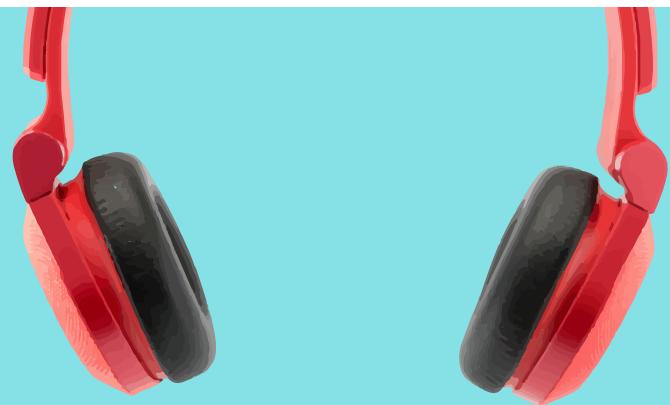




# Pollinate



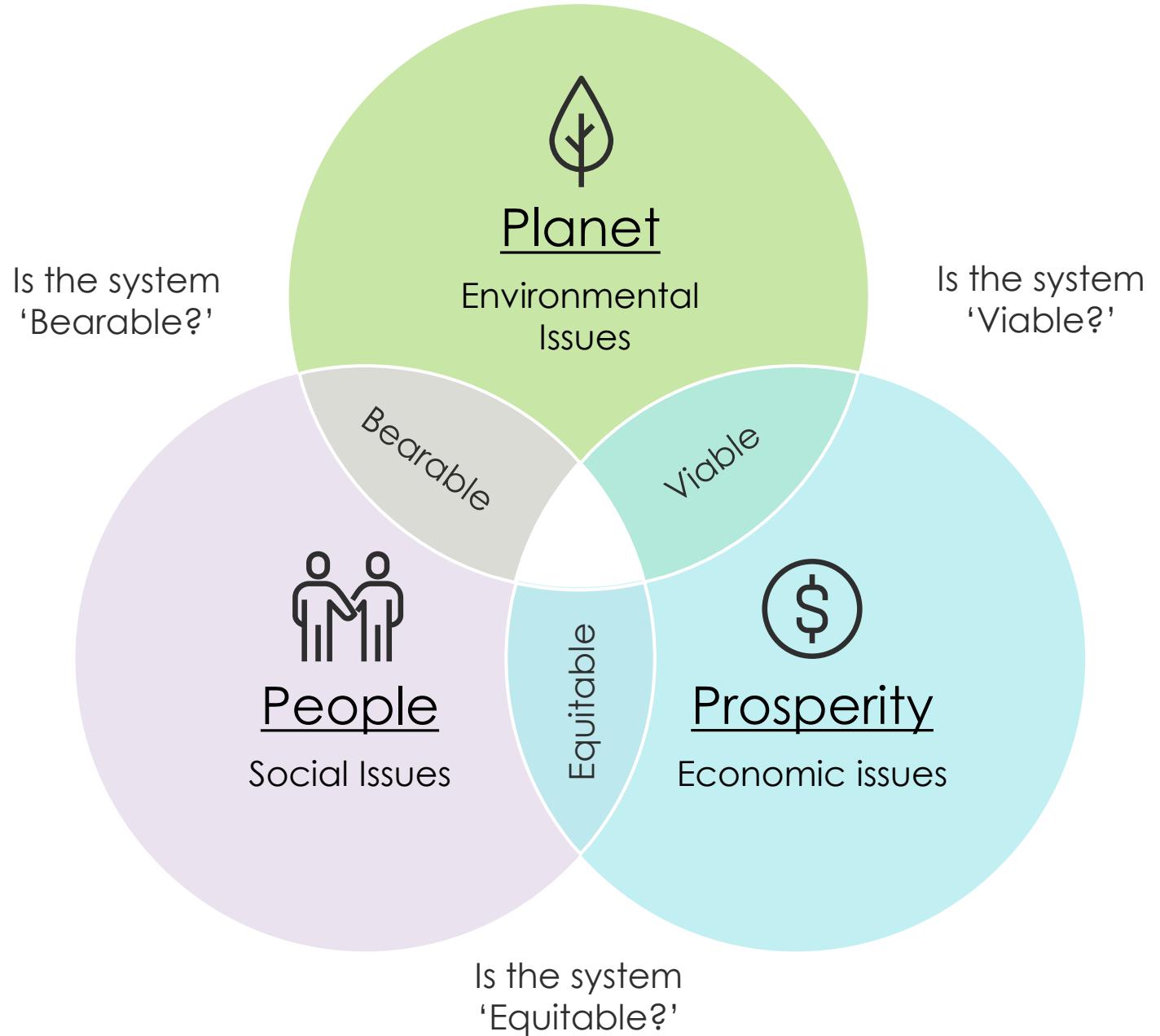
A research and strategy agency

The Pulse of the Nation

# 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



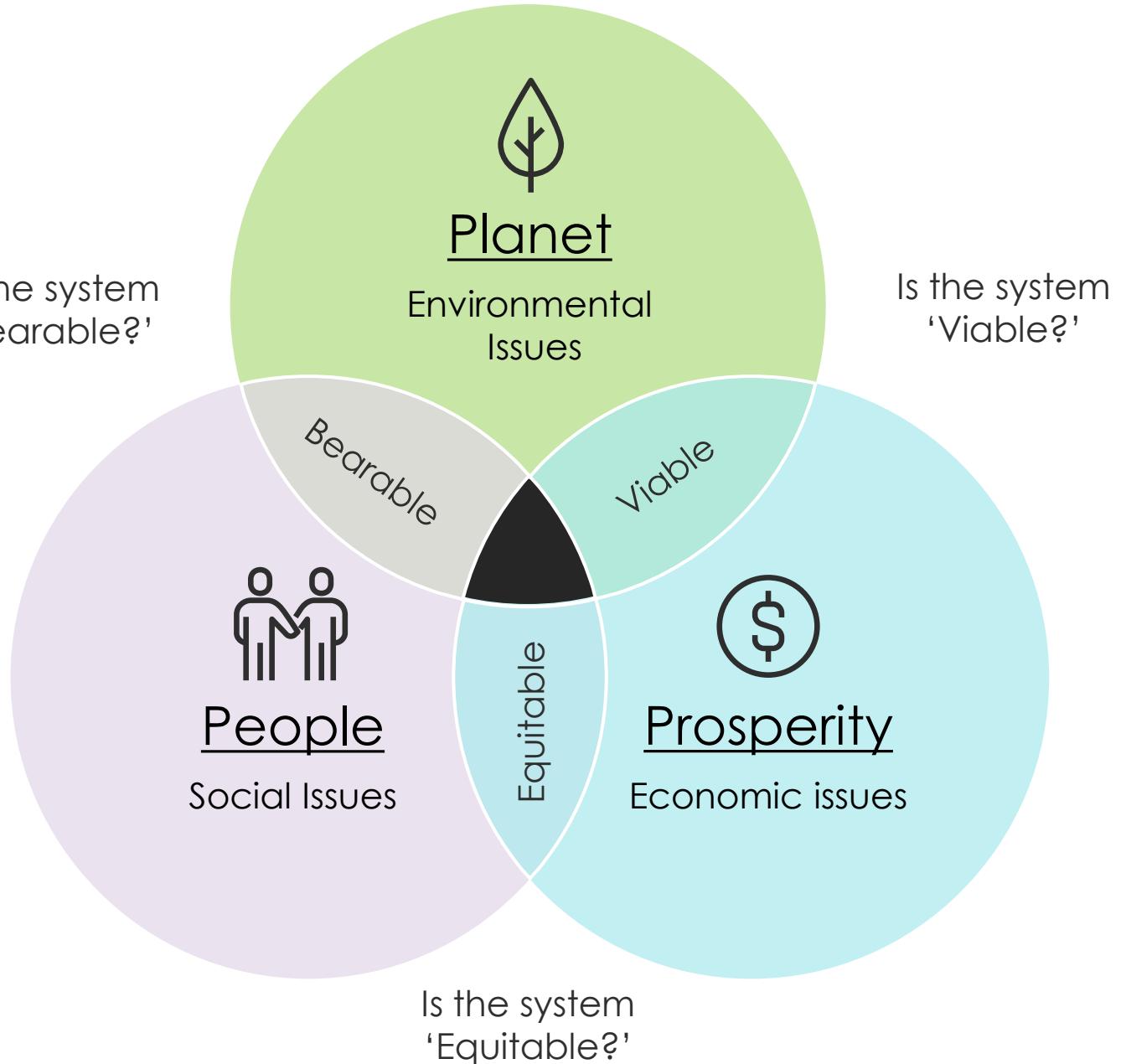
## Three themes for today ...

We are seeing a confluence of concern

Industry and institutions will lead the way

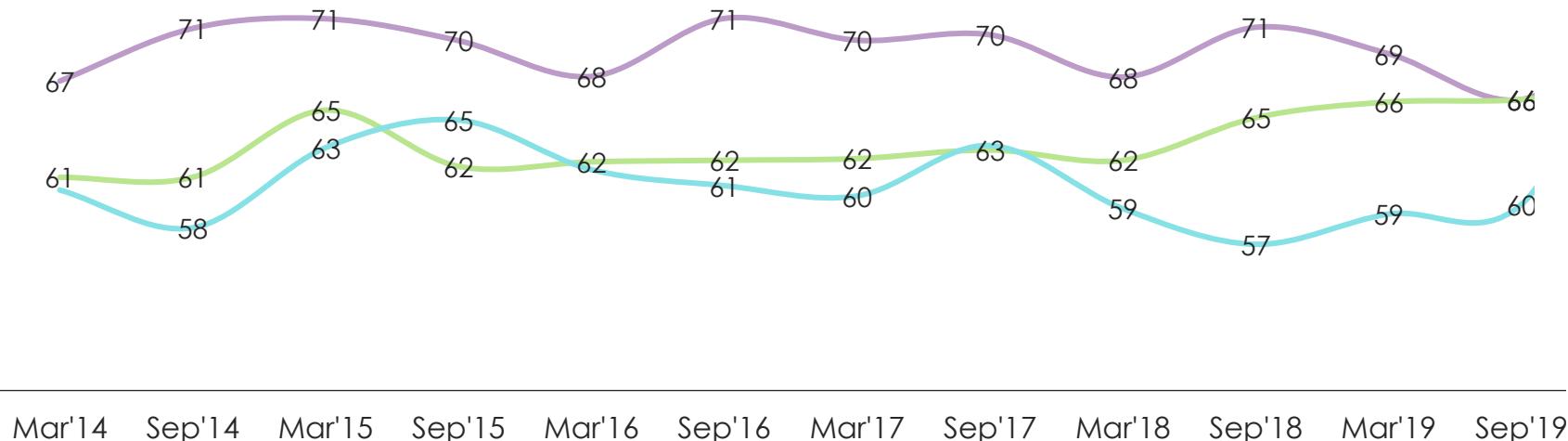
Organisations need to define their own sustainability story

We are seeing a  
confluence of  
concern



# Pre-COVID saw environmental concern equal first with social concern for the first time

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



Society



Environment



Economy

2019 saw a rise in sustainability as a way for organisations to differentiate.

Harvard  
Business  
Review

Sustainable Business Practices

## Research: Actually, Consumers Do Buy Sustainable Products

by Tensie Whelan and Randi Kronthal-Sacco

June 19, 2019

Markets

## Global Sustainable Investments Rise 34 Percent to \$30.7 Trillion

By Emily Chasan +Follow

1 April 2019, 23:00 GMT+11 Updated on 2 April 2019, 00:53 GMT+11

- Assets in Japan now comprise 18 percent of money managed
- Europe is world's biggest socially conscious investing market



By Teresa Ish and Henrik Österblom

May 17, 2019

## The future of sustainable businesses is looking brighter

By Vitaliy Soloviy on July 30, 2019

Best Practices

Supply Chains

## The rising tide of sustainable seafood

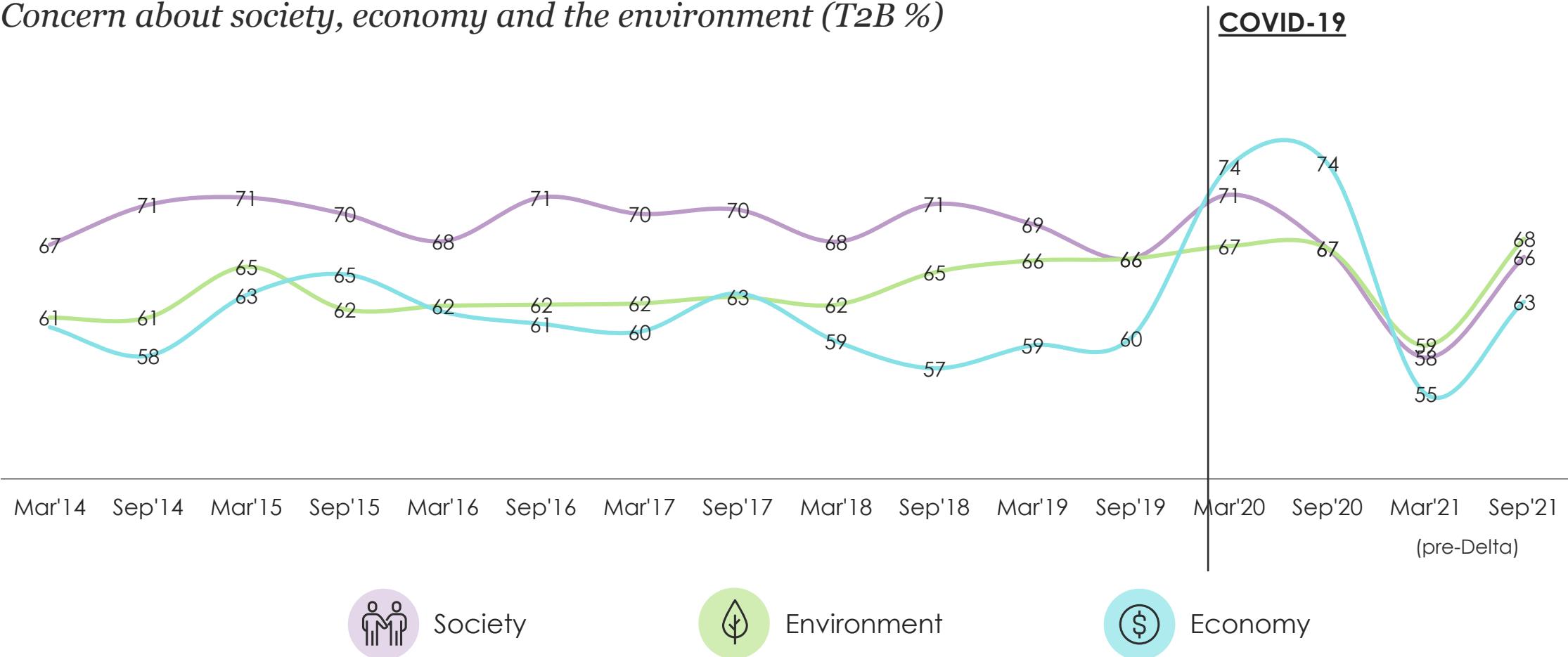
Despite its swift rise, the sustainable seafood movement's work is far from done. To safeguard the future of fish, more seafood businesses must commit to sustainability, and consumers must be even more resolute in demanding a transparent seafood supply chain and supporting sustainability with every purchase.



But then COVID happened ...

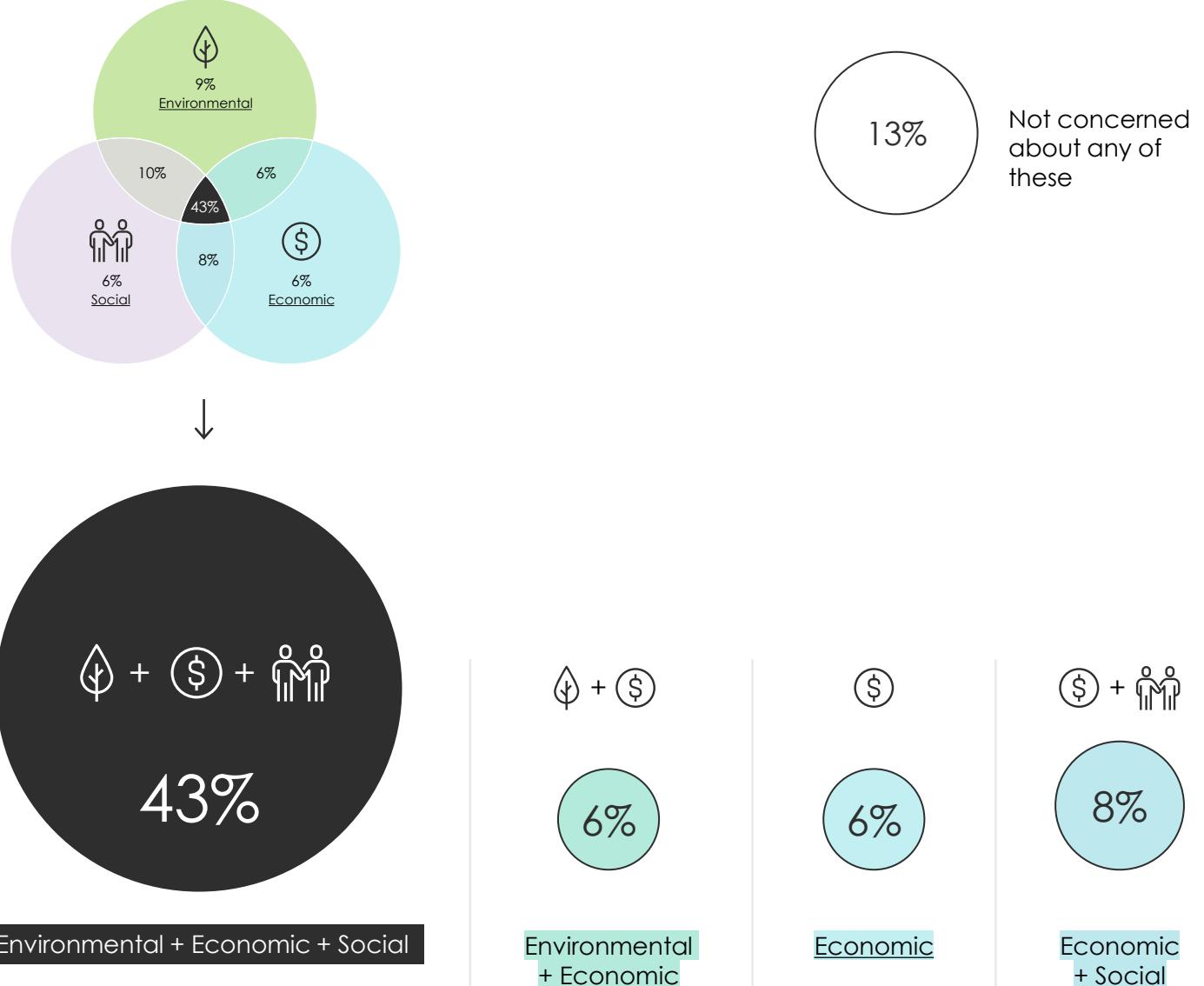
COVID saw a rise in concern about the economy and society but now we're coming out of COVID we're seeing a singularity of concerns

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



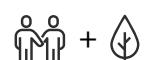
# The concern crossover

43% are concerned about all three



6%

Social



10%

Social + Environmental



9%

Environmental

Environmental + Economic + Social



6%

Environmental + Economic



6%

Economic



8%

Economic + Social

# Concerns about one issue often intersect with concerns about other issues

*What is currently concerning you about...*



## The environment

With the globalization of economy and trade, environmental pollution is becoming increasingly internationalized, and the transboundary transfer of hazardous wastes is a prominent manifestation of this aspect.

Urban build destroying natural landscapes and animal habitats. Climate change/global warming. non-recyclables ending up in waterways/oceans.

Climate change and lack of initiative taken by Australian Federal Government to commit to anti emissions and environmental protection actions



## The economy

Rising costs of living, rising housing prices and probable rise in unemployment rate in coming months

All the people and businesses going broke due to COVID-19 lock downs, and the unprecedented government borrowing which generations will have to repay.

Everything is going sky high in price and people on pensions and unemployment are getting further in debt just to try and have one meal a day and pay basic bills

Price of living going up but wages staying the same. Rich are getting richer, average and poor people getting worse...



## Society

People losing confidence and being weary because of the COVID pandemic that changed their lives

The way the pandemic is affecting people physically mentally and economically

Not enough interest and effort towards addressing climate change

Anti-vaxxers, COVID 19, hospital overload, selfish protestors, science deniers

Individuals are making no effort to make the world a better place. Many are blabbering on and making a scene to get their own way...

Our level of concern has increased for every issue in the top 10 list

We are more concerned about all things ...

*Please indicate which of the following currently concern you? Australia's top 10 issues*



Concern Type:    Economic    Societal    Environmental    Wave:    Sep'20    Mar' 21    Sep'21

# Our perception of life in Australia is greatly impacted by our national COVID experience

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



Life optimism is a rollercoaster, strongly aligned with the national COVID experience and currently more Australians think life is getting worse than getting better



## Ministers

Department of Health

☰ Menu

← Ministers

# Mental health clinics to support Australians in lockdown in NSW and VIC

The Morrison Government is providing \$17.7 million to rapidly establish 10 Head to Health pop up mental health support sites for areas currently facing extended COVID-19 restrictions in and around Greater Sydney and to extend the operation of at least 12 clinics in Victoria until 30 June 2022.

**ABC NEWS**

Just In Watch Live Coronavirus Politics World Business More ▾

In COVID lockdown record numbers are turning to Lifeline, these are the people picking up the call

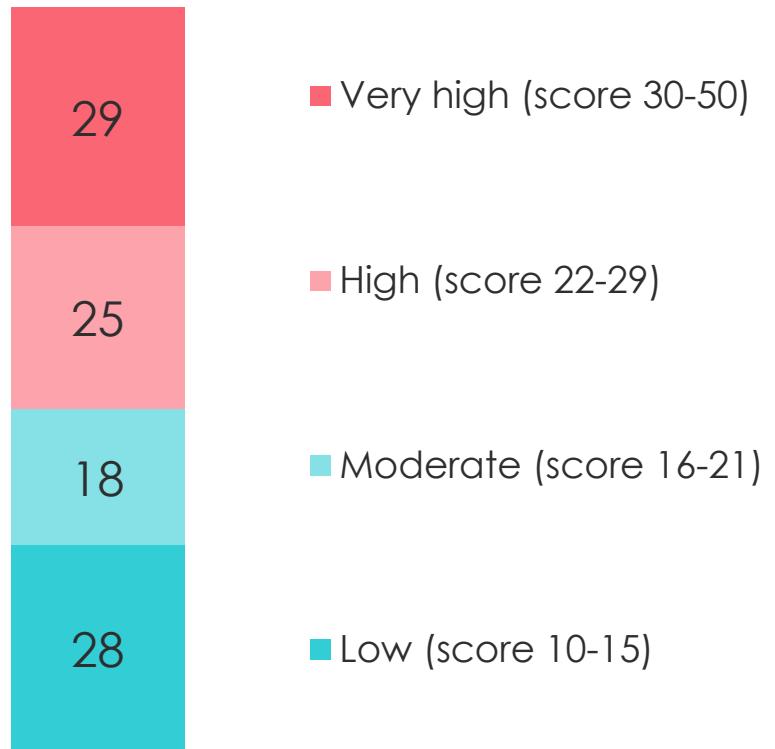
By Maani Truu  
Posted Sat 21 Aug 2021 at 5:00am

## What's happened?

The constant stress of COVID, lockdowns, economic and social issues has impacted wellbeing to the point as a nation we are highly psychologically distressed, according to the Kessler Psychological Distress Scale (K10)

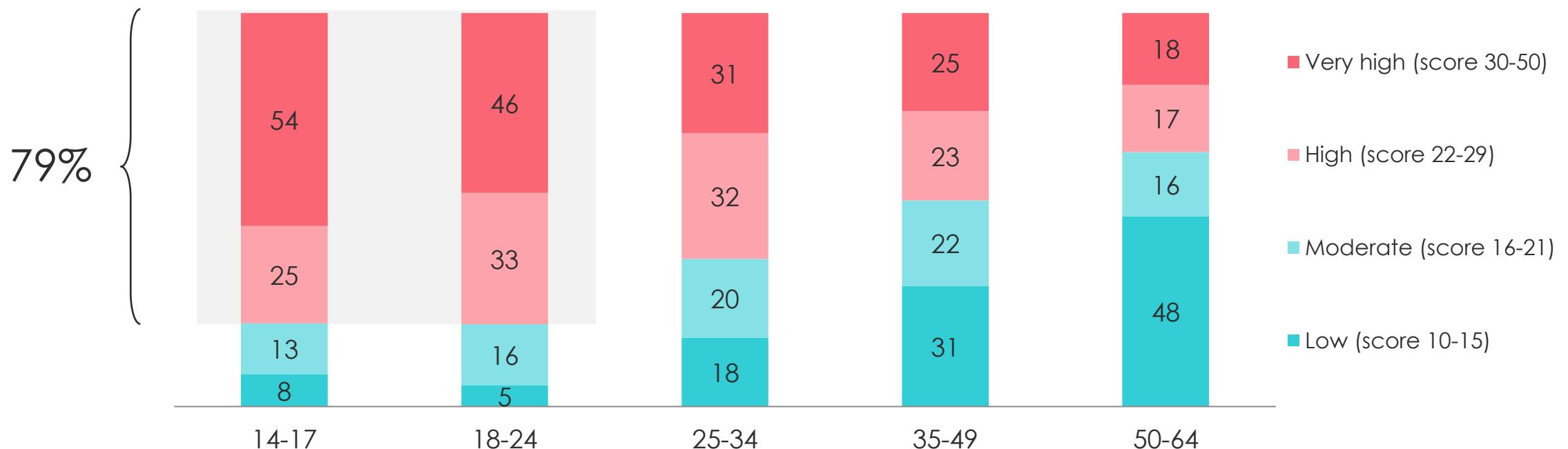
As a nation, nearly 1 in 3 are very highly psychologically distressed

*K10 Psychological distress*



79% of 14-17's and 18-24's score high or very high psychologically distressed on the K10 distress scale

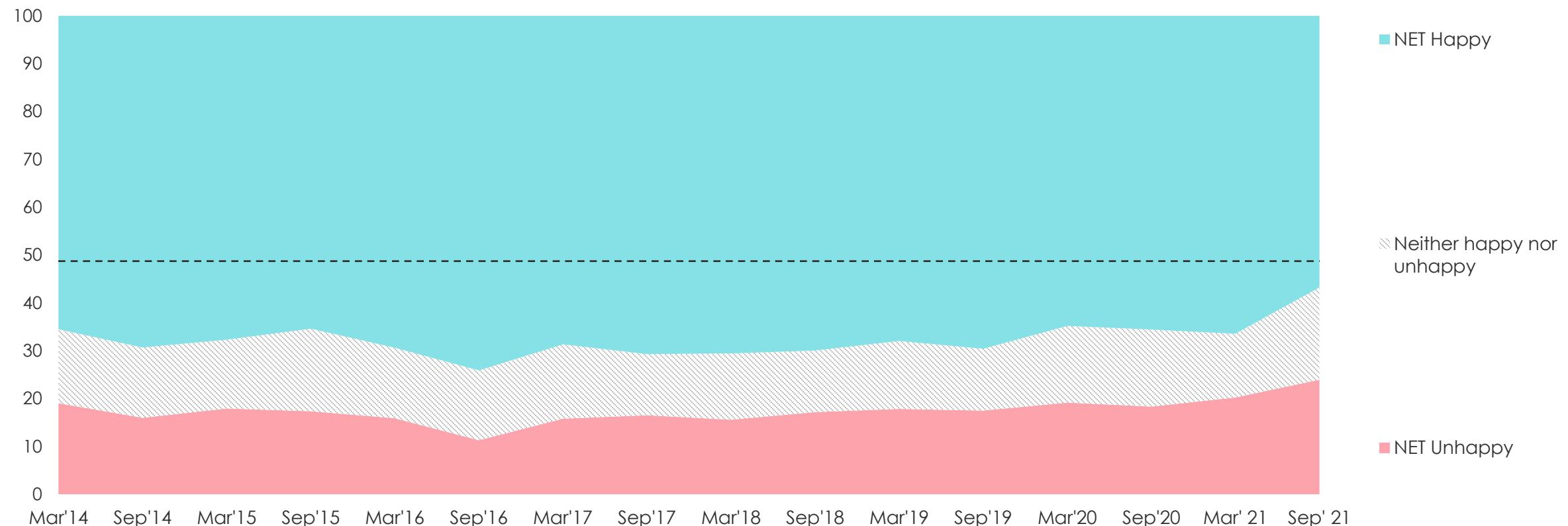
*K10 Psychological distress score by Age*



There is a generational issue here, but even 1 in 2 of those aged 35-49 score high or very high – everyone is affected

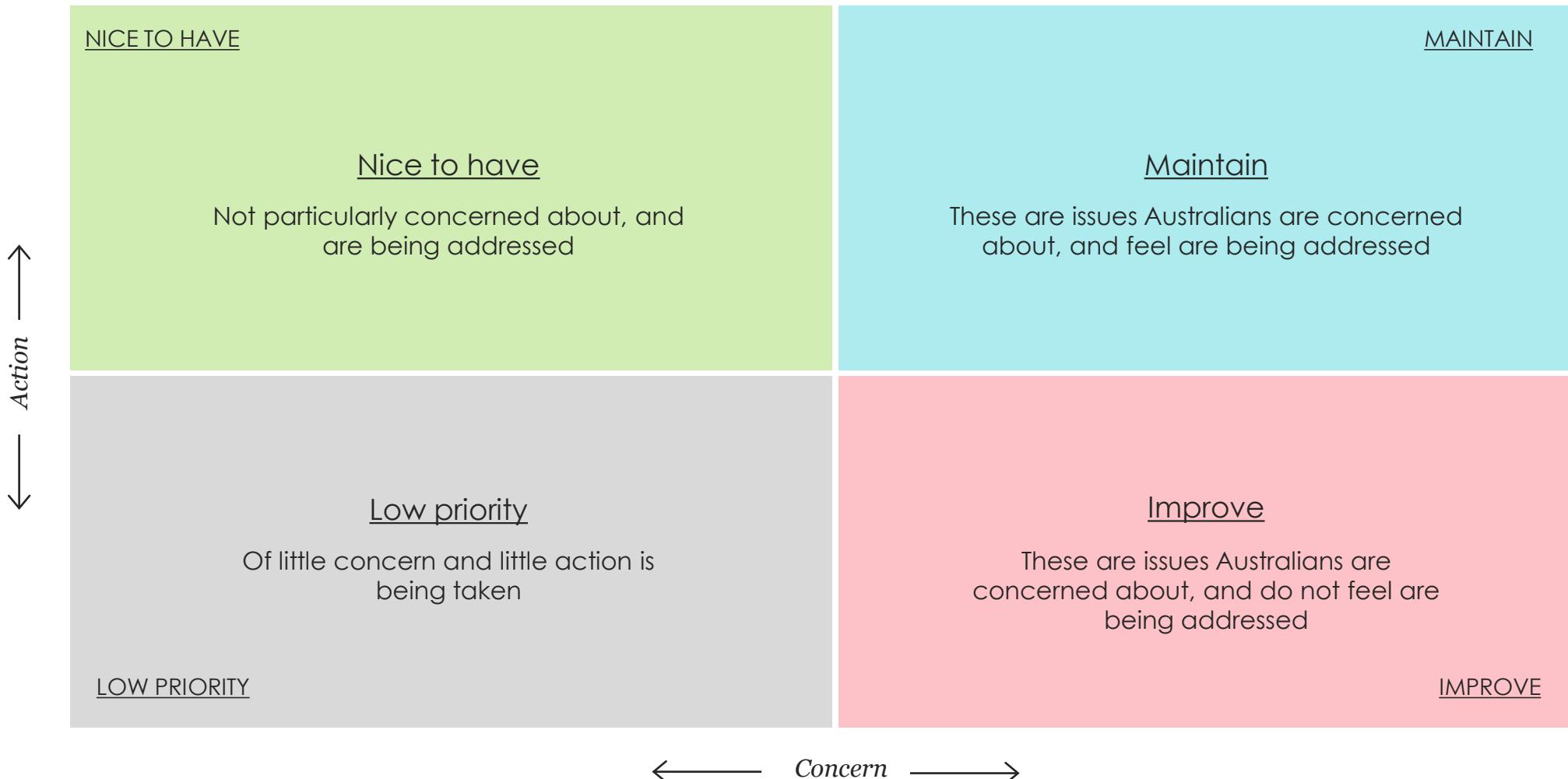
Perhaps unsurprisingly, the happiness of Australians is the lowest we've seen in the 6 years we've tracked it

*How happy or content are you with your life right now? (%)*



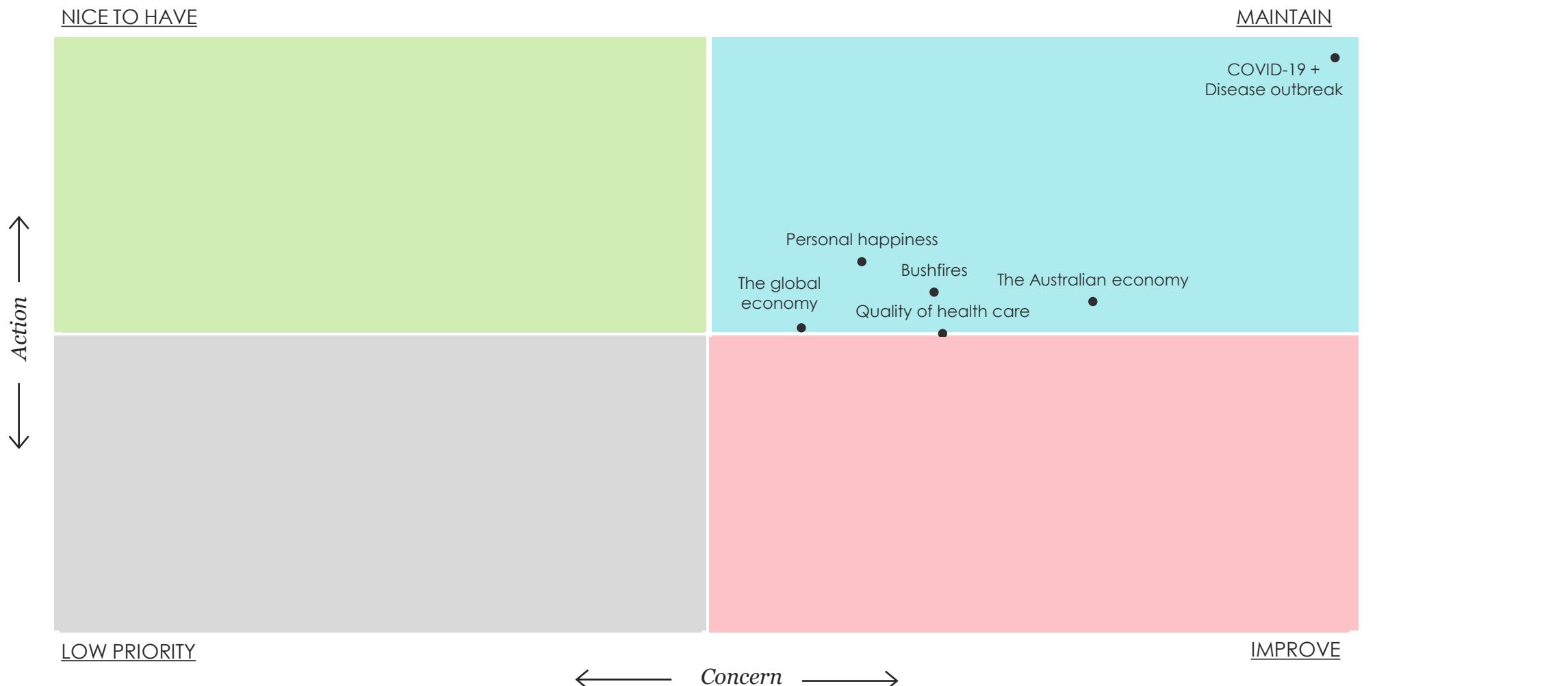
# Is enough being done about these issues of concern?

*These quadrants represent strategic implications for government and organisations*



# What is going well: management of COVID, the economy, healthcare, bushfires and personal happiness

*Concern x action matrix*



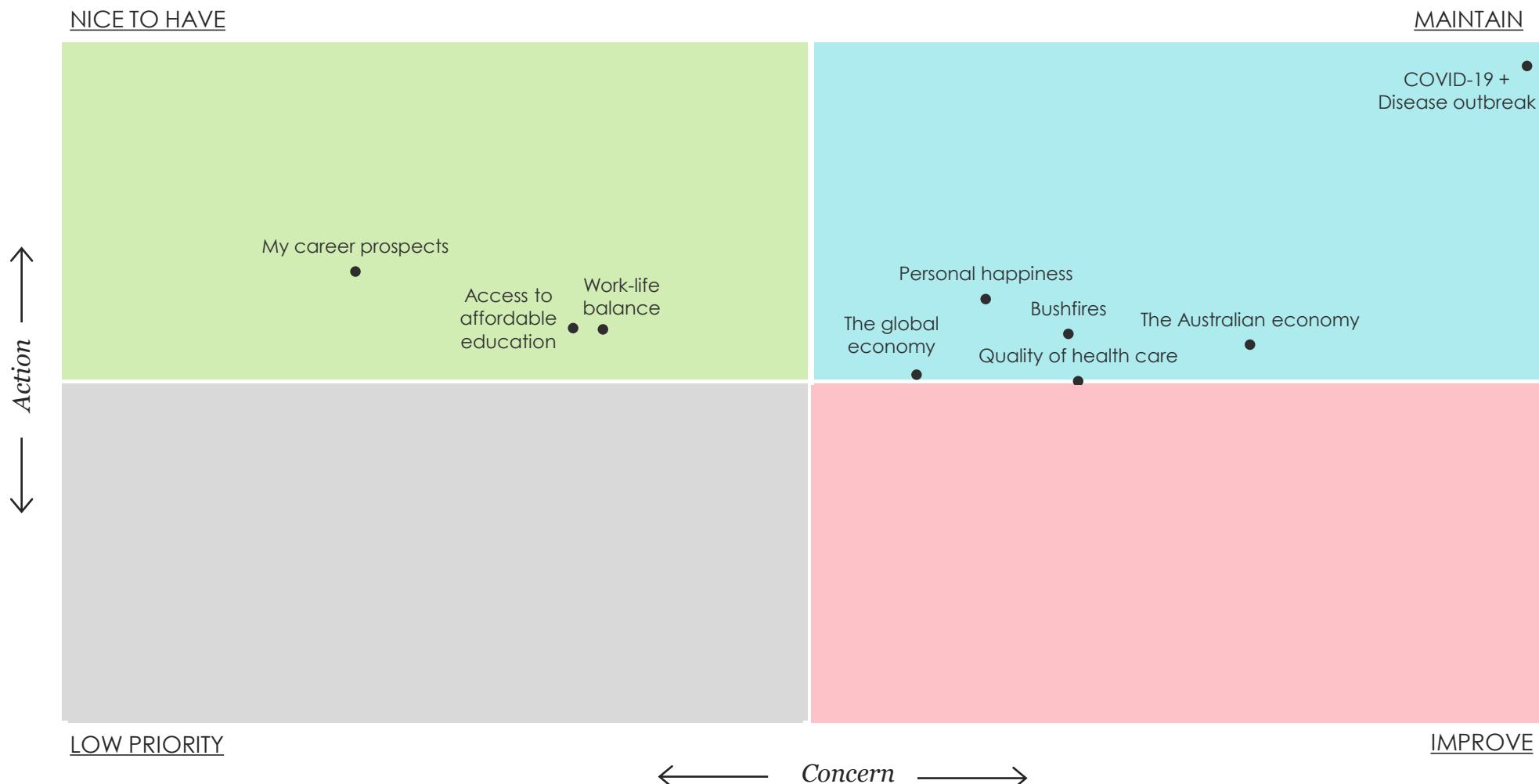
DQ3a/b/c - Please indicate, which of the following currently concern you?

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

Pollinate

# Australians think enough being done about issues relating to career, affordable education and work-life balance

*Concern x action matrix*



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

Pollinate

Quite a few issues are of relatively low concern, and are balanced by a relatively low perception of action

*Concern x action matrix*



# The *improve* quadrant highlights the concern around inequality in Australia and the environment

*Concern x action matrix*



## Australians are dealing with the tensions inherent in society

Economic, Environmental and Social issues don't exist in isolation, and Australians don't think of them as separate



## Australians want their concerns addressed

Particularly those related to environment and society

# The Government and individuals are responsible for environmental issues, while companies are not considered responsible

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

	Federal government	State government	Individuals	Companies + Industry	Non-profit organisations	Don't Know
Addressing climate change	57	11	8	9	3	13
A circular economy	38	18	10	17	2	15
Responding to bushfires	34	43	5	4	3	11
Reducing landfill	29	27	17	14	2	12
Recycling	22	24	28	13	4	9

# Government is responsible for Covid and gender equality, companies are responsible for ethical manufacturing and employee wellbeing

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

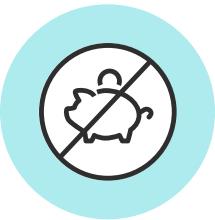
	Federal government	State government	Individuals	Companies + Industry	Non-profit organisations	Don't Know
Controlling epidemic outbreaks	59	20	7	5	1	9
Gender equality	36	9	23	13	2	17
Ethical manufacturing	28	10	4	40	2	16
Employee wellbeing	15	8	6	61	2	8

A lack of trust in corporations to act in people's best interest may be behind the low expectations of responsibility

Medical



Not for profit



State Govt



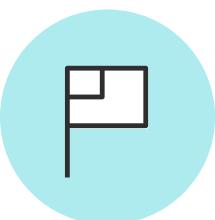
Super-annuation



Information technology



Federal Govt



Telcos



Gas and Electricity



Aged Care



Finance



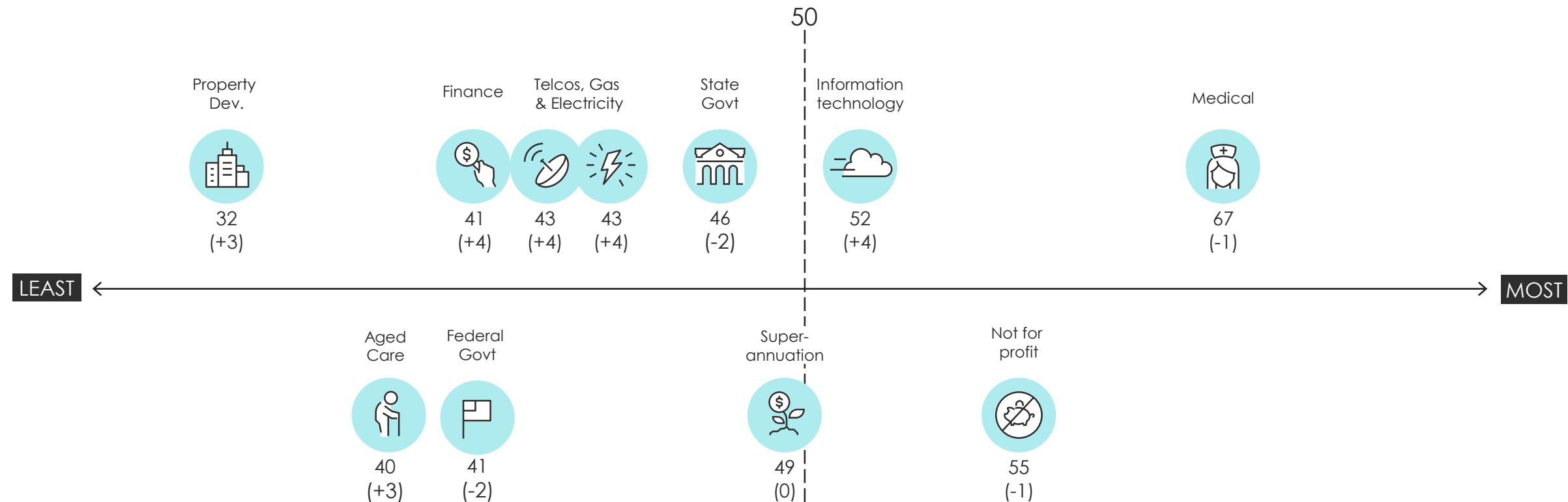
Property Dev.



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

The medical industry and NFP sector are perceived as acting in people's best interests, but we're skeptical of most industries

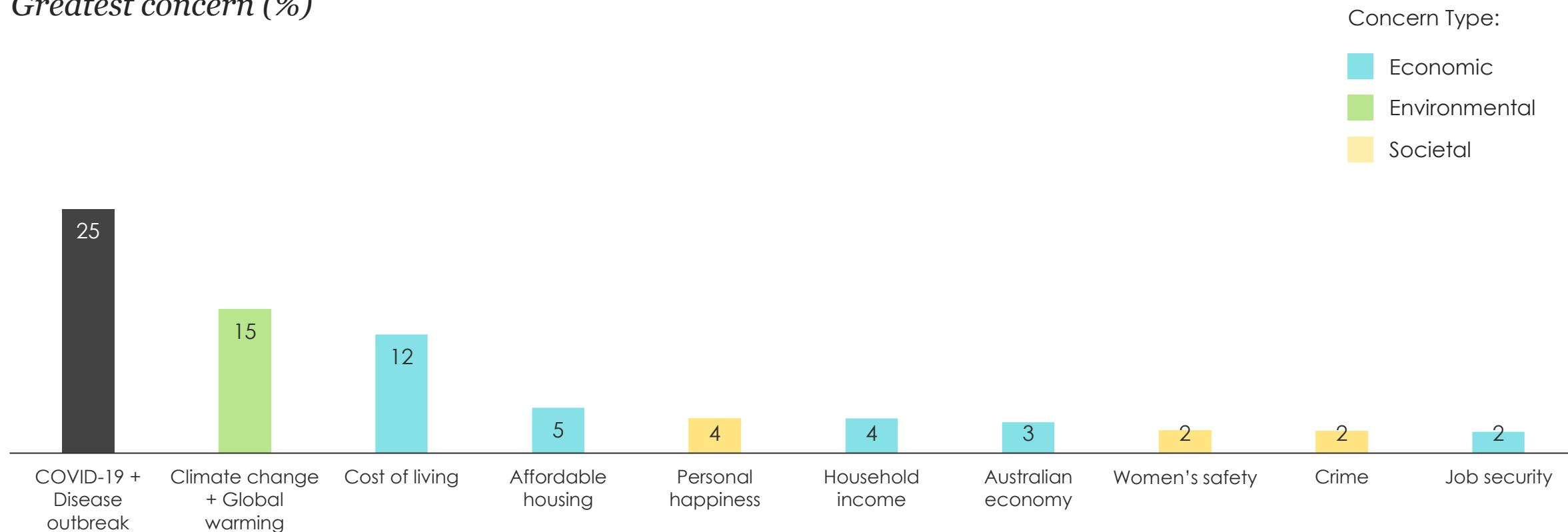
*The spectrum of industry trust (%)*



September sees an increase in trust for most, but not for Government or those at the top of the trust ladder

When asked to choose the most concerning issue,  
COVID is #1, followed by climate change

*Greatest concern (%)*

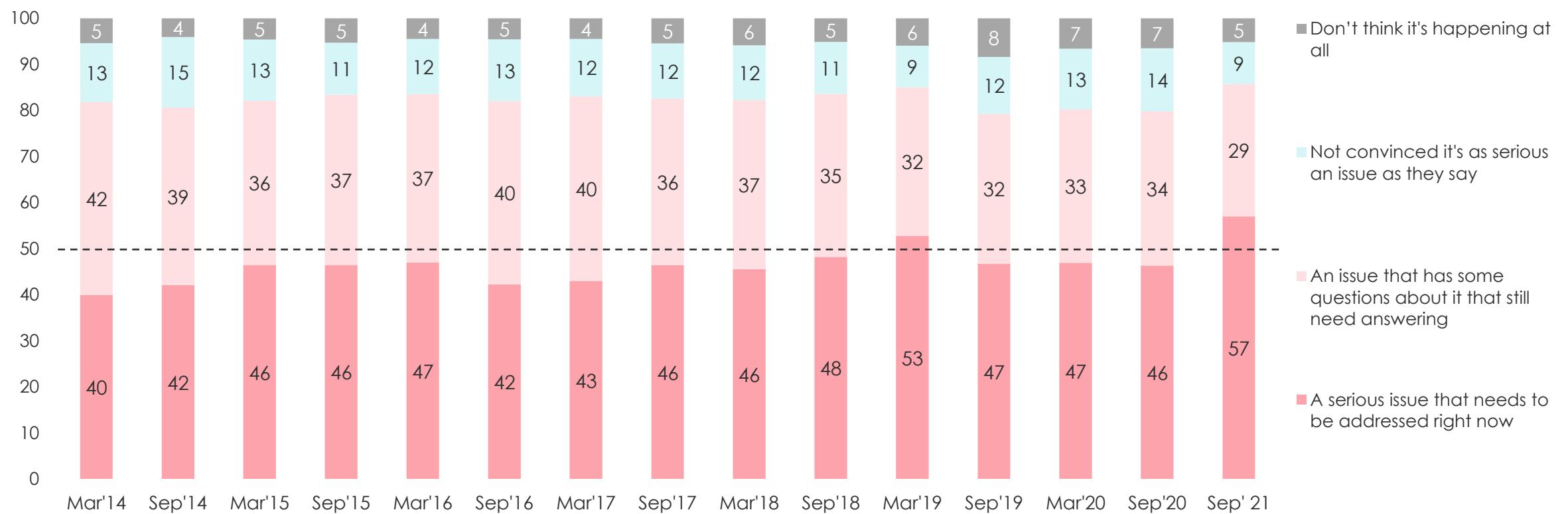




The call for action  
on climate  
change is the  
highest it has ever  
been

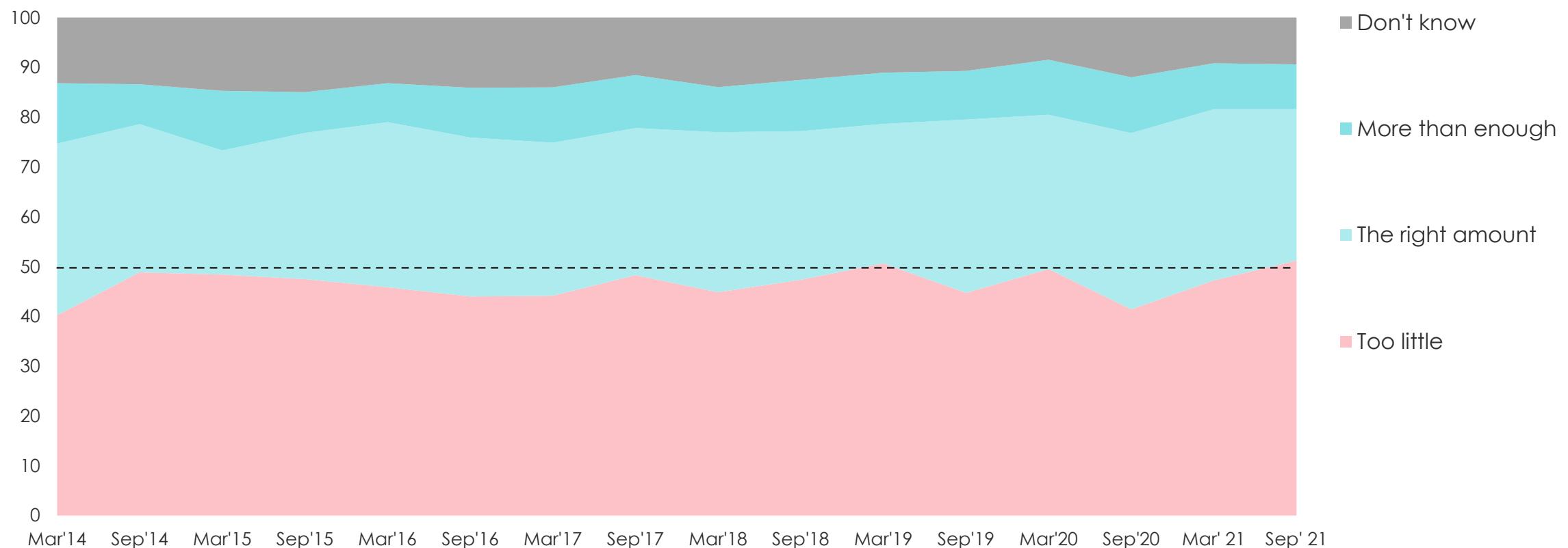
# Climate change is an issue 6 in 10 Australians feel needs to be addressed right now

*Attitudes to climate change (%)*



# 1 in 2 Australians feel Australia needs to do more to protect the environment

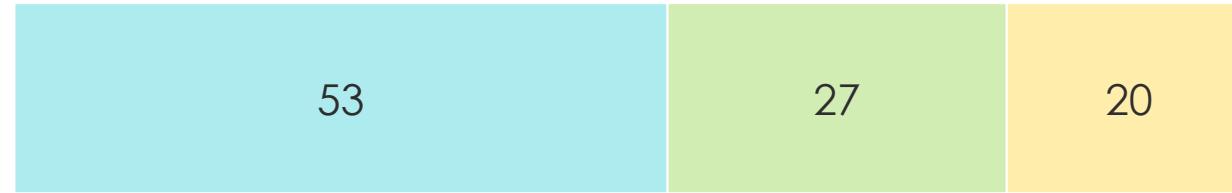
*Compared to other countries, how much do you think Australia is doing to protect the environment? (%)*



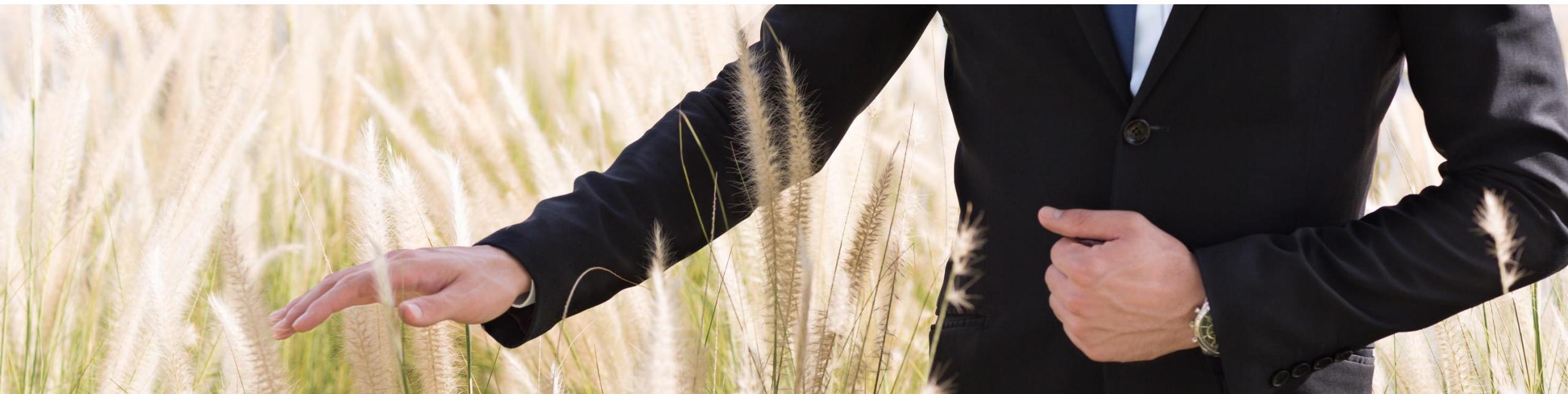
# Consumers want companies to play a greater role in how we combat climate change

*Expectations of companies around climate change (%)*

I want companies to play a greater leadership role in how we combat climate change

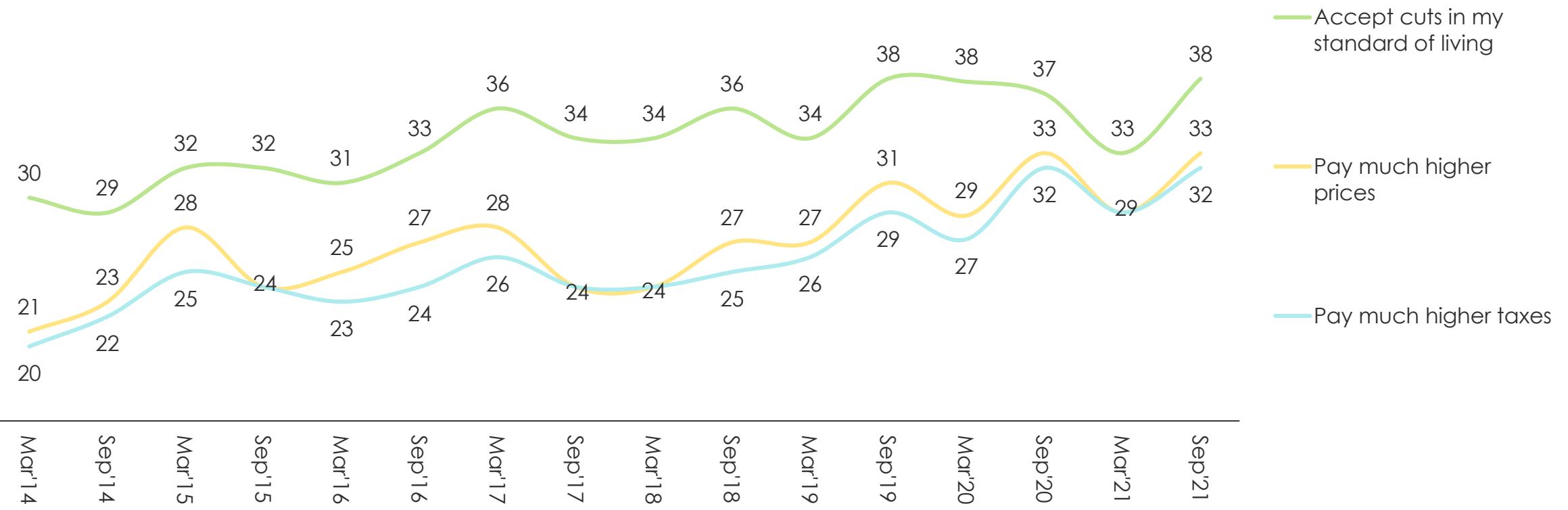


I don't think companies are capable of playing a leadership role in combating climate change



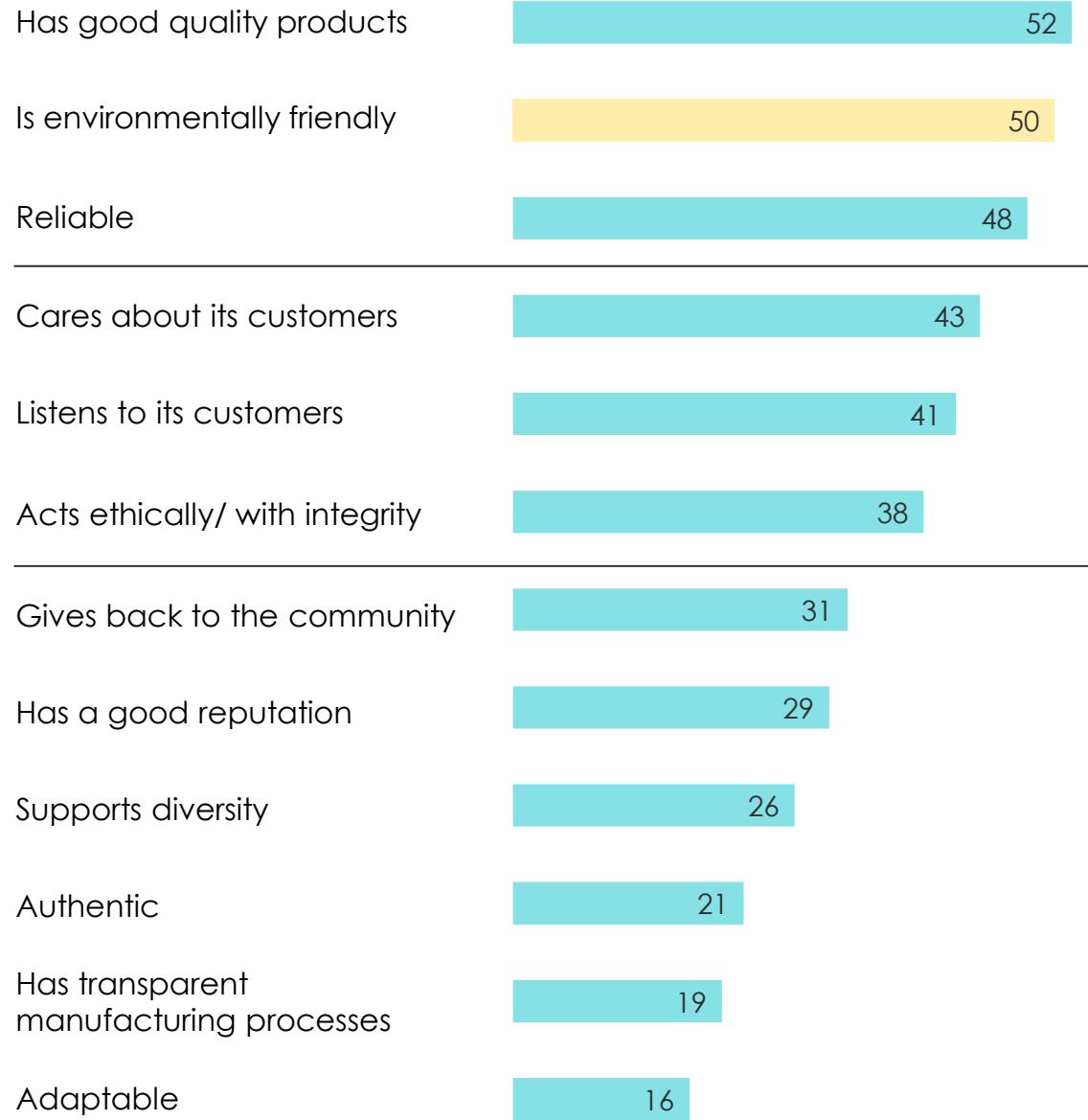
# Australians are willing to pay higher prices and accept cuts to their standard of living to protect the environment

*In order to protect the environment, I would be willing to... (%)*



We want the organisations we associate with to be good quality, environmentally friendly and reliable

*Most important features of an organisation (%)*



The topic of sustainability is more acute post-Covid than every before and regulation is also rising.  
This is changing the business landscape



# 'Sustainability' is a complex issue for people

There are 463 definitions of sustainability with no standardized definition. Sustainability means everything from safety, locality, seasonality, organics, naturality, ethically sourced, fair trade, etc...

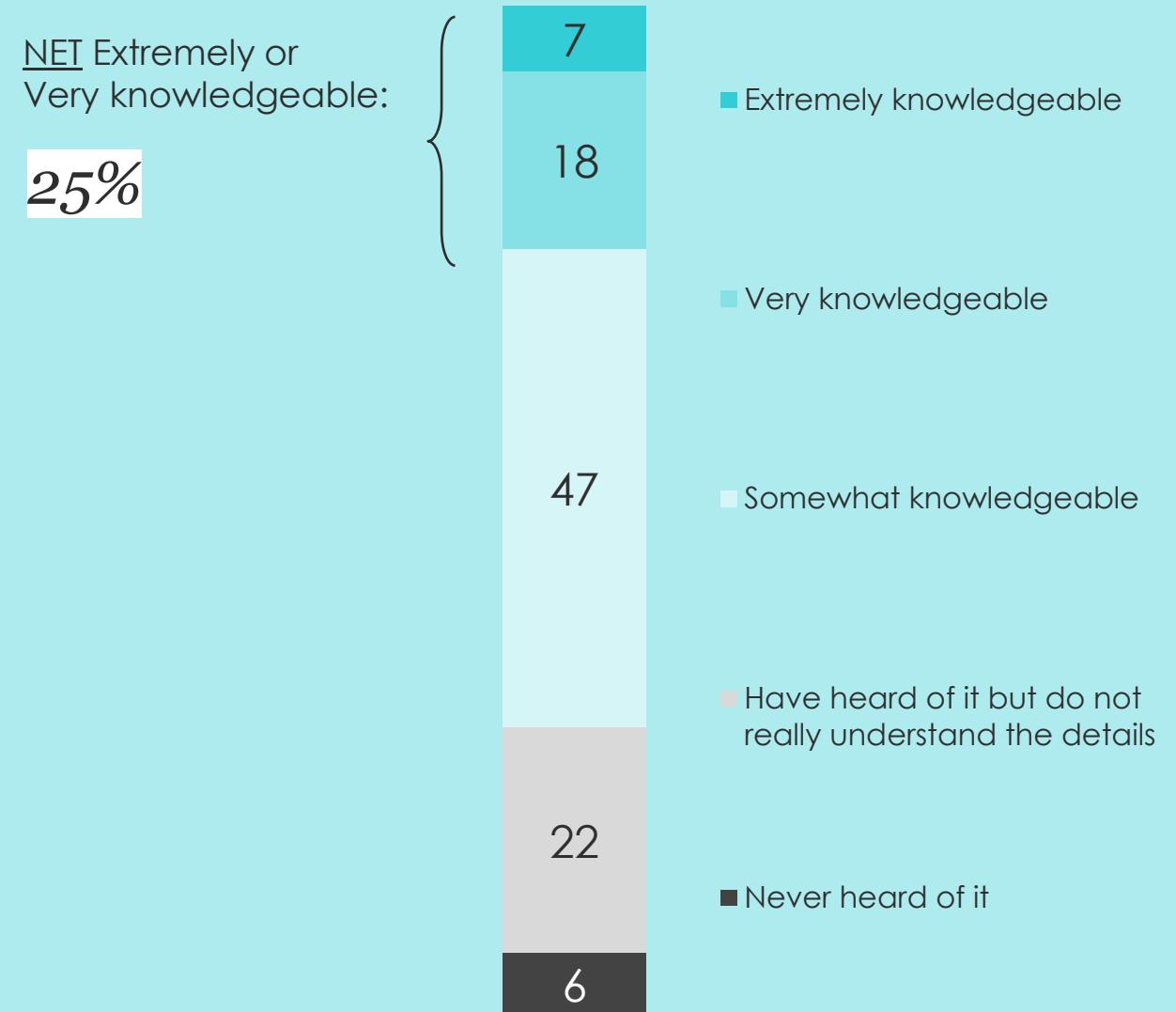
'Sustainability' is also used within organisations addressing ESG, employee relations.



# Most Australians feel only somewhat knowledgeable’ about sustainability

*Perceived knowledge about  
sustainability (%)*

Over 30 % have no understanding  
25% feel very knowledgeable



When it comes to  
sustainability,  
definitions go beyond  
environment

# *What would you define to be sustainability?*



A word cloud centered around the word "Environment". Other prominent words include Sustain, Maintain, Product, Way, Resource, Future, Recycle, Use, Without, Being, and Reduce.

SU2 -What would you define to be sustainability? Give us your best guess about what it is – even if you're not sure? Base: Total sample

# Two overall themes for sustainability.....

*What would you define to be sustainability?*

## Minimising impact

*Living in a way that creates little or no impact on the environment, and leaving the world in a better way than we found it*

*Considering all stages of the production of an item before and after consumption / use and striving for a circular economy to lower waste and emissions*

*Having a system that isn't wasteful or destructive to resources, and doesn't take or use more than it can create or keep*

*To ensure all our actions as a community come together to reduce all harm to all aspects of our day to day living , and the environment around us, and the effects it could have on future generations*

## Managing resources for the future

*Producing products and services in a way that does no long-term damage to the environment. So that the production can continue indefinitely with no significant harm to the environment or society*

*Something that can continue long term e.g., Financially sustainable, environmentally sustainable*

*A way of doing something that ensures long term future is achievable*

*Doing things now that won't harm future generations or impact on their resources and access to resources*

*Sustainability focuses on meeting the needs of the present without compromising the ability of future generations to meet their needs*

People  
believe their  
friends and family  
are choosing  
more sustainable  
options



*Proportion of social circle who chooses a sustainable product over an unsustainable product... (%)*



NET Always or most of the time:  
**51%**

- Always
- Most of the time
- Some of the time
- Rarely
- Never

# Consumers associate sustainable practices with trustworthiness and company ethics

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

I like to hear about the sustainable practices and works companies are doing



Companies shouldn't speak about their sustainable practices, they should just do it and keep quiet

I think companies who are trying to be sustainable are generally more trustworthy



I don't think there's a strong link between how sustainable a company is and how trustworthy they are

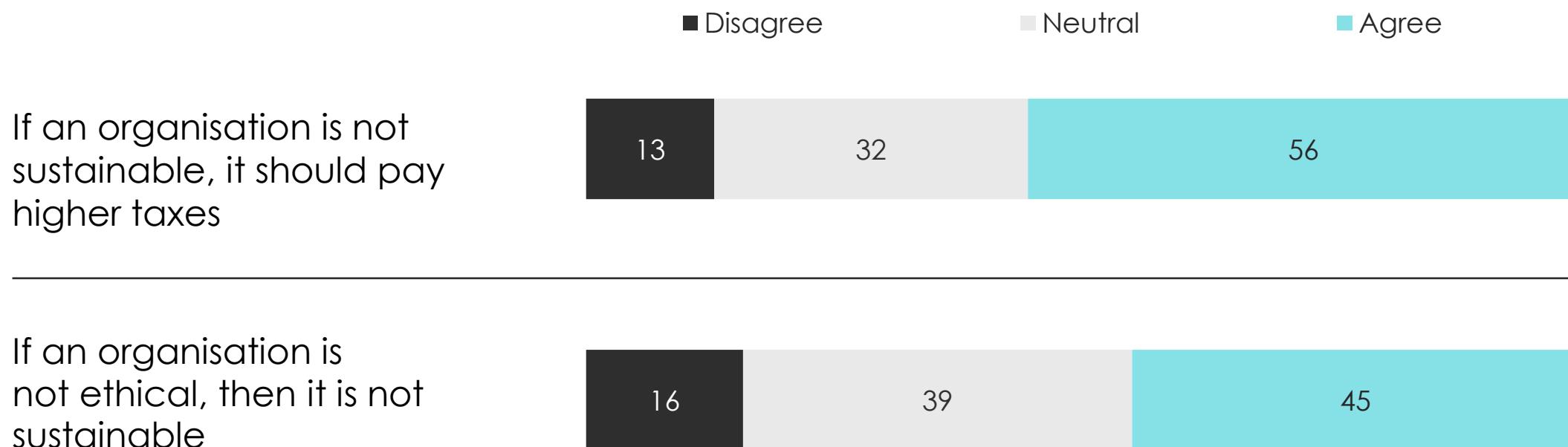
Companies who are trying to be sustainable are more ethical



Being more sustainable makes no difference to how ethical a company is

# Not being sustainable is... not sustainable!

*Attitudes to sustainability in organisations (%)*



# TO DO LIST

- 1.** Sustainability is not a choice for organisations anymore
- 2.** Organisations need to identify the 3-4 levers of change and integrate them into the organisation and brand narrative
- 3.** These levers need to be systemic, scalable and impactful



# Three themes for today ...

## We are seeing a confluence of concern

Covid has heightened our concerns about all things, and along with this we're more anxious and cautious about the future

*COVID has increased concern about sustainability in all aspects and this will change the business landscape*

## Industry and institutions will lead the way

The old "*She'll be right*" adage is not true: we want Governments and organisations to play an active role in bringing solutions, however we lack trust in institutions to act in people's best interest

*Customers are making decisions on more than product and service and willing to pay more for sustainability*

## Organisations need to define their own sustainability story

Sustainability means many things to consumers: naturality, organic, carbon neutral, seasonality, local, ethically sourced etc.. Organisations are now expected to have a sustainability lens and need to be able to tell this story

*Sustainability is not a choice for organisations: identify the levers of greatest impact and build these into your organisation and brand narrative*

# Thank you

To have The Pulse presented to your organisation and for more information  
please get in touch via email: [info@pollinate.com.au](mailto:info@pollinate.com.au)

Pollinate

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[www.pollinate.com.au](http://www.pollinate.com.au)