



Pollinate

A research and strategy agency

Part of

the
influence
group

Pulse #30:

The consumer view of sustainability

“Can’t find it, can’t afford it,
don’t trust it.”

How inequity will block ESG
goals

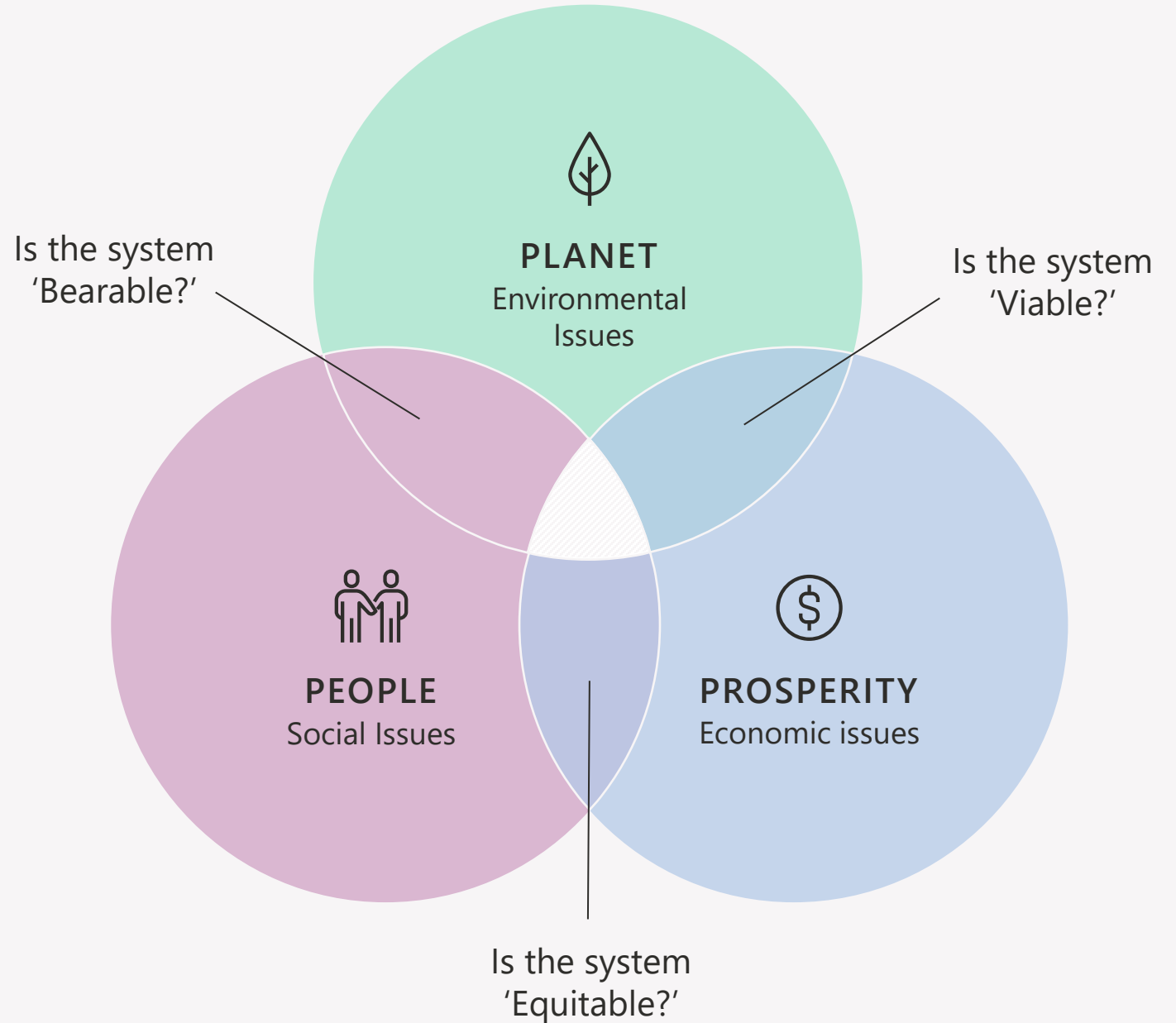


Pollinate acknowledges all Aboriginal and Torres Strait Islanders
Traditional Custodians of Country and recognises their continuing
connection to land, sea, culture and community.
We pay our respects to Elders past, present and future.

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





FINANCIAL REVIEW



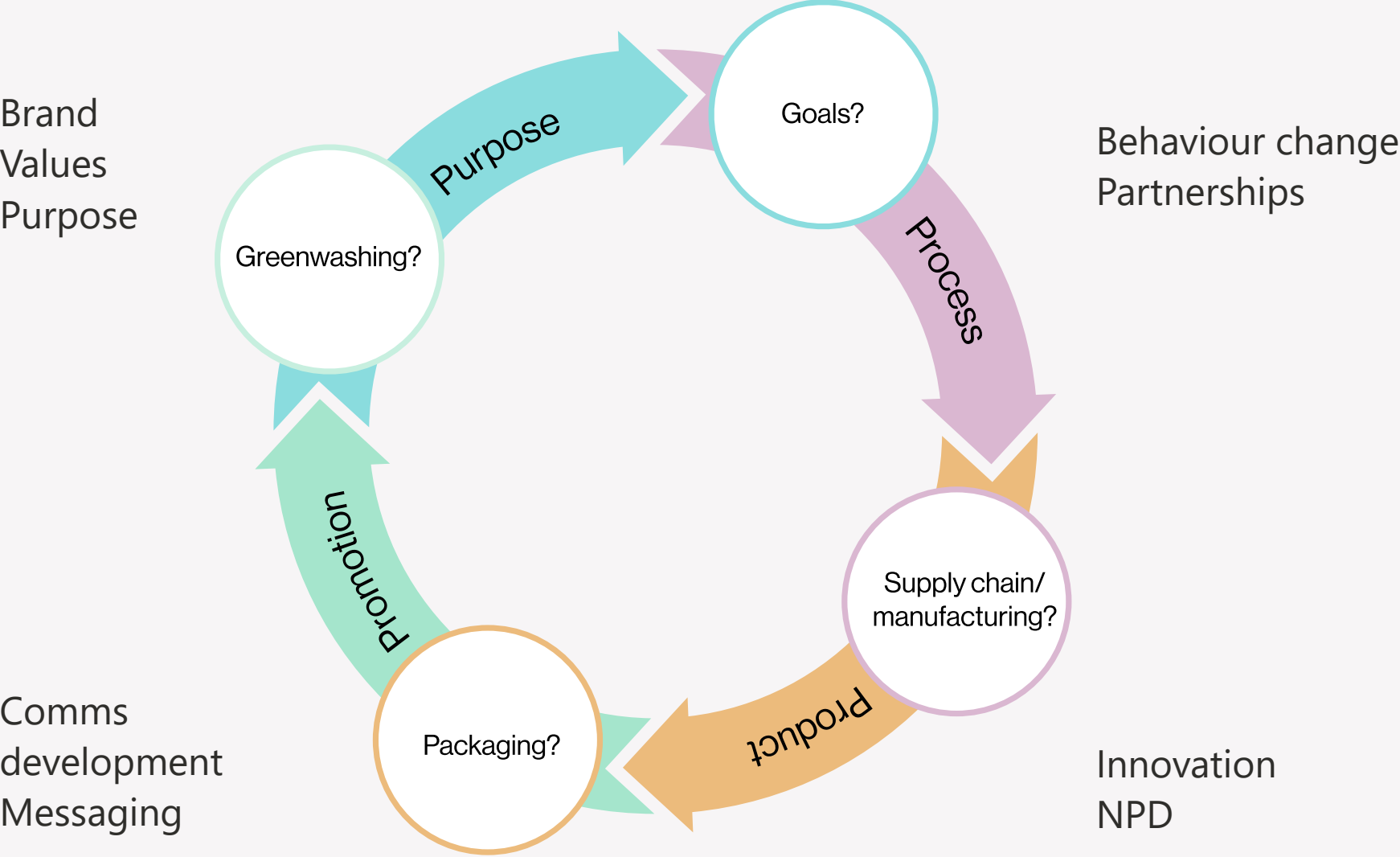
IN ASSOCIATION WITH **BCG**

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

[LEARN MORE HERE](#)

In recognition of the long-term investment and commitment to understand consumer attitudes and behaviours to sustainability.

Where do you have a sustainability challenge?



Who we spoke to in the Pulse tracking research

15 min online survey

Nationally representative sample

Sept '22

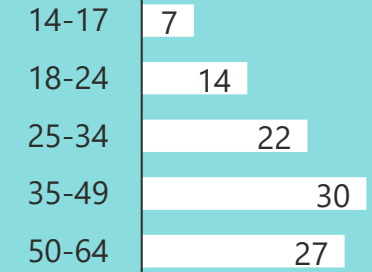
n=1000

Australians aged 18+

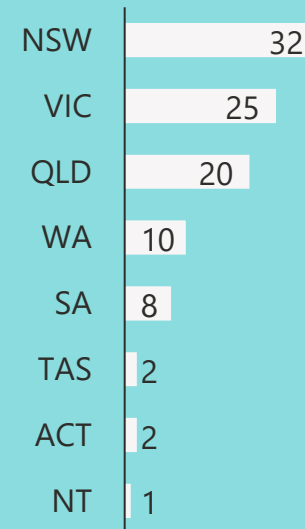
Gender (%)



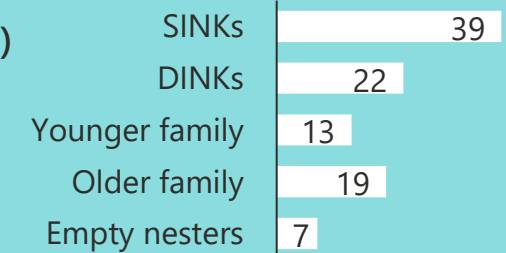
Age (%)



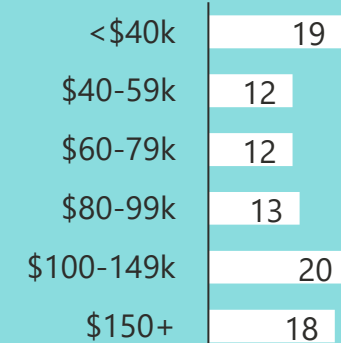
State (%)



Lifestage (%)



Household income (%)





Analysis framework

Looking at Sustainability through VRK

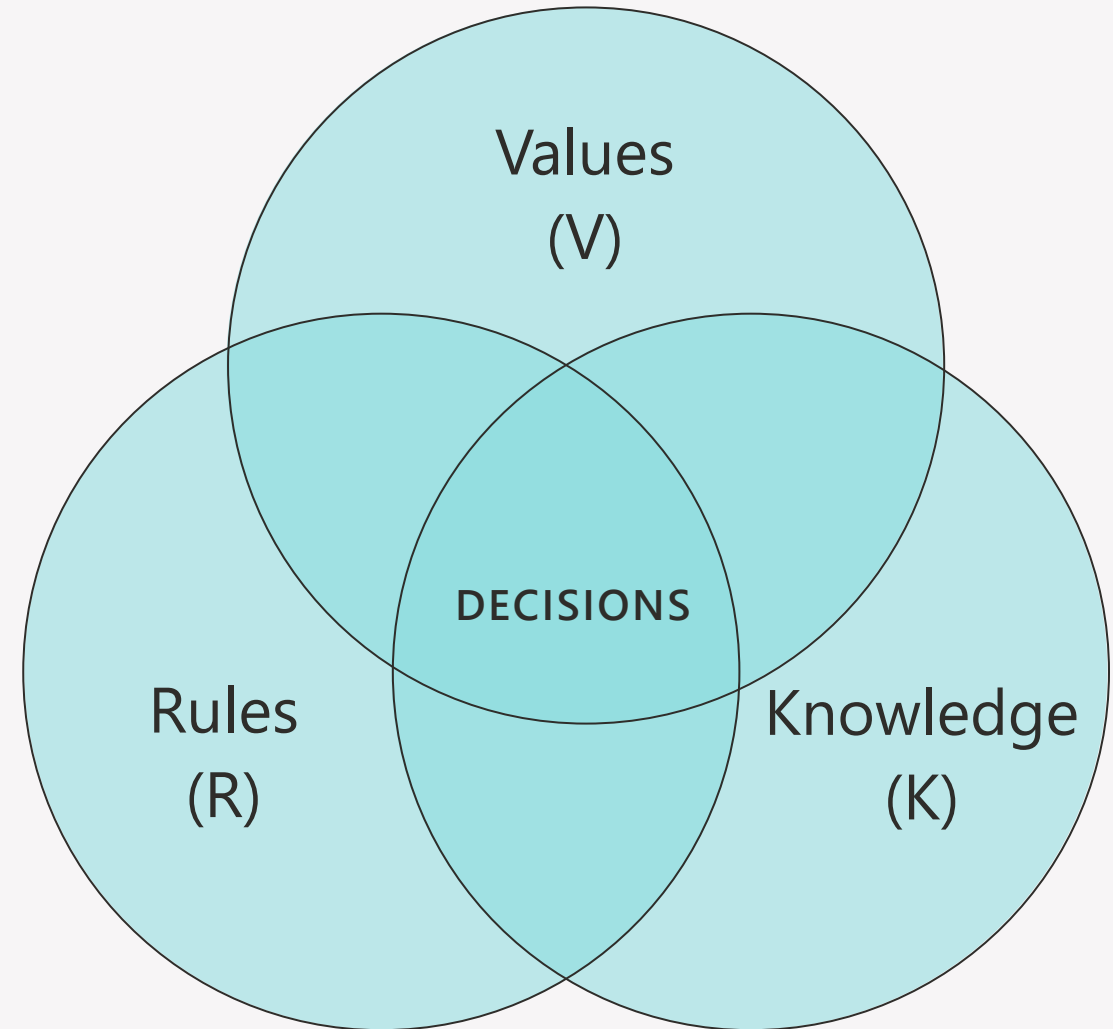
Values Rules Knowledge (VRK) framework

A framework that analyses the decision context to identify the factors that determine the available choices

VRK poses three fundamental questions:

1. Is it desired? (Values)
2. Is it known? (Knowledge)
3. Is it allowed? (Rules)

Pollinate use this framework to dig deeper and understand the underlying forces that drive of behaviour and attitudes to sustainability in Australia right now

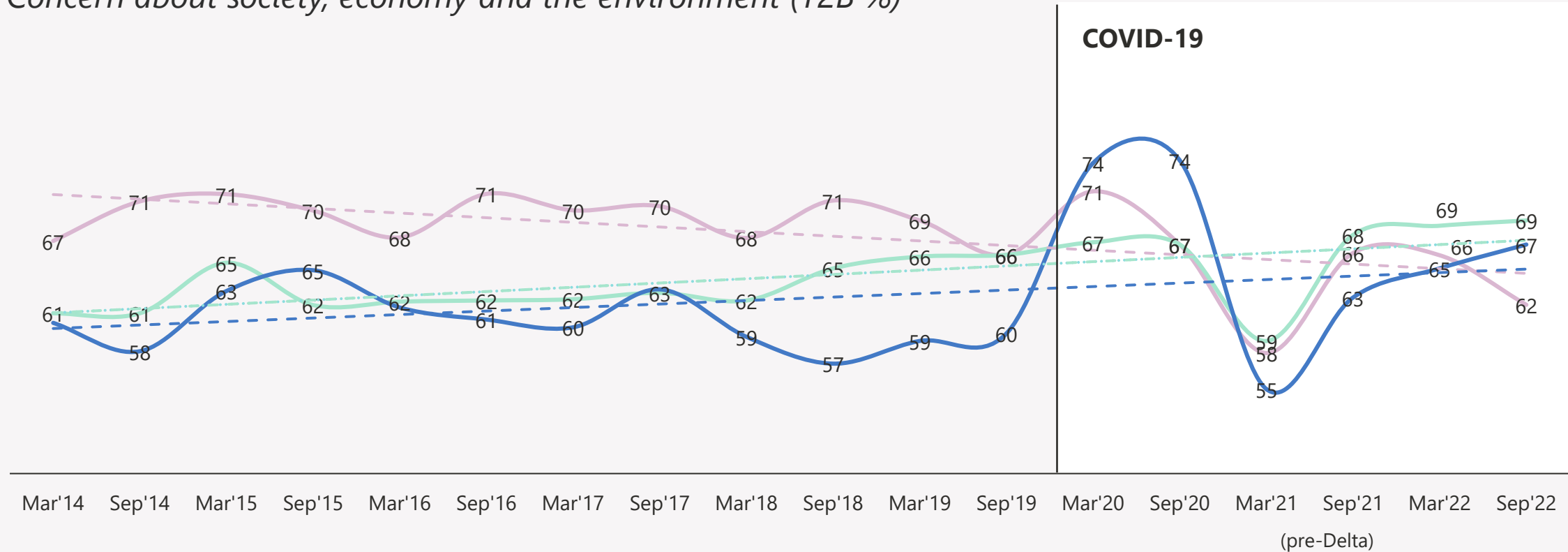


Values: is it desired?

Sustainability is important to Aussies, and there is an urgency for change but many of us just want to not feel guilty

Post COVID, the environment & economy concerns are highest

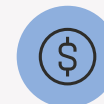
Concern about society, economy and the environment (T2B %)



Society



Environment

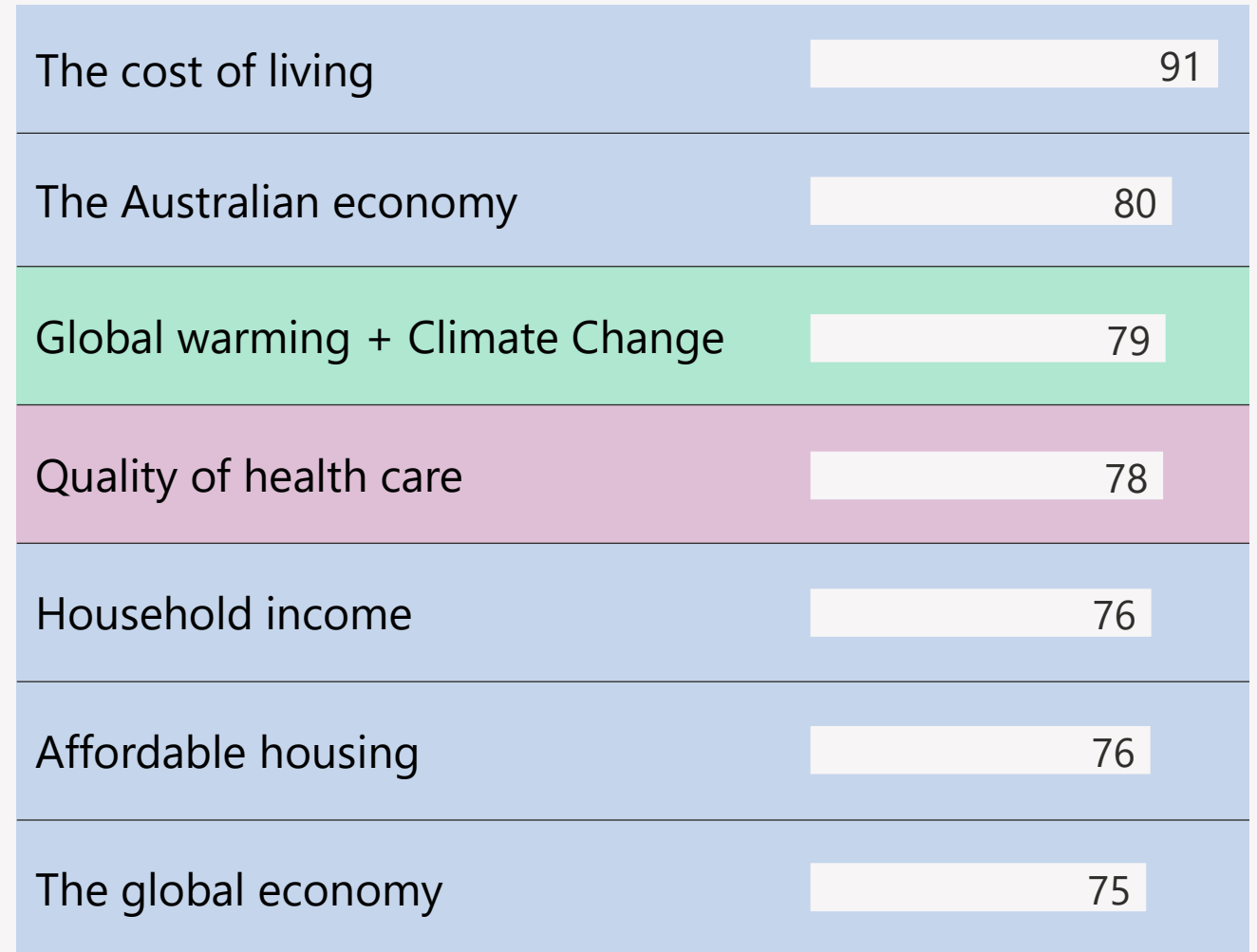


Economy

When prompted about specific issues, cost of living is the #1 concern.

And COVID has dropped off the radar.

Dominant issues of concern – Sept'22 (%)



■ Economic ■ Environmental ■ Societal



Living sustainably remains high on Australians agenda

89%

Australians feel living a sustainable lifestyle is important to them

There is an urgency around sustainability, and the benefits are clear for most of us

Attitudes to sustainability (T2B%)

73%

Society needs to
become more
sustainable
before it's too late

59%

Now is the time
for me to adopt a
more sustainable
lifestyle

58%

I can see how a
sustainable lifestyle
can benefit me
personally

38%

Just want to **not** feel
guilty about being
unsustainable

Guilt implies fault:
nearly 2:5 of us feel
that sustainability is
our fault

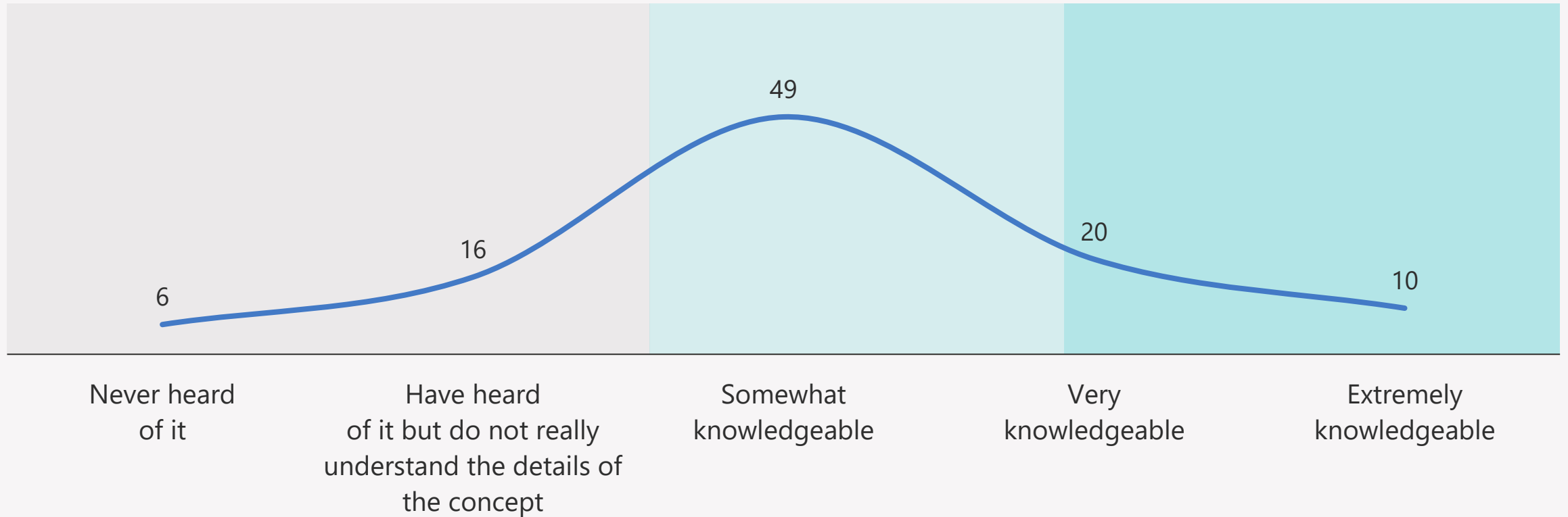


Knowledge: is it known?

Australian's understanding of sustainability is vague and anchored in the environment but we are still adopting positive environmental behaviours

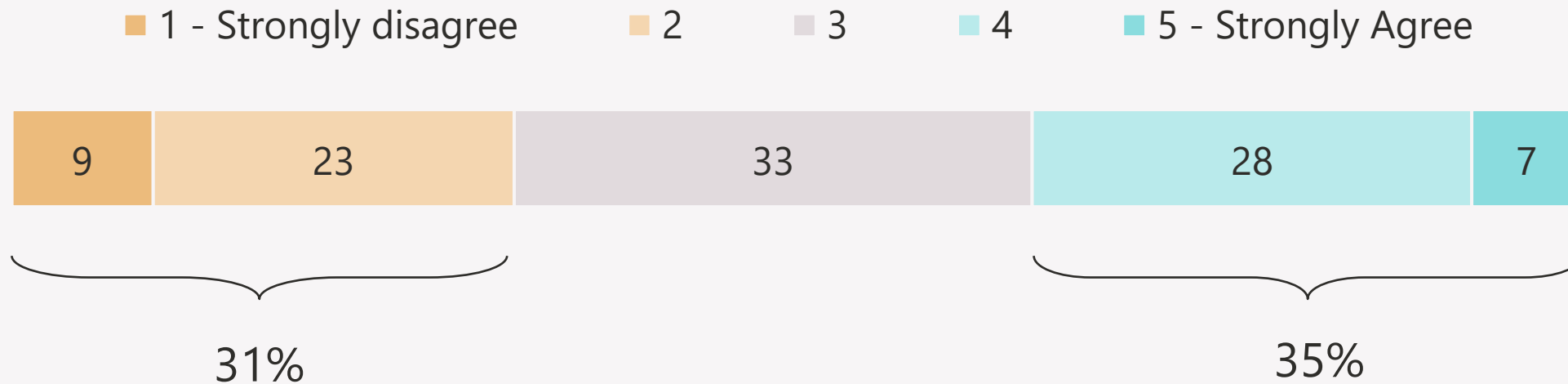
Most Aussies say they are at least somewhat knowledgeable about sustainability

Knowledge of the concept of sustainability (%)



But we don't think it's easy to have a sustainable lifestyle

It is easy to have a sustainable lifestyle (%)



With sustainability knowledge 'of' does not extend to knowing 'how'

Despite this lack of knowledge, we are still taking action

97%

Do at least one positive environmental action

7.9

Environmental actions done on average

Mark Ritson • Following
Marketing
1d • Edited • 🌐

Hey **Bain & Company** this isn't a bad bit of segmentation. But your social desirability gap between stated attitude and actual behaviour is no such thing. It's a stated attitude vs a stated behaviour. Which means it's still hopelessly overstated vs actual behaviour. Would love to see what the actual gap looks like. But your chart obscures it.

You need a decent experimental design or long term behavioural panel to make these claims properly. And - no offence - I usually expect **Bain & Company** to know this and not be so Methodologically weak.

Bain & Company
1w • 🌐 [+ Follow](#)

Our latest insight reveals that 65% of **#fashion** consumers care about the environment, but only some regularly prioritize sustainability in their shopping. To secure a competitive advantage with this rapidly growing market ...see more

There's a discrepancy between fashion consumers' willingness to act sustainably and their actual behavior

On a scale of 1 to 5, how would you describe your willingness to ...
On a scale of 1 to 5, how often do you ...

Action	Attitude (Scale 1-5)	Behavior (Scale 1-5)
Avoid fast fashion	3.5	3.5
Pay attention to garment care	3.7	3.7
Dispose safely	3.6	3.6
Reduce purchases	3.7	3.7
Buy higher-quality clothes which last longer	3.8	3.8
Repair when possible	3.6	3.6
Buy secondhand clothes and accessories	3.4	3.4
Check label info	3.6	3.6
Buy from brands advocating for DD support	3.6	3.6
Buy from brands sustainable packaging	3.7	3.7
Buy natural fiber clothes	3.7	3.7
Buy from brands with ethical sustainability policies	3.7	3.3
Buy from brands with labor certification	3.7	3.3

Actions that require consumers to collect and verify information to make a sustainable purchase have the highest gap

WWF
BAIN & COMPANY

Source: Bain analysis of global consumer survey

How Brands Can Embrace the Sustainable Fashion Opportunity
bain.com • 9 min read

Actions are primarily tangible and save money or avoid waste

The less cost/effort, the higher the engagement

Incremental shifts are more likely to be adopted.

Environmental actions undertaken (%)

Purchase longer lasting products where possible	84
Avoid using plastic wherever possible	71
Keep informed on impact we are having on world	61
Always purchase recycled paper products	55
Make sure purchases have environmental benefits where possible	55
Avoid products/services with negative environmental/social impact in supply chain	55
Have a compost bin	50
Avoid brands/ products I know are unsustainable	49
Use public transport/walk/ride bike because of the positive environmental impact	48
Try to buy the most sustainable option, even it costs more	47
Chosen green/sustainable energy for my home (solar panels/renewable energy)	47
Grow my own food/have a veggie patch	46
Use reusable cup every time I get a takeaway coffee	46
Usually choose sustainable products even if they cost more	43
Donate my time or money to a sustainable cause	32

Rules: is it allowed?

Most Australians do not have *access* to sustainable choices and most Australians *can't afford* the few options that they can find

Only
8%

of Australians
always have
sustainable
alternatives when
shopping



OPINION
PAUL KRUGMAN

Why Republicans Turned Against the Environment

Aug. 15, 2022



Sustainable options are always affordable for **only 8%** of Australians

It is not possible to achieve sustainability in Australia when over 90% of people do not have access to sustainable solutions

Sustainability risks becoming a divisive social issue, at worst it is re-framed as an agenda for the elite



**Sustainability
is **not**
accessible**

And accessibility
is an equity issue

Sustainability has
an equity issue

Only 43%

of Australian's believe a sustainable lifestyle is accessible to all Australians

The social justice limitation of sustainability is evident



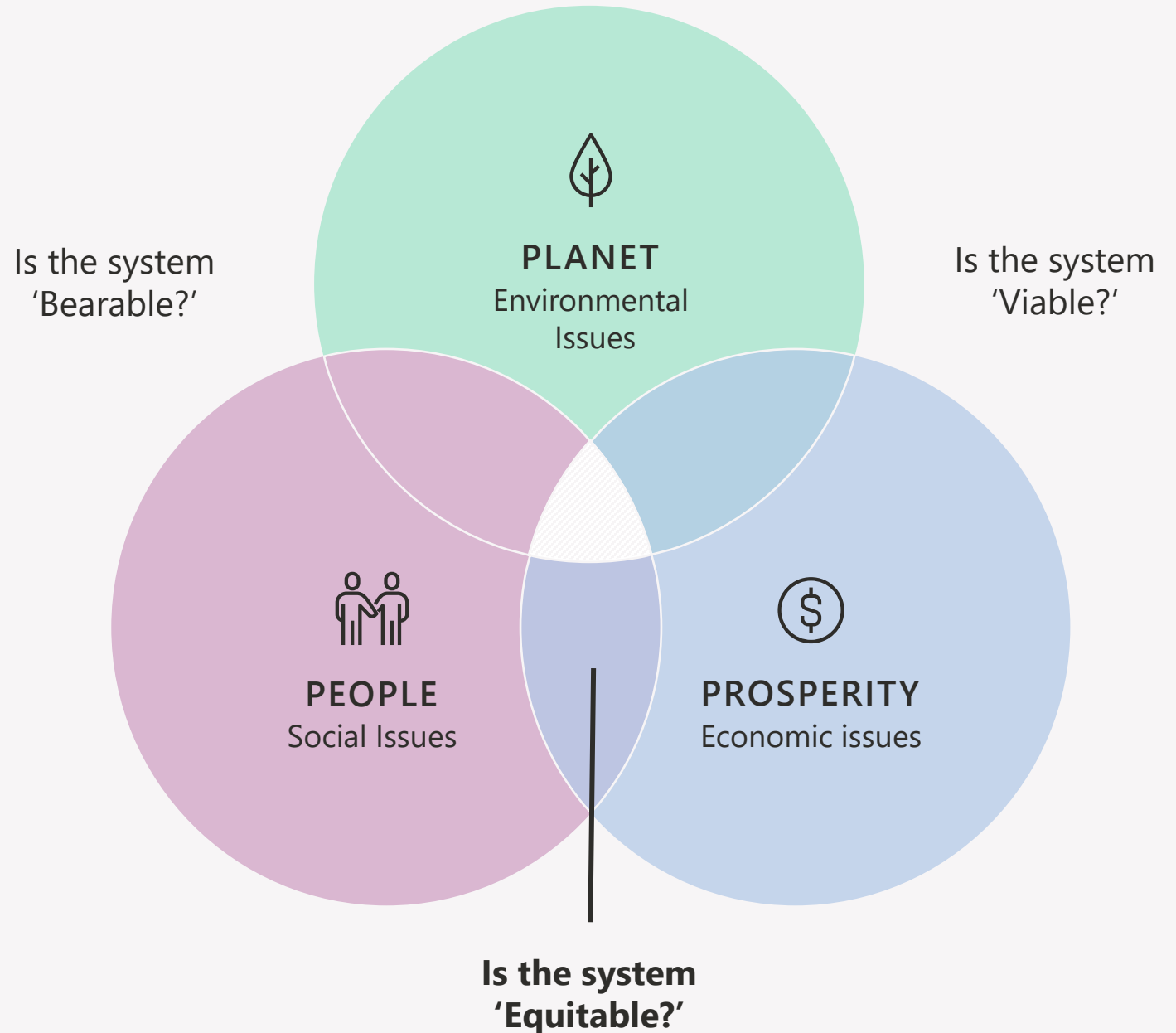
It is not the consumer who should be feeling guilty

Sustainability can not be achieved unless the system is equitable

Inequity will slow down achievement of ESG goals

Inequity could lead to outright rejection of sustainability

Government and industry is responsible for making it easy for people to access more sustainable choices



The role of brands & business

Most Australians don't trust sustainable choices and think brands use Greenwashing to put up prices

70%

Aussies think adopting sustainable practices is important for brands



But most people
don't know if sustainable
products are genuine

71%

... say it's hard to figure out whether products that
are labelled as 'sustainable' are actually sustainable

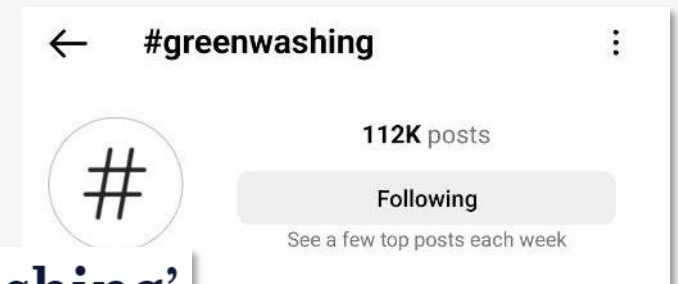


This failure by companies and government to make it easy for the consumer will erode trust.

Greenwashing has been in the news, with brands starting to pay the (literal) price both locally and globally

ACCC launches investigation into greenwashing

The competition watchdog launches two internet sweeps to identify companies making “misleading environmental and sustainability marketing claims and fake or misleading online business reviews”.



ASX cracks down on ethical fund ‘greenwashing’




John Collett

May 25, 2022 – 5.00am

Save | Share | A

Greta Thunberg to skip ‘greenwashing’ Cop27 climate summit in Egypt

Swedish climate activist says the UN’s climate conference will be ‘used as an opportunity for leaders and people in power to get attention’

 Sydney Morning Herald

[ASIC takes first compliance action over greenwashing](#)

An Australia-based energy company which provides power to parts of Africa has become the first entity to be hit with compliance action by...

5 days ago



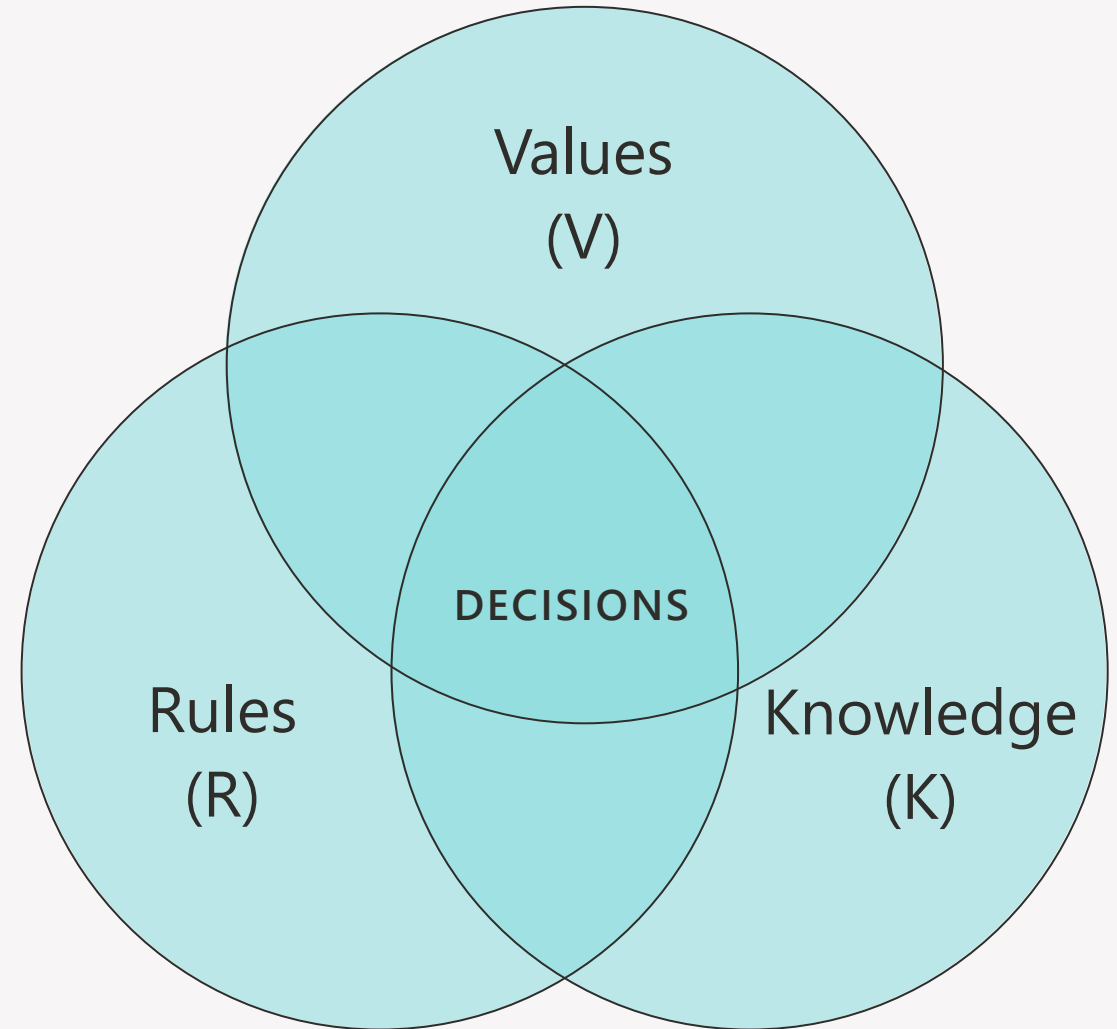
Greenwashing
is a reality

58%

*Companies and
organisations use
greenwashing to
justify higher prices*

In summary

1. Sustainability is urgently desired especially amongst younger Australians (Values)
2. People are only somewhat knowledgeable about sustainability, but don't know what it actually is or how to live a sustainable life. And they don't trust that sustainable choices are genuine (Knowledge)
3. Most of the time sustainable choices are not available. Even when they are, they are mostly unaffordable. They expect brands and business to take leadership but instead they get Greenwashing and higher prices (Rules)



The burden currently sits with the consumer

People feel guilty about things they can not control

Brands need to change the default choice to reduce consumer anxiety, guilt and shame

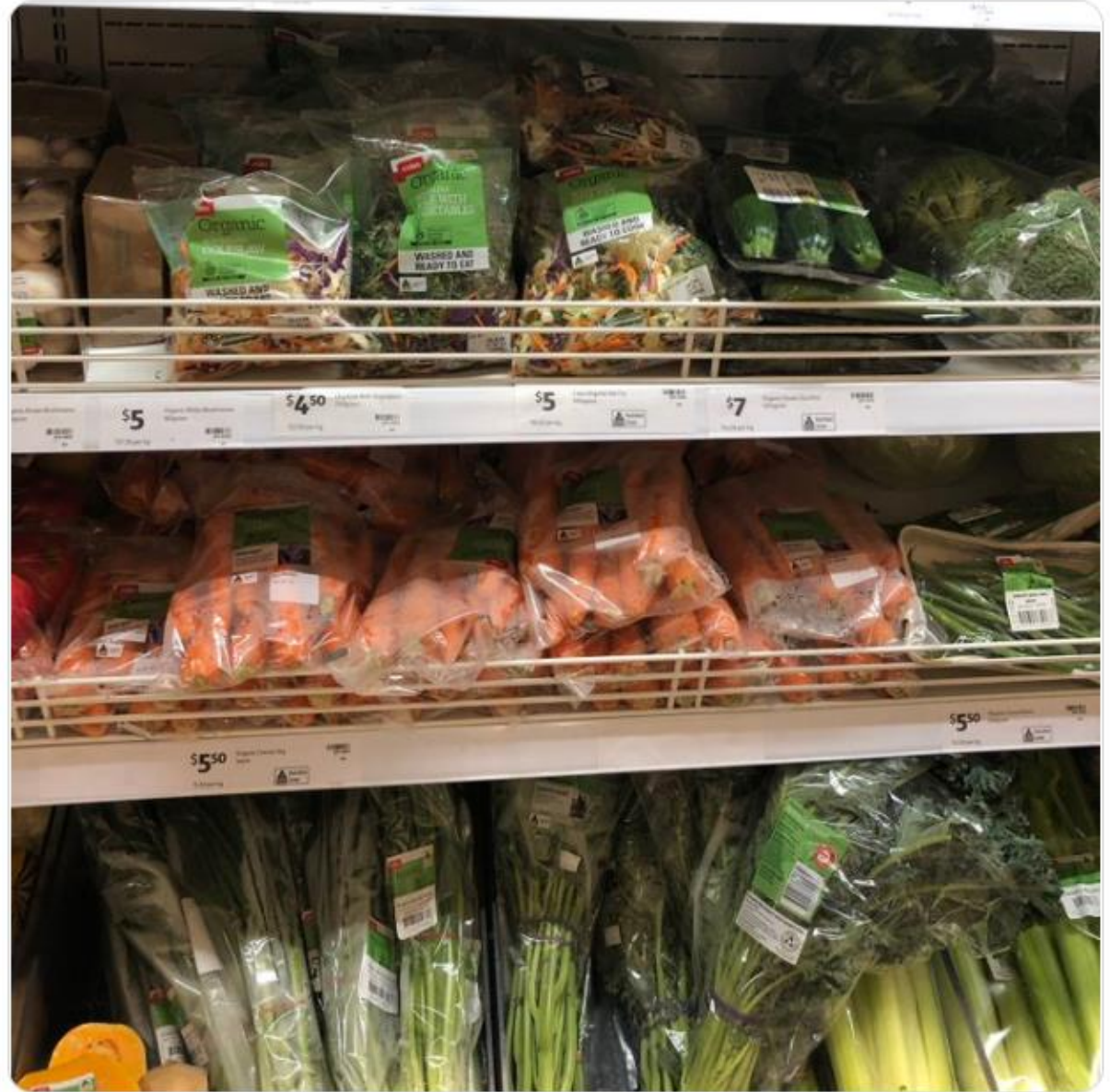


Roz Kelly

@Roz_Kelly · Follow




Do better @Coles ... #plasticshame



Individuals feel guilt for things they have no control over; the system doesn't allow people to take part and play a contributing role

In Australia, who is most responsible for each of the following? – Environmental (%)

	Federal govt	State govt	Councils	Companies/ corps	Industry bodies	Individuals	Non-profit
Addressing climate change	69	48	28	39	31	31	23
A circular economy	55	48	34	38	28	30	17
Responding to natural disasters	71	64	32	18	14	20	16
Renewable energy	64	51	24	35	26	20	13
Reducing landfill	44	49	48	36	28	37	14
Recycling	41	48	55	39	29	50	21

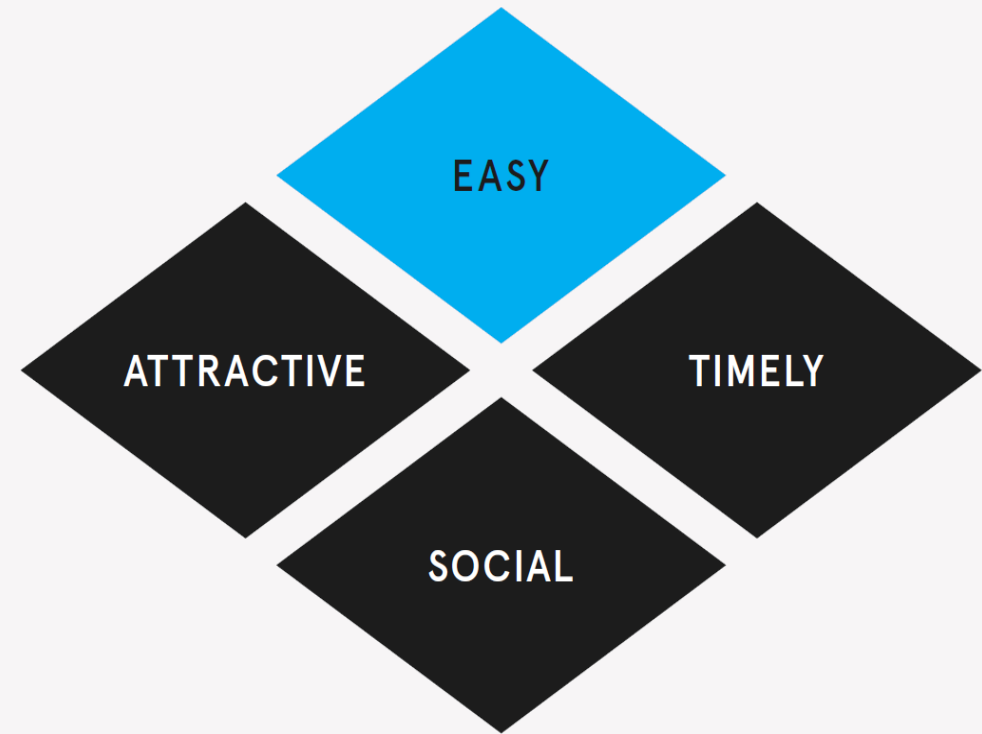


**Desire needs to align with
simple, easy solutions**

Applying the EAST model to behaviour change for sustainability

Designed by the UK Behavioural Insights Team (jointly owned by the UK Cabinet Office, innovation charity Nesta and their employees), the EAST Model: Easy, Attractive, Social, Timely has been developed over many projects and used in a variety of social situations and environments

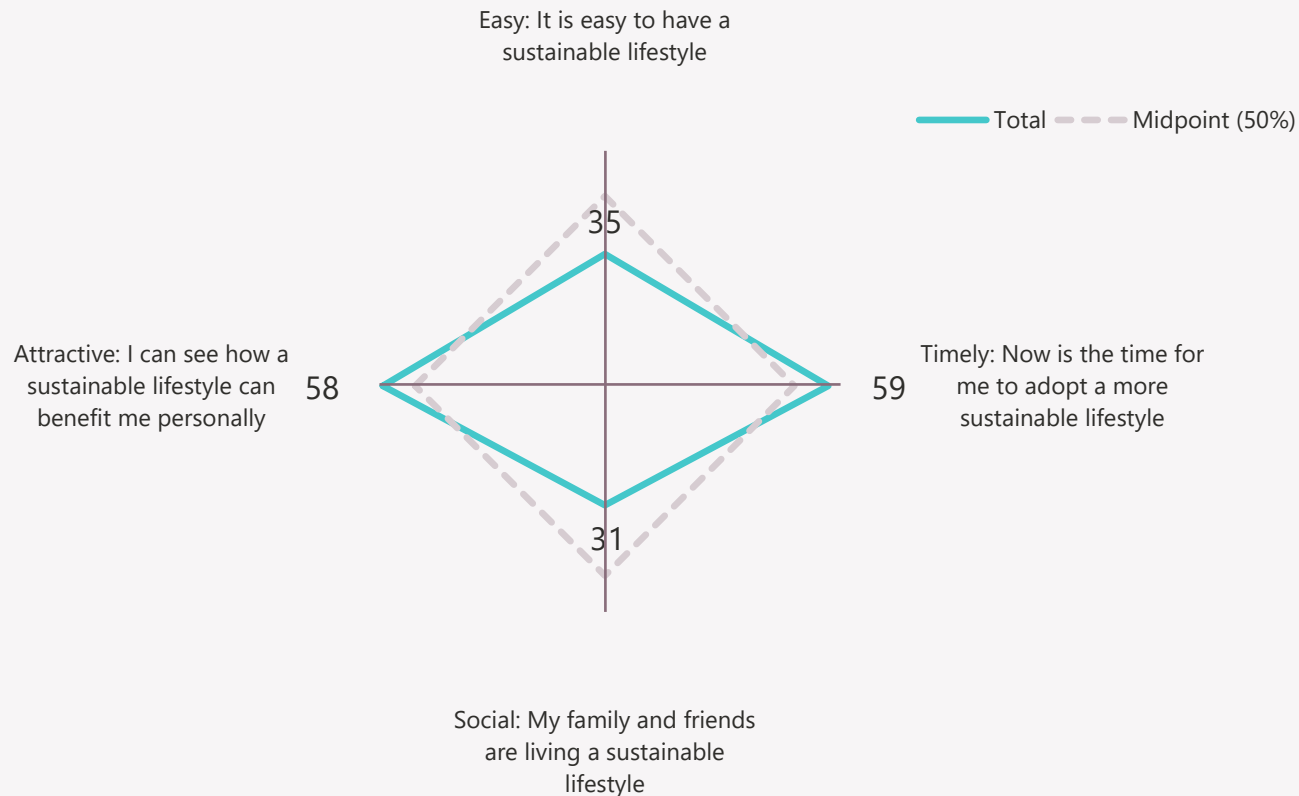
The key idea is if you want to encourage a behaviour, make it Easy, Attractive, Social and Timely (EAST)



Developed for integration with Government policy, the EAST model is straightforward and provides clear steps to shift society behaviour change

Aussies want the benefits now but its not easy and most others aren't doing it

Diagnostics (%) – EAST model



Don't try and educate people to make more 'knowledgeable choices:

Just make it easy... and a social norm

Just more
knowledge does
not work

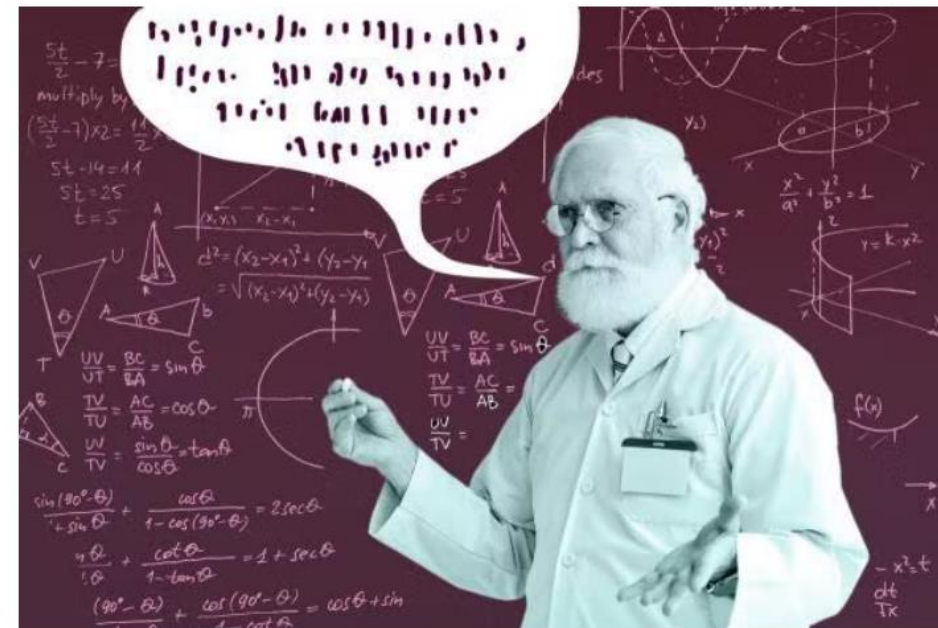
Confronted with
complexity people default
to simple 'rules of thumb'

We don't have a
knowledge deficit:
we have a
complexity dilemma

Scientists, Stop Thinking Explaining Science Will Fix Things

It won't. Try this instead.

BY TIM REQUARTH APRIL 19, 2017 • 4:12 PM



But where has the guilt come from?

People want to reduce their personal 'footprint'

But they can't easily do this and they face constant dilemmas about what is a 'good choice' or 'more sustainable' alternative

And usually end up with piles of plastic or waste and feel bad

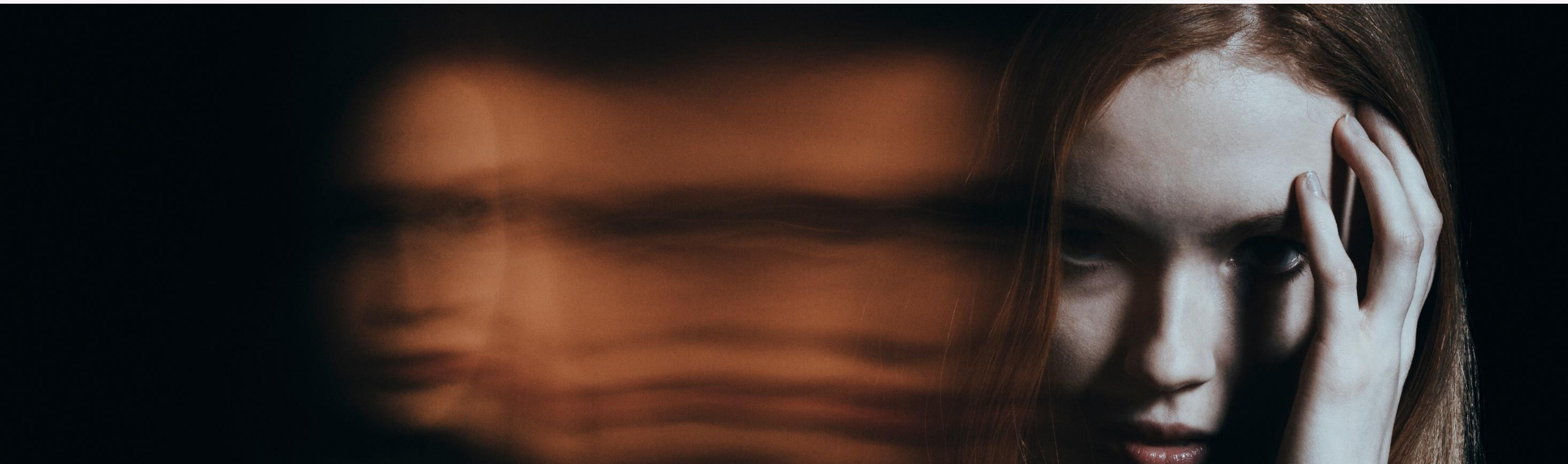
Which makes them feel personally responsible



This is 'shifting the burden' (in systems thinking terms)

The demand exists for sustainable products: the supply does not meet demand

The burden of responsibility has shifted from production to consumption



Shifting the burden...

...reduces the likelihood of addressing the fundamental problem.

The distraction itself – shifting responsibility to a guilty consumer – **reduces the chances of solving the actual cause**

Big oil coined 'carbon footprints' to blame us for their greed. Keep them on the hook
Rebecca Solnit



Climate-conscious individual choices are good - but not nearly enough to save the planet. More than personal virtue, we need collective action

Capitalism has co-opted wellness

HEALTH — JULY 8, 2019

The market for wellness is more about capitalism than prolonging life

In *Natural Causes*, journalist Barbara Ehrenreich questions our obsession with wellness.

The real issue...

Is the by shifting the burden to consumer guilt, it obscures and reduces the chance to fix the fundamental cause of the problem



In conclusion: The solution?

Make it easy

Make it available

Make it affordable

People want sustainable
choices but they don't have
access

**Sustainability shouldn't
be premium: it should be
mass market**



Thank you

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