



# Pollinate

**INSIGHTS THAT INSPIRE ACTION**

Pollinate acknowledges all  
*Aboriginal & Torres Strait Islander Traditional  
Custodians of Country*

And recognizes their continuing connection to  
land, sea, culture & community.

We pay our respects to Elders past,  
present and future.



# Who is Pollinate

Full-service brand & market  
research consultancy

Australian & independently owned

National & regional footprint with  
APAC capabilities

# Our services: Strategic insights that inspire action

1

Co-creation

2

Strategy  
development

3

Influence  
audits

4

Communications  
development  
& enhancement

5

New product  
development  
& innovation

6

Customer &  
audience  
segmentations

7

Advanced  
quantitative  
techniques

8

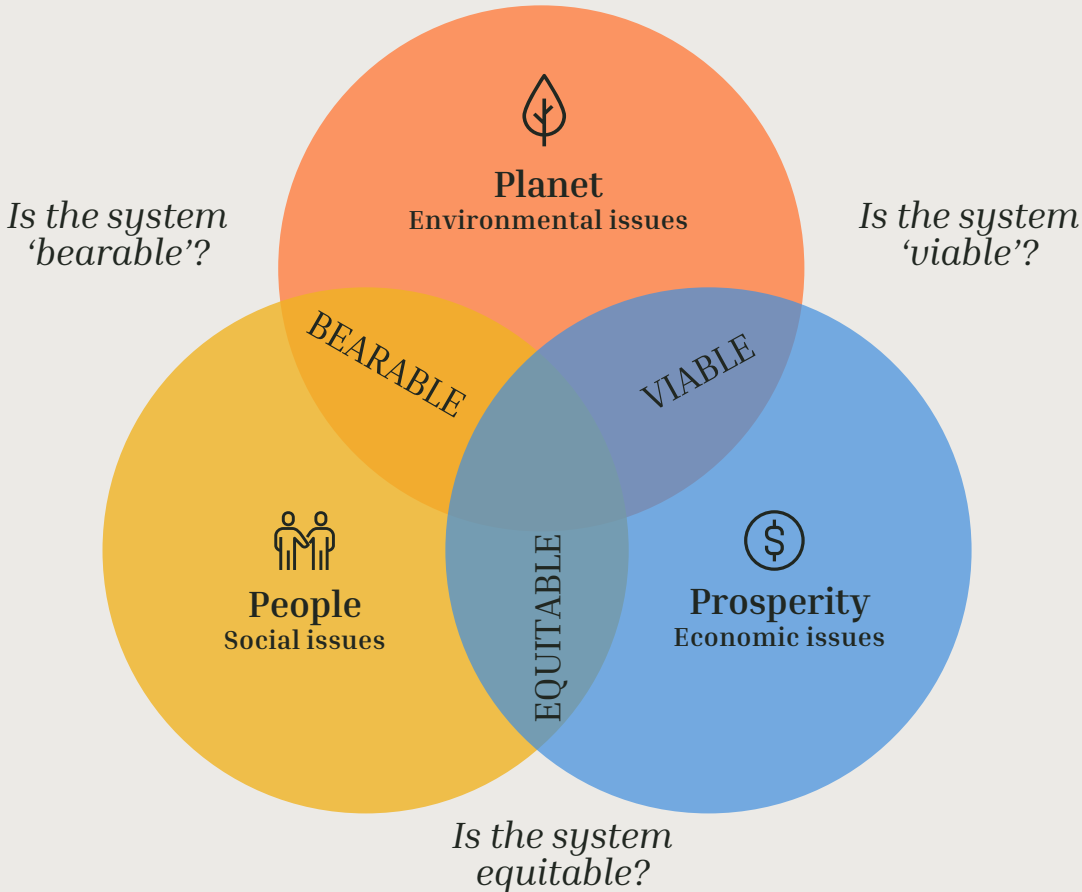
Always-on  
brand deep  
dives

# The POLLINATE PULSE

Since 2007 Pollinate has surveyed over 25,000 Australians via The Pollinate Pulse across the key pillars of environmental, societal and economic issues

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

Each Pulse wave surveys 1000 respondents - that are representative of the Australian population aged 14-64 - through a 20-minute online survey

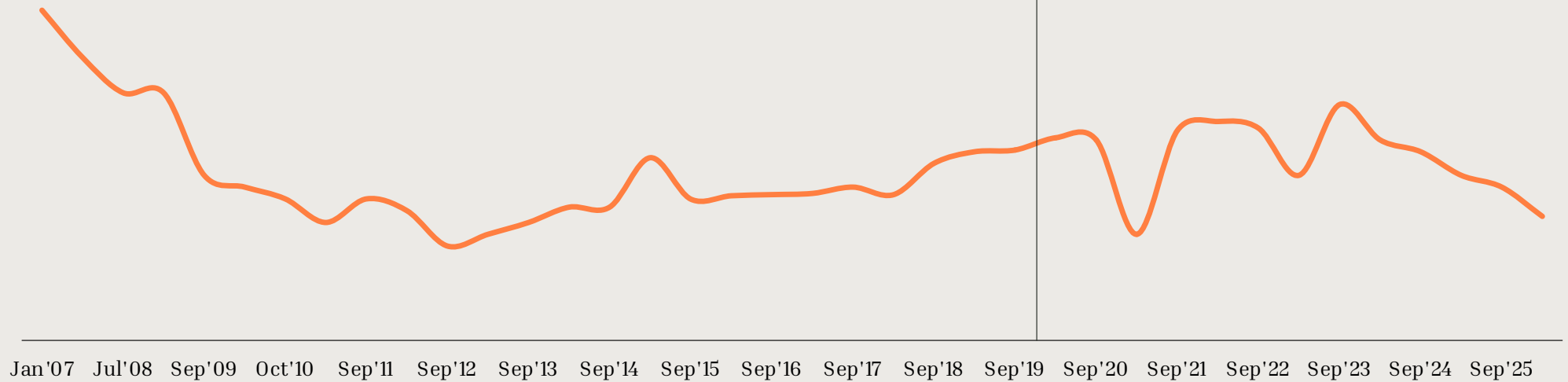


# 2026 marks **19 years** of tracking for The Pollinate Pulse

Concern about the environment (T2B%)



COVID 19

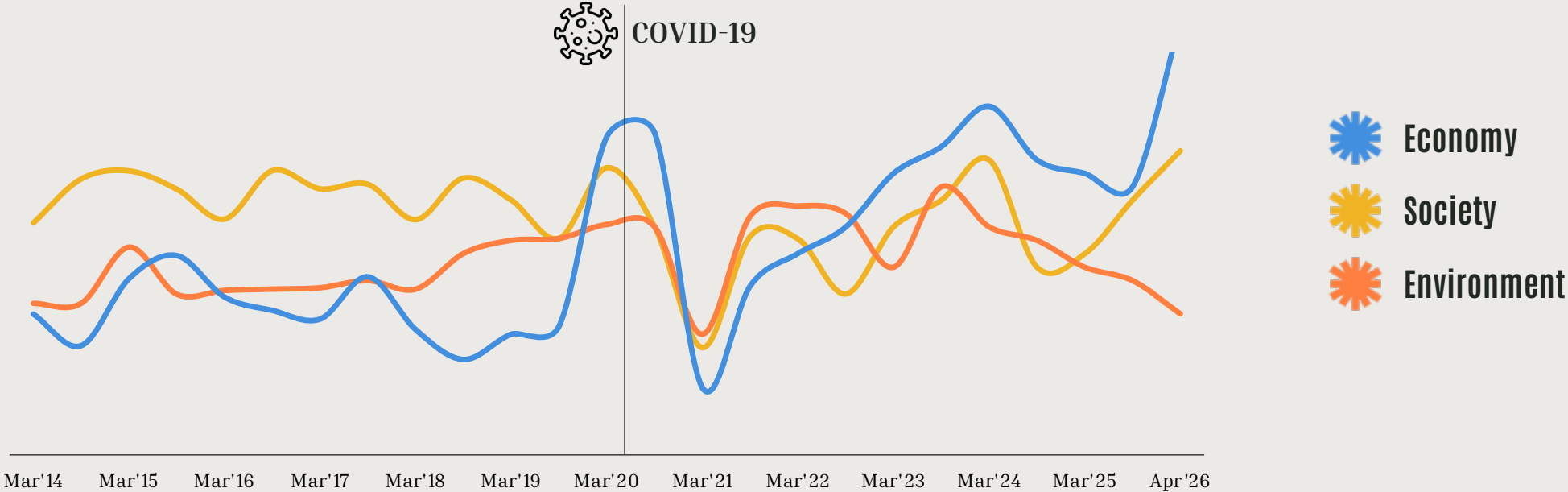




The national mood in  
Australia is darker  
than ever

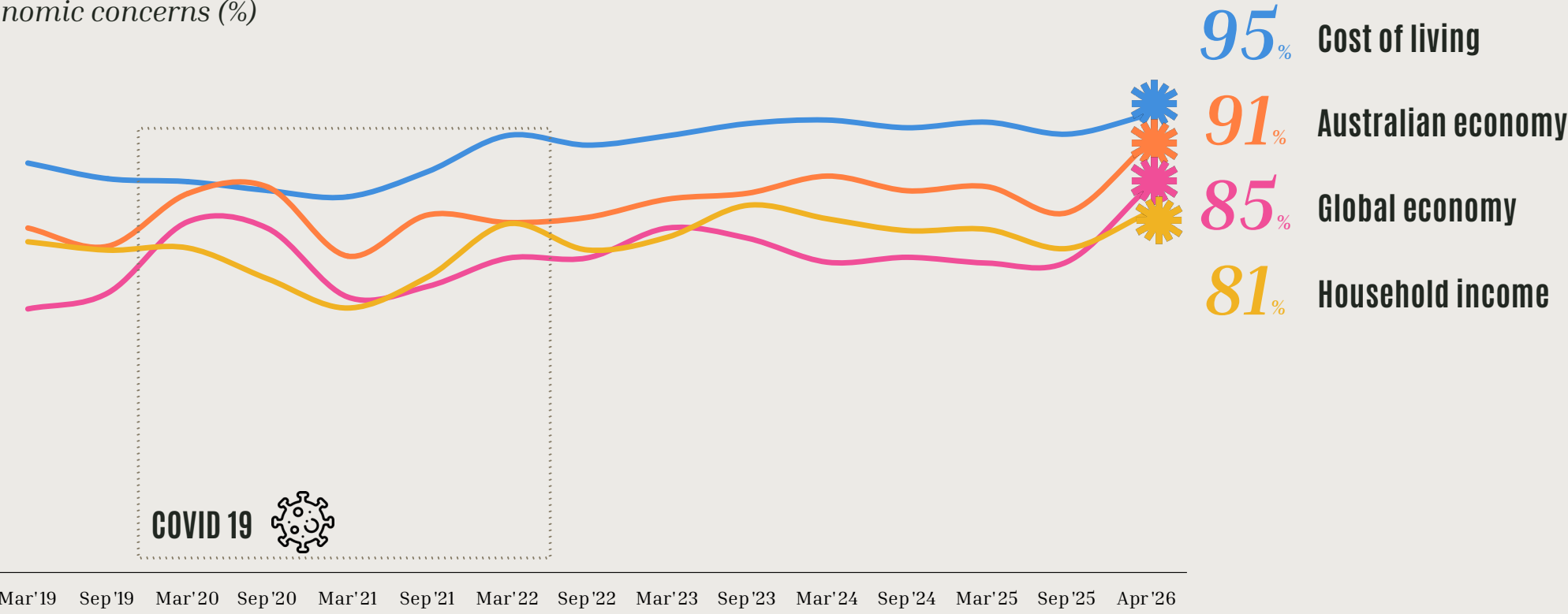
# Concerns about the economy have skyrocketed since last year. Concern about society also increasing

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



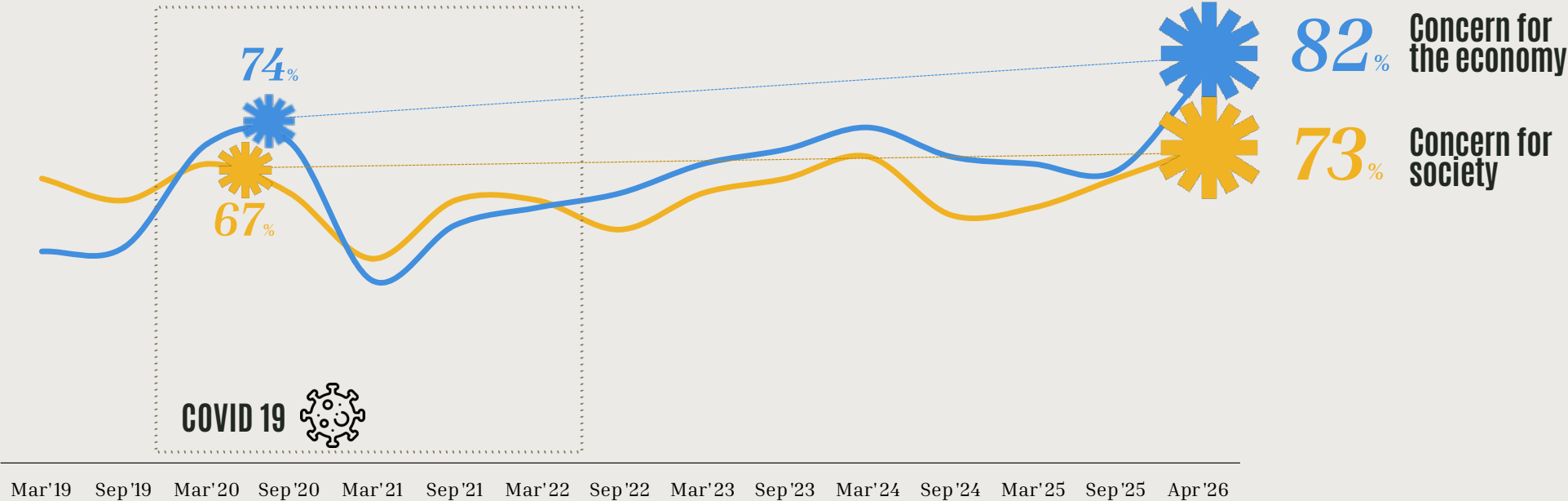
# And all economic concerns have sharply increased

Economic concerns (%)



# Total levels of concern today are beyond the depths of the pandemic

Areas of concern (%)

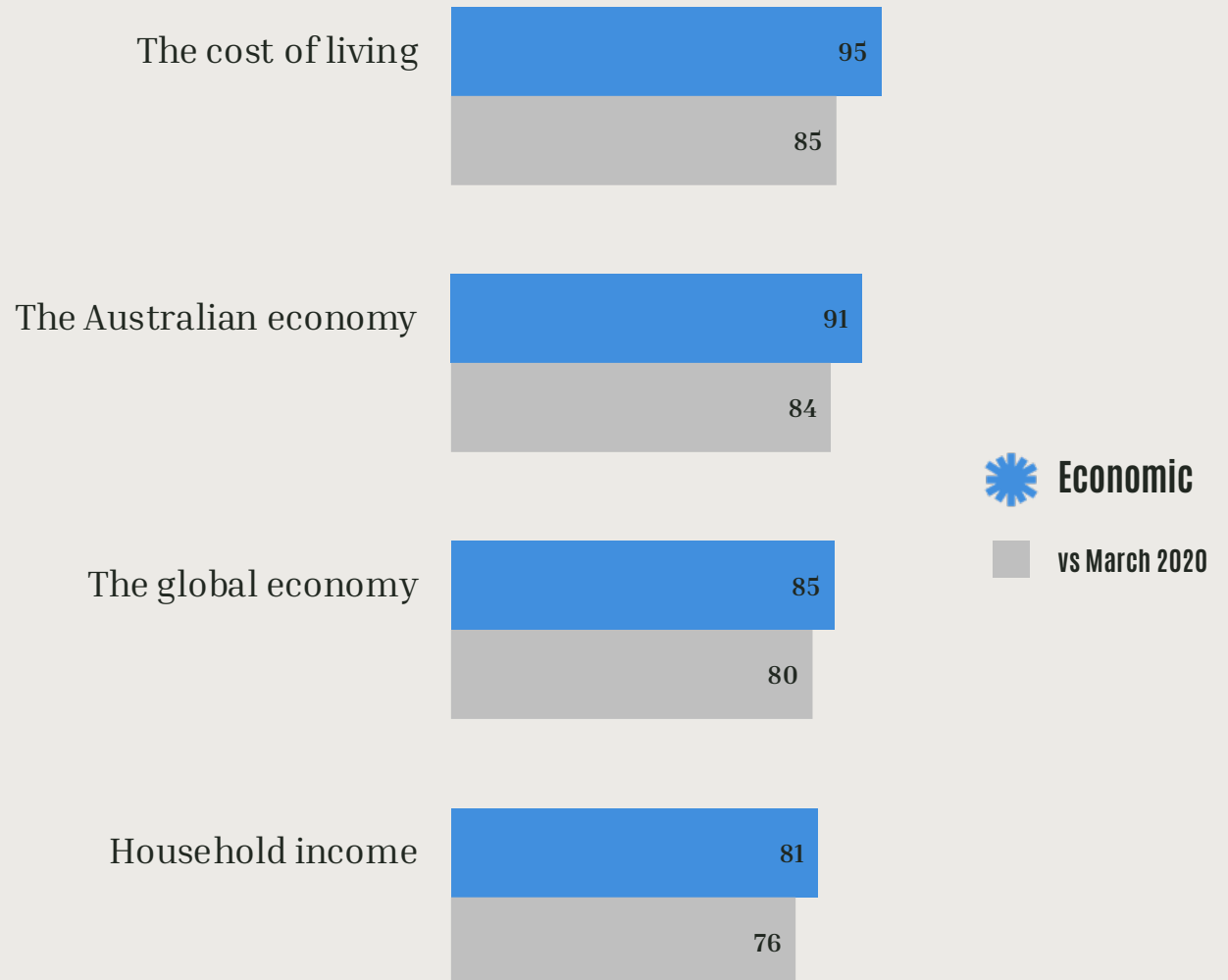


And all economic concerns are also

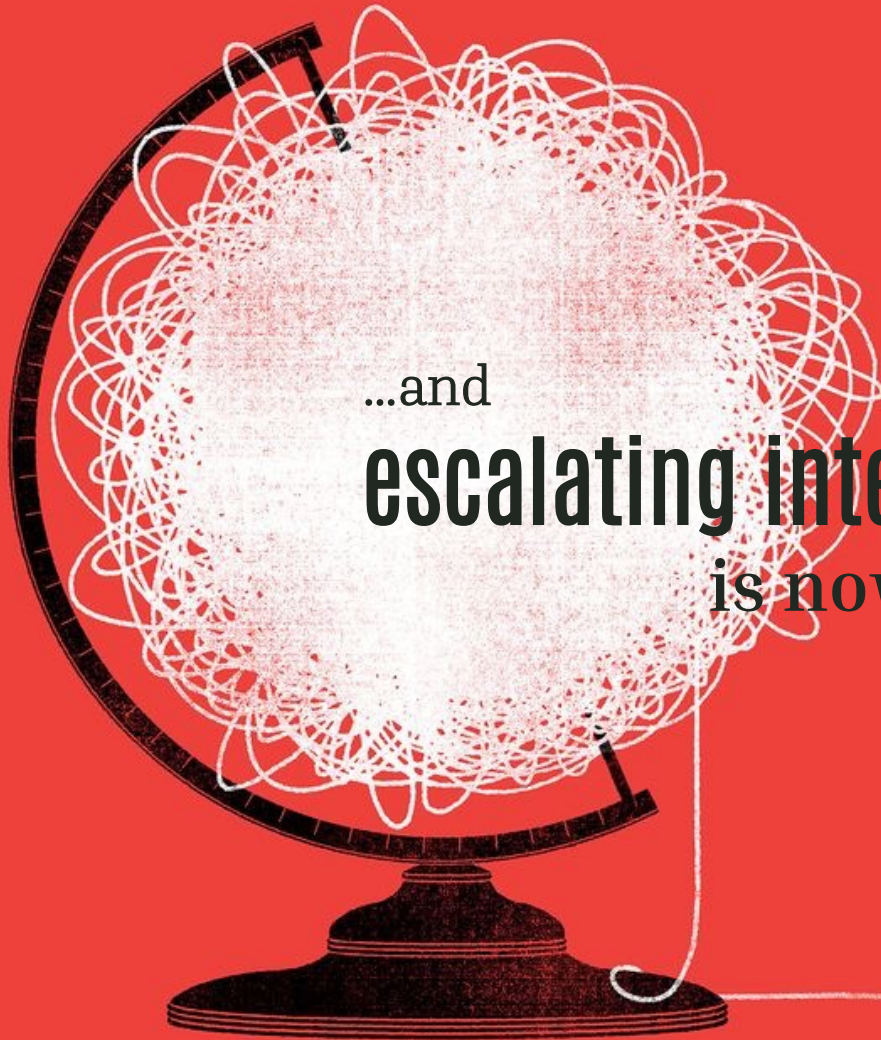
**HIGHER**

today than at the height of COVID 19 pandemic

*Top economic concerns in 2026 (%)*



DQ3a/b/c: Please indicate which of the following currently concern you?  
Each Pulse wave aims to obtain a sample of n=1000 representative of the Australian population



...and

**escalating international conflicts**  
is now ranked among the

*top 5 concerns*

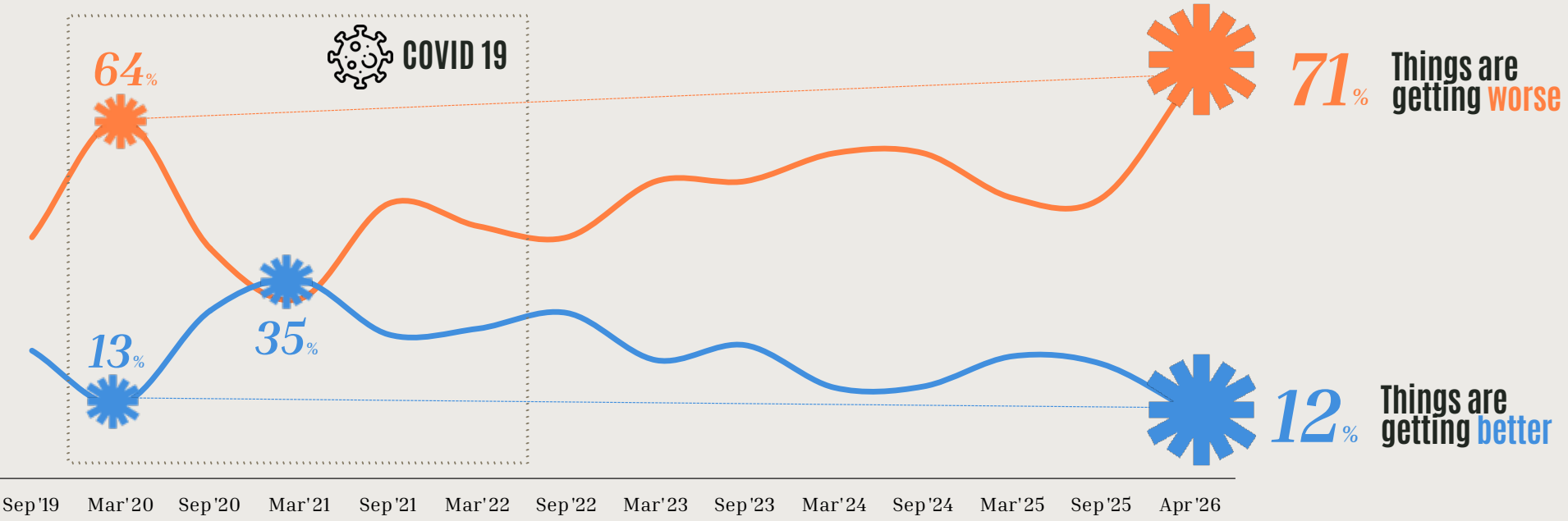
Overall...

We are the *most*  
*pessimistic*  
*ever*



# Optimism is at an all time low

Australian's outlook (%)

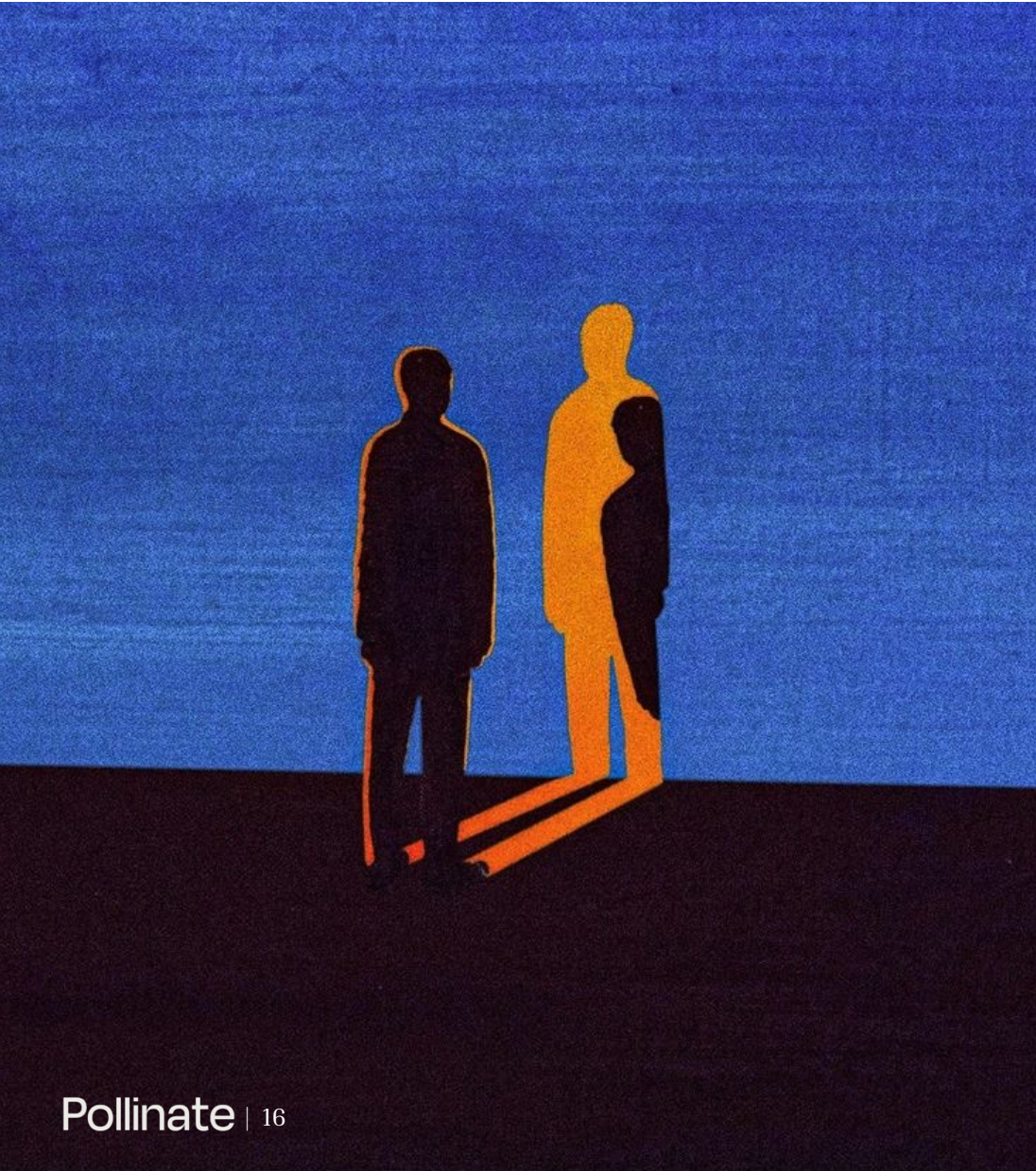


B4. Thinking about life in Australia, do you think things are getting [better / same / worse]? Each Pulse wave aims to obtain a sample of n=1000 representative of the Australian population

COVID was a viral pandemic that killed millions of people and strangled the economy and forced us all in to lockdown...



But we were **more optimistic** then than we are today



*Who is doing it*

**tough**  
*right now?*



# Women

are more likely to think things are

*getting worse*

**77%**  
of women

**VS**

**66%**  
of men

# Especially YOUNGER WOMEN

95%

Affordable housing

Vs. total 79%

92%

The global economy

Vs. total 85%

95%

Escalating international conflicts

Vs. total 83%

84%

Use of nuclear weapons

Vs. total 65%



Aussies 18-24 are worried about their

# FUTURE

Greater levels of concern compared to total (%)

**93%** are concerned about **affordable housing (vs 79%)**

**76%** are concerned about **job security (vs 60%)**

**70%** are concerned about **unemployment (vs 54%)**

Vs. total

DQ3b. Please indicate which of the following currently concern you?  
Base: Total sample March 2026 n=1,003

But **older** Aussies  
are the most

**PESSIMISTIC**

Getting worse (%)

**81%**  
50-64

**74%**  
35-49

**70%**  
18-24

In spite of being more pessimistic,  
older Australians are

# LESS CONCERNED

Than younger Australians

**74%**  
*Household Income*

**70%**  
*Affordable housing*

**64%**  
*Personal happiness*

**49%**  
*Job security*

DQ3b. Please indicate which of the following currently concern you?  
Base: Total sample March 2026 n=1,003

**Older people mostly already have a house, wealth and adult kids!**



The background of the slide features the silhouettes of five people of various ages and genders, positioned against a clear blue sky. The silhouettes are dark and detailed, showing profiles and some facial features like glasses. The overall composition is clean and modern.

**In summary**

Women and older people are the **most pessimistic** but..

**Youth** are the **most concerned** about economic issues

# WHY

## do these generational differences exist?

Older people are just more cynical?

Fear of losing assets?

Worry about future generations?

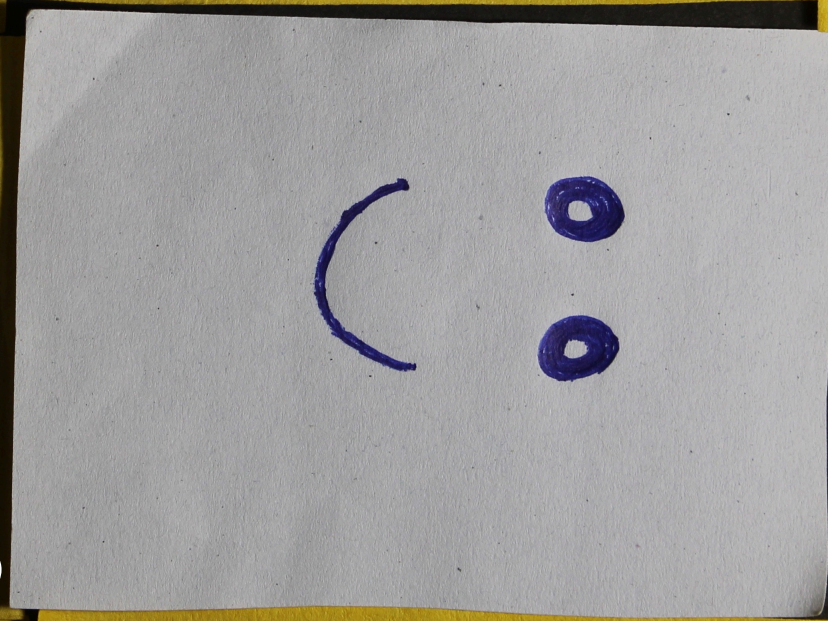
Youth literally can't emulate parent's success?

And young people have less to lose?



Who says it's

Getting  
better?  
Or staying  
the same?



A photograph of two men sitting at a bar, laughing heartily. The man on the left has dark hair and a beard, wearing a blue patterned shirt. The man on the right has reddish-brown hair and a beard, wearing a dark t-shirt. They are both holding glasses of beer. The background is a blurred bar setting with warm lighting.

**34%** of men say  
things have not  
worsened

**VS**

**23%**  
*Women*

Men are more likely to be  
*positive* compared to women



# 25-34 Aussies are the **LEAST** Pessimistic

Getting better (%)



Aussies 50-64 are TWICE as pessimistic

B4. Thinking about life in Australia, do you think things are getting [better / same / worse]?  
Base: Total sample March 2026 n=1,003

**49%**

**men 25-34**

say things are

**not getting worse**

**vs.**

**34%**

**Women  
25-34**





# Why are these groups more optimistic?

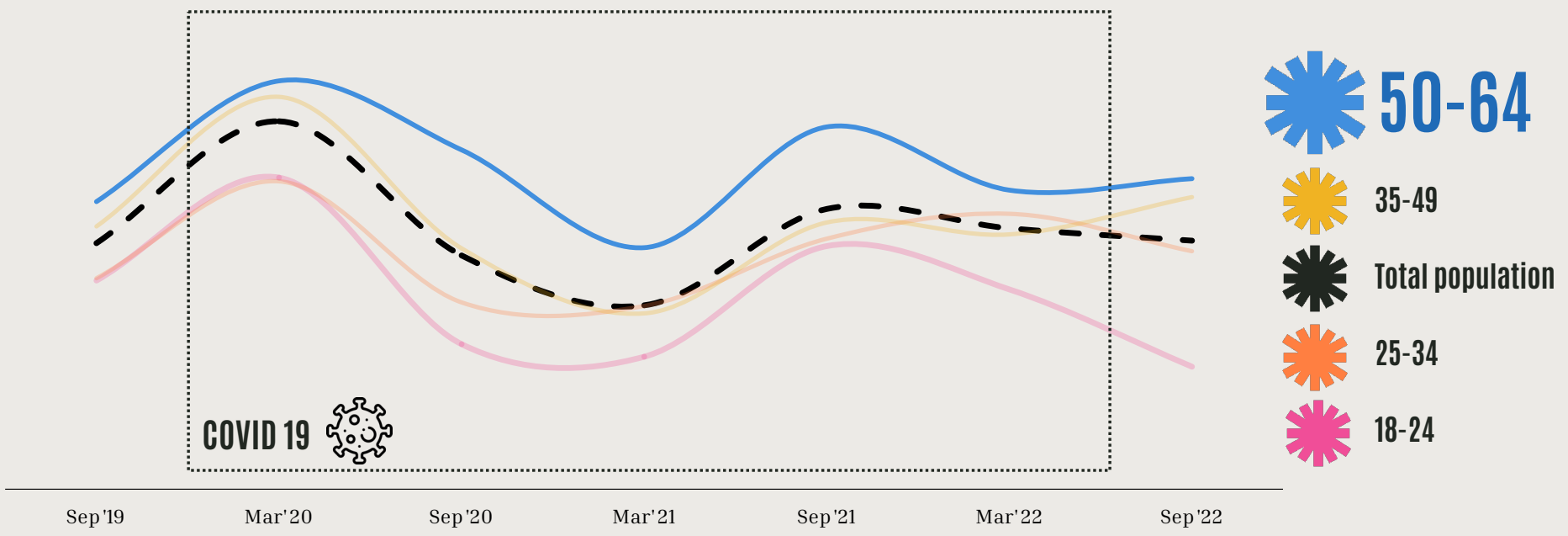
- Financial stability?
- Confidence?
- ... structural inequity: gender and generation?

*Was this the  
case during  
COVID?*



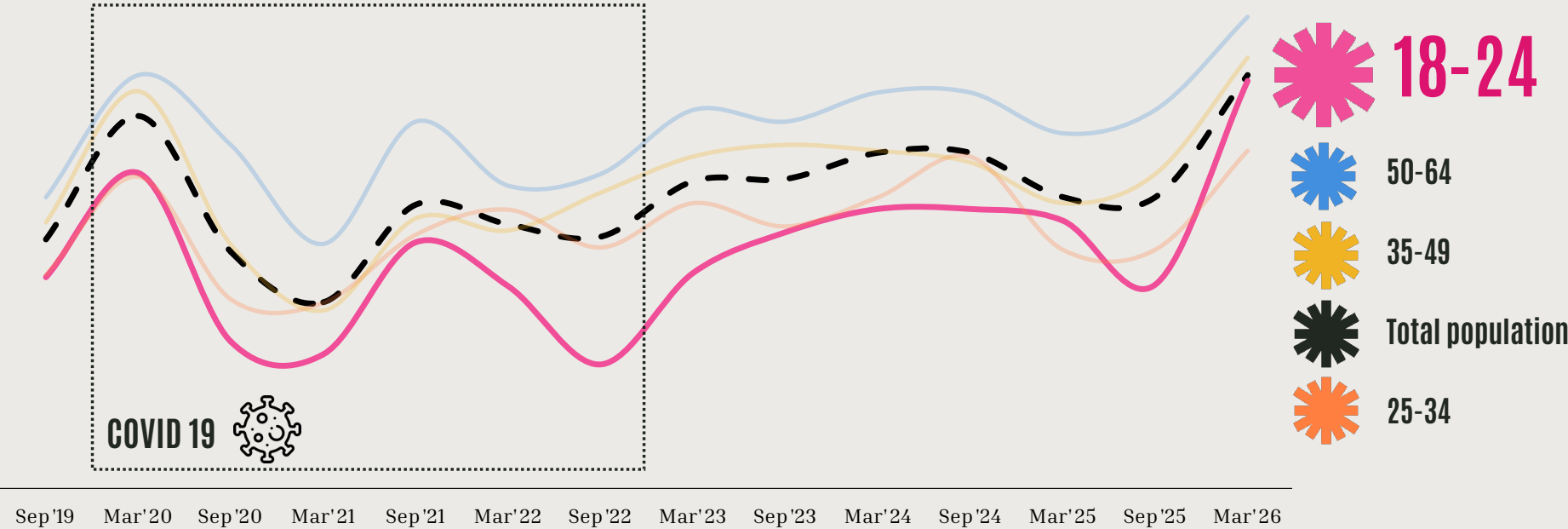
# Older Aussies have always been more pessimistic

Australian's outlook during COVID 19 pandemic – worse x age (%)



# Young people typically the most optimistic - but not anymore

Australian's outlook since the COVID 19 pandemic – worse x age (%)



B4. Thinking about life in Australia, do you think things are getting [better / same / worse]? Each Pulse wave aims to obtain a sample of n=1000 representative of the Australian population

How has this influenced

# behaviour?



# Australians are **adapting**

## NAB Consumer Sentiment Survey Q1 2026

NAB Behavioural & Industry Economics

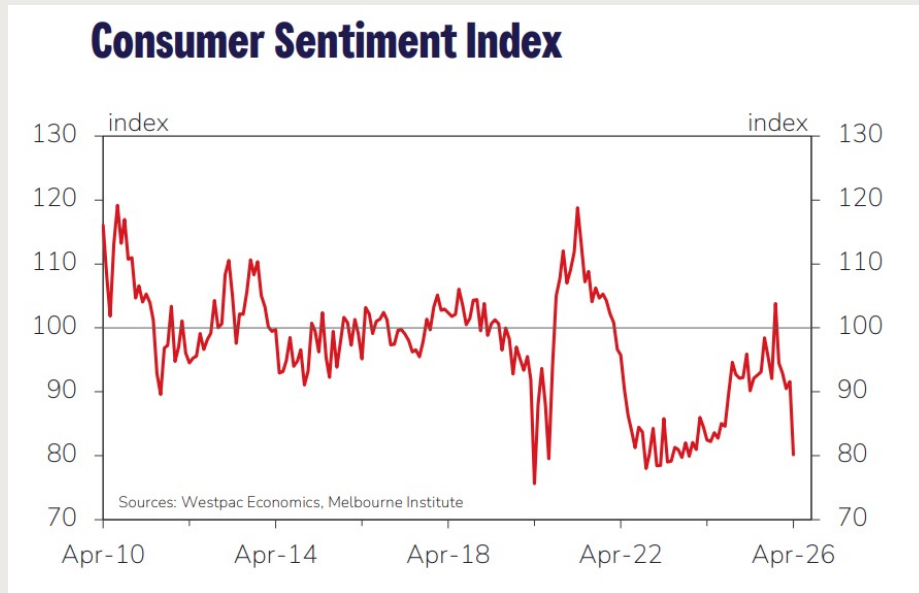
“

*..amid these challenges they are **responding with practical strategies**, from switching service providers and trading down to cheaper products, to shopping during sales and tapping into loyalty programs.*

*Rather than simply cutting back, **Australians are making deliberate and tactical choices** to stretch their budgets, demonstrating adaptability and determination against a backdrop of relentless negative headlines and growing uncertainty*

”

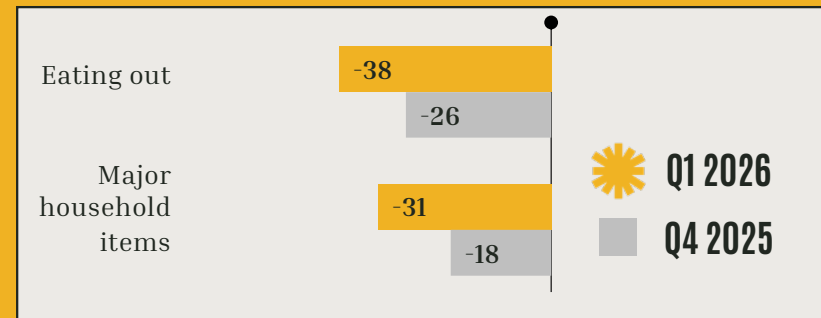
# With sentiment decreasing, Aussies are changing their behaviour



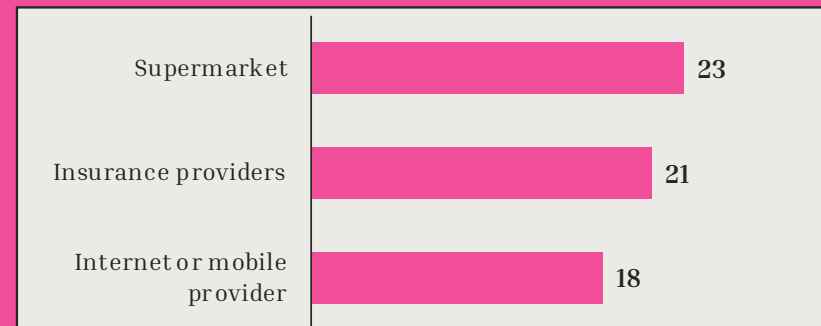
**NAB Consumer Sentiment Survey**  
**Q1 2026**

NAB Behavioural & Industry Economics

## Future intent to spend

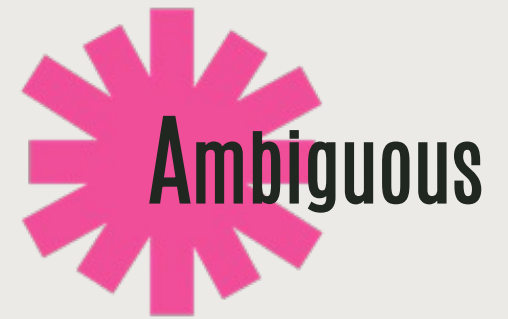


## Top 3 providers swapped



# What does the future look like?

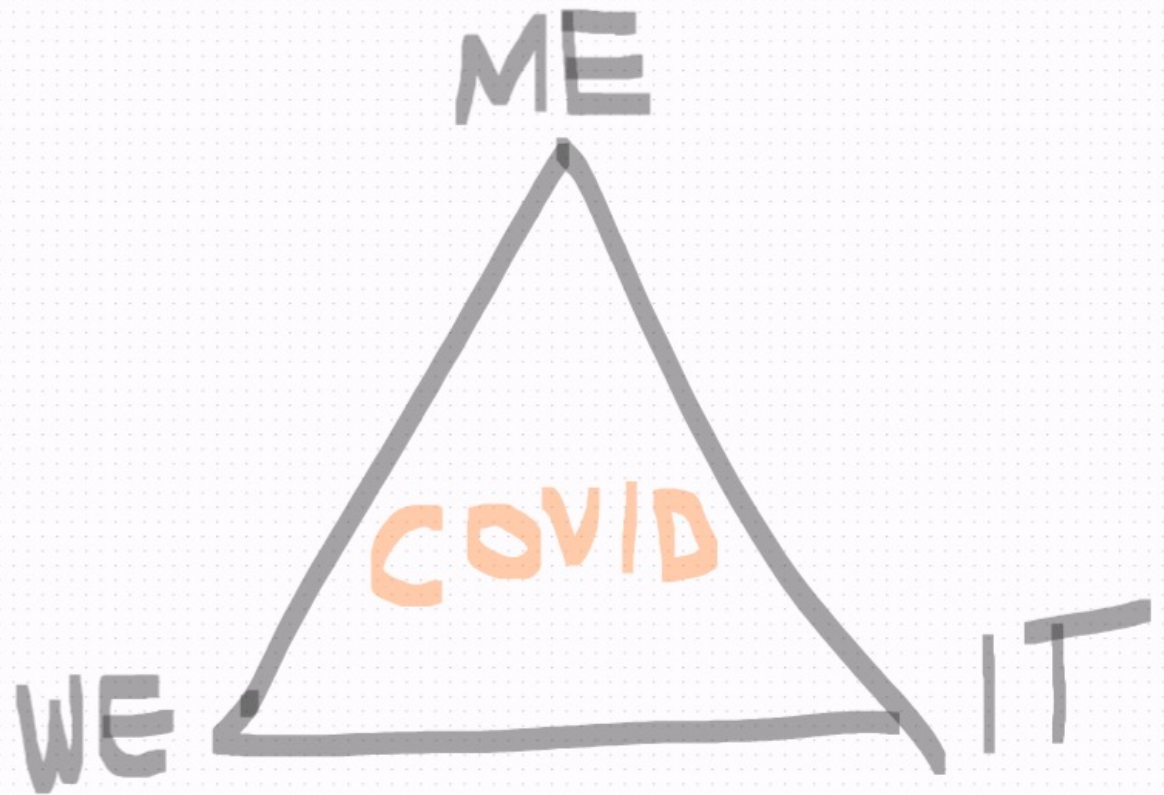
# VUCA



# Applying a systems approach...

How did COVID impact

- Me personally
- My friends and family
- Australia / The world

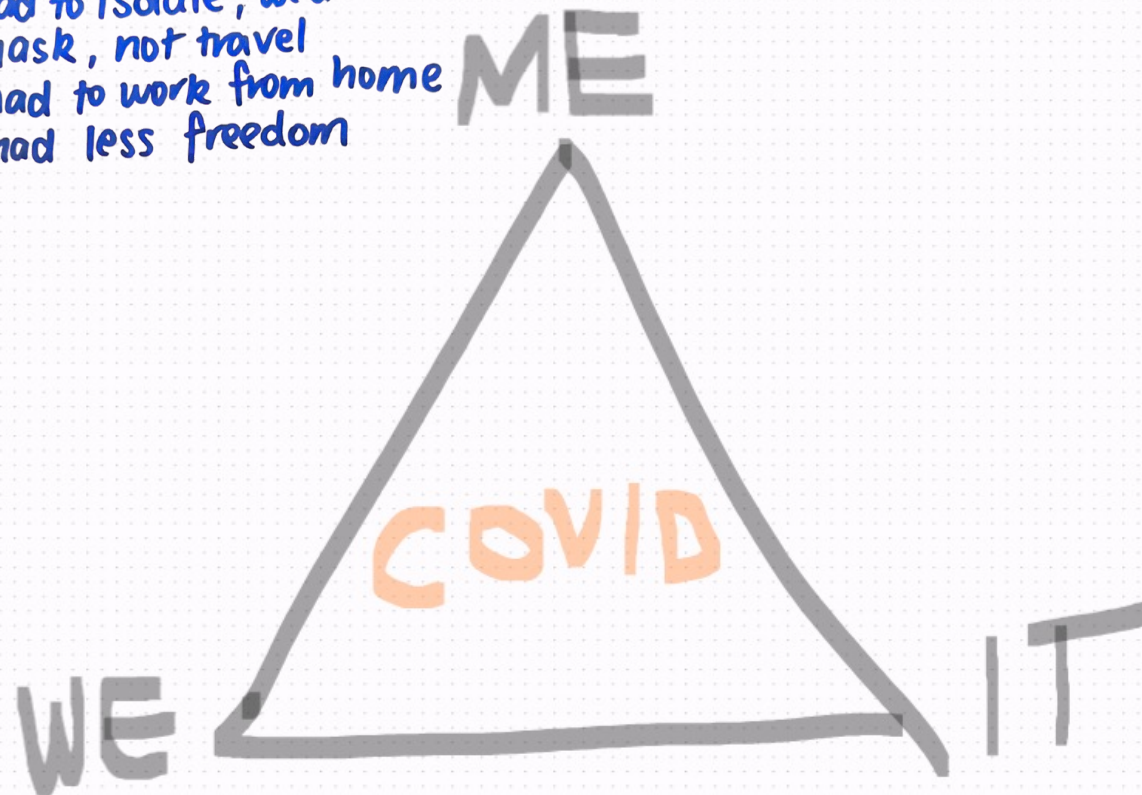


COVID 19 was  
characterised by

# COLLECTIVE ACTION

Everyone's individual  
liberties were limited  
everywhere

I had to isolate, wear  
a mask, not travel  
I had to work from home  
I had less freedom



We all had to isolate  
We all had to WFH  
We all had less freedom

The world was isolated  
The world stayed at home  
The world had less freedoms

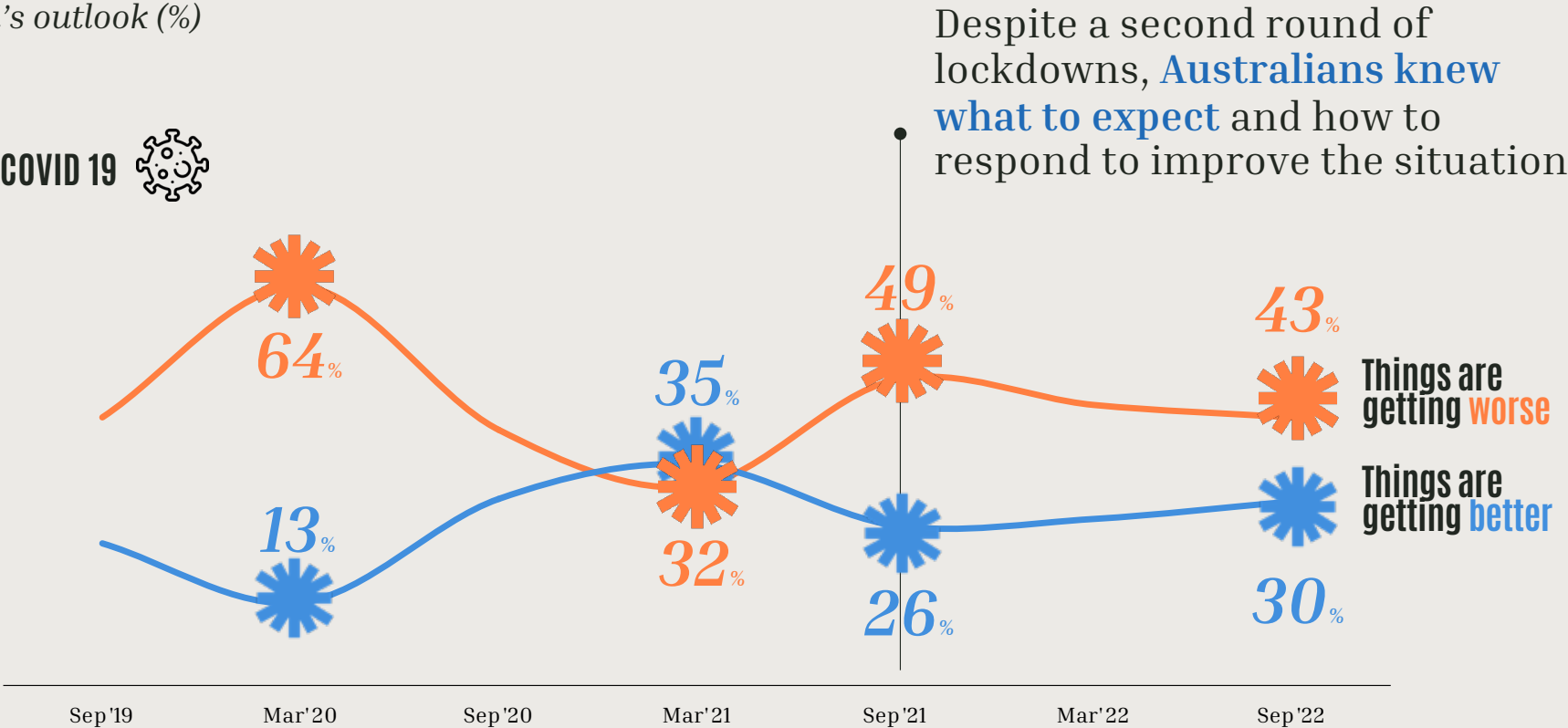


**And we sacrificed freedom in order to be all 'free' from disease**

# As the pandemic progressed outlook improved

Australian's outlook (%)

COVID 19 



B4. Thinking about life in Australia, do you think things are getting [better / same / worse]? Each Pulse wave aims to obtain a sample of n=1000 representative of the Australian population

# COVID-19 was **not** VUCA



**Volatile**

*Yes.*

*Frequent outbreaks*



**Uncertain**

*No.*

*Strict new behaviour rules to follow*



**Complex**

*No.*

*New rules created new habits and made behaviour change easy*

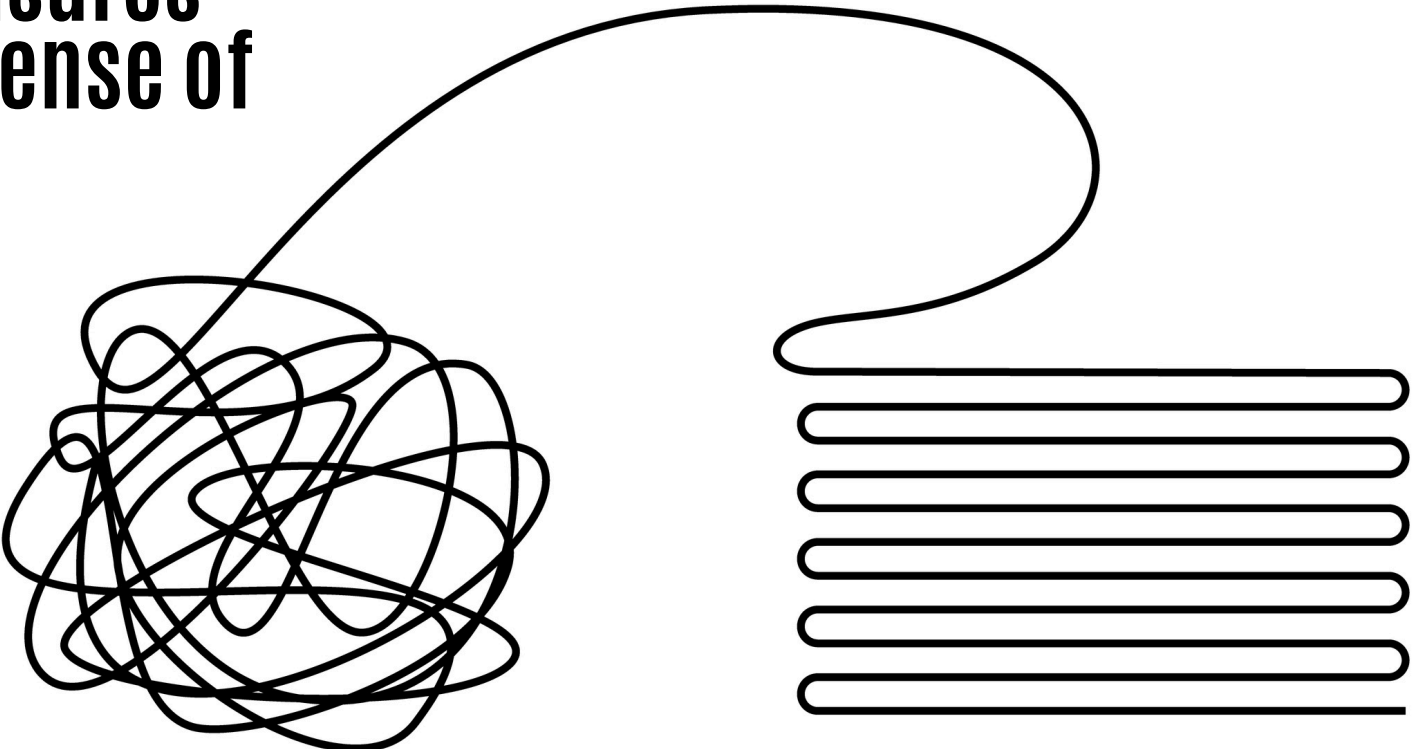


**Ambiguous**

*No.*

*Daily updates.  
24 hour news cycle  
Herd behaviour*

**During COVID 19 public health measures created a sense of**



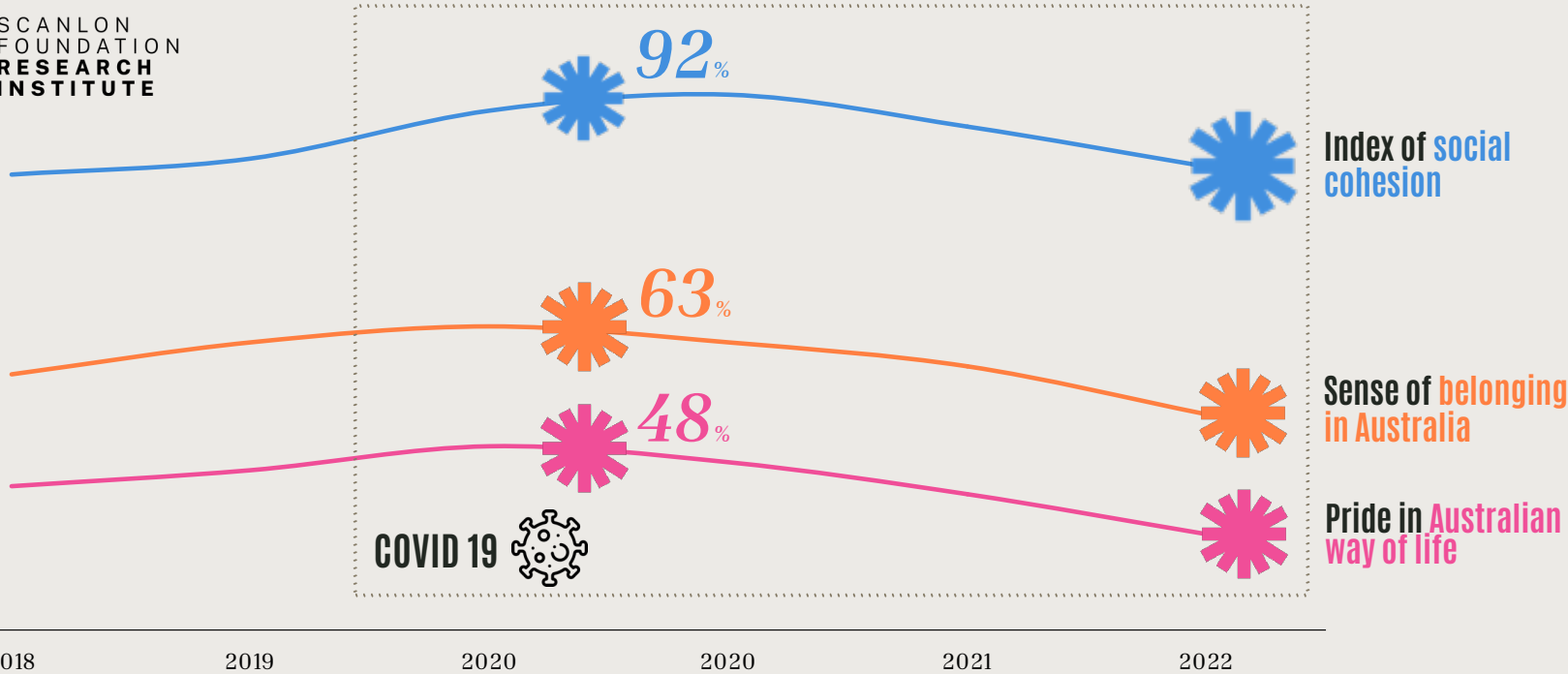
**CERTAINTY & CONTROL**

# Social cohesion peaked during the pandemic

Scanlon index of social cohesion (%)




SCANLON  
FOUNDATION  
RESEARCH  
INSTITUTE



**We all stopped using  
KeepCups, bought  
bicycles and  
puppies, stopped  
using cash**

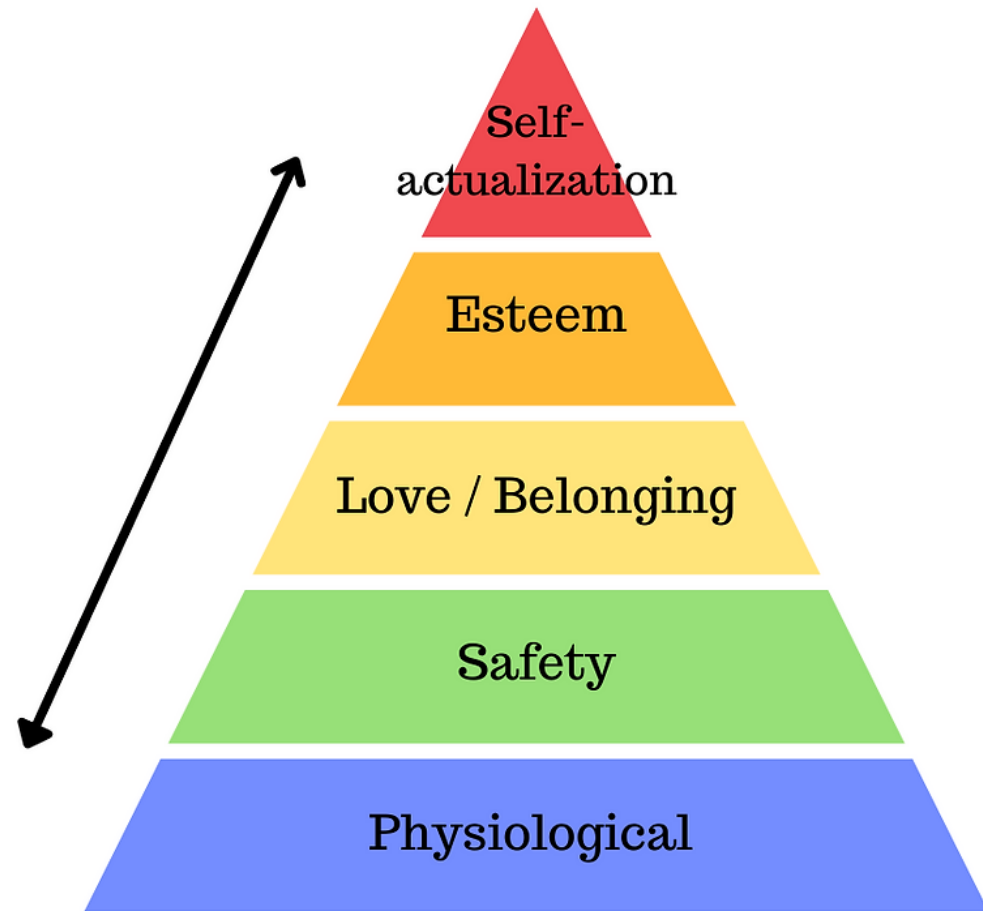


A close-up photograph of a person's hands holding a smartphone, scanning a QR code on a small white card placed on a counter. In the background, a larger tablet device also displays a QR code. The setting appears to be a service counter or checkout area with various items like a coffee cup and papers visible. The text is overlaid on the left side of the image.

**And QR codes are everywhere. Once we adopt new habits, we tend to keep them**

# Maslow!

# Belonging

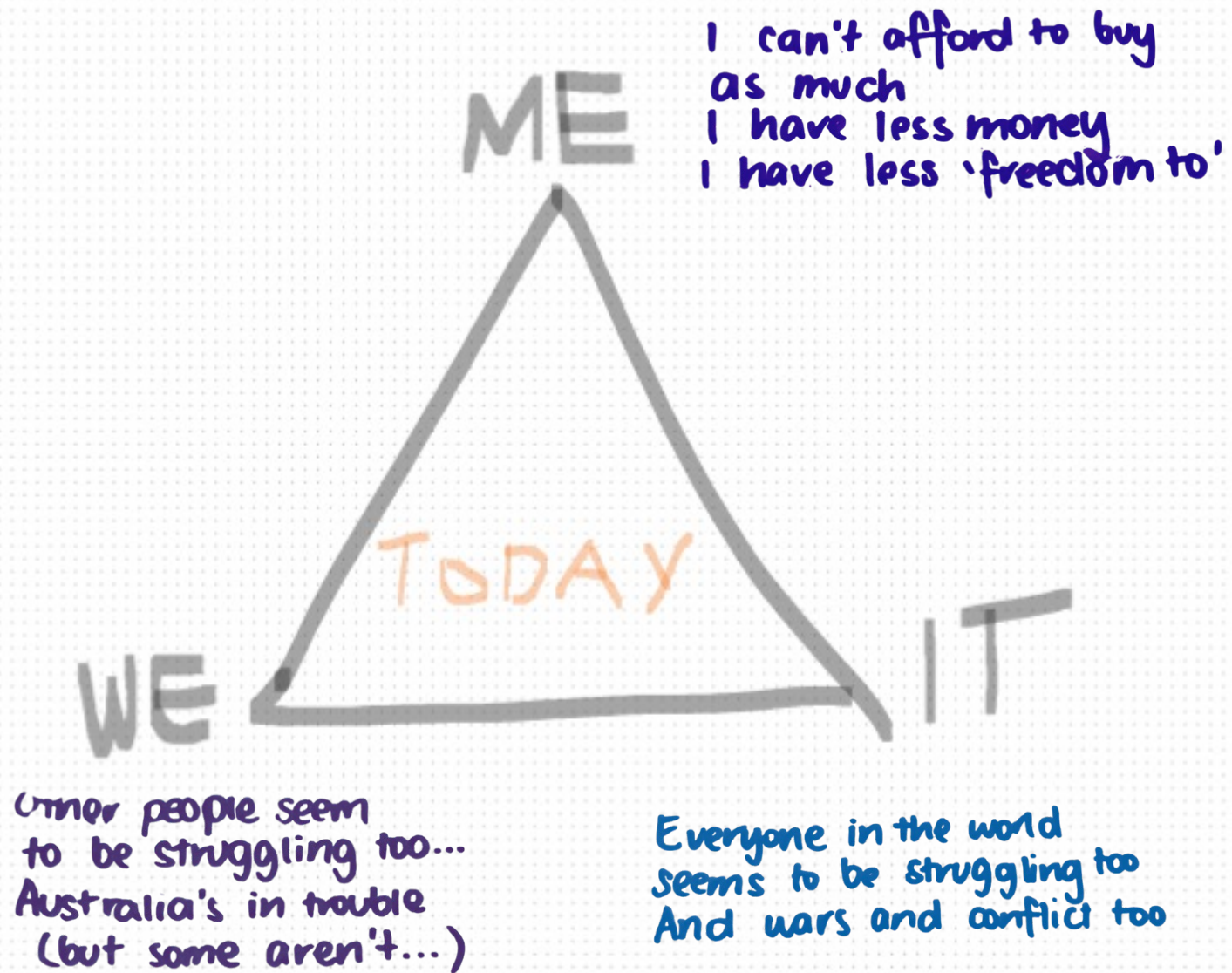


What makes the current situation  
**different?**



# Currently Australians are **FRAGMENTED**

There are no rules to follow,  
there is no clear direction  
and it's multiple things all  
at once



# Right now, **we are in VUCA**



**Volatile**

*Yes.*

*It seems like it's one thing after another*



**Uncertain**

*Yes.*

*Government isn't reacting in time.  
Costs keep going up*



**Complex**

*Yes.*

*There's new technology and everything seems hard*



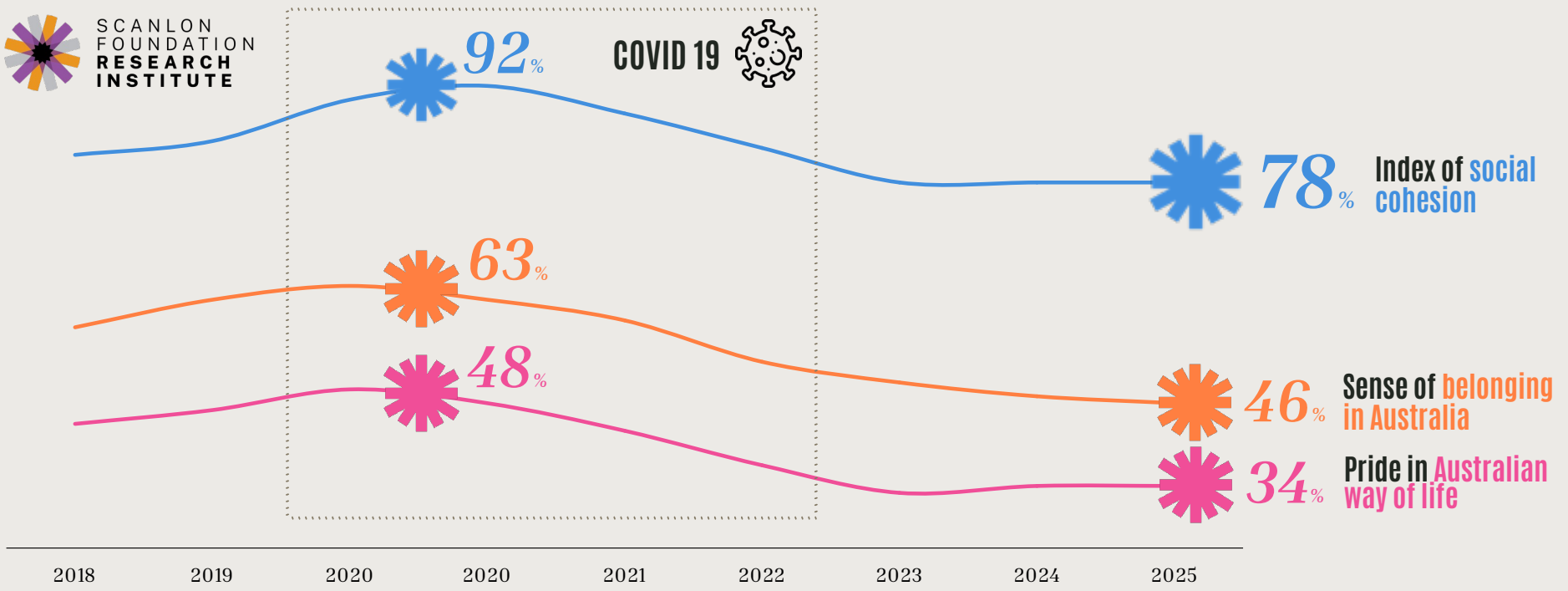
**Ambiguous**

*Yes.*

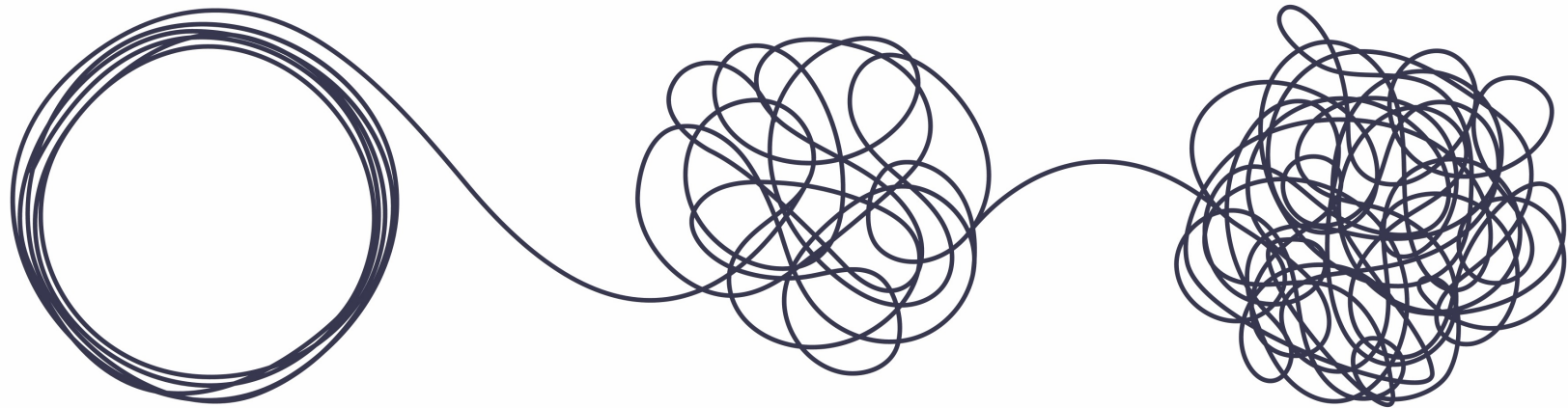
*No one has a clue what the future holds*

# Social cohesion has fallen since the pandemic: **less than half feel they belong**

Scanlon index of social cohesion (%)



**Currently it feels like things are spiraling**



**There is NO SENSE OF CONTROL**



**New habits are emerging**



THE **BUSINESS**

**HOME  
OWNERSHIP  
PIPE DREAM?**

Aspirations  
are shifting



**9 NEWS**

Pollinate | 54

# Has the 'fair go' gone?

**CLASS IS THE  
MISSING LINK IN  
AUSTRALIA'S  
GENERATIONAL  
INEQUALITY CRISIS**

**GRATTAN**  
Institute



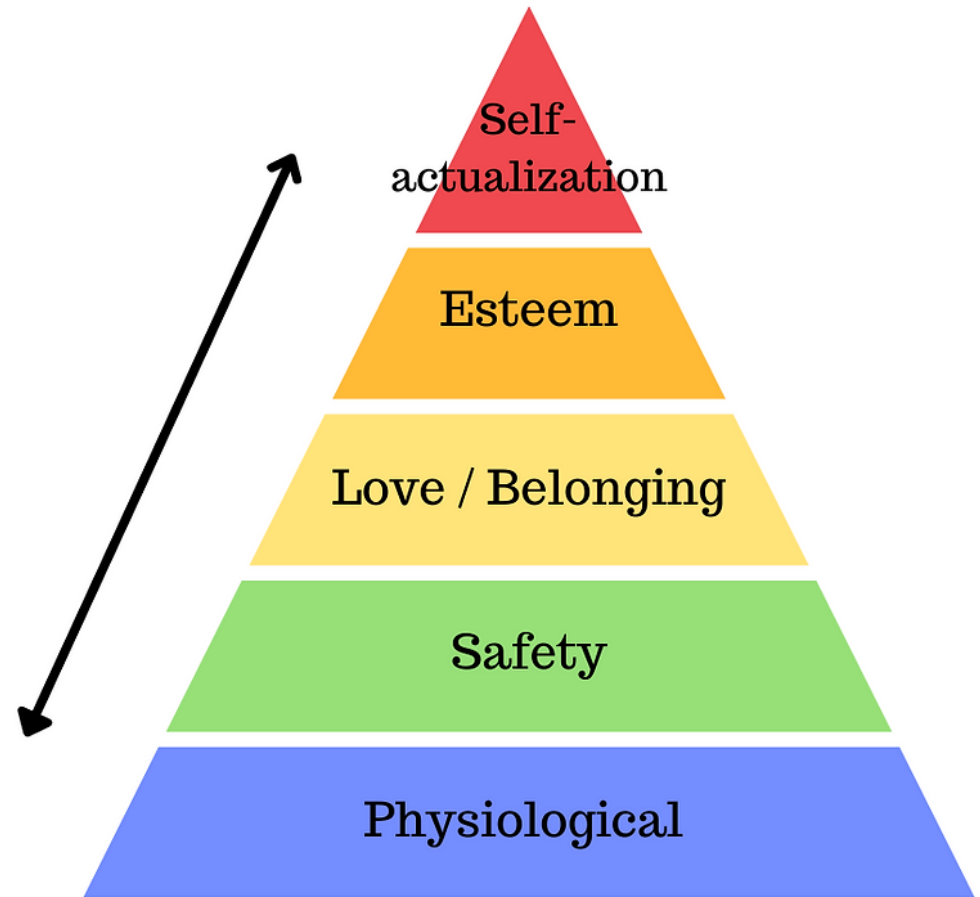
# What are the implications for brands?



*Bring back the*

# BELONGING

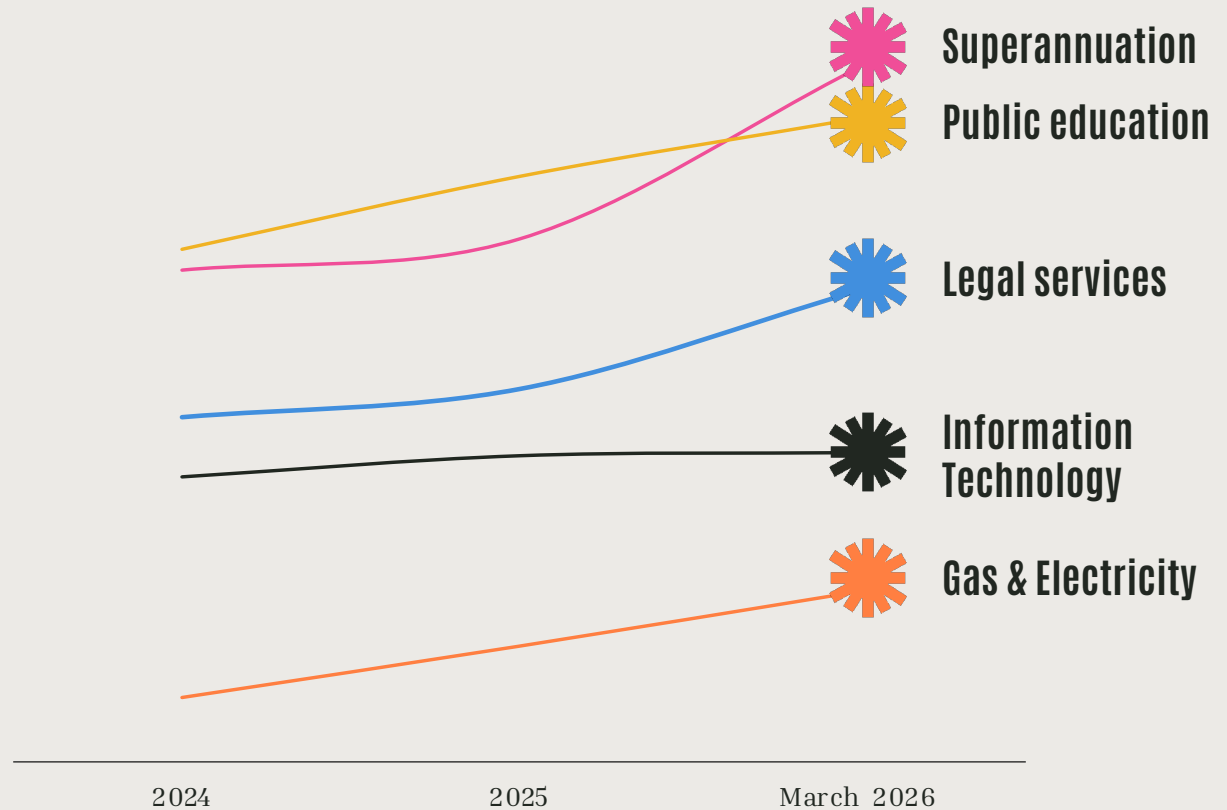
How can brands appeal to the universal needs of ALL Australians?



# Trust is also **RECOVERING**

So brands have an opportunity to demonstrate key drivers of trust:

- Competence
- Empathy
- Reliability



*Tackle VUCA by providing*

# CERTAINTY & ALIGNMENT

Make a simple **bold**  
commitment now and  
stick to it.



*And invest now in  
understanding the*

# NEW HABITS EMERGING

Habits are **hard to break** and have an insidious impact. You notice their influence once they are entrenched.



# THANK YOU

Hub Hyde Park, 223 Liverpool St, Darlinghurst NSW 2010

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

Sydney | Canberra



Interested in  
learning more?

*Find out at*  
*[info@pollinate.com.au](mailto:info@pollinate.com.au)*

# Compliance @ Pollinate

Pollinate is ISO 20252 certified, the international quality operating standard for market research agencies. We are members of The Research Society, abiding by the Professional Standards as outlined on [www.researchsociety.com.au](http://www.researchsociety.com.au) including the “Code of Professional Behaviour”. We also adhere to all state and federal legislation regarding privacy protection & data management when it comes to managing our projects.

Now we have debriefed your project, there are a couple of things we’d like to let you know...

## Third parties involved

If applicable, Pollinate engaged with third parties to deliver sample for this project e.g. for the Quantitative component...

### Quantitative

Supplier: Take 2 Research

Sample size: 1,003

M/Y of fieldwork: March 2026

If you have any questions regarding how the third parties are managed, please let us know.

## What you should have

As part of the project, you will have on file the final version of the following documents...

1. Our proposal, outlining our approach, sample size and costings
2. The Discussion Guide outlining the discussion flow of the research (if applicable)
3. The Questionnaire (Quantitative) or Recruitment Schedule & Screener (Qualitative), with the questions used to qualify participants and if relevant, a schedule with incentive amounts, research dates and times of the fieldwork
4. Our debrief, the final presentation with our findings from this project

If there’s anything you don’t have, or would like to make sure you’ve got the most recent version of, please let us know and we’ll get this to you ASAP

## Other info upon request

This varies project to project, and not all is applicable to this one, however if required we can provide other info on how fieldwork was managed...

### Quantitative

- The fieldwork method (e.g. in-person, door-to-door, CAPI, CATI etc.)
- Sampling details
- Number of fieldworkers
- Fieldwork validation methods
- Questionnaires and other visual exhibits or data collection documents
- Weighing procedures
- Estimating and imputation methods
- Number of cases used in subgroup analysis
- Reliability of the findings

## Closing your project

As the project is now complete, we’ll start our process of closing it, which involves the following...

1. De-identifying all respondent information and if applicable deleting any lists/sample sent to us by you or one of your partners
2. Collating all project materials, keeping only those we deem relevant and archiving for a period of 12 months. If applicable, we will retain video output related to this project for a period of 2 years from the date of this debrief. After this time, we will delete any project related video that’s not included as part of the final debrief document
3. Please let us know within 4 weeks of the debrief date if you would like any project materials or video retained longer than outlined above