POSSIBLE | MOBIUM GROUP

In Nature we Trust

2023 SOCIAL TRENDS REPORT

Report overview

A study into how Australians relate to nature and what this means for leaders engaging stakeholders in their climate and nature journey

In March 2023, we asked 2,035 Australians what they thought about nature, what they expected governments and businesses to do to protect it, and how they would like to have information communicated to them about it.

The study was conducted by research firm Mobium Group and strategy consultancy POSSIBLE, with technical and subject matter input from climate change advisory and solutions firm Pollination.

This document provides an overview of the research. Please contact andrew@possiblestrategy.com for options to access the full report.

About POSSIBLE

POSSIBLE is a specialist strategy and leadership firm working with global leaders of organisations addressing the biggest opportunities of our time in climate and nature.

Led by founder Andrew Baker, a strategy consultant, researcher, project developer and passion igniter with a purpose of accelerating the growth and impact of organisations creating their strategy to compete and win in an improving world, we work via direct, long-term relationships and apply our proprietary strategy and leadership processes to find novel solutions to our clients' most pressing issues and opportunities.

About Mobium Group

Mobium helps organisations understand and act on Australian consumers' desire to make healthier, more sustainable consumption choices.

Since 2005, our multi-mode primary and secondary research has supported decision-makers in corporates, governments, businesses and NGO's to write the business case for 'green'.

Mobium's Living LOHAS© project, an ongoing Australian research analysis, commenced in 2007, provides extensive insight into evolving community expectations and actions when it comes to environmental and social matters.

Mobium is a member of The Research Society, the professional association for the market research and insights industry in Australia.

From the founder

Andrew Baker
Founder, POSSIBLE

We must act

The nature crisis is gaining increasing attention in corporate Australia as new frameworks and regulations such as TNFD[1] and SFDR[2] put it on an equal footing with climate as a key issue impacting business now and over coming decades.

With approximately half of the world's economy, some $44Tn[3] of annual economic output according to the World Economic Forum, having a moderate to very high dependency on nature it makes sense for organisations to explore the risks and opportunities nature presents in their operations, from where and how they source raw materials to how they are processed and how they are ultimately presented to their B2B customers and end consumers.

Of course, the crises in climate and nature are inseparable. The global economy has been consuming nature's balance sheet faster than it can be replenished since industrialisation, generating critical risks in our landscapes, marine ecosystems and atmosphere. Climate change amplifies all those issues.

Why we created this report

In our strategy work with leading investors, entrepreneurs and advisors addressing the environmental crisis, we frequently engage with internal and external stakeholders on behalf of the organisations we serve.

This can include boards of directors, executives, staff, regulators, civil society leaders and consumers. Ultimately, these stakeholders are all members of the Australian community.

Many of the clients we work with are deep experts on climate and nature. They know the terminology and understand the science, **but how does broader Australian society compare?**

To find out, we worked with our research partner Mobium Group, to survey 2,035 Australians and gauge responses to more than 150 measures related to their environmental values, attitudes, beliefs and preferences.

1. Taskforce on Nature-related Financial Disclosures (TNFD)
2. Sustainable Finance Disclosure Regulation (SFDR)
3. Nature Risk Rising: Why the Crisis Engulfing Nature Matters for Business and the Economy

The questions we sought to answer

Our survey sought answers to the following topics:

- To what extent does the community understand the level of damage to nature?
- Do Australians understand the economic dependence of Australia's economy on our natural capital base?
- In a post-pandemic world, to what extent does the community prioritise action on environmental issues, compared to other pressing issues such as personal finances?
- Can nature provide a more relatable lens through which to present an organisation's broader climate and other environmental initiatives?

How to use these insights

Our report provides a compelling, post-pandemic baseline for understanding how Australians engage with climate and nature, and includes advice for leaders seeking to engage their communities, consumers and other stakeholders on their climate and nature strategy.

Read on for a snapshot of our findings, and contact us for access to the full report.

Need custom insights?

Our survey delved deep into the minds of Australian consumers across a range of topics, including perceptions of nature and climate, sustainability in food and fibre, brand reputation, eco-labels, greenwashing and links between sustainability and personal health and wellbeing. Our team can tailor these insights to your organisations specific needs. Contact us for more information.

Andrew Baker, Founder, POSSIBLE
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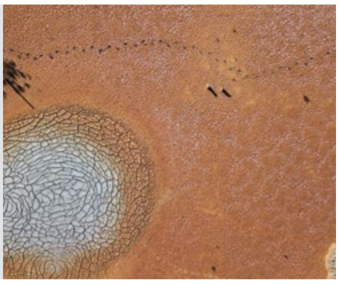
Key findings at a glance

Concern for nature is not at the commercial or political fringe in Australian life. It is front and centre. This is because Australians have a deep, intrinsic attachment to nature and want it protected. That care is enduring, and particularly deeply held amongst Gen Z.

Australians also understand that the deterioration of the natural environment is a risk to Australia's economy, and that environmental issues are likely to have a greater impact on them and their communities in five years time than they do now.



Despite their interest and concern, it is clear that most Australians don't fully appreciate the level of damage done. Organisations must get better at understanding the current state of one of our most important assets, and communicating this with the community.

There is widespread misunderstanding of even the most high-profile environmental terms such as net zero, and very few have ever heard of terms such as nature positive, circular economy and natural capital.

In the post-pandemic environment, personal financial concerns have risen above other priorities, but Australians still expect government and business to take action. The catch? Scepticism of environmental claims is entrenched, and widespread.

Nature offers a fresh lens through which to frame and accelerate action to address corporate risks and opportunities on climate and related issues. Leaders across all functions from the board to the front line have a role to play.

POLLINATION

“Australian companies are ploughing millions of dollars into selling their environmental credentials but in too many cases consumers aren’t buying.

We see a significant opportunity for companies who want to act authentically, earn community trust and fill this consumer confidence and awareness gap.”

Pollination Managing Director, Megan Flynn

Our full report includes...

Data and insights from 2,000+ Australian consumers, alongside 35 detailed charts addressing:

- What proportion of Australians enjoy experiencing nature?
- How many Australians participated in outdoor activities in the last 12 months?
- Which Australians believe nature should be protected for future generations?
- Which groups of Australians believe humans have a right to use nature at the expense of the needs of other creatures?
- Do Australians believe producers will have to change the way they make the food we eat and the clothes we wear due to the impacts of climate change?
- How has the level of belief that climate change is occurring and being driven by humans changed over the last decade?
- To what extent do Australians believe there is a link between climate change and severe weather events, and how that has changed since 2009?
- Which Australians believe the deterioration of the natural environment presents a risk to the Australian economy?
- How many Australians believe environmental issues will increasingly impact themselves and their communities over coming years?
- Do Australians believe they will have to change their diet in the future due to the impacts of climate change?
- What is the level of understanding of the damage already done to the world’s marine and land environments and forests?
- Which key climate and nature terms, such as Circular Economy, Nature Positive, or Natural Capital have Australians heard of, and do they understand what they mean?
- How many Australians want clearer information regarding the environmental benefits and impacts of the products and services they choose?
- Do Australians believe they have experienced greenwashing, and what does this do to their interest in future purchases of products marketed as ‘green’ or sustainable?
- How sceptical are Australian consumers about the social and environmental claims that companies make about their products and services?
- Have Australians’ concerns about environmental issues changed since before the Pandemic?
- What influence did environmental issues have on how Australians voted in the last Federal election, and how do they believe this will change for the next election?
- Do Australians believe the Federal Government is doing a good job with policies and programs related to the environment and climate change?
- What do Australians expect of business and government, when it comes to the environment and climate?
- How many Australians expect the products and services they buy in the future to be more environmentally friendly than they are today?
- Do sustainability issues make a difference to where people choose to work?
- How do Australians want to have climate issues explained to them?
- Do any brands have a standout reputation for being sustainable, ethical or environmentally friendly?
- How big is the difference between the expectations of Gen Z versus Boomers on these critical questions?

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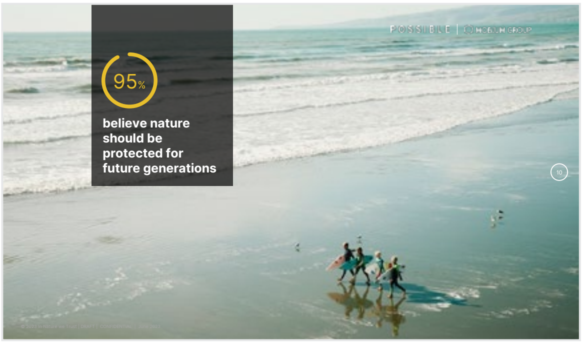
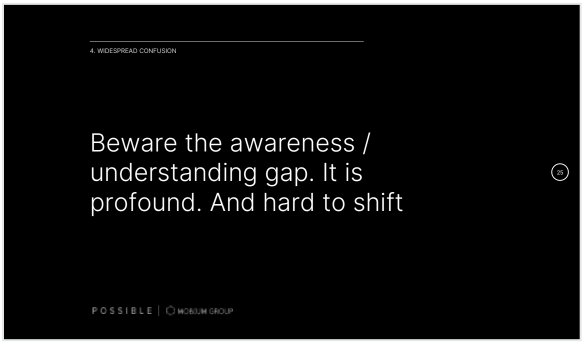
“In 2008, when Mobium started its community research on sustainability, 88% of respondents said they were sceptical about the environmental claims being made by companies about their products and services. That number has reduced only slightly to 85% in 2023.

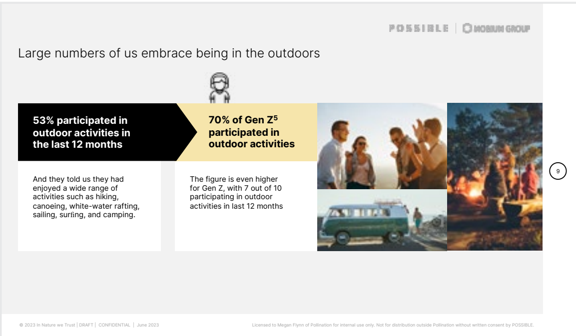
Consumers remain cynical about such claims and it’s not hard to see why,” Mr Bez said. “With so much greenwashing in the marketplace they are finding it difficult to separate genuine commitment from spin. Recent actions by the ACCC against companies making misleading environmental claims highlight the persistence of the issue and the difficulty Australians face when making purchasing decisions every day.”

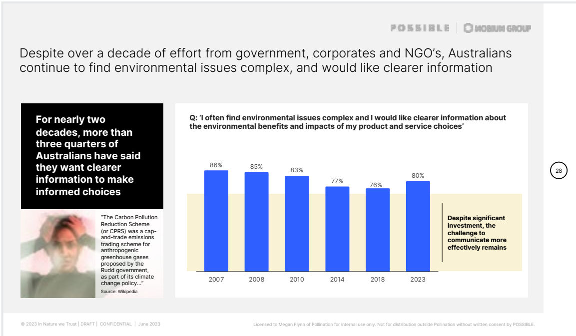
Mobium Group Research Director, Nick Bez

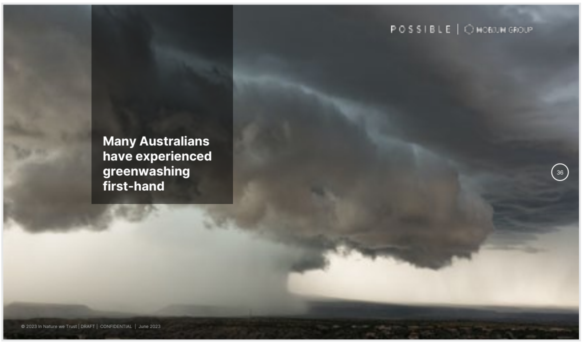
Sample pages from full report

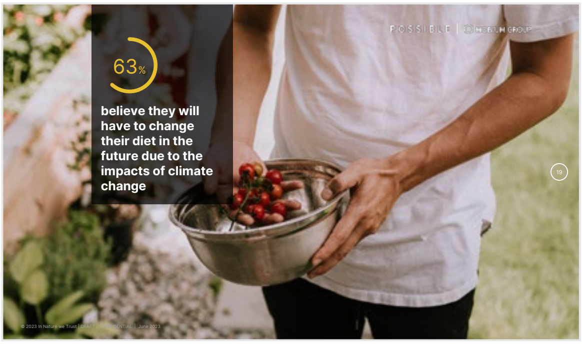


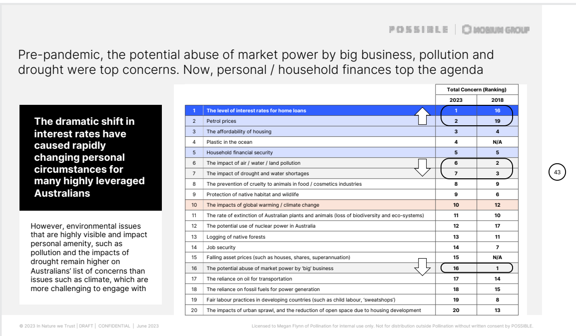


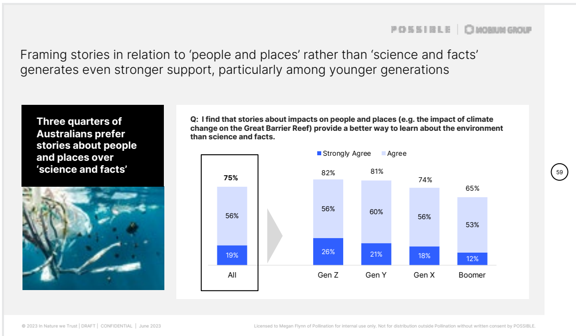












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“Mainstream Australians are seeing risks to their lifestyles and livelihoods from inaction on nature and they are not confident about who they can trust to help them address the problem.

There is clear opportunity for brands seeking to play a leading role in the shift to nature-positive outcomes. Some enterprising businesses are already taking positive steps but there is scope for corporate Australian to do much, much more.”

POSSIBLE Founder, Andrew Baker

The opportunity

There is a compelling opportunity for brands to stake out a leading position on nature. This will require them to get clear on their ambition, and to rally their organisation, from the board to front-line staff, and channel partners to suppliers, around a clear strategy to compete and win in a nature positive world.

With such interest from the community and consumers, the opportunities are enormous, as are the challenges of overcoming the trust barriers of a sceptical public.

After 18 years of research it is clear that the trends identified in this research are not going away.

Nature is here to stay, and the generational markers in this report indicate that it is only going to grow in importance over the coming years.

We encourage leaders to take five key steps:

1. Understand your **stakeholders**.
2. Set your ambition. What **reputation** do you want to have on nature five years from now with customers, staff and investors: leader or laggard?
3. Identify opportunities for creating **new products**, attracting **new customers**, and cementing relationships with those you have now, and take action.
4. Re-think your **communications**, to enhance cut through and engagement.
5. Build **alignment**, throughout your business and supply chain, to maximise the value of your efforts.

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Research methodology

The 2023 In Nature we Trust report is published by POSSIBLE and Mobium Group.

Quantitative Study

- A national quantitative survey was executed to collect an extensive inventory of the values, attitudes, and actions of adult Australians.
  - Sample size: 2,035
  - Screen: aged 16 – 77 covering four generational cohorts of minimum n=500 each
  - Generation definitions: Boomers (1946 to 1964); Gen X (1965 to 1980); Millennials (1981 to 1995); Gen Z (1996 to 2013) – Note: only 16+ year olds surveyed
  - Coverage: all States / Metro & Regional
  - Question set: > 150 measures
  - Data collection: multi-wave data collection process; February – March 2023
- Mobium Group is a member of The Research Society and is bound by a Code of Professional Behaviour in relation to the standards for conducting and reporting marketing research.
- Rounding of the data set has been undertaken in the analysis.
- Readers should note this may cause a variation of +/- 1% in individual responses.
- The report also draws on extensive data collected by Mobium Group through the Living LOHAS research series conducted at regular intervals from 2007-2018.

Qualitative Dialogue

Over 30 face-to-face discussions with Australian consumers in individual and group settings.

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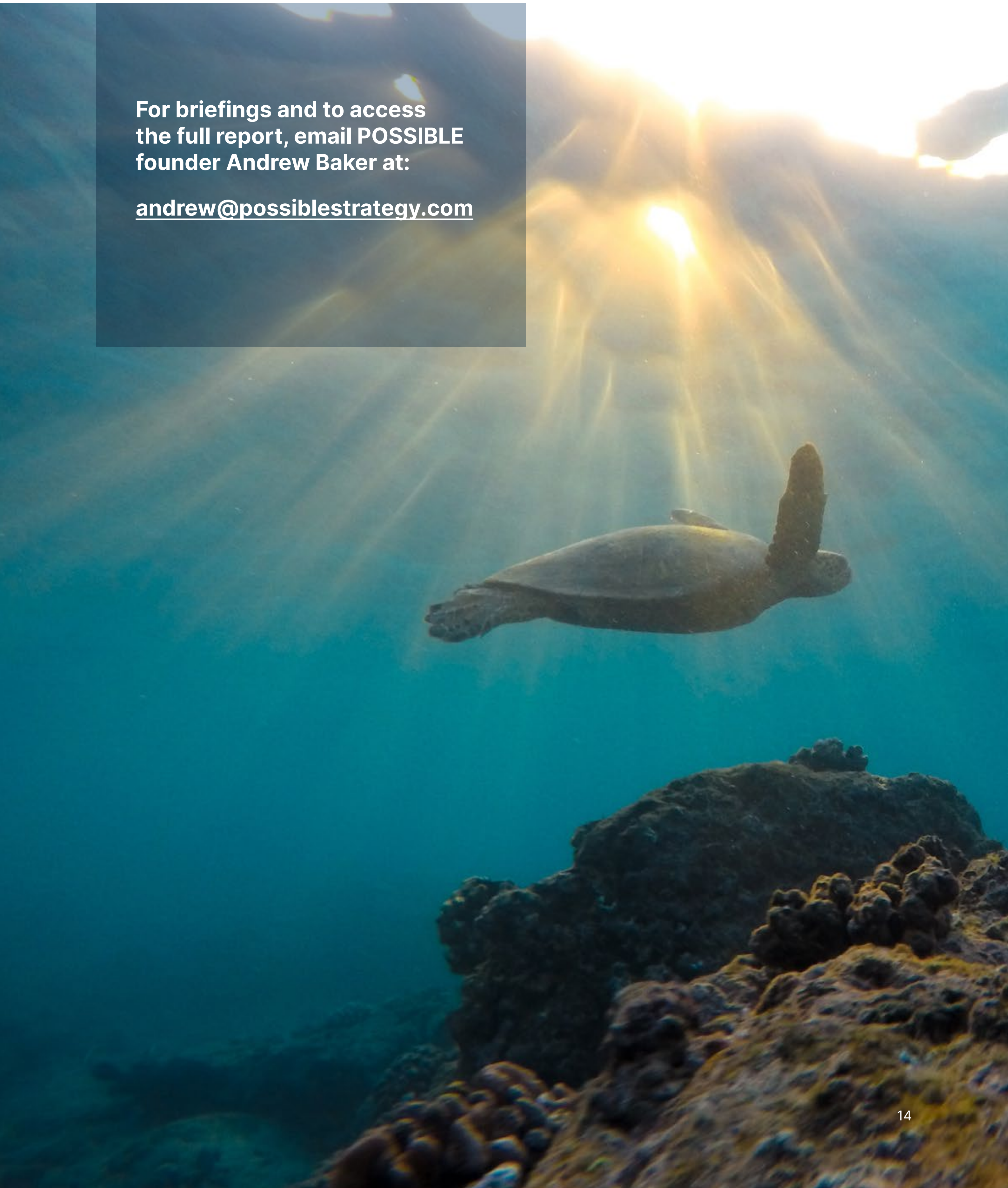
Full report



For briefings and to access the full report, email POSSIBLE founder Andrew Baker at:

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