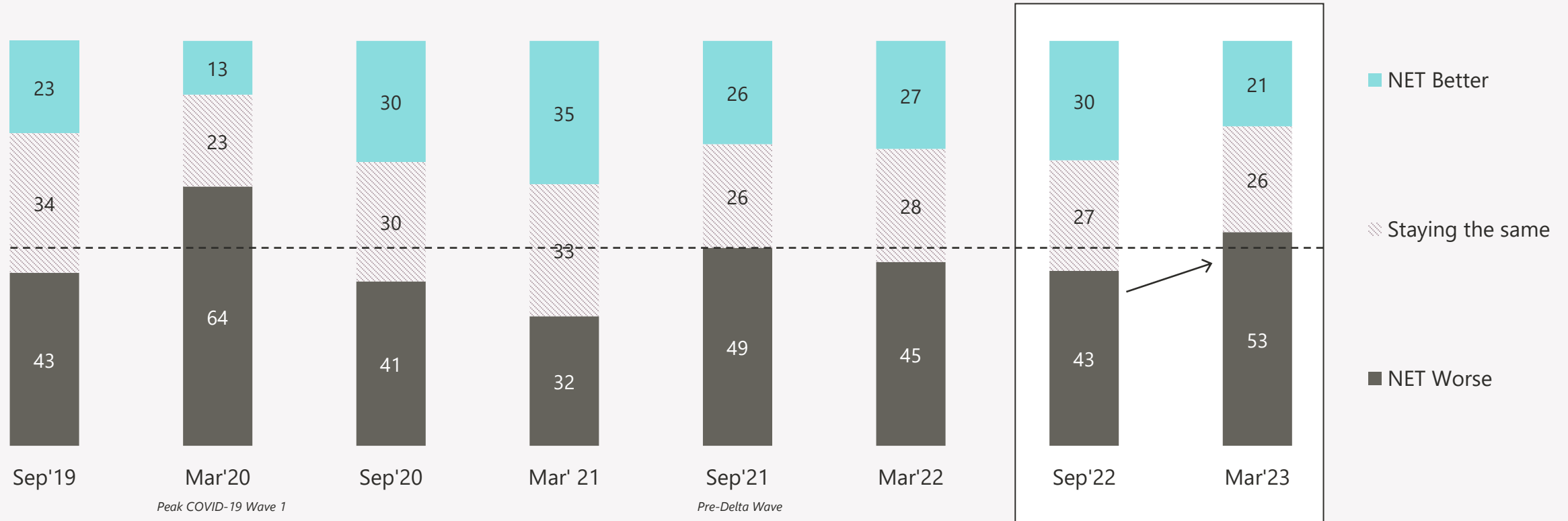


53%

think life in Australia is
going to ***get worse***

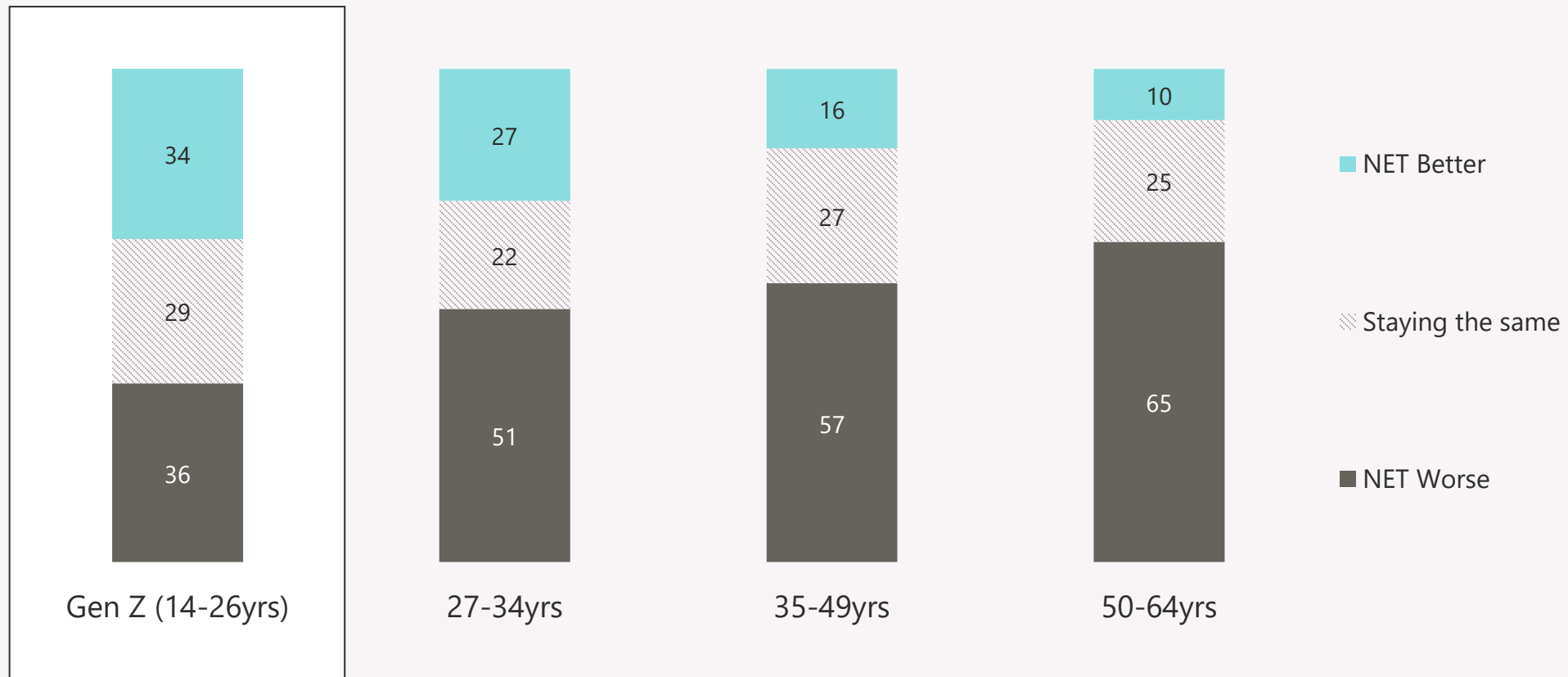
This declining outlook has worsened considerably since last year

Do you think life in Australia is getting... (%)



Young people are more optimistic about life in Australia

Do you think life in Australia is getting... (%)





Despite the
concerns,
69%
of Aussies say they
are happy with life
right now



EDDIE JAKU

1920 - 2021

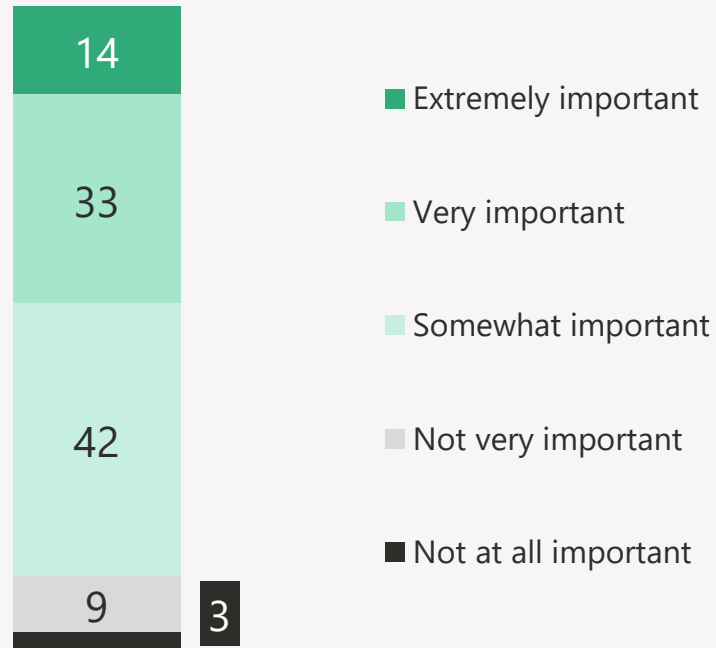
In spite of the deepening concerns,
most Australians remain *resolutely happy*

In the pursuit of happiness, we
want to live sustainable lifestyles...
but we don't know how!

Living a sustainable lifestyle is important to almost all Aussies

Importance of living a sustainable lifestyle (%)

NET Extremely/Very/ Somewhat important:



March '23



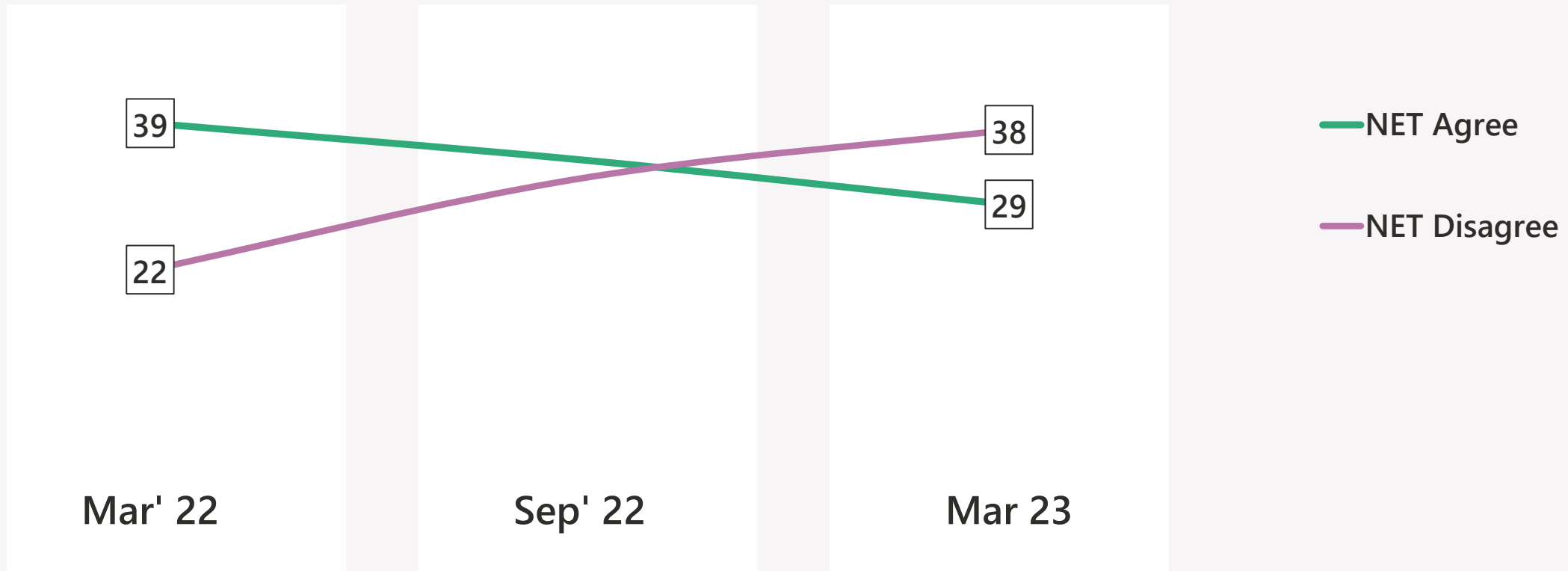
Only

26%

claim to be very
or extremely
knowledgeable
about
sustainability

It's getting harder and harder to have a sustainable life

Agreement 'It is easy to have a sustainable lifestyle' (%)



Brands are expected to
play a role in sustainability
but aren't trusted

Aussies are skeptical of companies when it comes to sustainability

Attitudes to sustainability (%)

72%

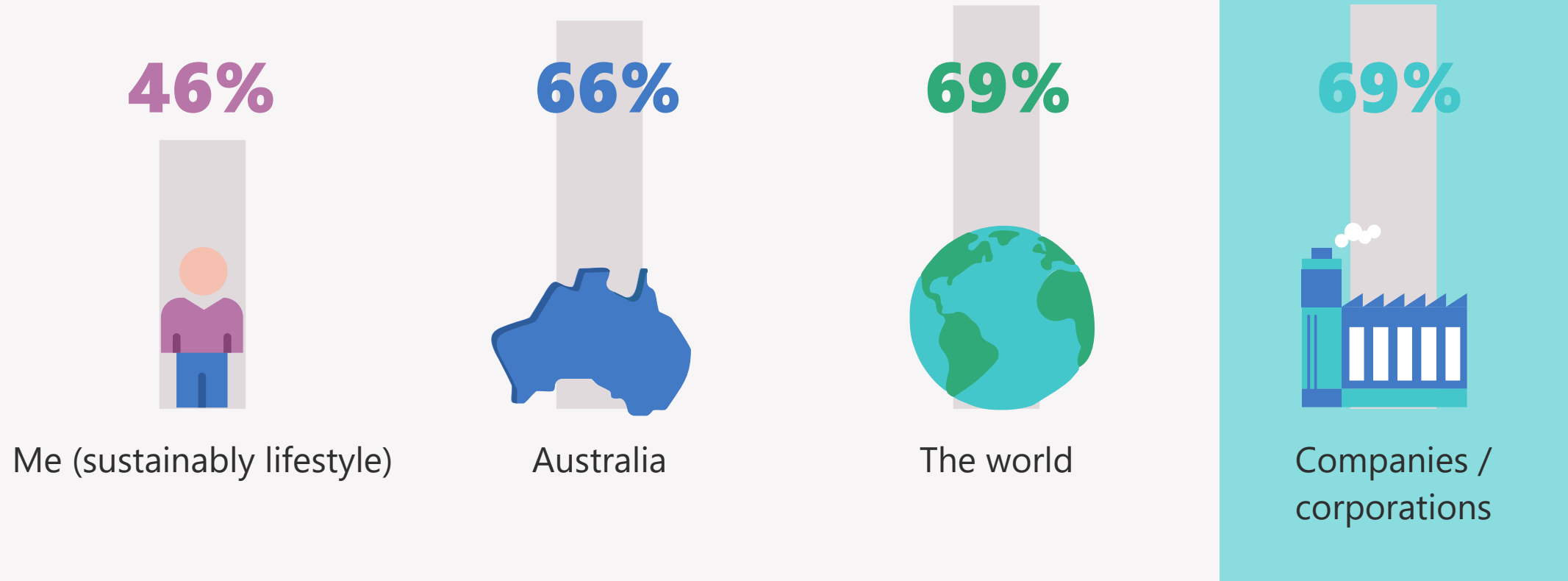
Agree "It's hard to figure out whether products that are labelled as 'sustainable' are actually sustainable"

62%

Agree "Companies and organisations use greenwashing to justify higher prices"

Sustainability is seen as even more important for countries and companies to adopt

Importance of sustainability (%)



**Current sustainability comms
are not clear**

We asked consumers to review the clarity and trustworthiness of sustainability claims for everyday products



 **has a plan.**

We've been carbon neutral since 2020.
By 2030, all our products will be too.



**Good for you.
Better for the planet.**

Sustainability claims are not clear across the board

Clarity of ads (Very clear %)

60%



Helga's

35%



Colgate

32%



Glad to be Green

23%



Heinz

23%

 **has a plan.**

We've been carbon neutral since 2020.
By 2030, all our products will be too.

Apple

Trust in these claims is even lower

Trust of ads (Completely trust %)



32

Helga's



15

Colgate



17

Glad to be Green



18

Heinz

 has a plan.

We've been carbon neutral since 2020.
By 2030, all our products will be too.

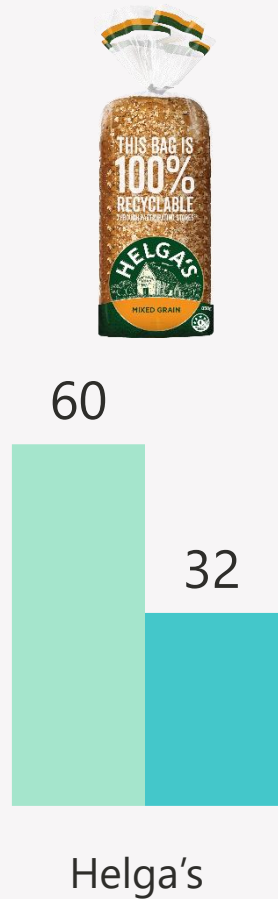
11

Apple

Trust seems to follow clarity of messaging

Clarity and trust of ads (Very clear/Completely trust %)

Very clear Completely trust



Apple has a plan.
 We've been carbon neutral since 2020.
 By 2030, all our products will be too.

23

11

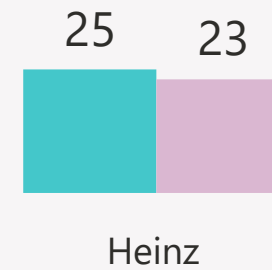
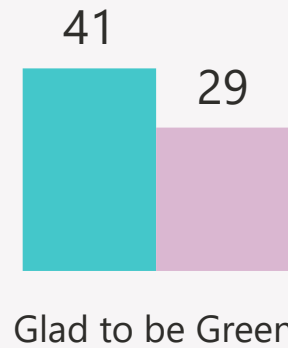
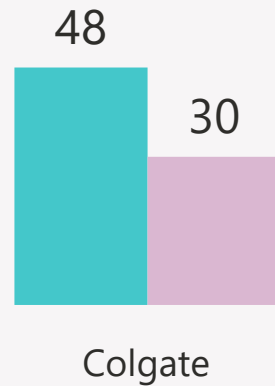
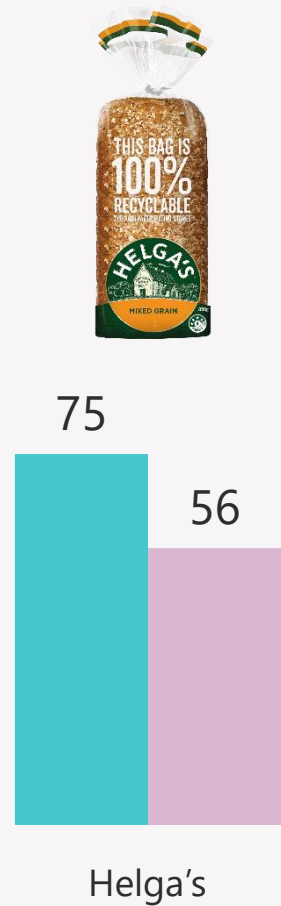
Apple

A note on age: Gen Z see more
clearly but trust less

Gen Z find the ads clearer than older people

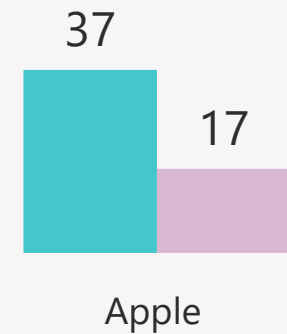
Clarity (Very clear %)

■ Gen Z ■ 27-64yrs



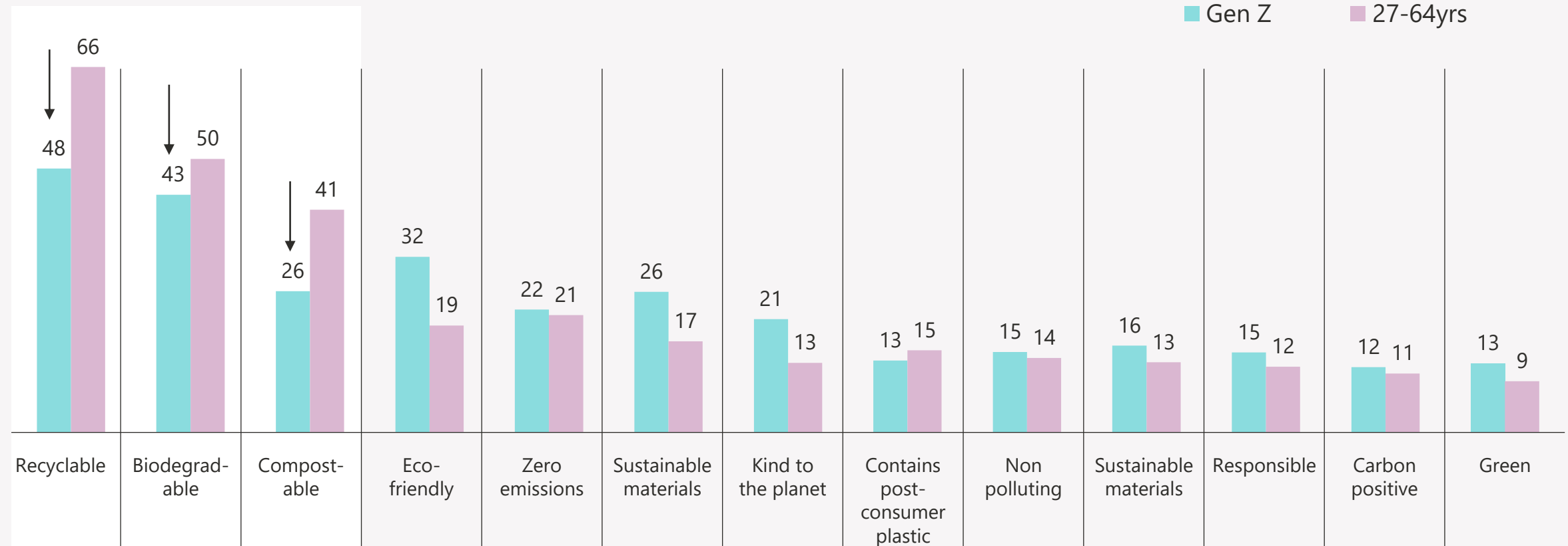
has a plan.

We've been carbon neutral since 2020. By 2030, all our products will be too.



Gen Z are more discerning when it comes to trusting these 'sustainability claims' (especially recyclable and compostable)

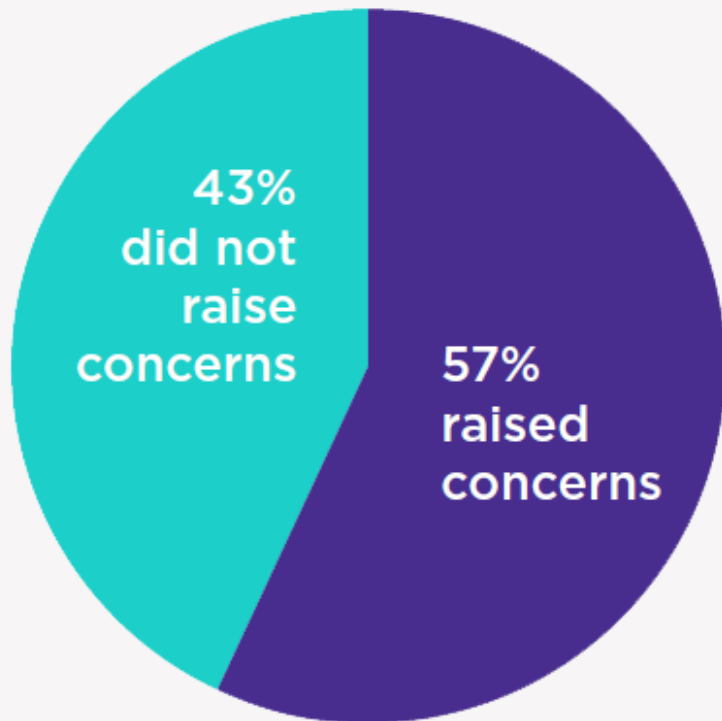
Most trustworthy (%)



People know this, we've been
here before, so why are brands'
sustainable communications
so bad?

ACCC found MOST business claims could be greenwashing

Overall proportion of businesses identified as making concerning claims



Greenwashing by businesses in Australia

Findings of the ACCC's internet sweep of environmental claims

March 2023



And the biggest issue was using 'vague or unclear claims'

- 1 using vague or unclear environmental claims
- 2 not providing sufficient evidence for their claims
- 3 setting environmental goals without clear plans for how these will be achieved
- 4 using third-party certifications and symbols in a confusing way.



Greenwashing by businesses in Australia

Findings of the ACCC's internet sweep of environmental
claims

March 2023





The ACCC views using vague or unclear environmental claims is **Greenwashing**

The Pulse evidence is clear: people don't trust the unclear claims.

So STOP IT!

In the confusion of
sustainability communications
actions speak louder than words

Aussies want to hear about tangible things a brand is doing

...rather than certifications and values...

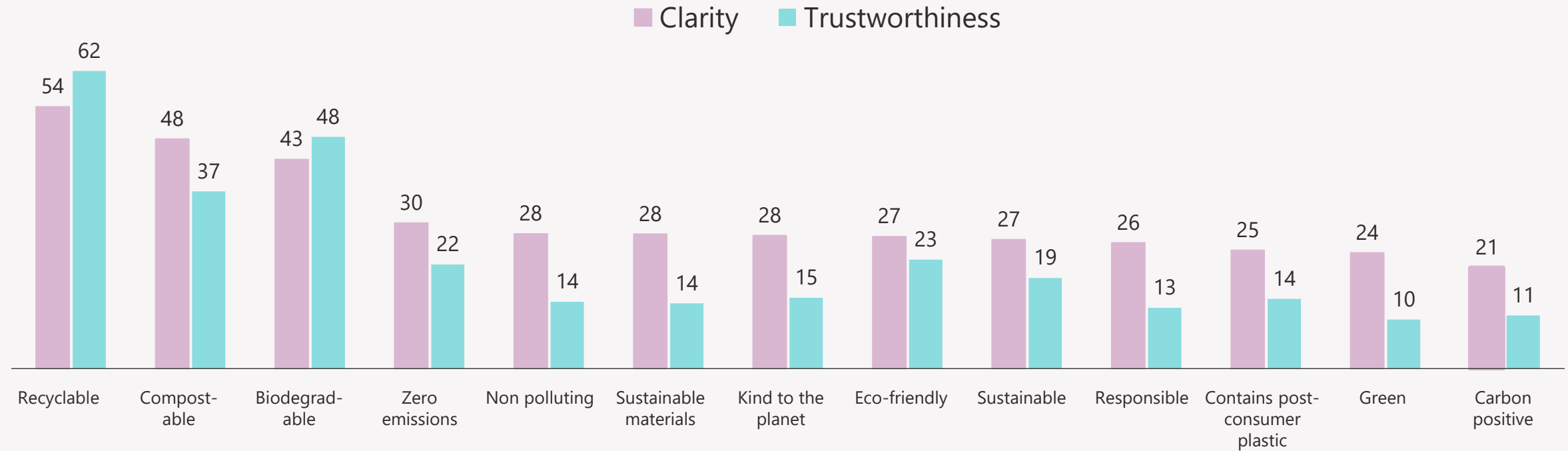
- Processes
- Programs
- Packaging
- achievements

Most important areas for a brand to talk about (%)

| | |
|---|----|
| Sustainable processes / programs in place | 66 |
| How sustainable their packaging is - can I recycle, reuse etc | 58 |
| Sustainable achievements | 50 |
| Product focus i.e. product impact on environment | 46 |
| Sustainable intentions | 46 |
| How sustainable their business model is overall | 40 |
| Consumer engagement initiatives | 35 |
| Sustainable partnerships to achieve goals i.e. Planet Ark | 31 |
| Infrastructure that allows me to support their sustainability efforts | 30 |
| Brand values that are similar to my own | 27 |
| Sustainability certifications they have received | 27 |

The clearer sustainability claims are, the more trusted they are

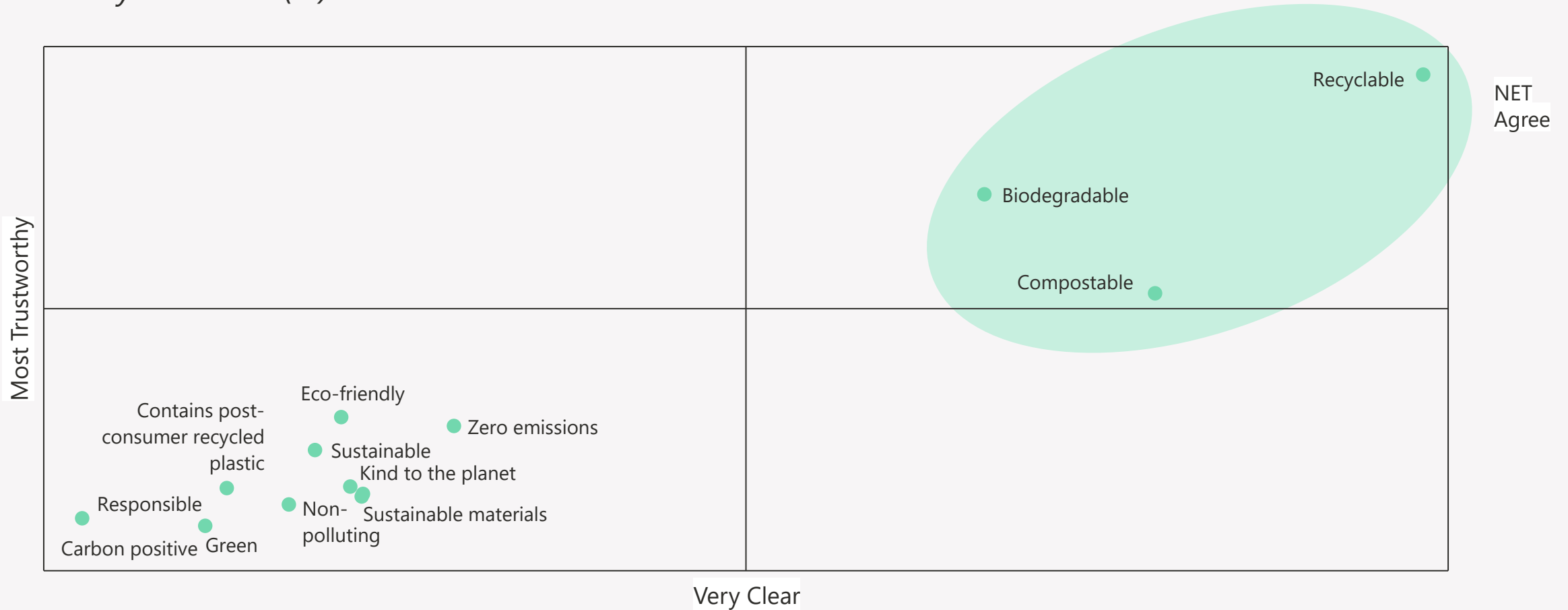
Clarity and trustworthiness of claims.... (%)



MC1bis: Here is a list of common claims made by brands for their products or services. Please indicate how clear, or not, these claims are.
MC2_: Which of the following claims do you consider to be the most trustworthy? Please pick your top three from the below list Base: Total sample Mar'23 n=1,076

Only recyclable, biodegradable or compostable claims are clear and trusted: *verbs (action words) seem to work best*

Clarity and Trust (%)



MC1bis: Here is a list of common claims made by brands for their products or services. Please indicate how clear, or not, these claims are
 MC2: Which of the following claims do you consider to be the most trustworthy? Please pick your top three from the below list. Base: Total sample Mar'23 n=1,076

So if it
is clear...

*...it is also more
trustworthy*

But mostly brand
communications
are neither clear
not trusted



60% very clear

32% completely trust

 **has a plan.**

We've been carbon neutral since 2020.
By 2030, all our products will be too.

23% very clear

11% completely trust

“Actions speak louder than words. All companies say they care, right? But few actually exercise that care.”

Simon Sinek

Thank you

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www.pollinate.com.au

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