



Ethical Gov. Relations

Openly Public Opinion Research

December 2023

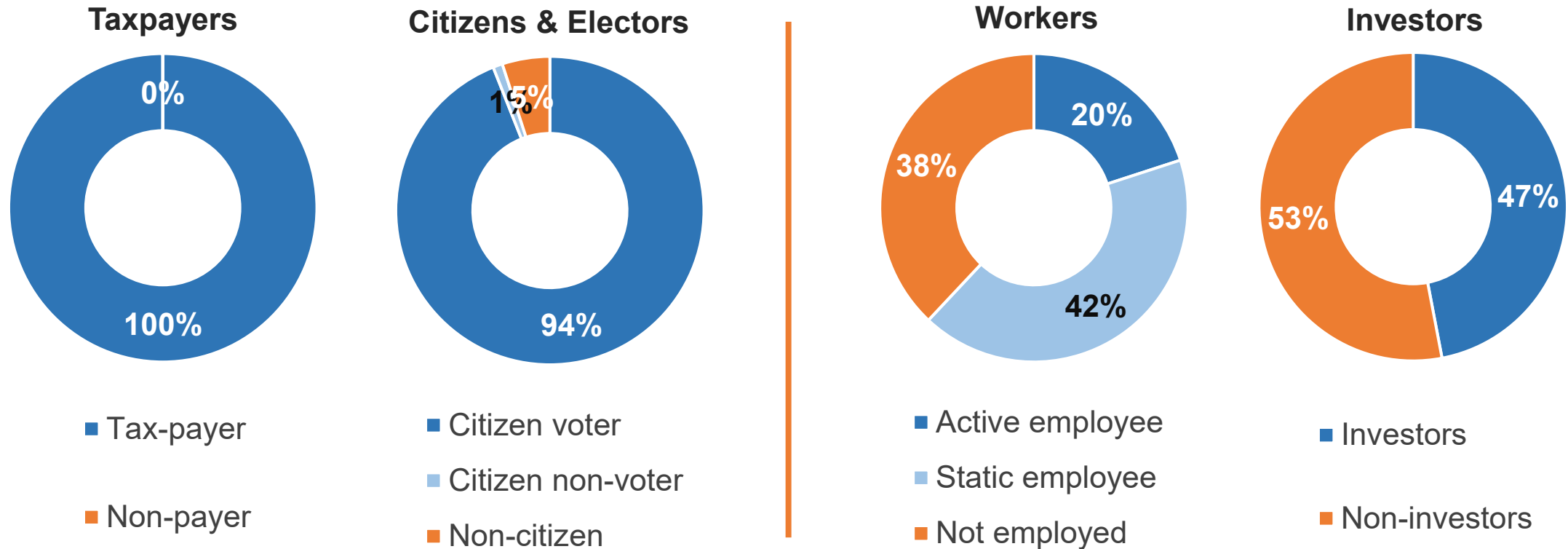
Headline Results

- This summary report is based on an n=1,602 survey conducted in early November 2023 and another n=1,605 in December 2023. Each sample is representative of the national population and is accurate to within +/-2.4%.
- Companies having behaving ethically when they have dealings with government is important to over three-quarters of Australians (76%), and very few say it is unimportant. This is the case for many scenarios, but particularly so for the more involved relationships of employees and investors.
- We also find there are practical consequences to having ethical / unethical dealings with government:
 - Around half of people would avoid using or recommending (46% and 44%) the products and services of companies engaging in unethical dealings, while 70% would be more likely to purchase from a proven ethical company.
 - More than half of investors (55%) would not invest or divest in a company that had behaved in such a way, a danger more than balanced by the three-quarters of investors (74%) who would preference an investment opportunity where the organization could prove ethical dealings.
 - Half of active employees (50%) said they would not consider or stop working at a company which had been unethical, and almost three-quarters (72%) said they would be more likely to work at a company with proven ethical dealings.
- The ratings thus far have been hypotheticals about the behaviour of generic organisations, of course, but we do find similar reactions when people are provided with a topical examples of Qantas and PwC.
 - We note that the airline's simple brand image has declined dramatically over the last few years, moving from one of the healthiest brand pre-COVID to quite a negative one now. PwC is rated at a similarly negative level now.
 - Between half and two-thirds are indeed less likely to use, recommend, work for or invest in Qantas as a result.
 - Around half of Australians believe governments should reduce their use of the 'big four' consultancies, with perceptions of unethical behaviours of PwC having real-world consequences for the entire sector.



Government & Corporate Audiences

It is perfectly acceptable to assess the views of the general public on topics such as this, but in terms of the impacts they might have on an organization it is useful to break them down by connection. All will be taxpayers in one form or another, and many will be electors and potential customers too, but only a fifth will be actual or potential employees or investors. This poll looks at all these audiences.

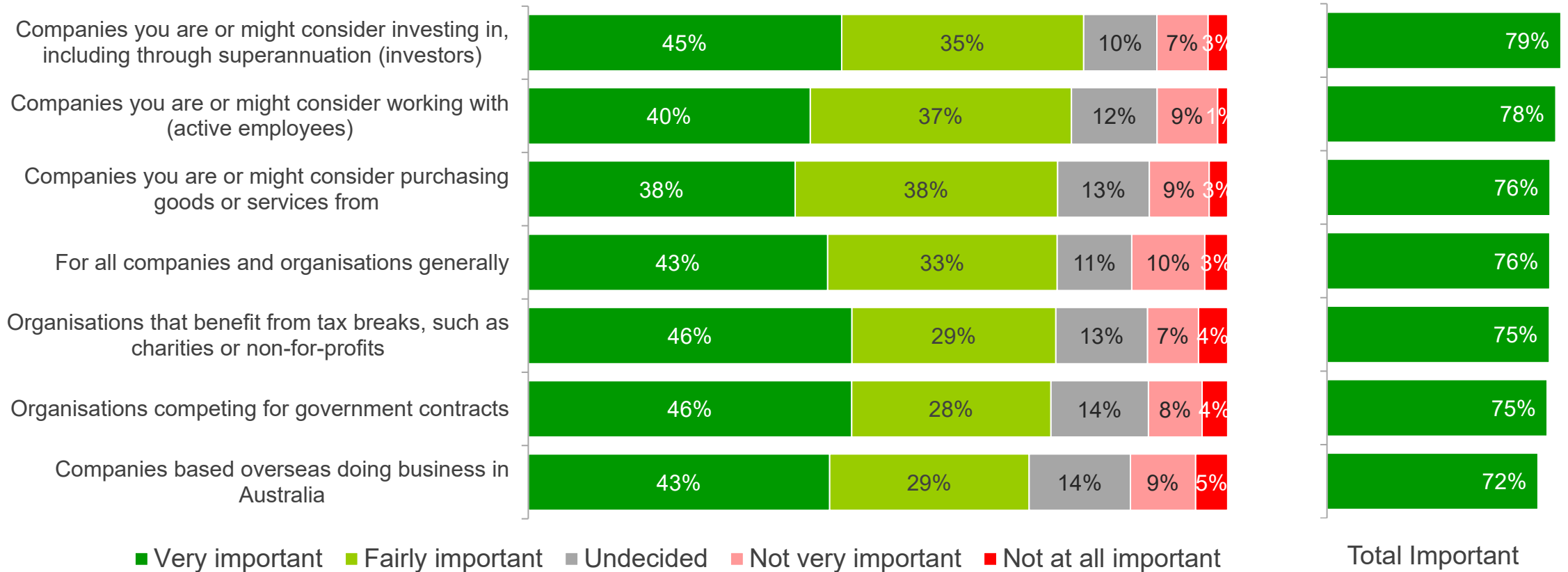


Q01) Do you invest in Australian companies, either directly through the share market or through funds, like a superannuation fund? Base: All Nov. (n=1602). Q02) Have you changed jobs or employers in the last year or so? Base: All Nov. (n=1602). Q03) Have you changed jobs or employers in the last year or so? Base: All Nov. (n=1602).



Importance of Ethnical Dealings with Gov.

Companies having behaving ethically when they have dealings with government is important to over three-quarters of Australians, and very few say it is unimportant. This is the case for many scenarios, but particularly so for the more involved relationships of employees and investors.



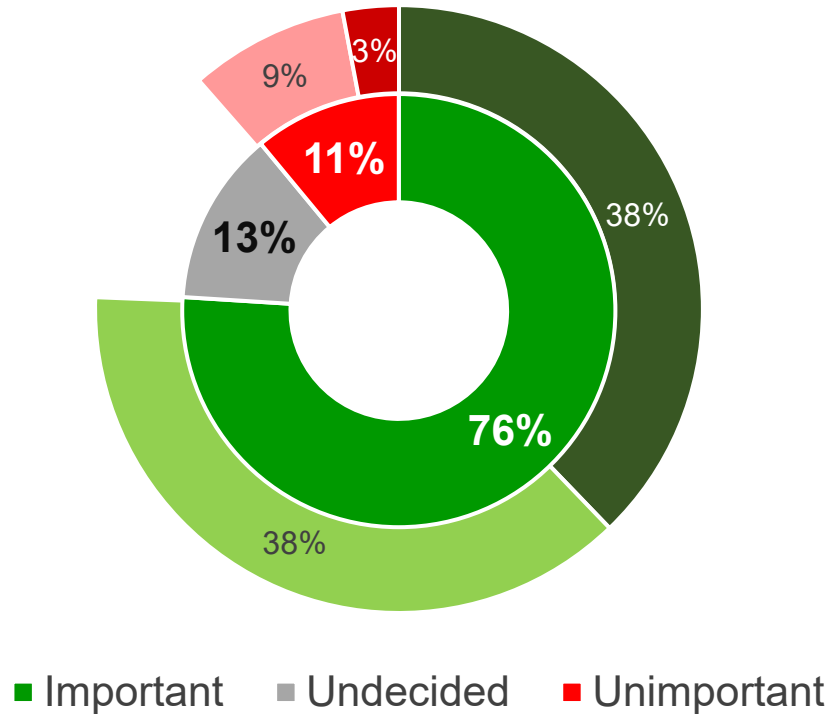
Q04) For you, how important is ethical behaviour by companies and organisations in their dealing with politicians and government officials in the following circumstances? Base: All Nov. (n=1,602).



Actual & Potential Customers

As we have seen, companies people might purchase from having ethical dealings with government is important to three-quarters of potential or actual customers. We tend to think that the effects of unethical behaviour would be mainly negative, and almost half do say they would not buy or recommend buying to others, but positive behaviours appeal to over two-thirds of buyers.

Importance of Ethical Dealings



Effects of Ethical Dealings (% Likely)



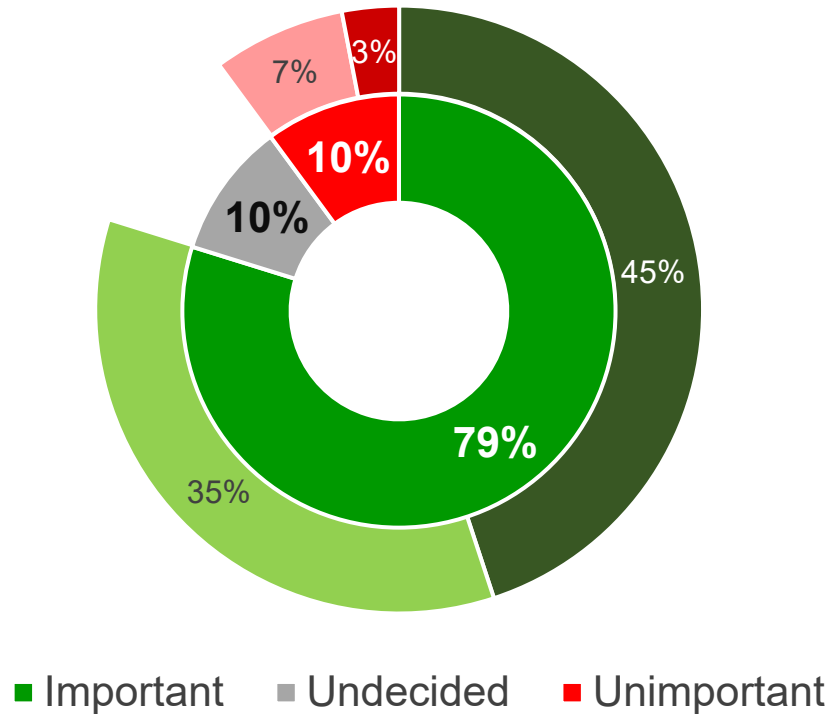
Q04) For you, how important is ethical behaviour by companies and organisations in their dealing with politicians and government officials in the following circumstances? Base: All Nov. (n=1,602). Q05) Being honest, please tell us how likely you would be to do the following? Base: All Nov. (n=1,602).



Actual & Potential Investors (Investors)

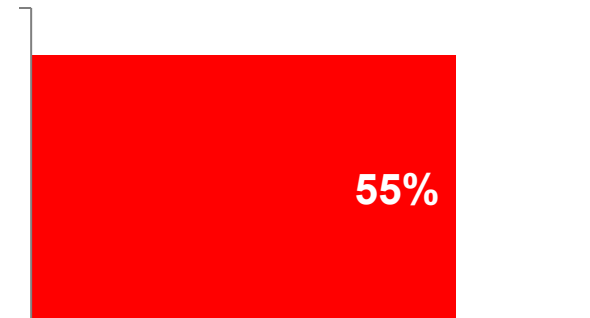
Ethical dealings with government are important to around eight-in-ten investors, and very important to almost half. More than half would not invest or divest in a company that had behaved in such a way, a danger more than balanced by the three-quarters of investors who would preference an investment opportunity where the organization could prove ethical dealings.

Importance of Ethical Dealings



Effects of Ethical Dealings (% Likely)

I would not invest or stop investing in a company that was unethical in its dealings with government



I would continue or consider investing in a company that was ethical in its dealing with government



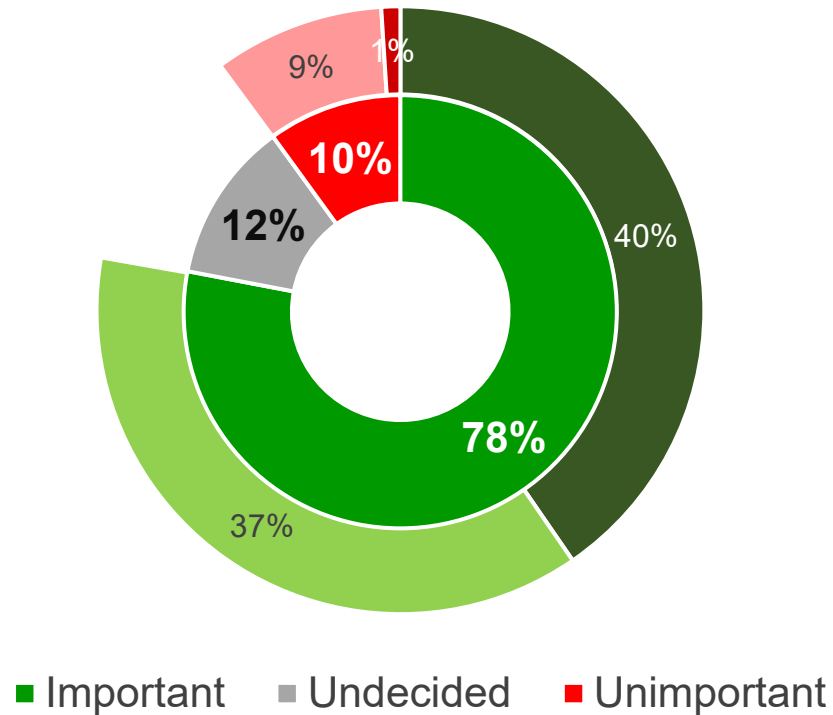
Q04) For you, how important is ethical behaviour by companies and organisations in their dealing with politicians and government officials in the following circumstances? Base: Investors (n=824). Q05) Being honest, please tell us how likely you would be to do the following? Base: Investors 6 (n=824).



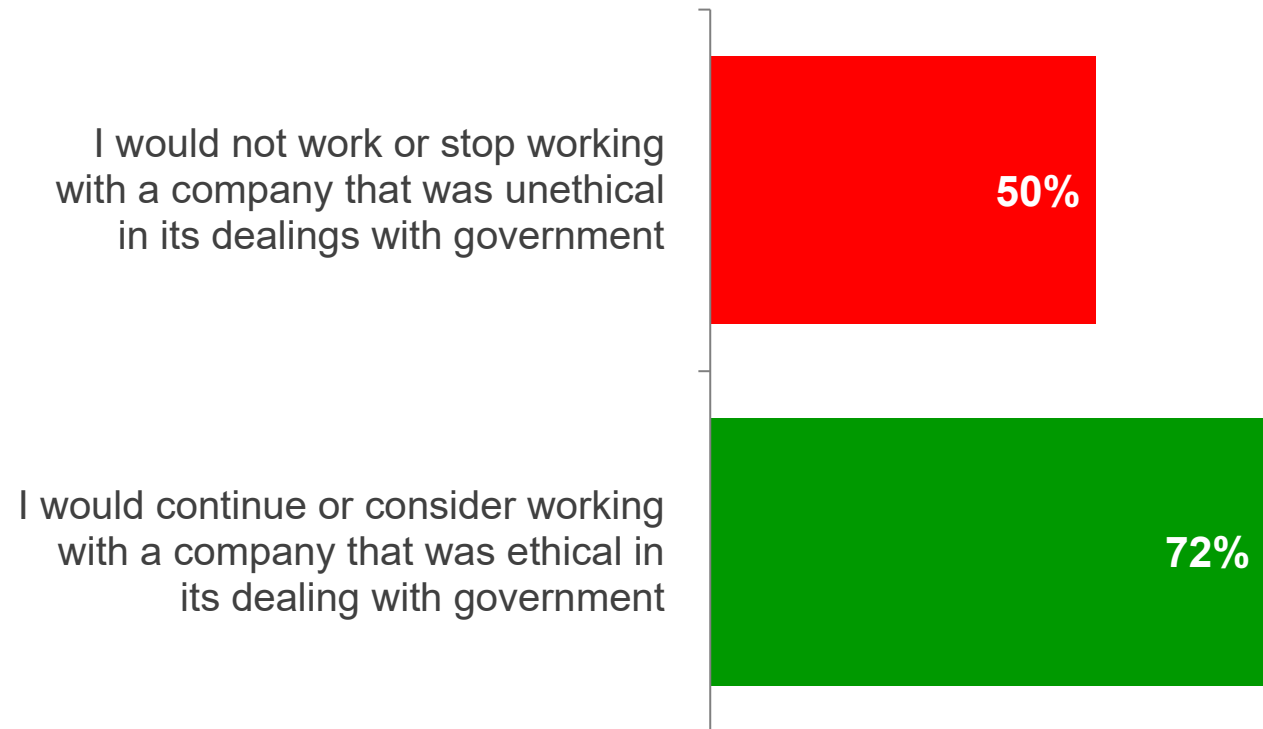
Actual & Potential Employees (Active)

Similarly, almost eight-in-ten active employees (those who have recently sought or are now seeking new employment) regard ethical dealings as important in an employer. Half said they would not consider or stop working at a company which had been unethical, and almost three-quarters said they would be more likely to work at a company with proven ethical dealings.

Importance of Ethical Dealings



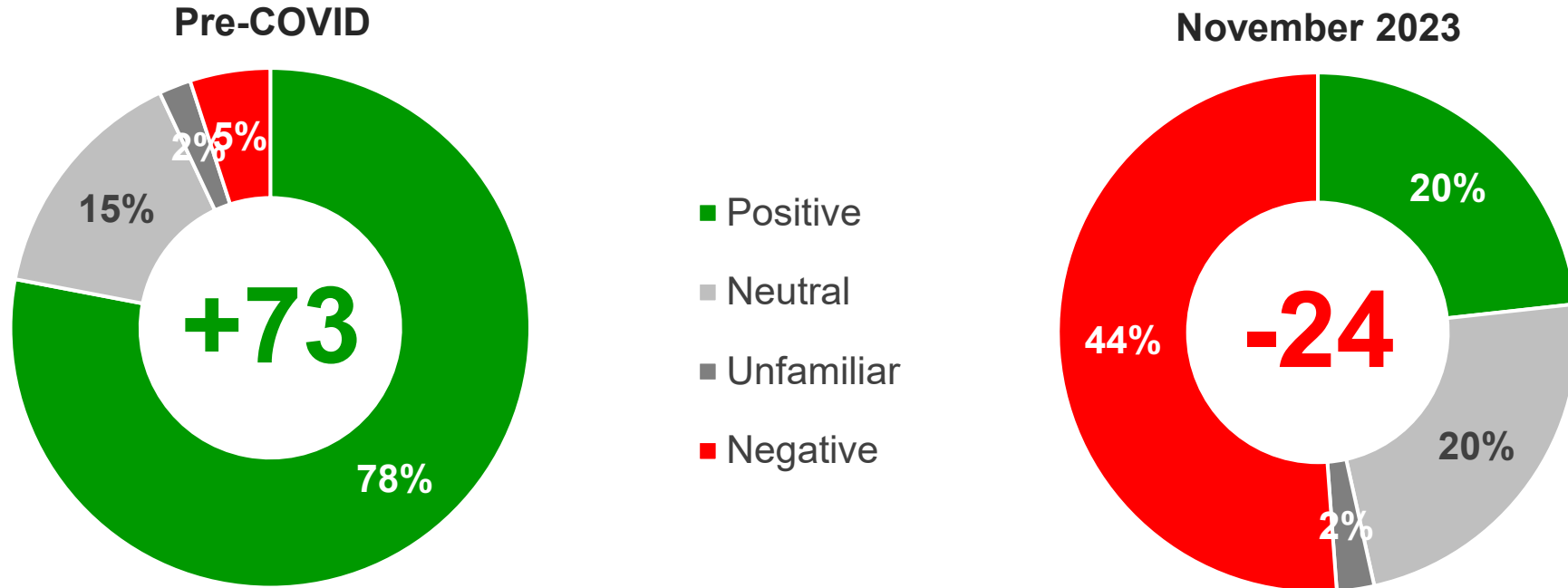
Effects of Ethical Dealings (% Likely)



Q04) For you, how important is ethical behaviour by companies and organisations in their dealing with politicians and government officials in the following circumstances? Base: Active employees (n=380). Q05) Being honest, please tell us how likely you would be to do the following? Base: 7 Active employees (n=380).

Opinions of Qantas

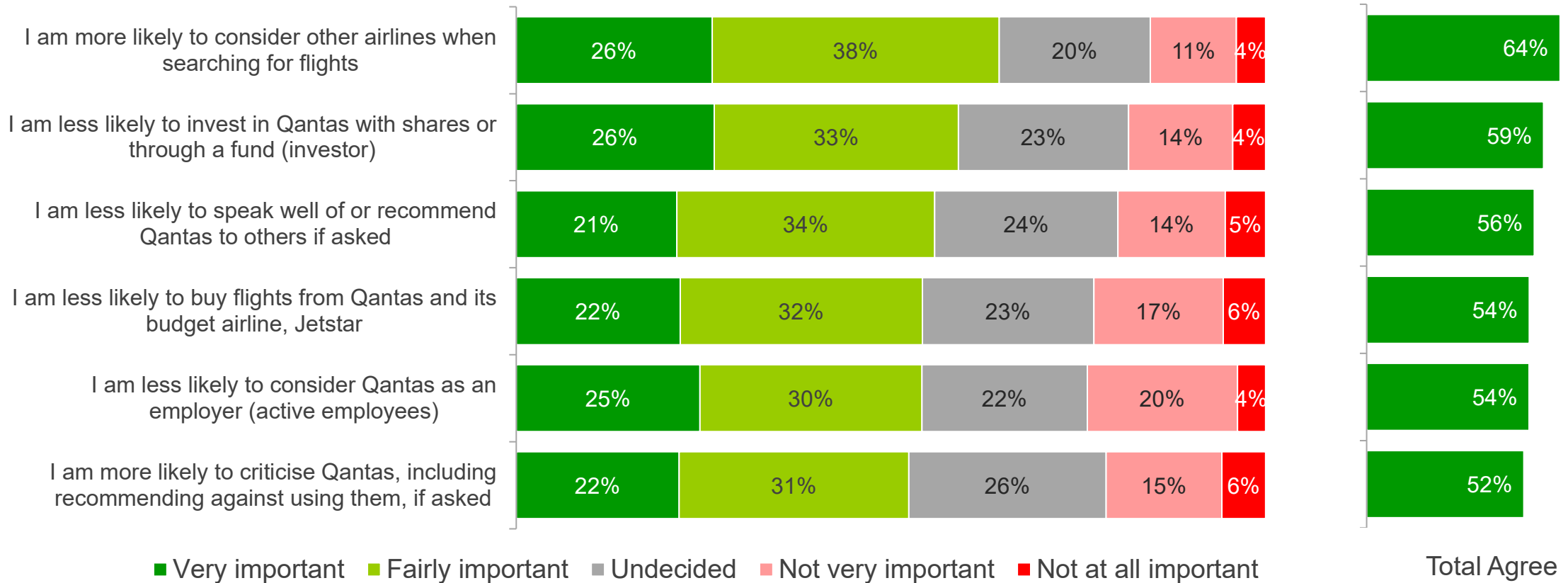
The ratings thus far have been hypotheticals about the behaviour of generic organisations, of course, but we do find similar reactions when people are provided with a topical example in Qantas. First, we note that the airline’s simple brand image has declined dramatically over the last few years, moving from one of the healthiest brand pre-COVID to quite a negative one now.



Q20) Below is a list of people and organisations. For each, please tell us whether you know them and, if so, whether you have a positive, neutral or negative view of them. Base: All Nov. (n=1,602). Net Likeability = % Positive - % Negative.

Effect on Behaviours Relating to Qantas

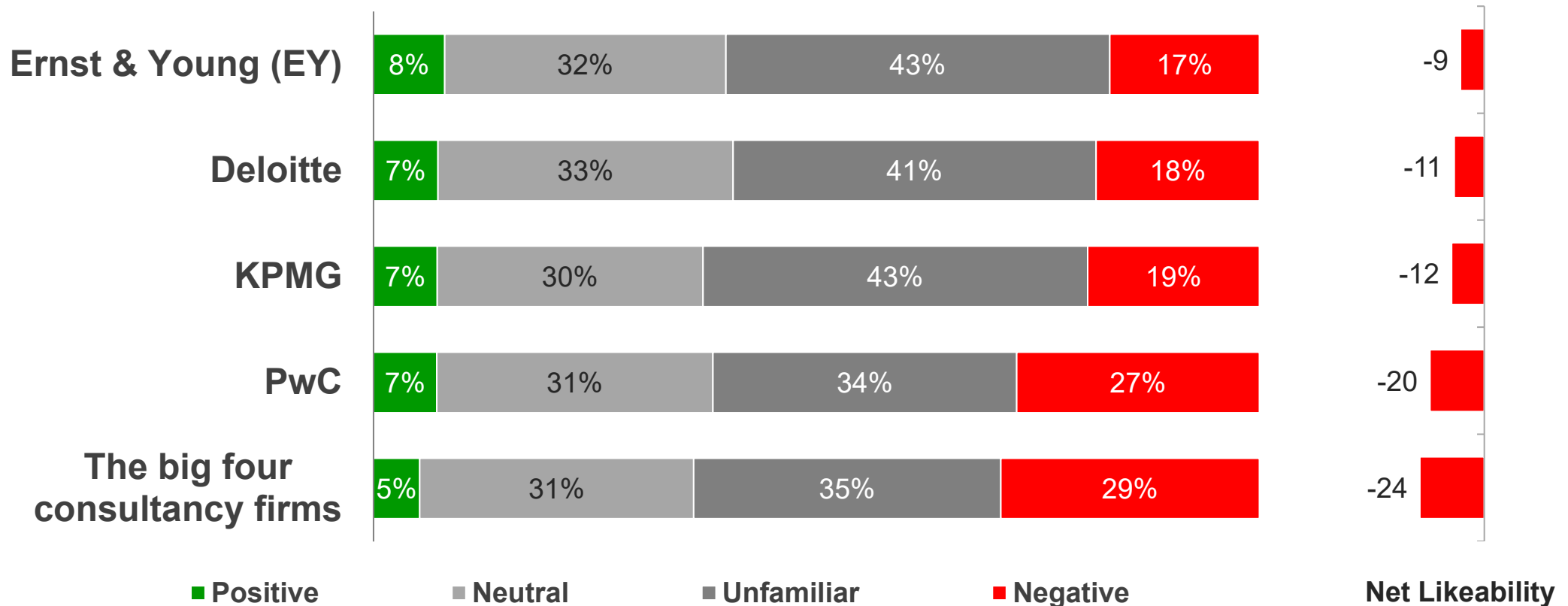
The causes of this decline are manifold, but certainly accusations of unethical dealings with government in terms of competition, lounge gifts, COVID support, etc., have figured. And we find that between half and two-thirds are indeed less likely to use, recommend, work for or invest in Qantas as a result. Ethical behaviours have real-world consequences.





Opinions of 'Big Four' Consultancies

Though many Australians are blissfully unfamiliar with the 'big four' consultancies, or undecided about them (consistent with a lack of customer connection), those who are are more likely to hold them in negative than positive regard at a rate of six-to-one. Intriguingly, this appears to be linked mostly to PwC than others, but generic views of the whole sector are rated most negatively as a result.

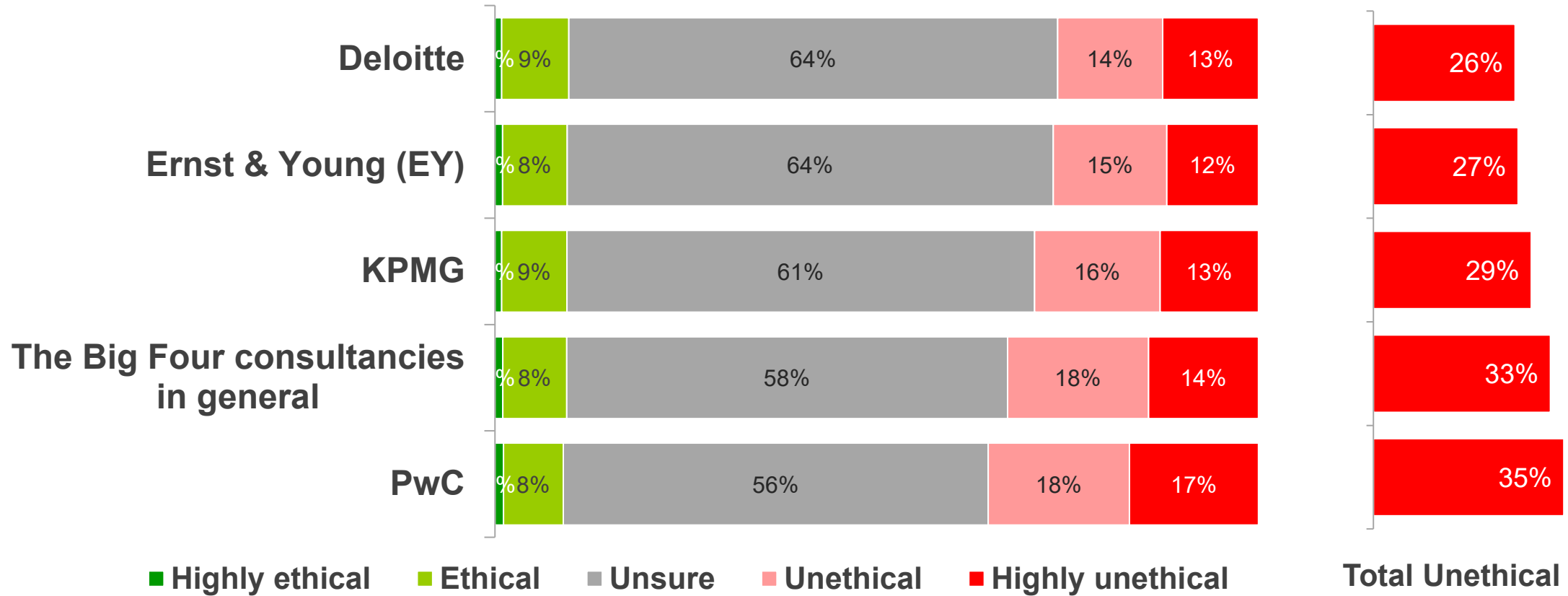


Q20) Below is a list of people and organisations. For each, please tell us whether you know them and, if so, whether you have a positive, neutral or negative view of them. Base: All Dec. (n=1,600). Net Likeability = % Positive - % Negative.



Behaviours of 'Big Four' Consultancies

A third also believe that this group of consultancies has been unethical in its dealings with government, though this appears to be driven by PwC and simply spread to other brands. That is, the behaviours of one player can impact all others.

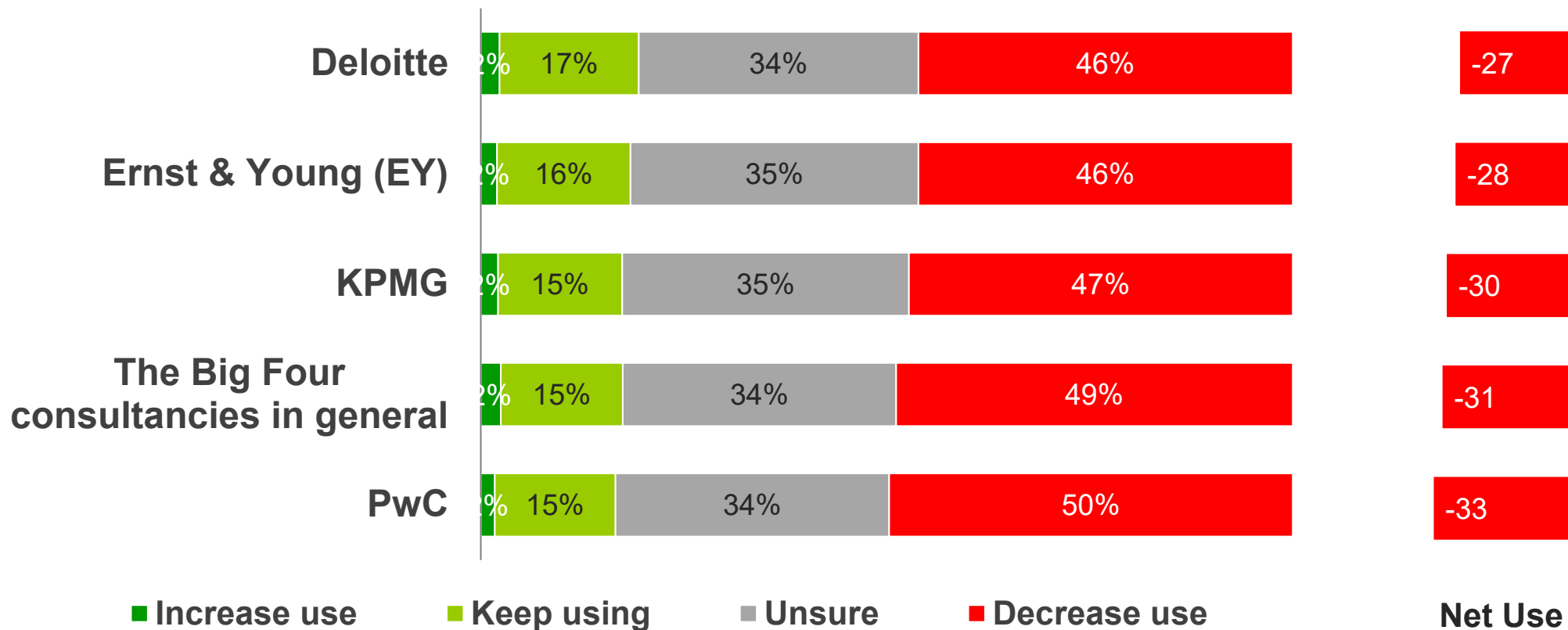


Q3102) You may have heard about the 'big four' consultancy firms – PwC, KPMG, Ernst & Young (EY) and Deloitte – who provide accounting, tax, auditing, consultancy, risk and legal advice to large companies and governments around the world, including Australia. Their behaviour, the nature and extent of the services they provide has been the matter of some debate this year. How ethical would you say they are in its dealings with governments? Base: All Dec. (n=1,600).



Gov. Use of 'Big Four' Consultancies

As a result, around half of Australians believe that governments should decrease their use of the 'big four' consultancies. Just 2% think their use should be increased and 15% that it should remain as it is now. There is a strong prejudice to take action on government contracts here.



Q3103) And do you think that Australian governments should increase or decrease their use of these large consultancies, as opposed to employing in-house public servants to complete those tasks? Base: All Dec. (n=1,600). Net Use = % Use more / No change - % Use less.



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September 2024



Summary Methodology

This summary report details the findings of an Australia-wide survey on business dealings with governments in Australia, conducted independently by Resolve for Openly as follows:

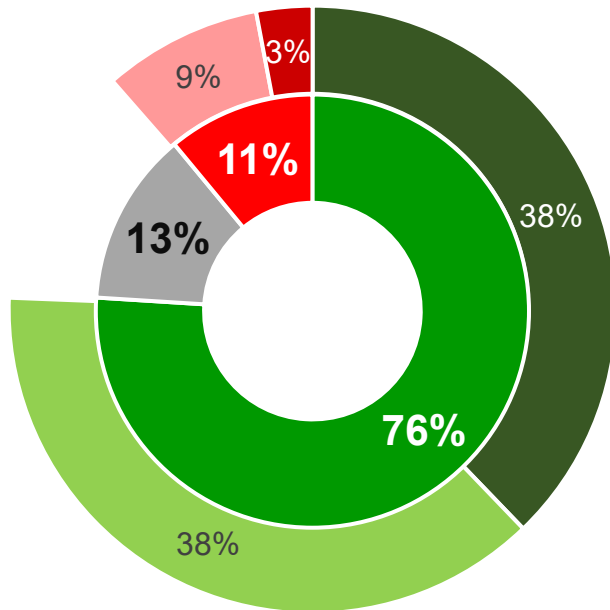
- An on-line survey (part of the Resolve Omnibus) conducted 3rd – 7th September 2024, achieving a sample of n=1,614 adult Australians, with a notional maximum error margin of +/-2.4%.
- Used panel(s) primarily recruited by invitation off-line (random phone surveys, F2F, mail, etc.) to avoid inherent biases in self-selecting consumer panels and purely on-line recruitment.
- Respondents were not informed of the survey's topic(s) or publication prior to taking part to avoid response bias, e.g. a skew to more politically interested and/or informed voters seeking to send a public message.
- Detailed state-by-state quotas and weighting were employed for area, sex, age, education, income, etc., to ensure the sample truly reflected the population. Unless there are 'over-samples' of particular sub-groups of interest, any data weighting is minimal and the effective sample size / error margin will be very similar to above.
- Security and quality control checks were undertaken, including screening out 'bots', timing, 'straight lining', etc.
- Breakdowns may be provided by geo-demographic groups, product / services users and voting blocs, and all will have larger error margins than the total sample. Small sample groups are either indicated or omitted.
- Statistically significant differences among sub-groups are highlighted in green and red for higher and lower respectively.
- Commentary of results may include the pollster's opinions, in turn based on breadth of historical experience.



Importance of Ethical Dealings

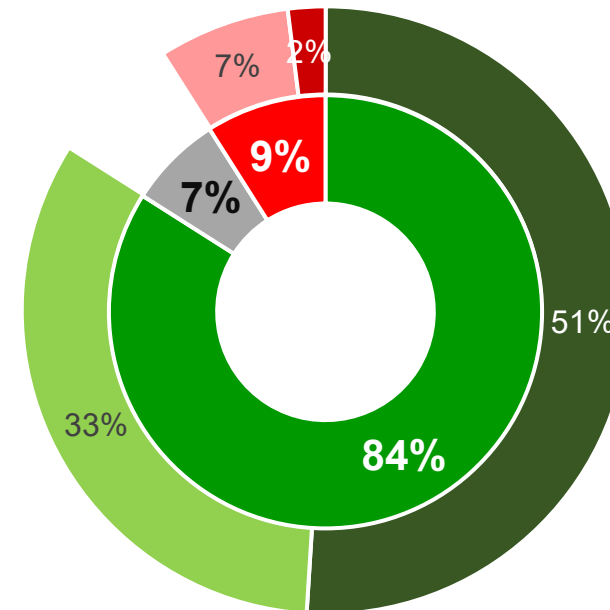
Almost one year on, not only does this latest poll confirm the importance of ethical dealings by business with government, it actually shows it has become more important. It was not just a topical 'blip' caused by Qantas, PWC, etc. We know from our previous research that this has a very practical outcome, with both positive and negative views affecting brand, recommendation and interactions.

Importance of Ethical Dealings Nov. 2023



■ Important ■ Undecided ■ Unimportant

Importance of Ethical Dealings Sep. 2024



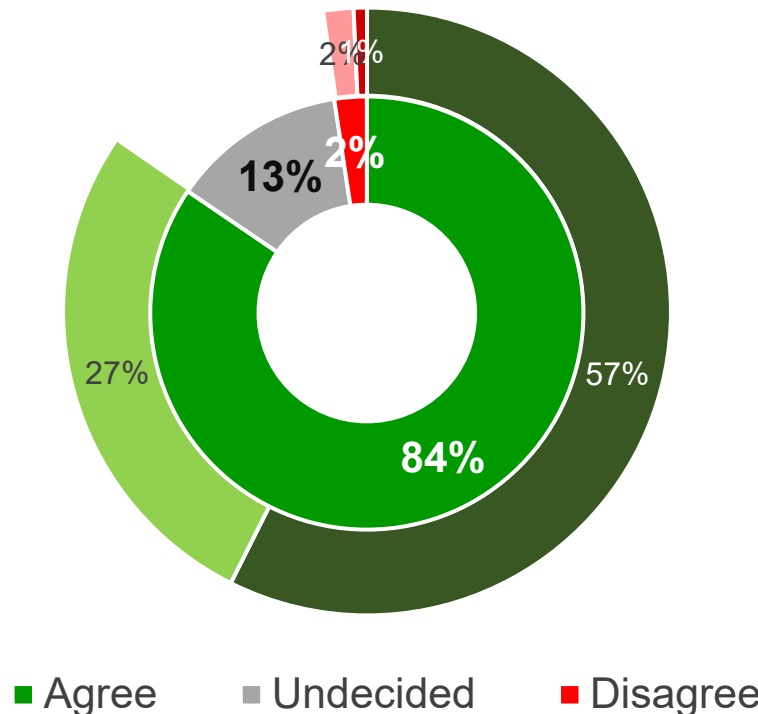
■ Important ■ Undecided ■ Unimportant



Transparency in Dealings

And, in being ethical, the vast majority of Australians agree that it is critical for business to be transparent in their dealings with government too. This would include things like timely meeting and donations disclosure, being open about their policy positions and asks, etc.

Transparency in Dealings Sep. 2024



Q3916) To what extent do you agree or disagree with the statement: “When businesses have dealings with politicians and government officials it is critical that they are transparent about those dealings”? Base: All (Sep. 2024 n=1,614).



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