

What Australians  
think: Consumer  
trends and  
insights

*Canberra Region  
Tourism Conference*

Garrett Tyler-Parker,  
Pollinate

Pollinate



# Pollinate

**18**

*years old*

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*Independently  
owned*



**20+**


*full-time staff  
members*



*Offices in  
Sydney,  
Canberra &  
Melbourne*

**ISO 20252**  
*accredited*

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**Full service**   
*brand and  
market research*

# Who we work with



# VisitCanberra Research

Since 2019, Pollinate have surveyed Canberra's domestic tourism market in NSW, VIC and QLD

## Evaluating:

- Perception of the domestic travel market
- Intention to travel
- Likelihood to visit Canberra
- Perception of Canberra
- Response to VisitCanberra advertising

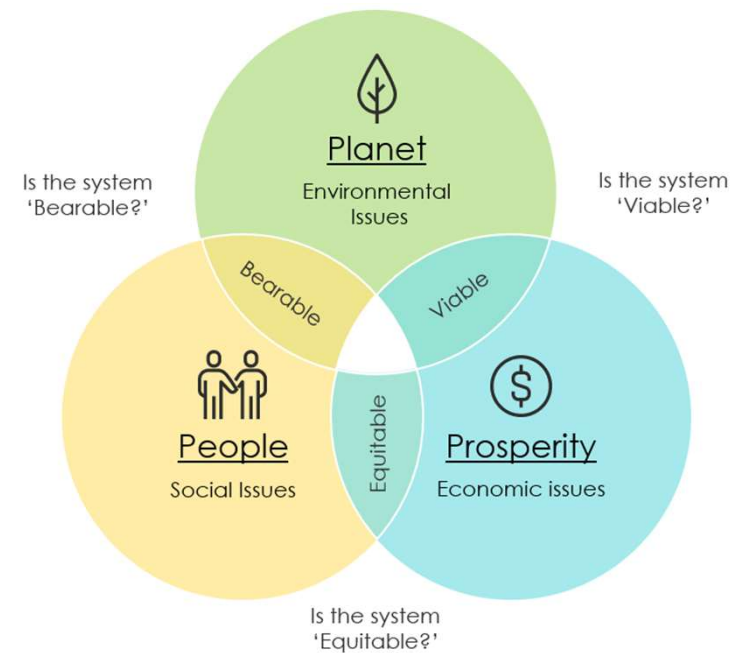


n=500 respondents across NSW, VIC, QLD, with sample representative of the general local population

# Pollinate Pulse

Since 2007, Pollinate has surveyed over 25,000 Australians via The Pulse

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



n=1000 Australians aged 14-64, every March & September. Sample representative of the general Australian population

## Visiting Canberra

**1 in 5** are likely to visit Canberra on an upcoming short break or weekend away

**1 in 2** are on the fence

But **1 in 4** are extremely unlikely to visit Canberra anytime soon

# What attracts people to Canberra

## *Why are you likely to travel to Canberra?*



- Exhibitions or displays at museums
- Because it is Capital and has lots of museums
- To visit Questacon
- The War Museum
- Take kids and show them the history
  
- Art and food and tourist attractions
- Excellent city, lots of diverse food
- Visit friends and wineries
  
- A great cultural scenery and lots of delicious food
- I really like the environment there
- Really like the city and so many different types of things to do and see
- There is good scenery and the culture there is so good that I can relax

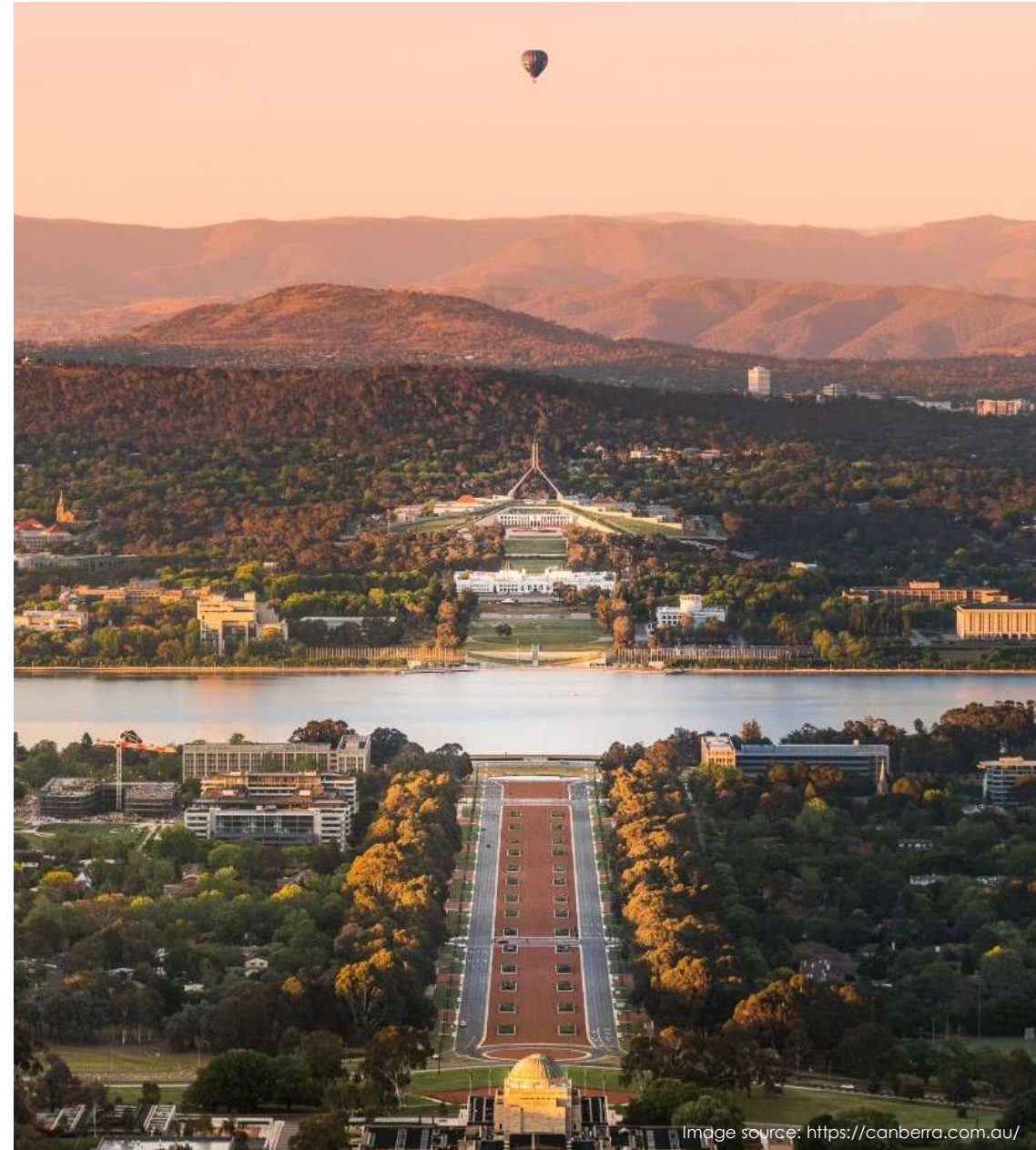



Image source: <https://canberra.com.au/>



What are  
Australians  
thinking and feeling  
that we can tap into  
and get them on the  
road to Canberra?

# 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



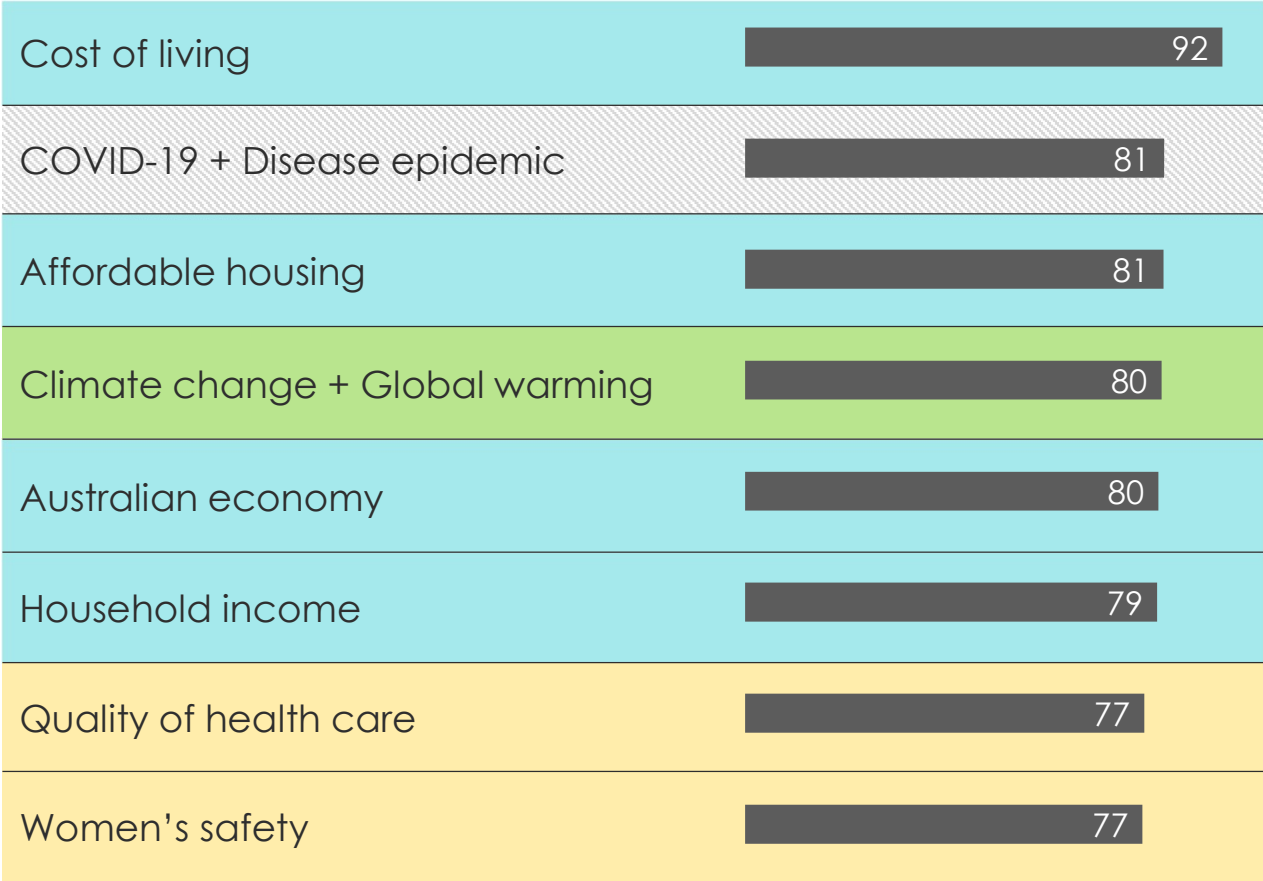
## Economy

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

DQ3 - Please indicate, which of the following currently concern you? Base: Total sample

## 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 2:31pm

### 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."

The Guardian  
For 200 years

#### 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

Living situation ...

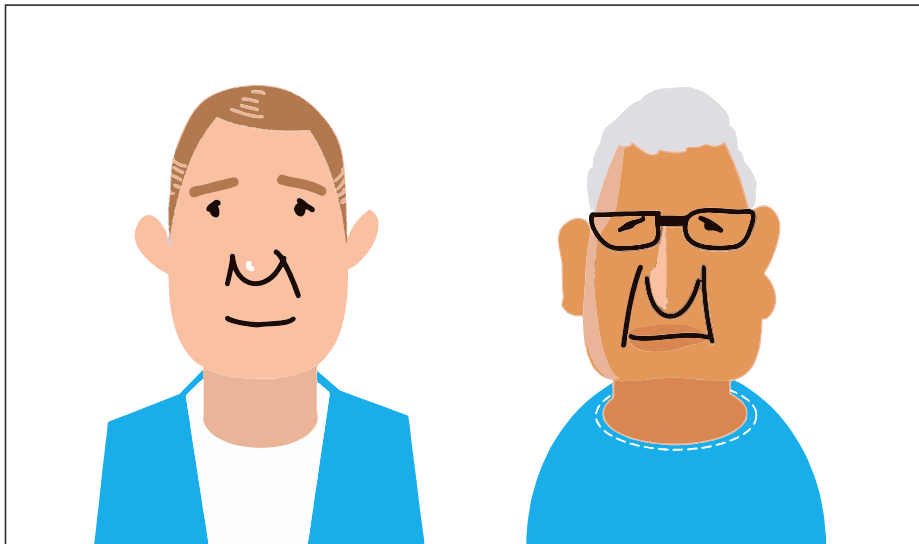
Financially comfortable



Financially struggling

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

Traditionalists

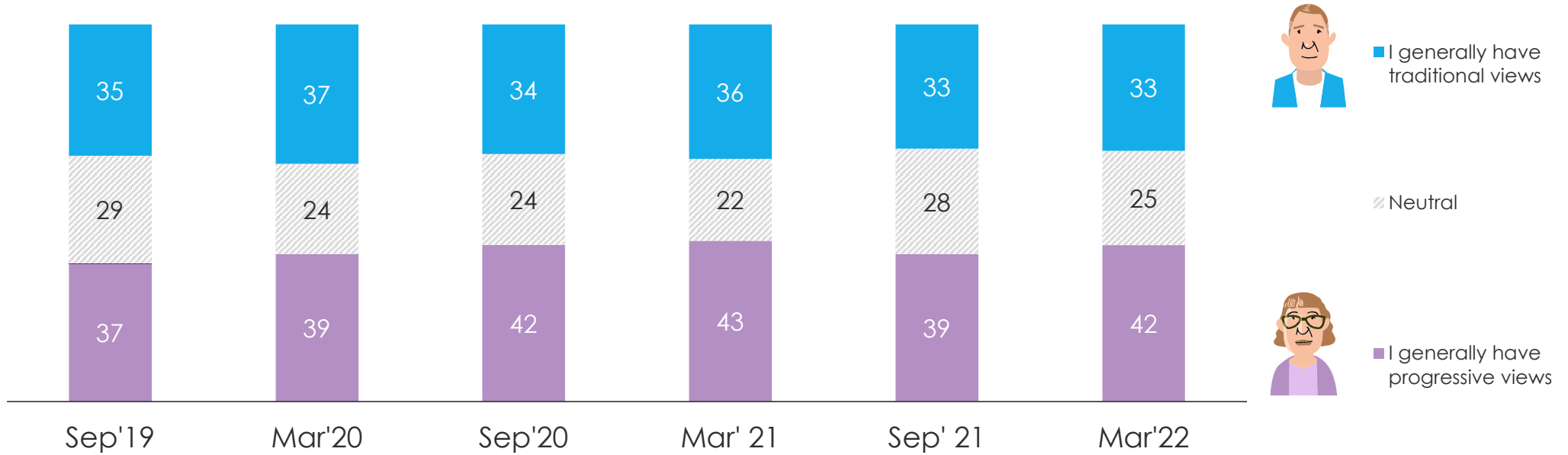


Progressives



# 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? (%)*

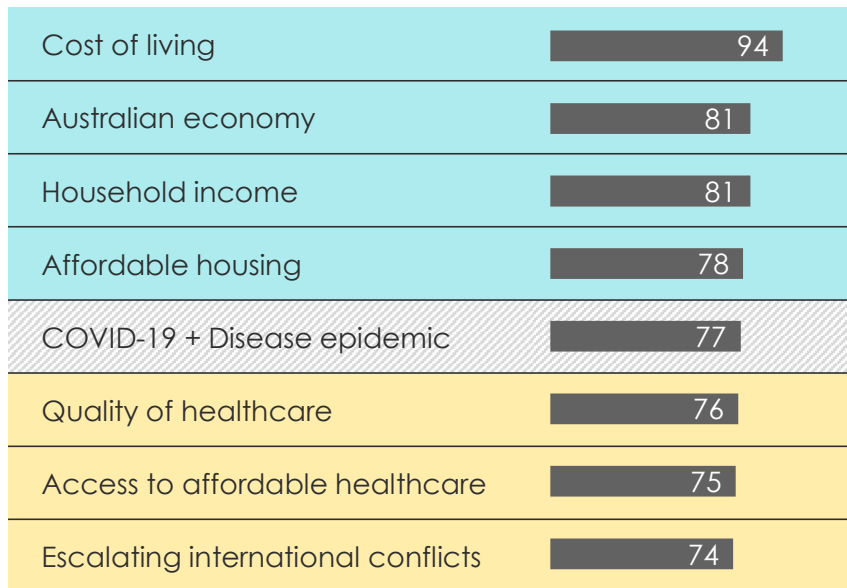


# Cost of living, affordable housing and COVID concern us all, but that is where the synergy stops



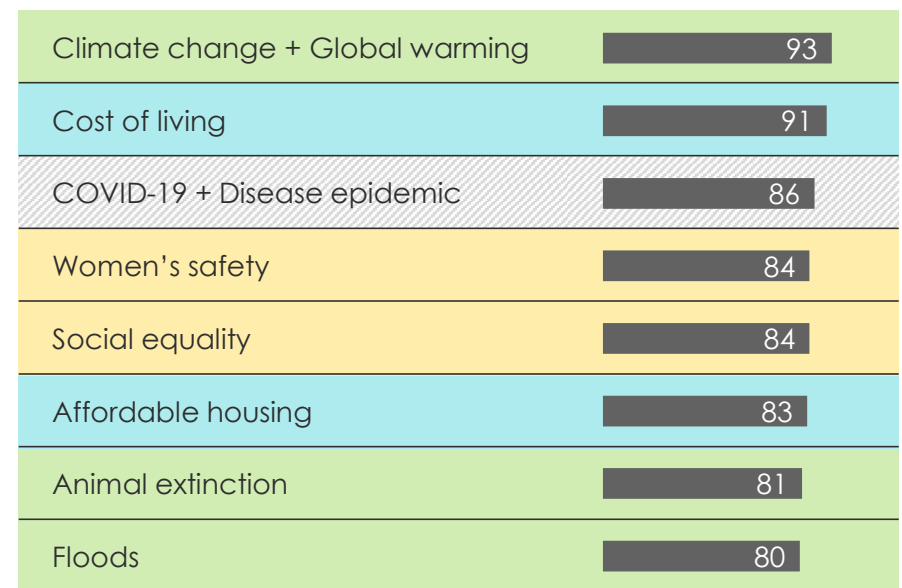
## Traditional

Economic and social (healthcare) issues



## Progressive

Environmental and social (equality) issues



■ Economic   
 ■ Environmental   
 ■ Societal

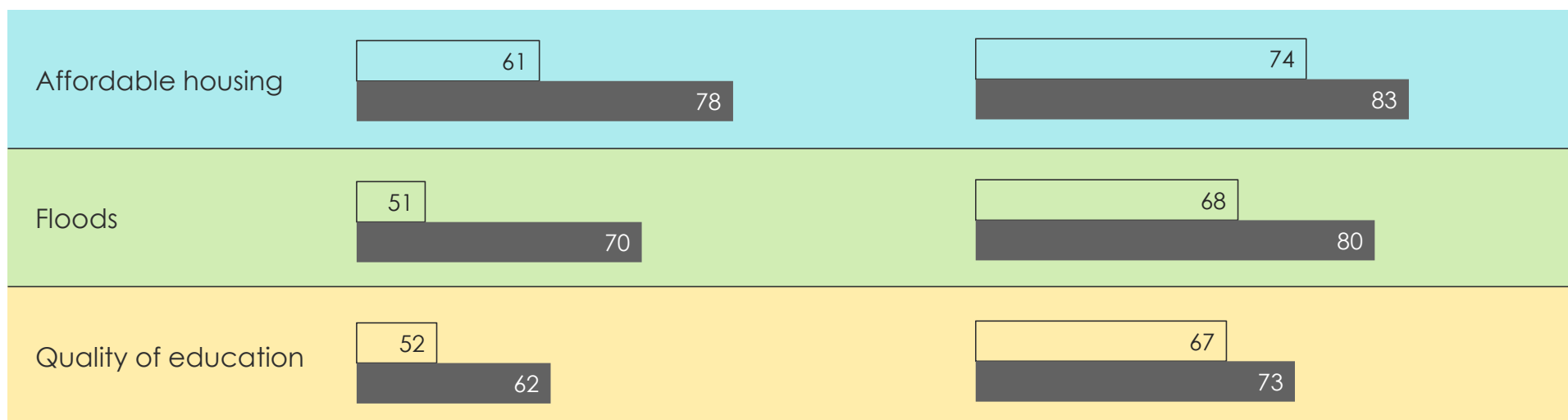
# When it comes to emerging issues, there is common concern around on affordable housing, floods and quality of education



Traditional



Progressive



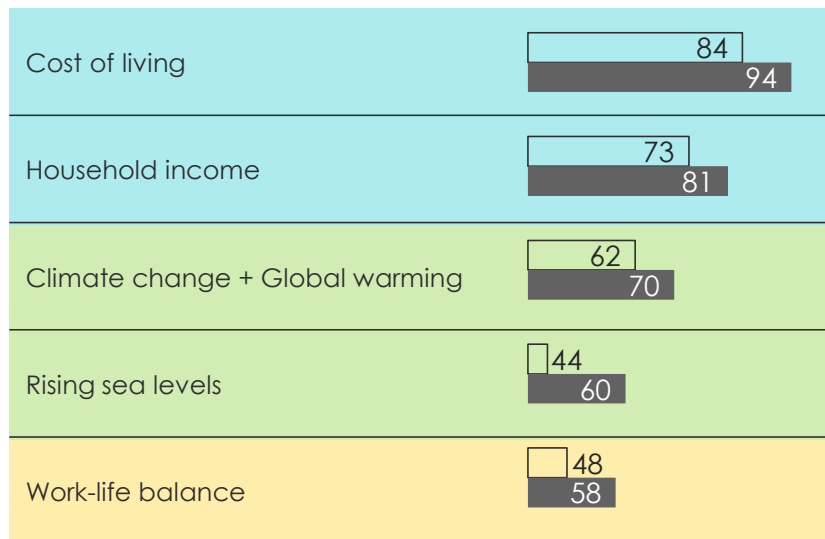
■ Economic ■ Environmental ■ Societal □ March 20 ■ March 22

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



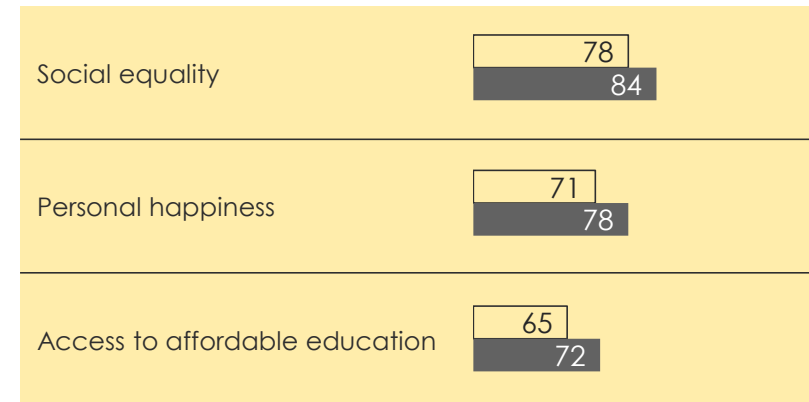
## Traditional

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



## Progressive

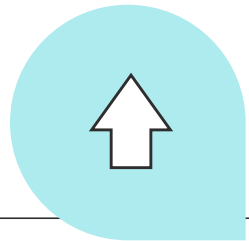
Rising concern about access to affordable education, happiness, social equality



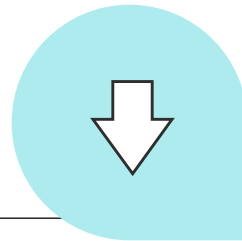
■ Economic   
 ■ Environmental   
 ■ Societal   
 □ March 20   
 ■ March 22



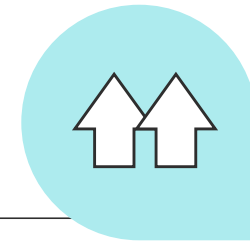
## Where Australians are right now:



Cost of living  
is the dominant  
issue and  
emerging issue



Concern about  
Covid, the global  
economy and  
unemployment is  
receding



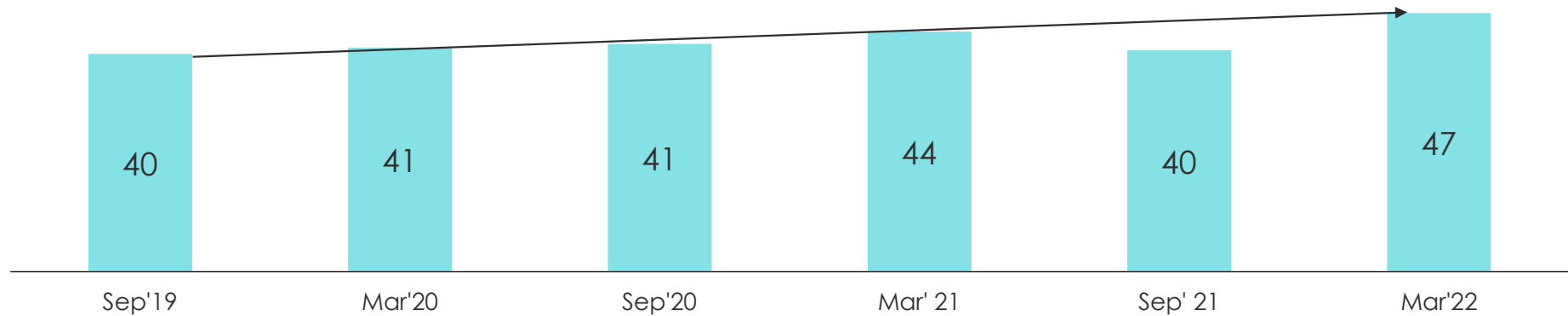
Climate change  
is dominant  
among  
Progressives and  
emerging among  
Traditionals

*But what are people 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? (%)*

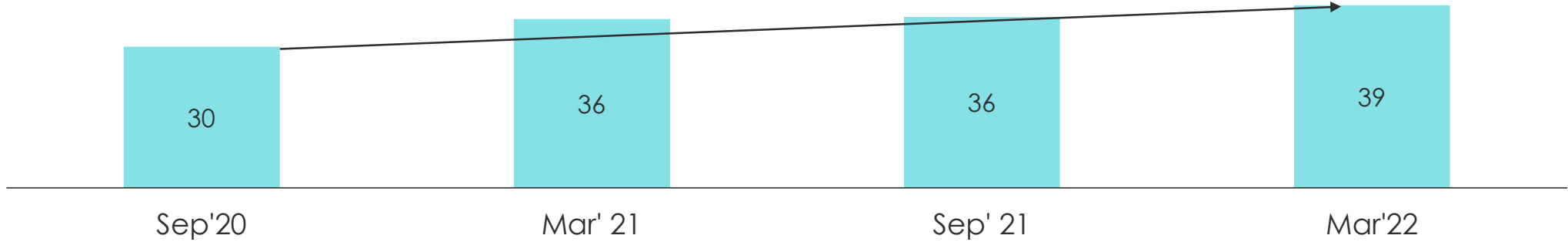
*When buying things, I research extensively*



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

*Personal responsibility around climate change (%)*

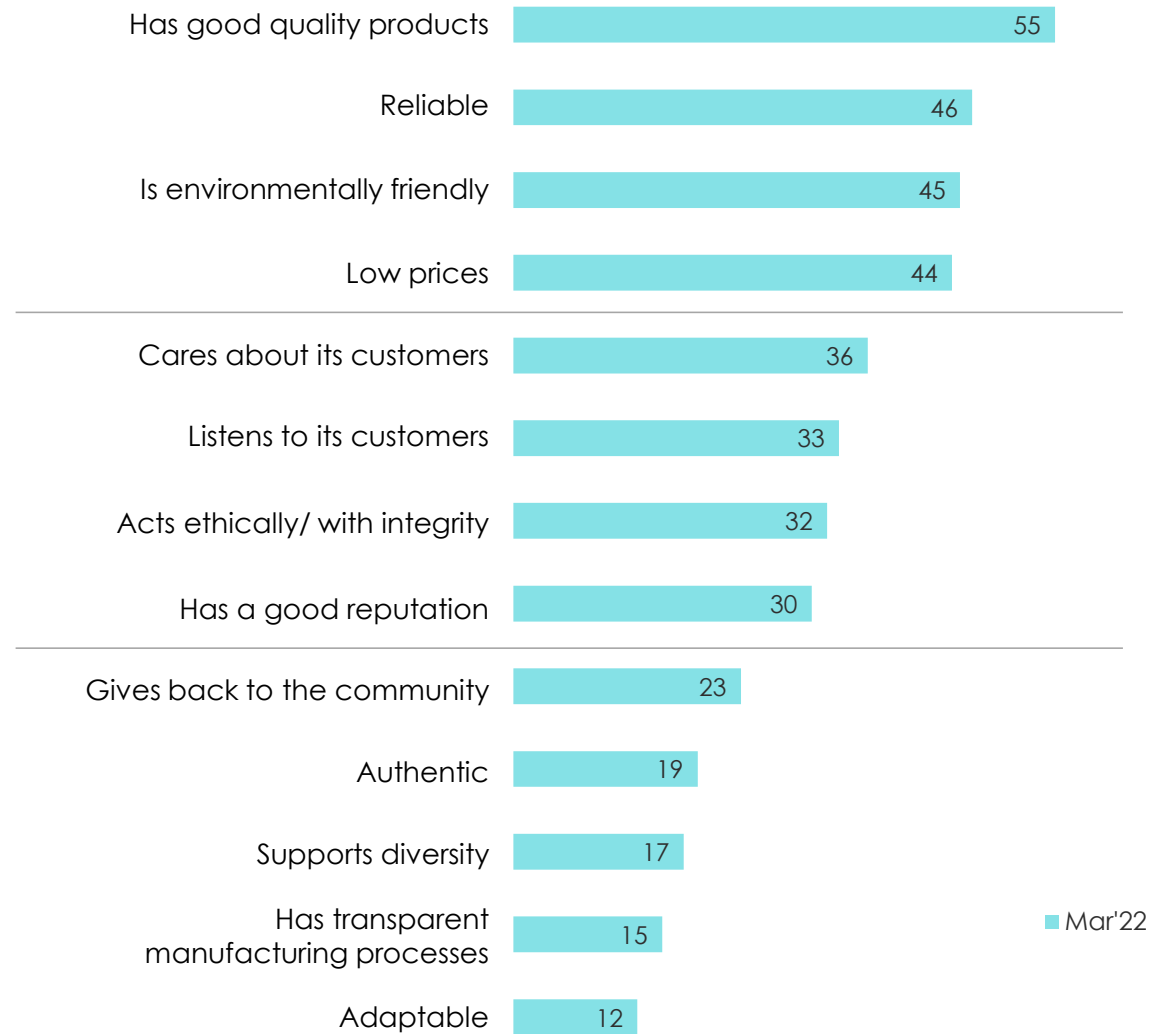
I should be spending my money where I want to see change in combatting climate change



## So what is it about?

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

*Most important features of a brand (%)*



LM1 - Now imagine that you are the CEO of a brand whose target audience is people your age. What are the most important qualities you think your brand should have? Base: Total sample

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



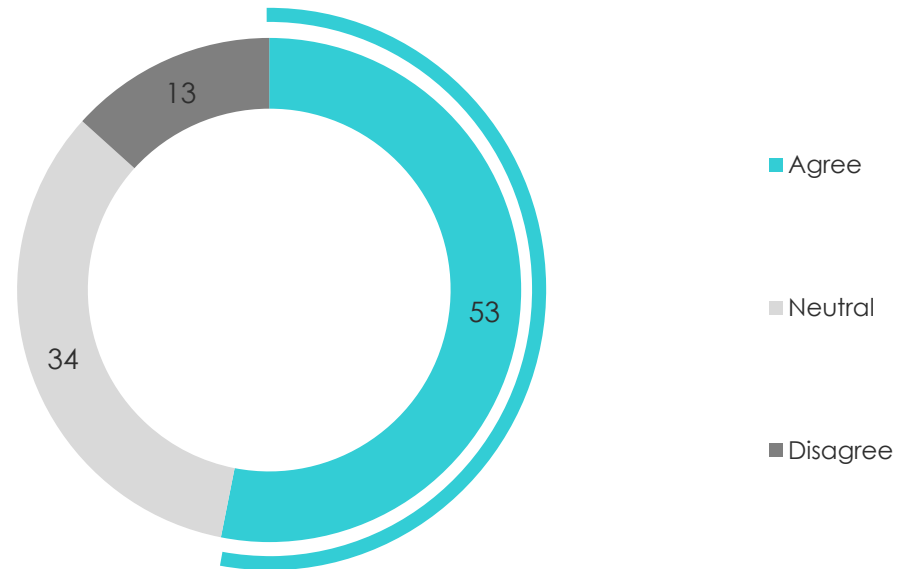
Nearly **1 in 2** think sustainability encompasses the environment, economy and society

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*



SU6 - Please indicate how much you agree or disagree with the following statements.  
Base: Total sample



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

*Expectations of brands and 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

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

*Expectations of brands and companies around sustainability (%)*

I want companies to play a greater leadership role in combating climate change



I don't think companies can play a leadership role in combating climate change

I like to hear about the sustainable practices companies are doing



Companies shouldn't speak about the sustainable practices they are doing

... and they want to hear about it

When it comes to the Canberra market...



Image source: <https://canberra.com.au/business/Pollinate>

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



More likely to  
have a  
progressive  
mindset...



More likely to  
research things  
extensively...

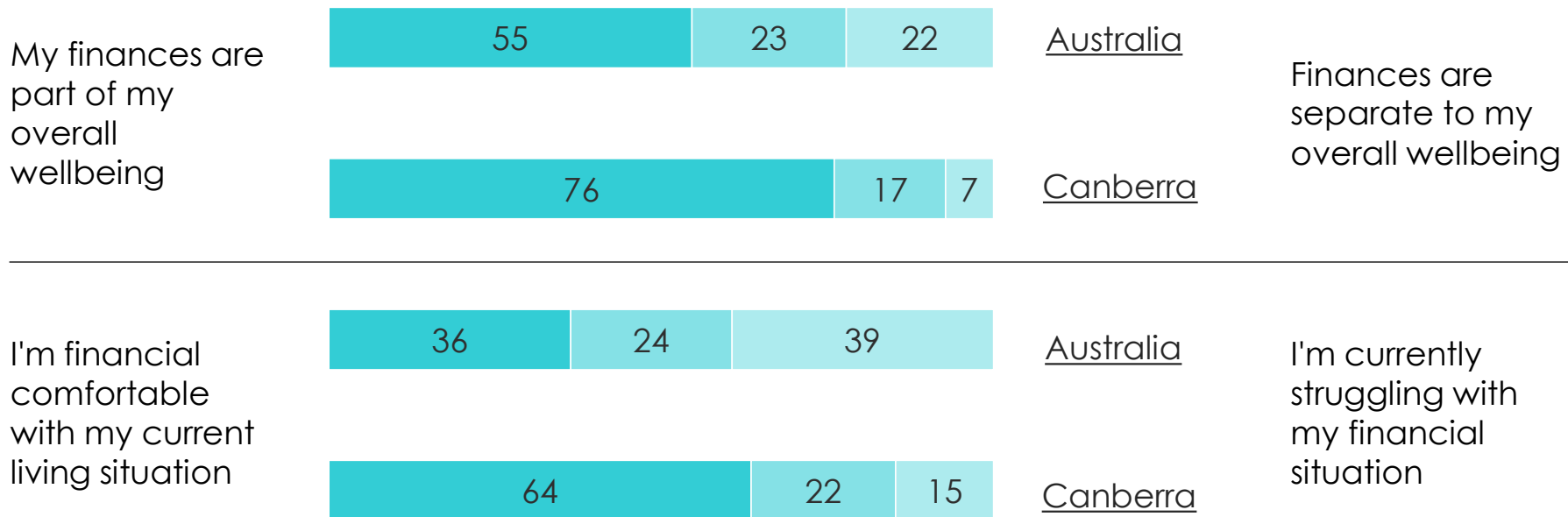


More likely to  
spending their  
money where they  
want to see change  
in combatting  
climate change....

...than the rest of Australia

# Canberrans have a different mindset to the nation

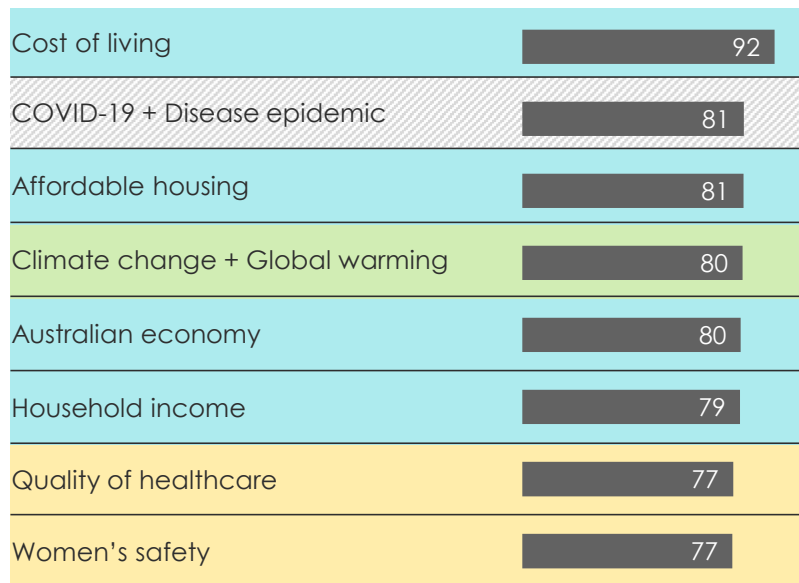
## *Views and outlook on the world (%)*



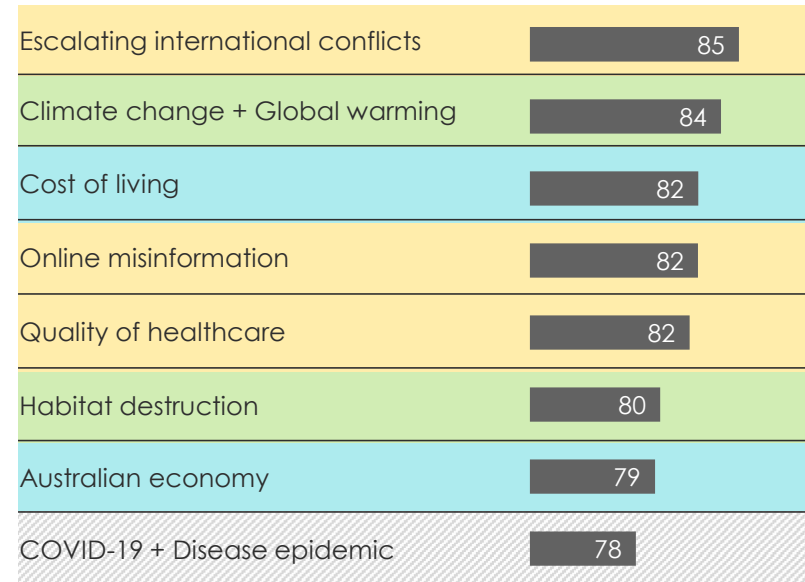
# Dominant issues among Canberrans are quite different, with a greater level of concern for societal issues

## *Dominant issues of concern (%)*

### Total Australia



### Canberra



Concern Type: Economic Societal Environmental

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

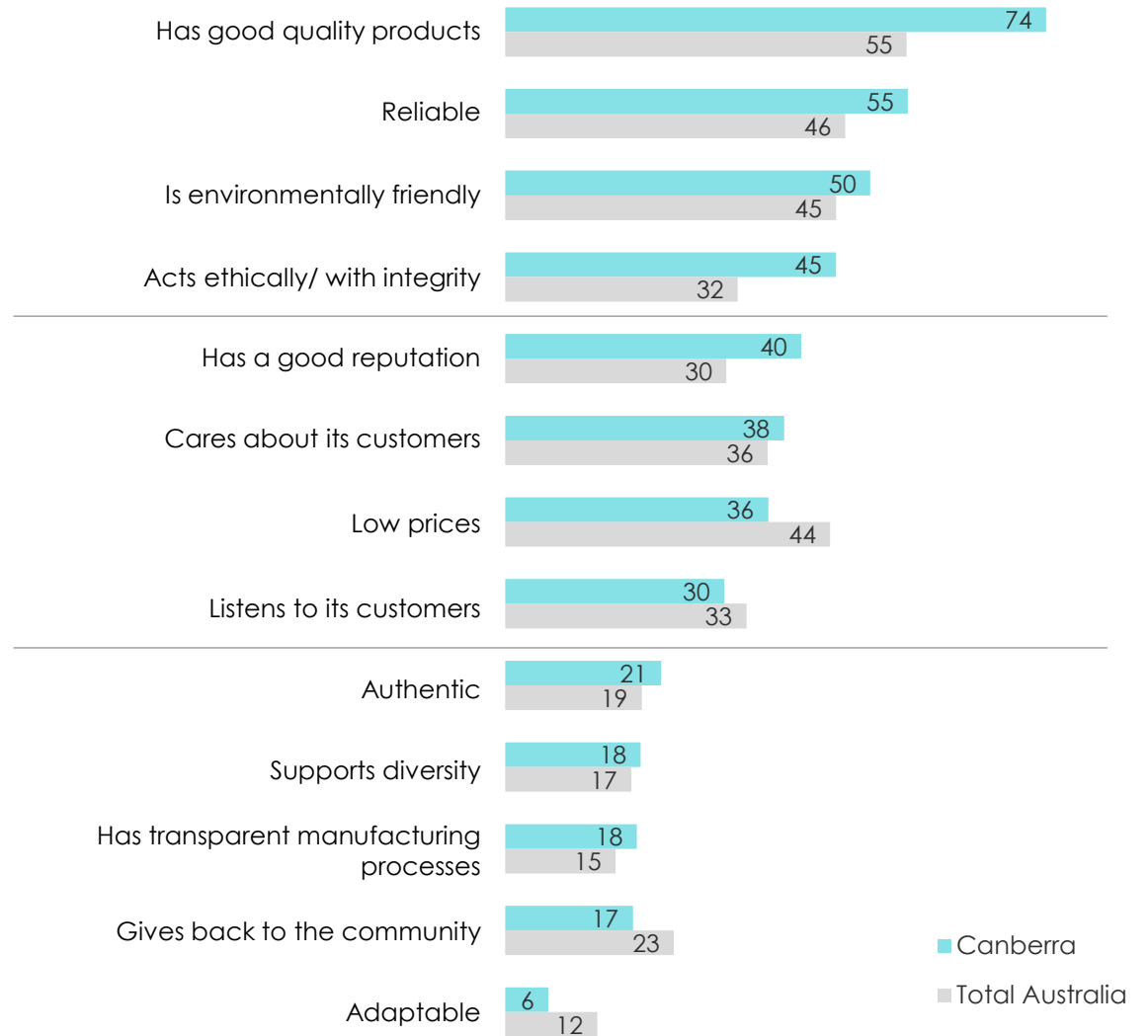


Image source: <https://trade.visitcanberra.com.au/>

# 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



LM1 - Now imagine that you are the CEO of a brand whose target audience is people your age. What are the most important qualities you think your brand should have?  
 Base: Mar'22 Total Australia n=1000 / Canberra n=176



What  
Australians  
think: Consumer  
trends and  
insights

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

# Thank you

Pollinate

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