

Key findings
from the 2021
Allianz Life
Sustainable
Investing Study

Sustainable investing for sustainable outcomes:

A majority of Americans
are ready to act

Despite ongoing volatility, it seems the trend of sustainable investing is here to stay – with financial services and insurance companies in a unique position to play a critical role in the adoption of sustainable investing principles.



2021 Allianz Life Sustainable Investing Study was conducted by Allianz Life via an online survey. The nationally representative sample included 1,000 respondents age 18+ with an annual household income of at least \$50,000.

As one provider of financial solutions who is already committed to this philosophy, Allianz Life recognizes the unique opportunity to bring about change on both international and local scales. We accomplish this through a wide variety of actions designed to support sustainability, protect the local environment, and support societal equity.

We support sustainability via an investment strategy that prioritizes the selection of asset managers based on their commitment to recognized ESG (environmental, social, and governance) principles, and engages and evaluates them on an ongoing basis to ensure their continued integration of these practices.

When it comes to protecting the local environment, we are continuously finding new ways to reduce our company's controllable carbon footprint, and we provide our employees with education and resources to extend sustainability from their workspaces to their home bases.

We support societal equity and actively drive positive social change to attain better outcomes by being an active member in our community through financial education and other community relations and giving programs designed to address systemic inequity in an effective manner.



Sustainability remains top of mind and in favor among Americans.

Of those surveyed, nearly **two thirds (64%)** currently hold a positive overall opinion of this type of investing, and **52%**, who are not currently participating, expressed interest in allocating funds to sustainable investments.



Those already engaged in sustainable investing are doing it in sizeable proportions ...

Respondents (already investing) are putting **nearly half (46%)** of their total investment portfolio toward companies adhering to sustainability principles.

... and they aren't afraid to revoke funding from a company that lacks sustainability practices.

More than **two-thirds (68%)** of respondents believe that reallocating investments away from companies not adhering to sustainability principles (to those that do) is an effective way to punish or reward companies for their actions.



The financial and insurance industries are obliged to participate ...

A financial services/insurance company can make a **significant impact on environmental sustainability efforts.**

- 64% agreed for financial services companies
- 61% agreed for insurance companies

A collective commitment from the financial services/insurance industry to environmental sustainability efforts would make a **positive difference.**

- 68% agreed for the financial services industry
- 64% agreed for the insurance industry

... as Americans put the onus on them to lead by example.

63% of respondents believe that financial services companies have a responsibility to do whatever they can to mitigate the climate crisis, and 59% felt insurance companies have the same obligation.



A company's decision to embrace sustainability spells sustainable success ...

Financial services companies/insurance carriers who embrace environmental sustainability are better positioned for long-term success.

- 62% agreed for financial services companies
- 58% agreed for insurance carriers

... and it could present a competitive edge.

More than 63% of respondents said that if they were deciding which life insurance policy to choose, they would choose one from the carrier that is committed to incorporating principles of sustainability into their investment decisions.



Yet, with increased expectations comes a need for greater awareness of the investing process among financial services companies and investment carriers.

"I understand how financial services companies/insurance carriers make decisions about how to invest their money."

- 52% agreed for financial services companies
- 46% agreed for insurance carriers

"I am aware of specific financial services companies that successfully invest their assets in environmental sustainability efforts."

- 38% agreed for financial services companies
- 31% agreed for insurance carriers



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www.allianzlife.com/sustainability.

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