The Growth DISTILLERY presents

Needs of the Nation.

A framework for understanding Australian consumer expectations and equipping corporations to strategically engage in the areas that drive growth.

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What this work means for you...

Clear guidance
On the issues that matter to Australians.

A playbook
On ESG strategy & how to engage with issues to avoid missteps, build deeper loyalty with existing customers and attract new ones.
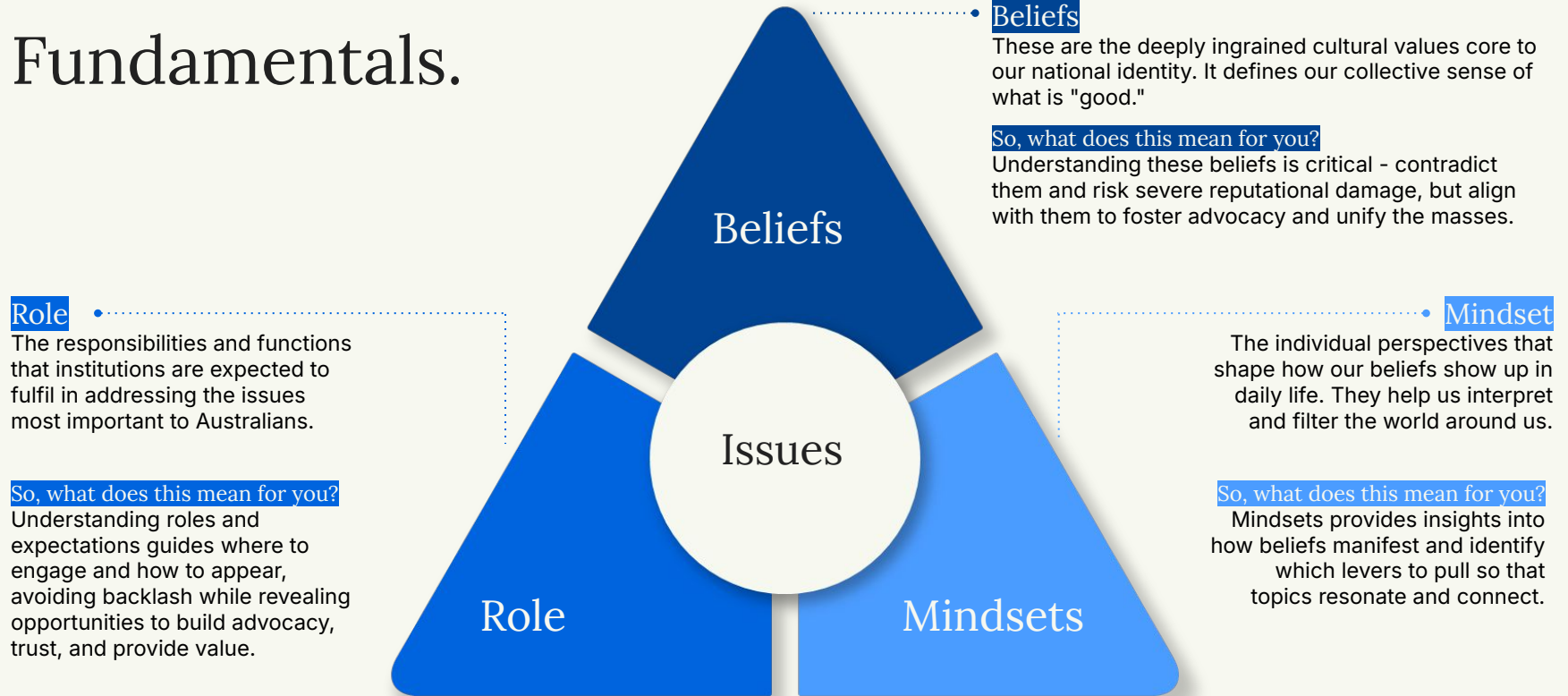
Where to play
The no fly zones and the societal issues corporations can engage with to build brand affinity & advocacy.

How to win
Tapping into our nation's beliefs will deepen engagement and allow you to connect authentically & responsibly with Australians.

The Fundamentals.

Beliefs
These are the deeply ingrained cultural values core to our national identity. It defines our collective sense of what is "good."

So, what does this mean for you?
Understanding these beliefs is critical - contradict them and risk severe reputational damage, but align with them to foster advocacy and unify the masses.

Role
The responsibilities and functions that institutions are expected to fulfil in addressing the issues most important to Australians.

So, what does this mean for you?
Understanding roles and expectations guides where to engage and how to appear, avoiding backlash while revealing opportunities to build advocacy, trust, and provide value.

Mindset
The individual perspectives that shape how our beliefs show up in daily life. They help us interpret and filter the world around us.

So, what does this mean for you?
Mindsets provides insights into how beliefs manifest and identify which levers to pull so that topics resonate and connect.

Beliefs

Issues

Role

Mindsets

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A quick word on pedigree...

Academic consultation with six experts.

Experts in:

Academia, social commentary, social history, psychology, literature and demography.

Listening and interviewing 48 Australians.

250+ hours of listening.

48 Australian adults with a broad cross section across gender, age, ethnicity, household income, household structure, time living in Australia, education levels and mindsets.

Quantitative validation with 6,000 Australians.

Validating the insights.

Robust questionnaire sizing the issues that matter most to Australians, enabling us to look at multiple sub-groups: demographics, political leaning, mindsets and ethnicity.

Act I:

The issues Australians care about
and the role they expect
corporations to play.

Corporations are falling short with Aussies on the issues they care about, despite good intentions.

We have seen a number of missteps by big corporations trying to do the right thing, but misunderstanding the core expectations of Australians is doing them a disservice and contributing to the gap between the intentions of corporations and the perceptions of Australians.

62%

consider it important for corporations to actively engage in the issues they care about.

56%

do not believe corporations are doing well in tackling the issues important to them.

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Corporations must better understand Australians to determine how & where to show up in order to build lasting brand affinity & reputation

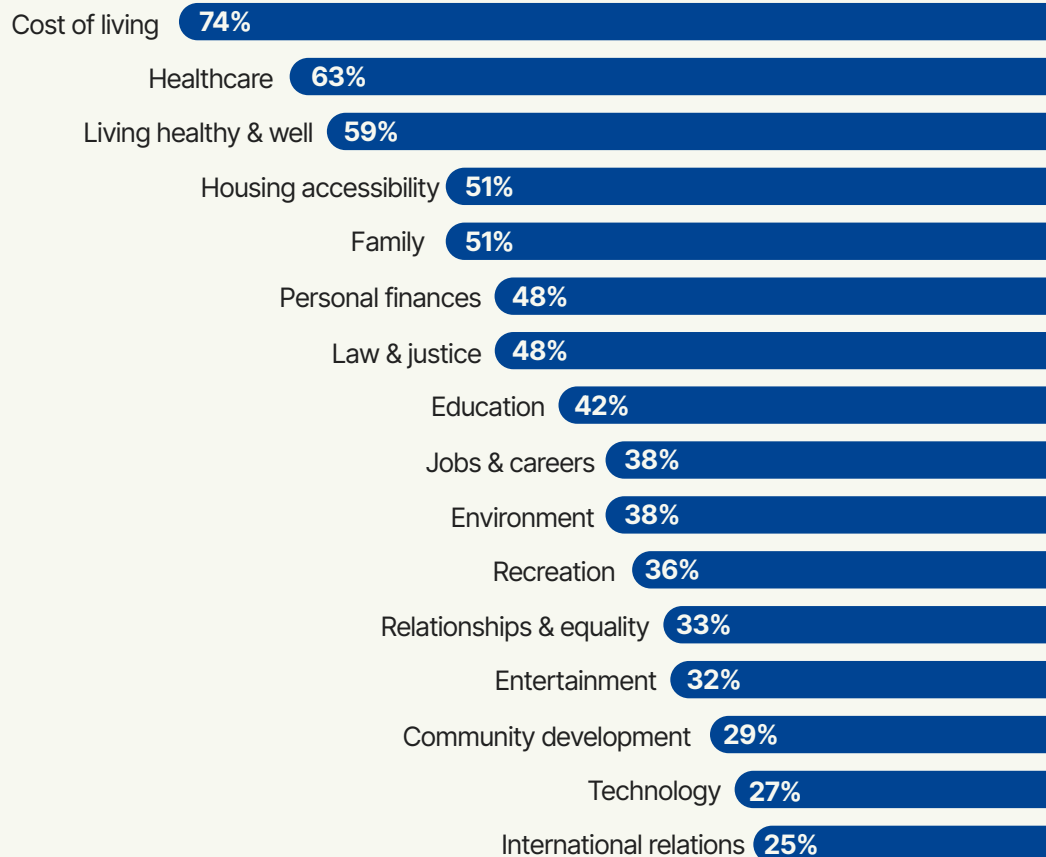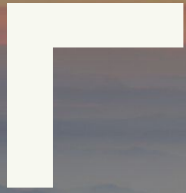THE growth DISTILLERY | TRA

What do *Australians* care about?

The most common issues centre broadly around 'quality of life' - cost of living, healthcare, living healthy and well, and housing accessibility

Issues of Importance to Australians 18+ (% Important)

Issue	%
Cost of living	74%
Healthcare	63%
Living healthy & well	59%
Housing accessibility	51%
Family	51%
Personal finances	48%
Law & justice	48%
Education	42%
Jobs & careers	38%
Environment	38%
Recreation	36%
Relationships & equality	33%
Entertainment	32%
Community development	29%
Technology	27%
International relations	25%

Q. Which of these topics are important to you personally?

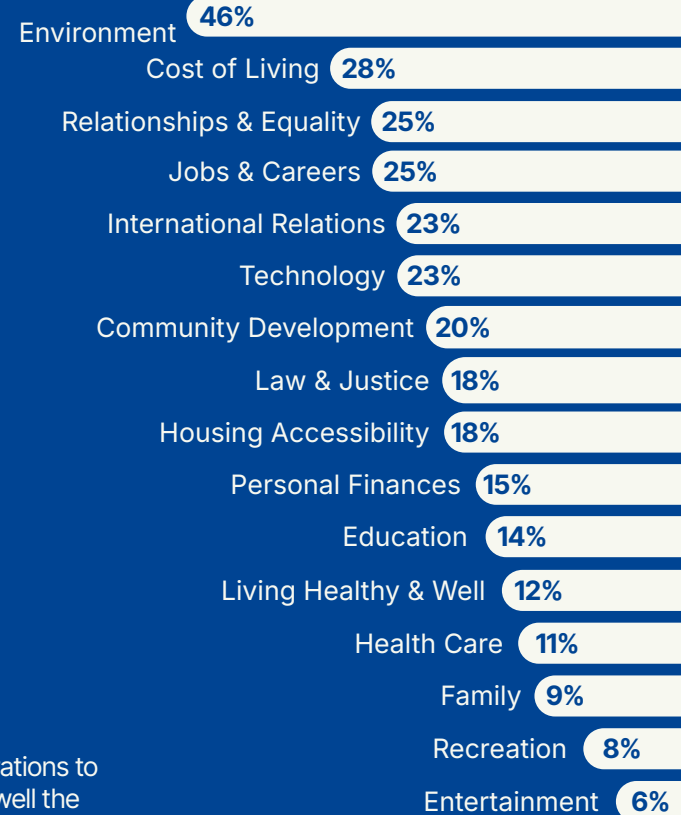THE growth DISTILLERY | TRA

But, Mind the Gap

Large corporations are doing better in some of these issues than others...

To help prioritise resources and attention, corporations need to know where Australians want them to engage and where they are perceived to be falling short.

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Significant gaps exist between public expectations of corporate engagement and the perceptions of their effectiveness.

But this means there is a meaningful *opportunity* to **close the delivery gap** for Australians on the **issues they care about.**

Corporation Performance Gap (% Gap)

Issue	Gap
Environment	46%
Cost of Living	28%
Relationships & Equality	25%
Jobs & Careers	25%
International Relations	23%
Technology	23%
Community Development	20%
Law & Justice	18%
Housing Accessibility	18%
Personal Finances	15%
Education	14%
Living Healthy & Well	12%
Health Care	11%
Family	9%
Recreation	8%
Entertainment	6%

Delivery Gap

Importance of corporations to engage **minus** How well the they are delivering on the issue.

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To cater to the issues Australians care about, corporations need to consider what's important and where they are falling short, but to make positive and lasting impact they also need to know their *right to play*.

Across all sectors, Institutions* must navigate a spectrum of roles to address the issues Australians care about most.

Institutions include media, corporations, businesses, and government.

Advocate

Focus on the **why**

Take action, lobby for necessary reforms and lead by example to drive change.

Educate & Influence

Focus on the **how**

Implement programs that explain how Australians can take action and benefit from initiatives.

Inform

Focus on the **what**

Provide clear, accurate information about initiatives to keep Australians well-informed.

No input

No input or say

There is no permission to play in this space. Speaking up can be detrimental.

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Corporations are expected to take on different roles depending on the issues of interest

While gaps exist across all issues, what you can do varies relative to your role

Advocate
Cost of Living
Environmental Concerns
Jobs & Careers
Relationships & Equality

Educate & Influence
Education
Community Development
International Relations

Inform
Living Healthy & Well
Technology
Family
Personal Finances

No input
Housing Accessibility
Healthcare
Recreation
Entertainment
Law & Justice

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But you **MUST** tread carefully...

Overstep where Australians have not given corporations permission to play in...

and beware the swift and significant consequences!

Don't just take our word for it.

Australians judge the intent and can feel the lack of authenticity

"Corporate Australia should **stay firmly out of politics or social issues.** Any time when brands get involved in politics, whether right or left, is dangerous. Corporations are profit-oriented entities, and they **have no role deciding policy that concerns social issues.**"
Male, 18-25 Metro ACT

"I do not believe it is the role of corporate Australia to try and make changes to the ideologies of Australians. *They exist to sell goods and services and do not know what is best for the community."*
Male, 18-25, Metro VIC

"The involvement of various organisations, and corporations in support of the yes vote for voice referendum **was divisive and ultimately ineffective** as shown by the result. **It was a waste of money** which would have been **better used if that money was spent on actual improvements in indigenous communities health care.**"
Male, 45 – 54, NT

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So *where* should Corporations play?
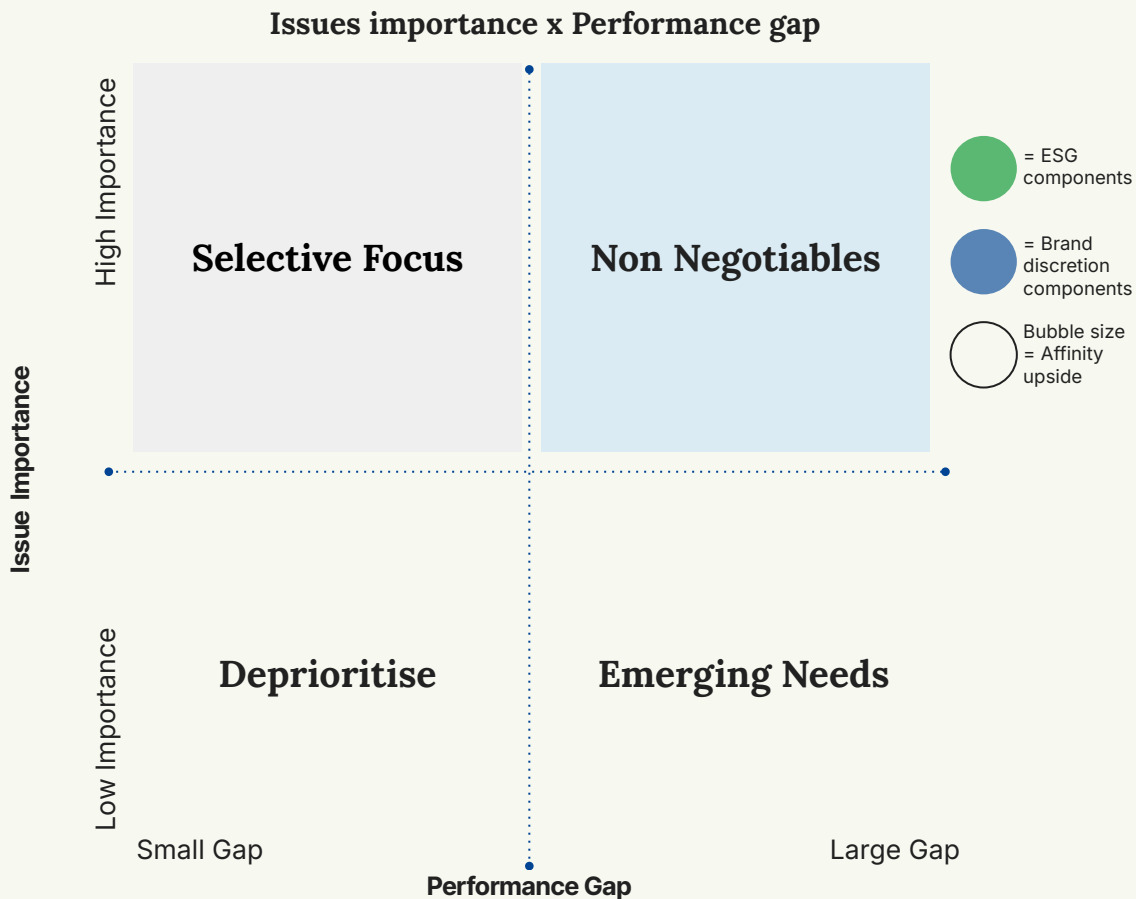
Non Negotiables:
Agnostic of sector or industry you must have a presence.

Selective Focus & Emerging Needs:
Exercise discretion based on proximity to your category and audience of focus.

Deprioritise:
Least important issues to consumers and the smallest delivery gaps, resource can be better allocated to other sections for greater impact.
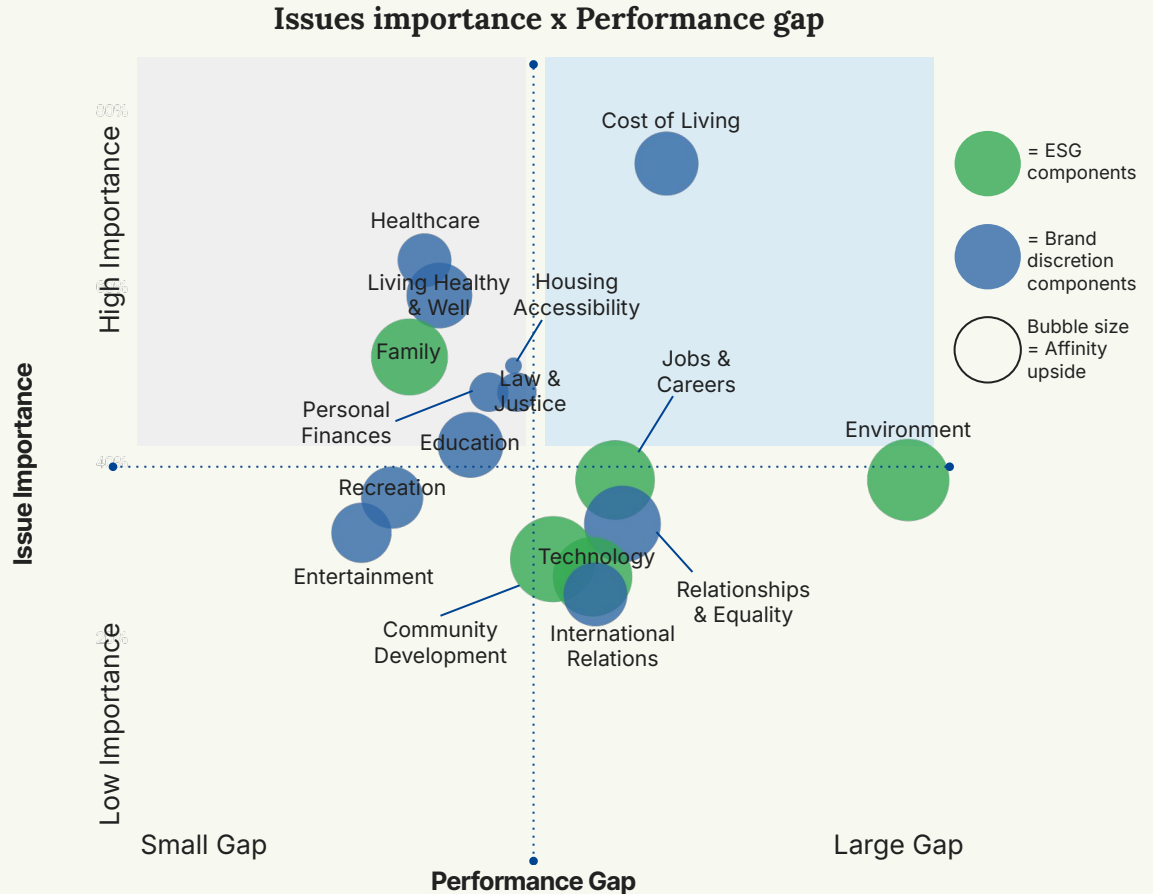
Issues importance x Performance gap

Issue Importance

High Importance

Low Importance

Selective Focus

Non Negotiables

Deprioritise

Emerging Needs

Small Gap

Large Gap

Performance Gap

= ESG components

= Brand discretion components

Bubble size = Affinity upside

Key priorities for corporate action.

Prioritise ESG components & gaps.
There is no one-size-fits-all approach to ESG planning & execution, but there are some common issues that are often included, and you will require a an understanding of where the gaps are to underpin your strategy.

Balance importance with precision.
For issues that are important but where gaps are smaller or less ESG-centric, approach them with discretion. Consider both your industry, brand positioning and role carefully when determining how to address these issues.

Issues importance x Performance gap

Issue Importance

High Importance — Low Importance

Performance Gap

Small Gap — Large Gap

- Cost of Living
- Healthcare
- Living Healthy & Well
- Housing Accessibility
- Family
- Personal Finances
- Law & Justice
- Education
- Jobs & Careers
- Environment
- Recreation
- Entertainment
- Technology
- Relationships & Equality
- Community Development
- International Relations

Legend:
- = ESG components (green)
- = Brand discretion components (blue)
- Bubble size = Affinity upside

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Knowing the issues to prioritise is only half the picture...

The other half is <mark>executional excellence</mark>

If done right it insulates brands against the unknown & unlocks broad appeal and deep engagement.

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How do you do this?

To reduce the risk of marginalising consumers but still appealing to their motivations and aspirations:

Align to the most relevant belief for the given issue.

Doing this can help rally the masses and reduce alienating consumer segments.

Tailor to mindsets as beliefs will show up differently in individuals.

Delivery can then be adapted to increase emotional appeal and connection to the issue.

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Act II:

Australians are clear on where corporations can play and in what capacity, but to truly connect, how brands show up and speak ultimately defines their impact...

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There are *five beliefs* that underpin our national identity, unique to Australia, and are the backbone of what makes our nation great.

Belief in our People

Its essence:
We have the right to be treated equally and everyone gets a fair go.

Belief in our Place

Its essence:
We have the right to feel secure, safe and rooted.

Belief in our Land

Its essence:
We live in a land of unique possibilities.

Belief in our Ourselves

Its essence:
We give it a go, we have tenacity and grit.

Belief in Each Other

Its essence:
We look out for our own and have each other's backs.

These beliefs are universally held and shared - we are united in the inherent role they play to the future success of our nation.

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3 in 4 western consumers have parted ways with a brand over a conflict in values.

Consumers are moving more quickly towards brand & organisations that align with their beliefs.
Cultural beliefs are the foundation upon which corporations must build to foster loyalty & attract new customers.

Anchoring issues to beliefs will unlock *greater positivity and impact* for corporations.

Different issues anchor closer certain to Australian beliefs. For example, concerns about the environment are inherently linked to our beliefs in our place and our land, whereas issues around relationships and equality are linked closest to our beliefs in our people, place and each other.

By consciously using beliefs when corporations talk to Australians on these issues, while ensuring they play the role expected of them, corporations unlock the ability for deeper connection and, in some instances, the opportunity to build advocacy, **both for a cause but also themselves.**

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An example of how aligning with beliefs can have significant upside

Situation	Beliefs	Upside
Bunnings has built a brand reputation aligned with Australia's beliefs over decades. → Community sausage sizzles → Age inclusive workforce → Kids DIY classes	Their actions align with the most universal and enduring beliefs we have in our **People, Place** and **Each Other.**	Bunnings claimed #1 most trusted brand in Australia Hardware store of the year, 7 years in a row. 95% of Australian hardware shoppers shop at Bunnings.

#1
Most trusted brand by Australian consumers in 2023

93%
Average customer satisfaction rating over 12 month in 2023

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But...

Beliefs are insufficient on their own. It is our *individual mindsets* that dictate how our beliefs show up in our daily lives.

Mindsets are the lenses we apply to help help us navigate the world around us. They help us interpret issues, process information, and make decisions.

While individuals generally have a default set of mindsets, these can vary depending on the context. Mindsets are individually held and transcend demographic boundaries.

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Mindsets can be a much stronger predictor of human behaviour than demographics.

Scott Morrison

Born 1968
Raised in Sydney
Married once
Two Children
Wealthy
Famous

Hugh Jackman

Born 1968
Raised in Sydney
Married once
Two Children
Wealthy
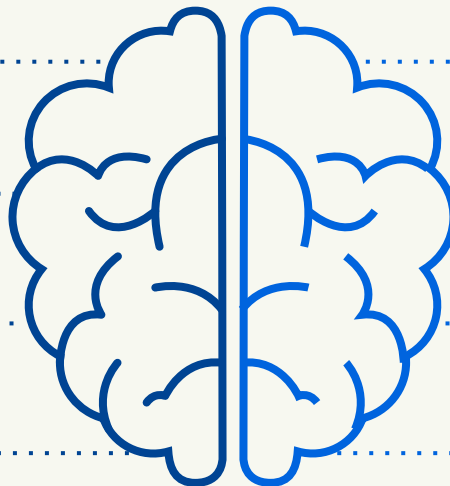Famous

So... what are mindsets?

There are four mindset dichotomies that dictate how our beliefs manifest and show up in our lives. We each have a 'default mode' when it comes to how we behave and react to the world around us, shaped by multiple factors including our environment, upbringing and natural disposition.

Traditional (68%): value long-established customs, preferring stability over change.

Collectivist (36%): prefers being part of an extended family & broader community.

Mainstream (51%): aligns with widely accepted norms and popular trends within society.

Fixed (53%): happy with their position in life.

Progressive (32%): embraces innovation and reform, seeking to challenge and improve current systems and norms.

Individualist (64%): prefers to focus on themselves and their immediate family.

Unique (49%): stands out from the norm and embraces unconventional ideas and originality.

Growth (47%): looking to get ahead in life and improve their position.

Mindsets provide guidance to the most potent engagement levers.

Our individual mindsets are the lens through which we see an issue and respond to messages. By leaning on particular markers that resonate with each mindset, corporations can engage Australians more effectively.

So, what are the markers corporations must be looking to?

Traditional vs. Progressive

Honouring heritage with time-tested traditions versus pioneering the future with data driven innovation.

Traditional

Authority
Establish credibility by upholding to high quality standards, and leaning on proven before results & initiatives to instil confidence.

Consistency
Reliable, ensuring coherent, dependable coverage and opinions.

Fairness
Balanced reporting, voicing multiple perspectives and the underrepresented.

Sanctity
Uphold societal values and social norms, respecting individual and institutional integrity.

Progressive

Proof points & rationale
Present data-driven evidence, with rationale and the outcome in mind.

Purpose & Possibility
Inspire audiences with visions of future advancements and positive change.

Disengage with status quo
Challenge traditional norms and promote innovative reforms and perspectives.

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Collectivist vs. Individualist

Fostering community and cooperation versus valuing personal freedom and autonomy.

Collectivist

Social proof
Highlight collective actions and shared experiences.

Affiliation
Promote unity and shared identity through inclusive & relatable storytelling.

Cooperation
Encourage collaboration between corporations and the public.

Loyalty and trust
Build long-term trust by consistently demonstrating reliability and commitment to the community.

Local
Cover local stories and issues, emphasising community benefits and personal connections.

Individualist

Autonomy
Highlight stories that emphasize personal choice and self-determination.

Freedom
Champion the right to free expression and access to diverse viewpoints.

Affirmation
Celebrate individual achievements and personal stories, acknowledging unique contributions.

Directness
Communicate clearly and straightforward, staying transparent and honest.

Reciprocity
Foster a two-way relationship with audiences, valuing their feedback.

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Mainstream vs. Unique

Finding comfort in the familiar versus thriving on uniqueness and individuality.

Mainstream

What's popular
Use trends and widely accepted ideas to shape content and appeal to broad audiences.

Conforming
Meet audiences where they are.

Low risk
Emphasise safety, stability and minimal risk.

Societal proof and norms
Highlight examples of successful adoption and positive outcomes by corporations.

Unique

New and different
Highlight and create innovative and unconventional ideas to captivate and engage audiences.

Trial and experimentation
Showcase new approaches and experimental ideas, emphasising potential for positive change.

Stand out
Showcase unique corporate achievements and contributions to foster a sense of pride and distinction.

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Growth vs. Fixed

Chasing ambitious dreams and taking risks versus embracing steady progress with balanced stability.

Growth

Goals and ambition
Showcase visionary projects and encourage community participation in ambitious goals.

FOMO
Create excitement by emphasising the unique benefits and opportunities of consumption.

Take risks
Highlight the positive outcomes of taking calculated risks, follow through with own storytelling and actions.

Change and transformation
Emphasise the potential for meaningful change and transformation.

Fixed

Strive for balance
Promote a balanced perspective, emphasizing steady progress and balance.

Optimism
Focus on positive outcomes and that corporation actions lead to a better future.

Slow but steady
Continue to inform, gradually progressing with improvements.

Reassurance
Reinforce the role of corporations to improve the life of all Australians.

What all of this means for *Corporations*:

Prioritise Issues

For maximum impact, align with the issues that consumers care about and where you can close the performance gap:
Cost of Living, Environment, Jobs & Careers, Healthcare

Play your Role

The role corporations should play is dependent on both the issue being addressed and the brand of the organisation. Deliver on the role expected of you and acknowledge the no fly zones.

Identify Beliefs

Anchor to the most relevant belief for the issue, and whatever you do, don't go against the nation's belief system.

Link to mindsets

Tailor your message to targeted mindsets for maximum impact, while being mindful of how different mindsets may interpret your message and actions.
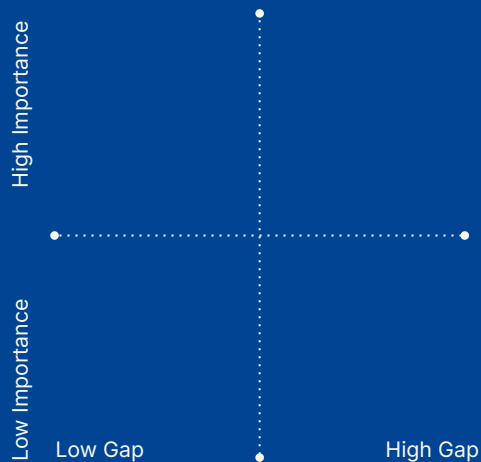
Act III:

Applying the framework to audiences of interest.

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Your playbook on meeting your audience's needs.

High Importance

Low Importance

Low Gap   High Gap

Issues to prioritise.

Issues of concern.

Where to focus.

Our role to play.

Beliefs to anchor to.

Where are they going.

How & **where** to show up.

Mindsets to engage.

Engagement Levers

Who you're engaging.

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Under 40s.

High Importance
Low Importance

Cost of living

Jobs & careers

Environmental concerns

Low Gap   High Gap

	Cost of Living	Jobs & careers	Environmental concerns
Issues to prioritise.			
Issues of concern.	Grocery costs Utility costs Inflation	Work-life balance Employment & job creation	Climate change mitigation Green Energy
Your role to play.	Advocate ● Engage in social impact and advocacy ● Simplify complex issues	Advocate ● Encourage feedback from community ● Educate with factual information	Advocate ● Actively shape policy & legislation ● Manage national resources & infrastructure
Beliefs to anchor to.	Belief in our People & Place	Belief in our People & Ourselves	Belief in our Place & Land
Where are they going.	Tiktok Podcasts Social media	Tiktok Blogs Podcasts	Tiktok Blogs Podcasts

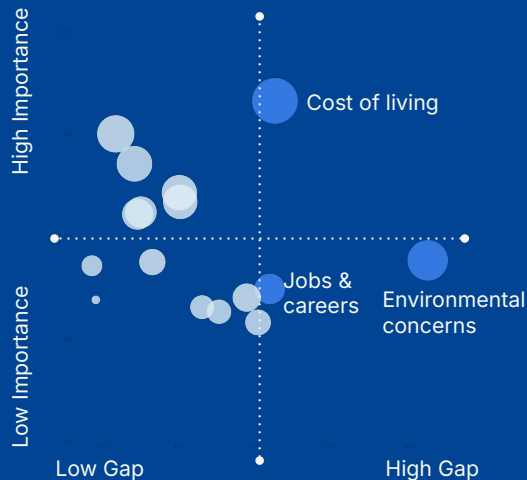|	Progressive	Individualist	Mainstream	Growth
Mindsets to engage.				
Engagement Levers	Proof points Purpose & possibility Change the status quo	Autonomy Freedom Affirmation Directness Reciprocity	What's popular Conforming Low risk Societal proof and norms	Change & transformation Goals & ambition FOMO Take risks

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Over 40s.

High Importance / Low Importance

Cost of living

Jobs & careers

Environmental concerns

Low Gap — High Gap

	Cost of Living	**Environmental concerns**	**Jobs & Careers**
Issues to prioritise.			
Issues of concern.	Grocery prices Utility costs Transport prices	Management of natural resources Climate change mitigation	Work-life balance Employment & job creation Labour rights
Your role to play.	Advocate ● Regulate businesses and institutions ● Actively shape policy and legislation	Advocate ● Actively shape policy and legislation ● Regulate businesses and institutions	Advocate ● Engage in social impact and advocacy ● Amplify individual voices to shape policy
Beliefs to anchor to.	Belief in our People & Place	Belief in our Place & Land	Belief in our People & Ourselves
Where are they going.	Radio Printed media TV	Radio WOM News websites	Radio Government websites WOM

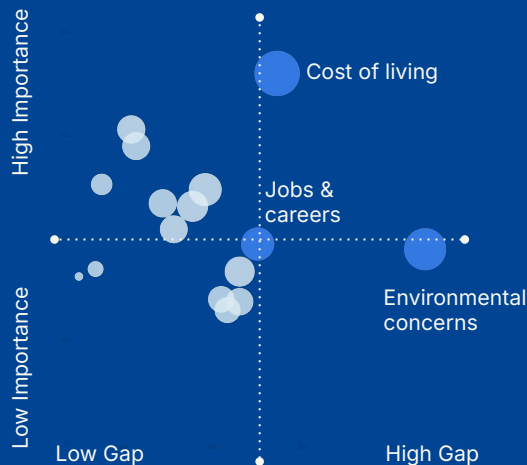|	**Traditional**	**Individualist**	**Mainstream**	**Fixed**
Mindsets to engage.				
Engagement Levers	Authority Consistency Fairness Sanctity Proven before	Autonomy Freedom Affirmation Directness Reciprocity	What's popular Conforming Low risk Societal proof and norms	Strive for balance Optimism Stability Reassurance

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Metropolitan Australia.

Australians living within capital cities.

High Importance — Low Importance

Low Gap — High Gap

- Cost of living
- Jobs & careers
- Environmental concerns

	Cost of living	Environmental Concerns	Jobs & Careers
Issues to prioritise.			
Issues of concern.	Grocery costs Utility costs Transport prices	Climate change mitigation Green energy	Work-life balance Employment & job creation
Your role to play.	Advocate ● Simplify and clarify complex issues ● Provide constructive solutions	Advocate ● Actively shape policy & legislation ● Regulate businesses & institutions	Advocate ● Respond to national incidents ● Authentic and motivational leadership
Beliefs to anchor to.	Belief in our People & Place	Belief in our Place & Land	Belief in our People & Ourselves
Where are they going.	News websites YouTube TikTok	Podcasts TikTok Government sites	YouTube TikTok Government sites

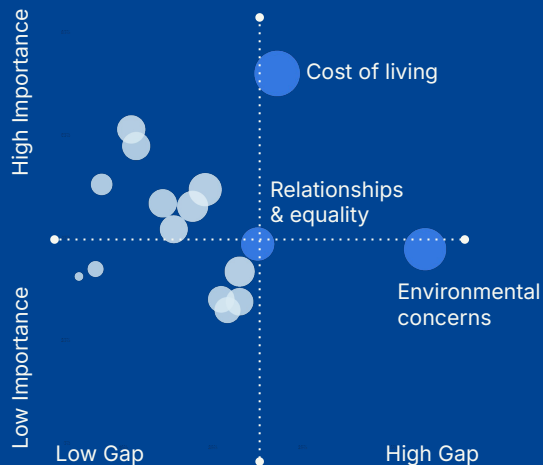|	Progressive	Individualist	Mainstream	Growth
Mindsets to engage.	Progressive	Individualist	Mainstream	Growth
Engagement Levers	Proof & rationale Purpose & possibility Challenge status quo	Autonomy Freedom Affirmation Directness Reciprocity	What's popular Conforming Low risk Social proof & social norms	Goals & ambition FOMO Take risks Change & transformation

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Regional Australia.

Australians not living within capital cities.

High Importance — Low Importance (vertical axis)
Low Gap — High Gap (horizontal axis)

- Cost of living
- Relationships & equality
- Environmental concerns

	Cost of living	**Environmental Concerns**	**Relationships & Equality**
Issues to prioritise.			
Issues of concern.	Grocery prices Utility costs Transport prices	Environmental conservation Management of natural resources	Domestic violence prevention & support Gender equality Disability rights
Your role to play.	Advocate ● Actively affecting communities ● Managing national resources	Advocate ● Actively shape policy and legislation ● Manage national resources	Advocate ● Encourage feedback from the community ● Engage in social impact and advocacy
Beliefs to anchor to.	Belief in our People & Place	Belief in our Place & Land	Belief in our People, Place & Each Other
Where are they going.	Printed media WOM Social media	Radio WOM Search	WOM Government websites Podcasts

	Traditional	**Individualist**	**Unique**	**Fixed**
Mindsets to engage.				
Engagement Levers	Authority Consistency Fairness Sanctity Proven before	Autonomy Freedom Affirmation Directness Reciprocity	New and different Trial and experimentation Stand out	Strive for balance Optimism Stability Reassurance

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High affluents.

Top 10% household income.

Low Importance — High Importance (vertical axis)
Low Gap — High Gap (horizontal axis)

Jobs & careers
Environmental concerns
Relationships & equality

	Environmental Concerns	Jobs & Careers	Relationships & Equality
Issues to prioritise.			
Issues of concern.	Environmental conservation Green energy	Work-life balance Labour rights and job creation	Domestic violence prevention & support Gender equality Cultural equality
Your role to play.	Advocate • Actively shape policy & legislation • Manage national resources	Advocate • Authentic and motivational leadership • Encourage feedback from the community	Advocate • Encourage feedback from the community • Empathise and highlight human experiences
Beliefs to anchor to.	Belief in our Place & Land	Belief in our People & Ourselves	Belief in our People, Place & Each Other
Where are they going.	TikTok Conferences/Webinars News websites	Aggregators TikTok Radio	News websites Radio YouTube

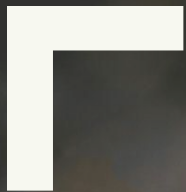|	Progressive	Collectivist	Mainstream	Fixed
Mindsets to engage.				
Engagement Levers	Proof & rationale Purpose & possibility Challenge status quo	Social proof Affiliation Cooperation Loyalty & trust Local	What's popular Conforming Low risk Social proof & social norms	Strive for balance Optimism Stability Reassurance

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Want to know more?

Needs of the Nation is a two part exploration presented by **The Growth Distillery** in partnership with TRA.

We invite you to explore the application and implication of this framework across our other module covering **governments,** available at:

www.thegrowthdistillery.com.au