2024 Australian Consumers' Sustainability Study

RESEARCH INK

Summary

Research Ink conducted a representative survey of adult Australian consumers, to better understand what role sustainability plays in their purchasing attitudes and behaviours.

We found that concerns about the environment and worries for future generations are running relatively high. However, consumers are not without hope, with the majority believing that if **people were more environmentally responsible**, it would make a difference.

How this is achieved and who is accountable is not as clearly defined. Some consumers believe that organisations are largely responsible, in particular manufacturers and the Government. However, others believe that it needs to be a collective effort, with both individual consumers and organisations needing to contribute to a sustainable future.

Whilst Australia is in a cost-of-living crisis, it's not surprising that **price is top of mind for consumers** when making day-to-day purchases, with **product quality** a clear second.

When asked outright, sustainability is of lower priority. However, **many are still buying sustainably across one or more product categories**, with paper, baby and cleaning products the sustainability 'winners'.

Females, younger consumers and Victorians are currently leading the way, as well as those from higher income households. The latter finding may reflect more flexibility with their household budgets, with expense the number one barrier to purchasing sustainably and verbatim feedback indicating that sustainability can get lost amongst more pressing concerns.

When purchasing, consumers' experiences are varied, with many feeling confident about being able to make sustainable choices and putting faith in sustainable brands and claims, but an almost equal number feeling overwhelmed and distrustful.

When asked unaided **what makes a product sustainable**, longevity / durability / quality descriptors are the most common, followed by sustainable / ethical production practices and being able to recycle / reuse the product.

Ultimately, **the majority of consumers would be likely to buy more sustainable alternatives, if it was made easier**, with a key barrier to purchase working out what products are sustainable. Clear / transparent labelling would assist in this area.

Outside of day-to-day purchases, findings indicate sustainability is also now a key consideration for many Australians when making larger financial decisions concerning household energy, motor vehicles and financial providers.

Finally, we have identified four different segments, based on attitudes towards sustainability: the **Eco Champions, Eco Whelmed, Passive Observers** and **Sustainability Sceptics**. By understanding the beliefs, motivations and behaviours of these segments, we hope that Australian brands looking to support and encourage sustainable purchasing can develop strategies to do so.

About this study

With so many other factors influencing the purchasing decisions of Australians in 2024, how does sustainability fit in?

Research Ink conducted a representative survey of adult Australian consumers, to better understand what role sustainability plays in their purchasing attitudes and behaviours.

For those looking to buy sustainably:

- What motivates them?
- How confident are they at navigating between real and false claims?
- Do they feel like their actions contribute to the big picture?
- How easy is it for them to purchase sustainably?
- How can some of these purchasing barriers be overcome?
- What are the sustainability product / service category winners / losers?

Data collection **March 2024** via an online panel*

1,250 survey respondents

Nationally representative survey of Australian consumers 18+

Weighting applied to correct for small differences for interlocking age and gender compared to the Australian population**.

**Lightspeed Research*

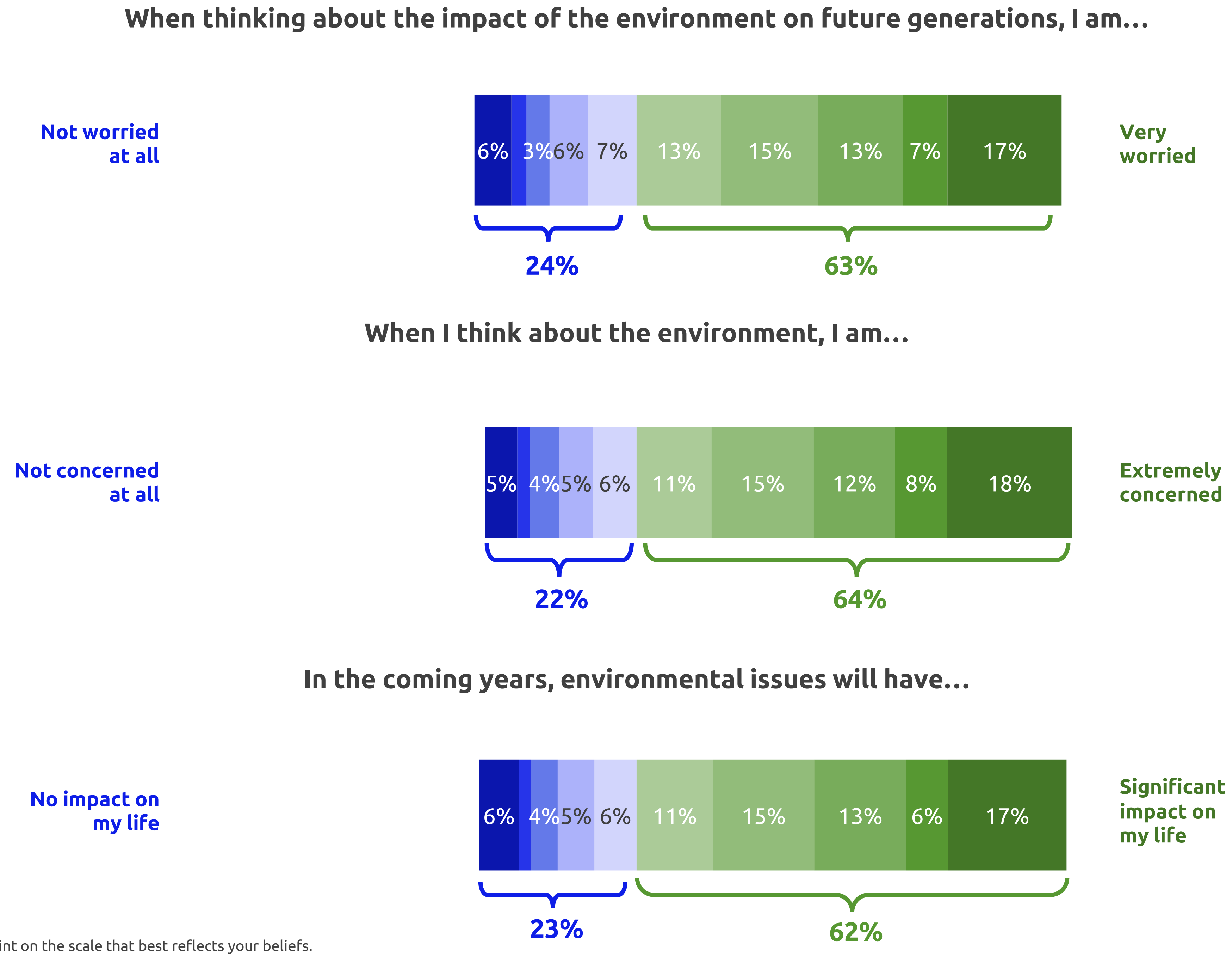
*** Refer to Appendix for details regarding sample*

Sustainability attitudes

Perceived Threat

Almost 2 out of 3 Australian consumers felt to some extent that environmental issues will have an impact on their lives, had some level of concern about the environment and had worries for future generations.

Just under 1 in 5 Australian consumers are extremely concerned about these issues.



Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

22% indicated the environment was not much of a concern for them, of these consumers…

24%

felt environmental issues have been exaggerated and / or they have not been told the entire truth

"I feel that the media and many other outlets are over playing the situation for their own ends without really thinking or checking the actual facts."

21%

said they had other things or issues to worry about

"Because there are many other things to worry about directly involving myself, like high cost of living ."

"There are much more important and confronting issues such as the high cost of living, crime, failing healthcare."

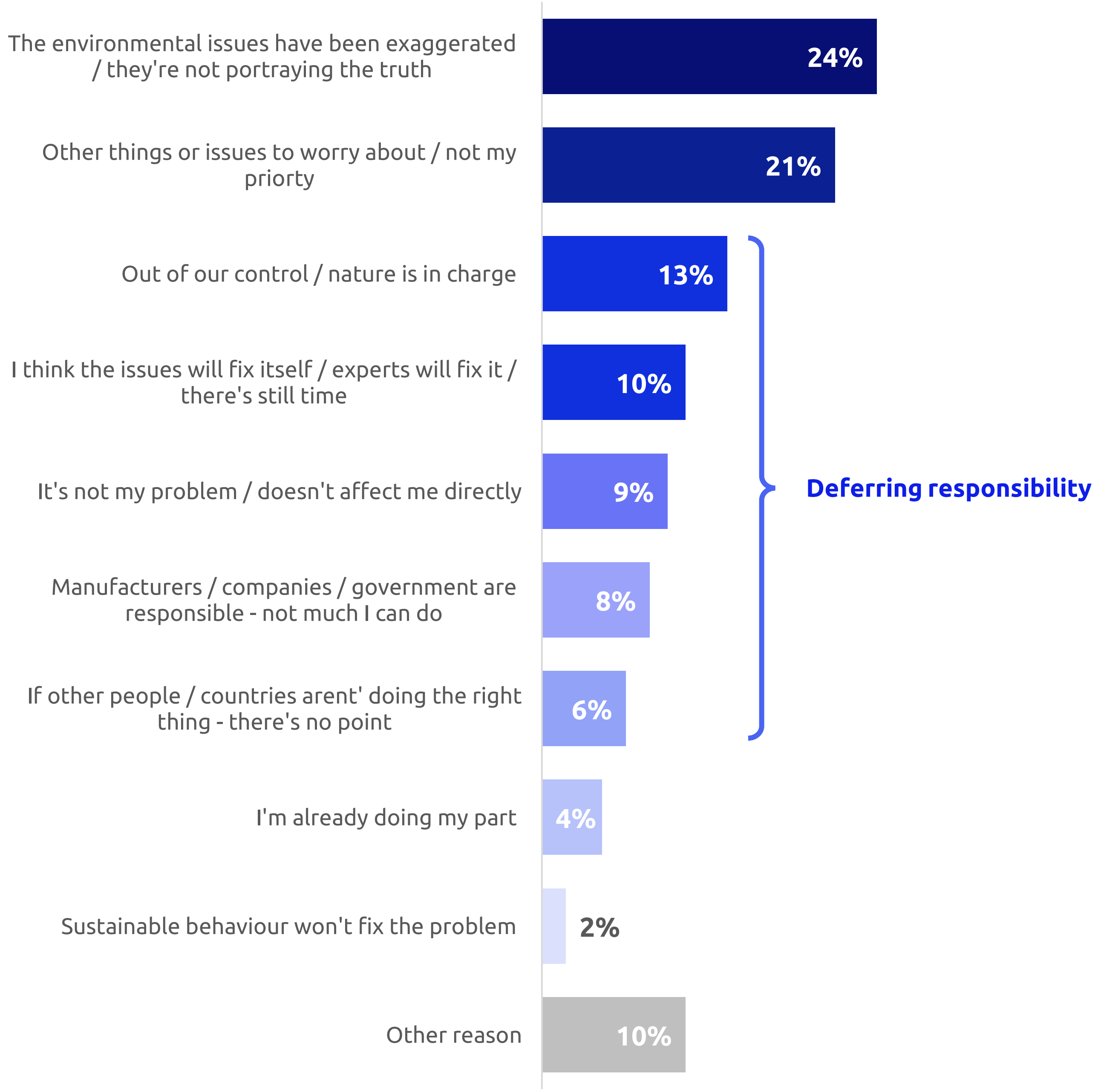
Q. Why is the environment not an immediate concern for you?
Base: Were not concerned about the environment and provided valid response, excluding don't knows (n=231). Unweighted.

Why the environment is not an immediate concern

The top two reasons behind why some Australian consumers are not as concerned about the environment are a belief that environmental issues have been exaggerated (around 1 in 4) and having other things to worry about (around 1 in 5).

The other reasons mentioned mostly related to the issue being out of their hands.

Why 22% did not see the environment as an immediate concern...

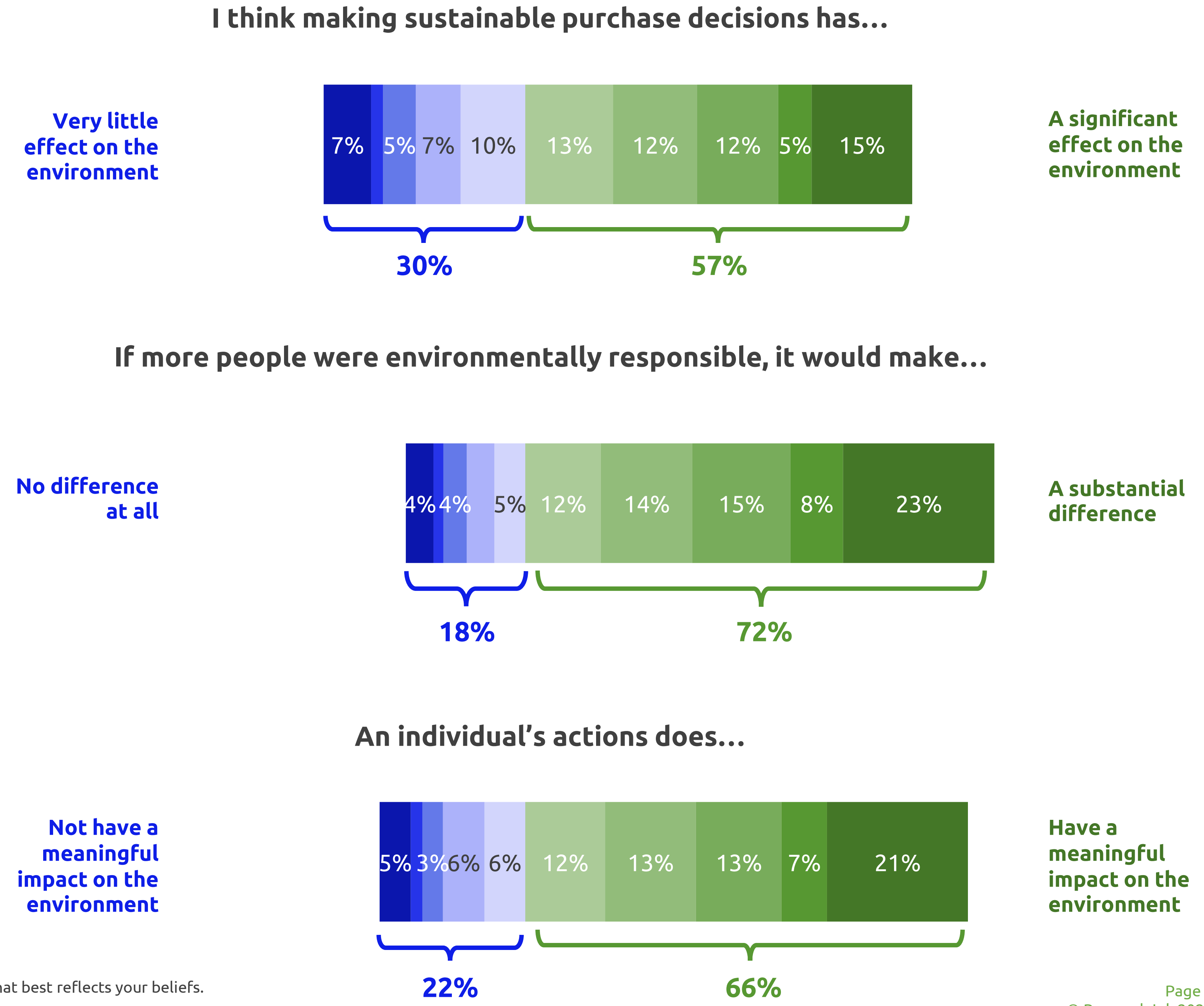


Q. Why is the environment not an immediate concern for you?
Base: Were not concerned about the environment and provided valid response, excluding don't knows (n=231). Unweighted.

Perceived Effectiveness

Almost 3 in 4 Australian consumers felt that if people were environmentally responsible it would make some difference, whilst nearly 1 in 4 thought it would make a substantial difference.

2 in 3 believed an individual's actions can have some level of meaningful impact on the environment and almost 3 in 5 felt that sustainable purchase decisions can have some effect.

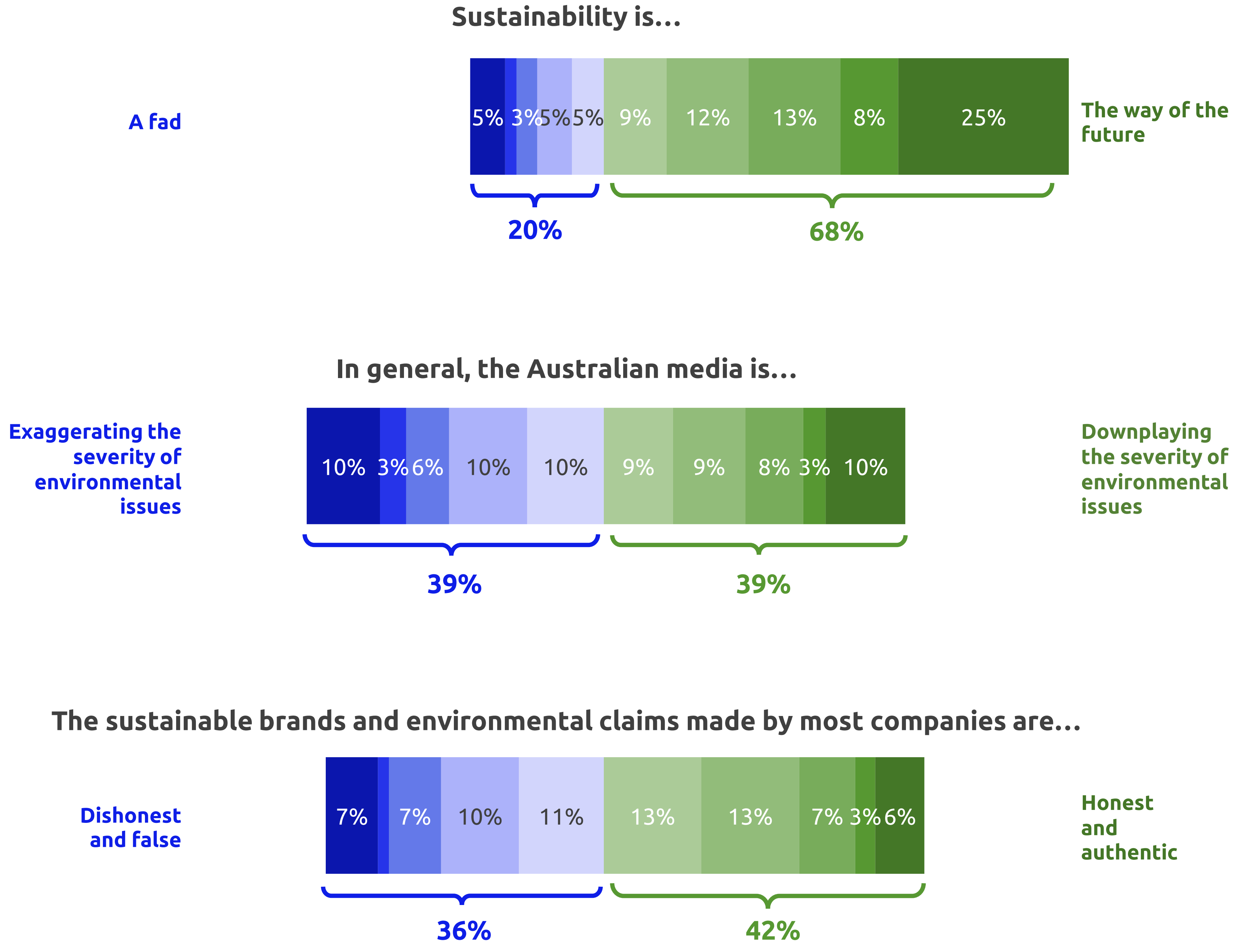


Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

Scepticism

About 2 in 3 Australian consumers thought that sustainability is the way of the future, rather than a fad.

However, they were polarised about the portrayal of environmental issues by the Australian media, as well as the honesty and authenticity of sustainable brands and their environmental claims.



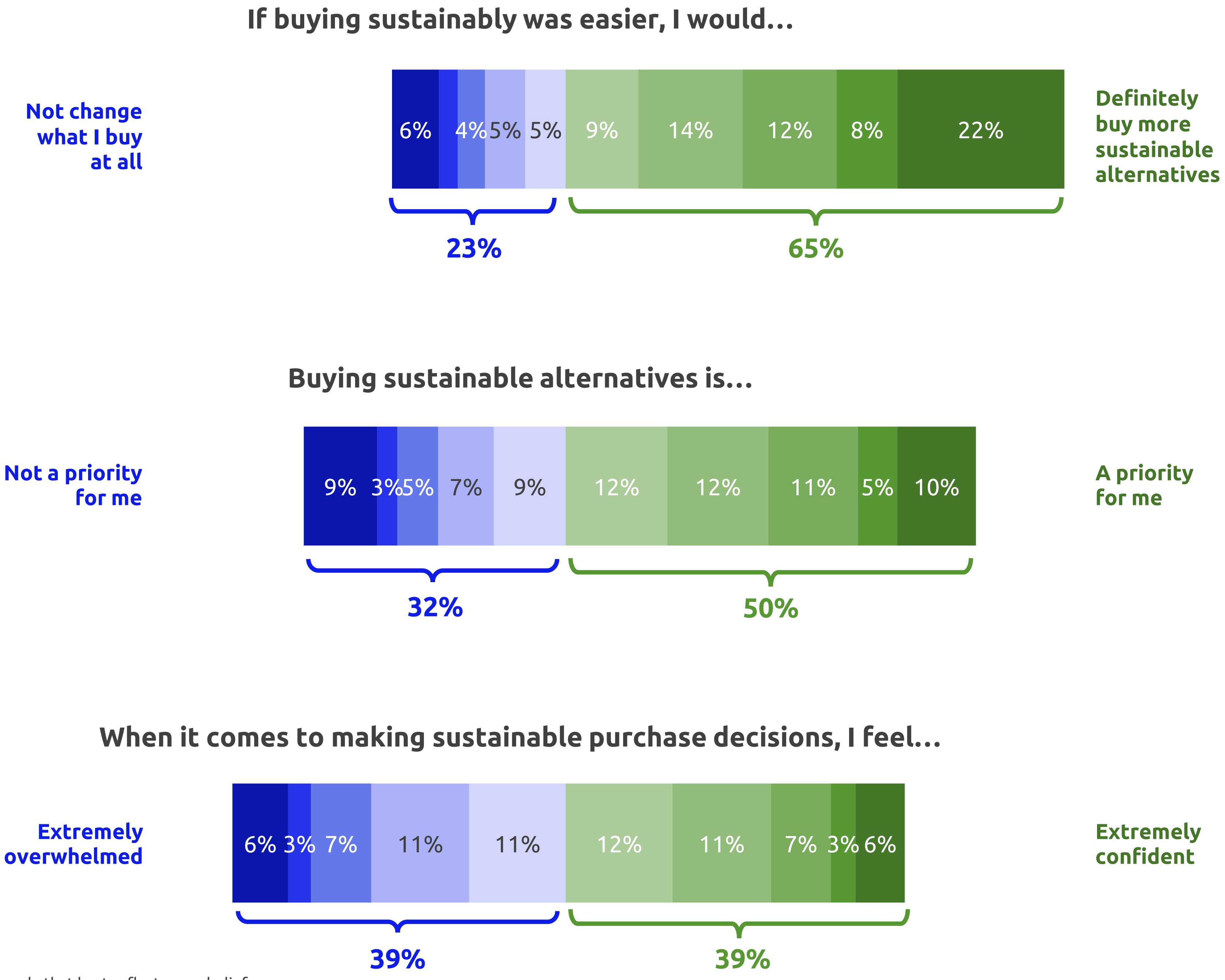
Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

Self-Efficacy

Half of Australian consumers prioritised buying sustainable alternatives to some extent.

Almost 2 in 3 would be more inclined to buy more sustainable alternatives if it was easier.

However, there was an equal mix of confidence and a feeling of being overwhelmed when making sustainable purchase decisions.



Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

When it came to sustainable purchasing decisions…

39%

felt overwhelmed to some extent

"It feels impossible to differentiate a brand being genuine about sustainability versus one trying to benefit solely off market trends."

Of these consumers….

27%

were distrustful of sustainable claims / green washing

"Listening to the claims of retailers claiming "green" credentials while still selling items wrapped in plastic. Leads to a cynical view."

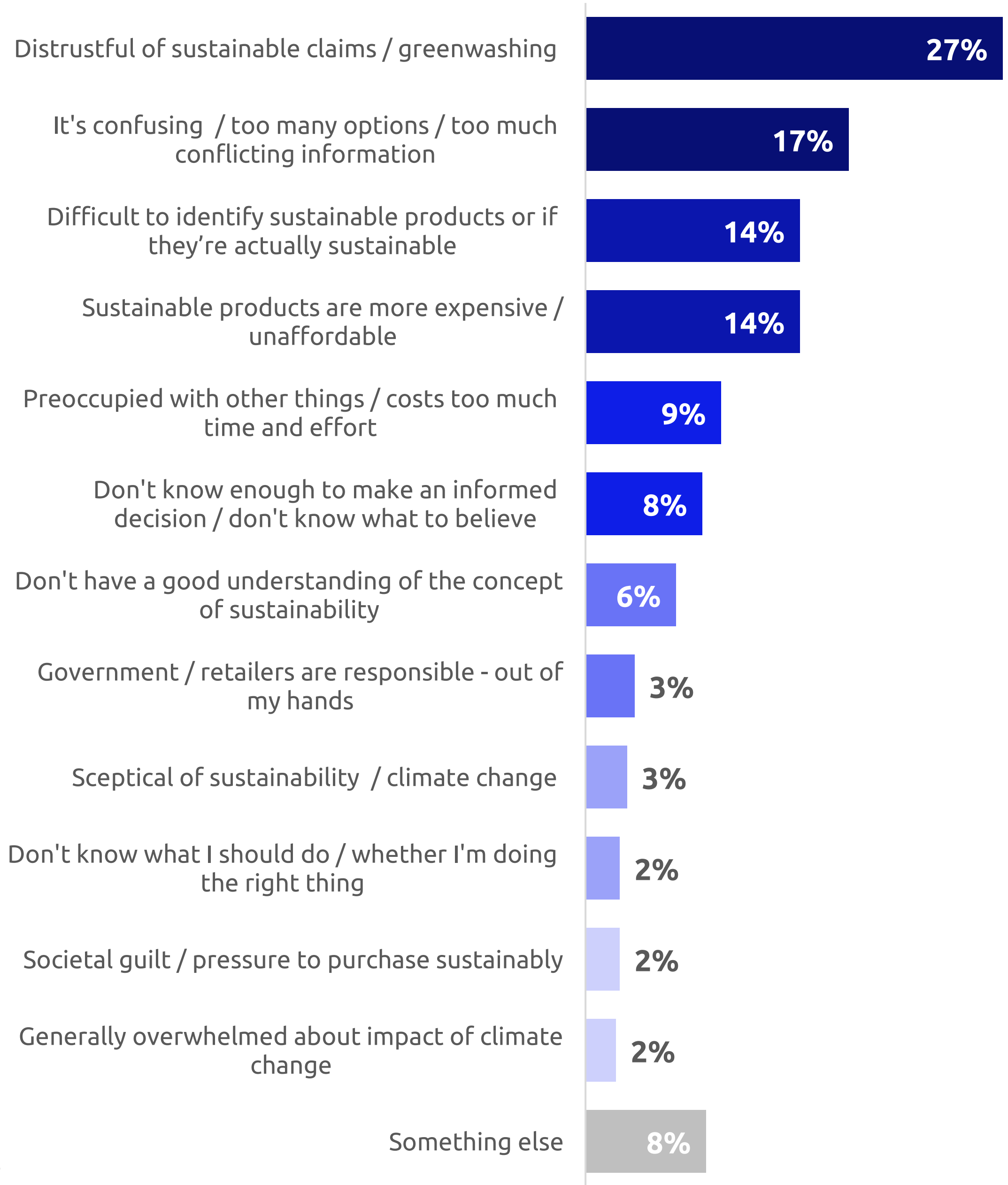
Q. Why do you feel overwhelmed by sustainable product decisions?
Base: Were overwhelmed by sustainable product decisions who provided valid response, excluding don't knows (n=405). Unweighted.

Sustainable products

When asked why they feel overwhelmed by sustainable product decisions, more than 1 in 4 mentioned distrust of the claims made by companies.

Confusion, with too many options and / or conflicting information, was mentioned by almost 1 in 5.

Why 39% felt overwhelmed by sustainable product decisions...



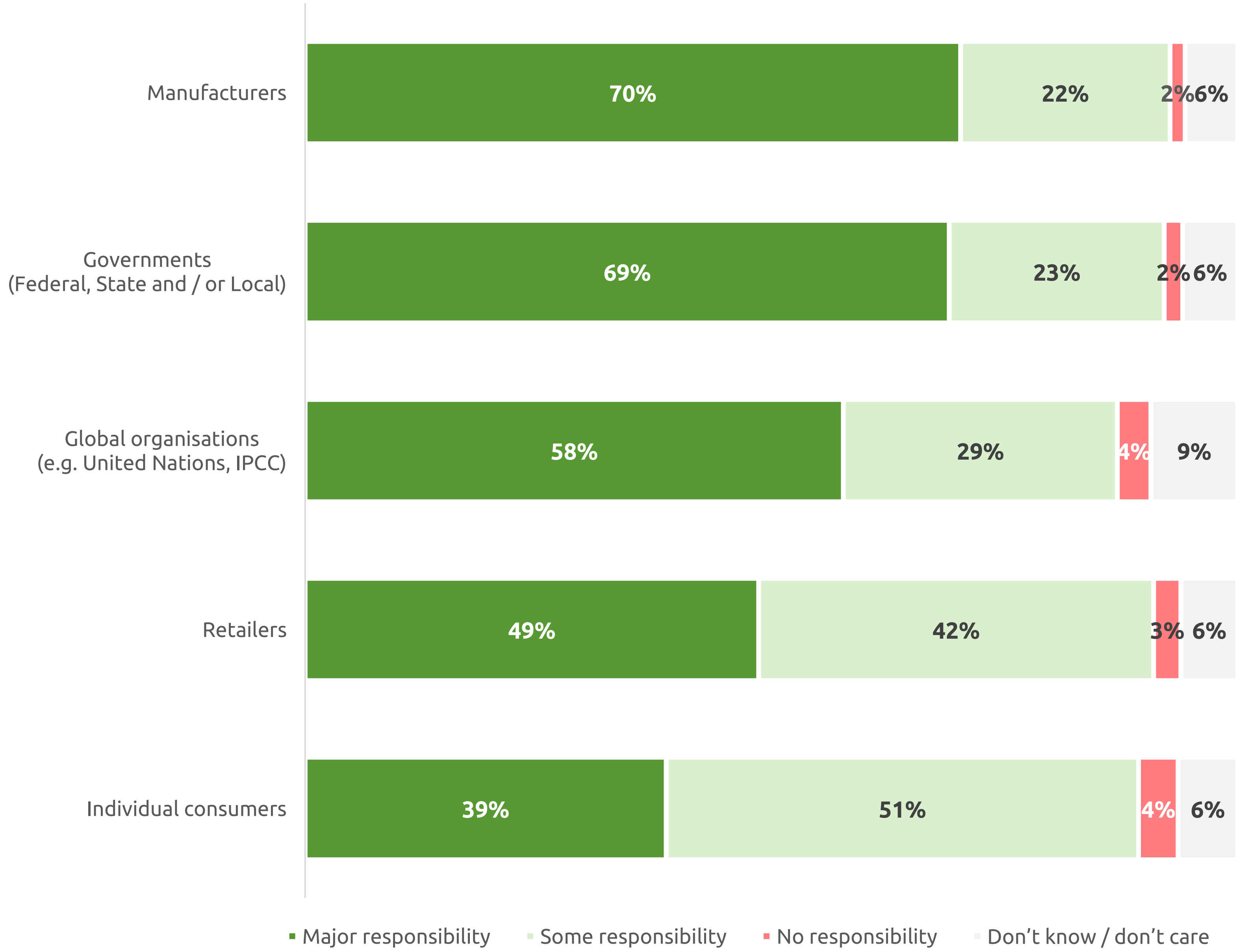
Q. Why do you feel overwhelmed by sustainable product decisions?
Base: Were overwhelmed by sustainable product decisions who provided valid response, excluding don't know's (n=405). Unweighted.

Perceived responsibility

Around 7 in 10 Australian consumers believe that manufacturers and the Government hold a major responsibility in achieving a sustainable future.

Only 2 in 5 felt that individual consumers had a major responsibility, although 1 in 2 felt that they had at least some responsibility.

Responsibility for a sustainable future...



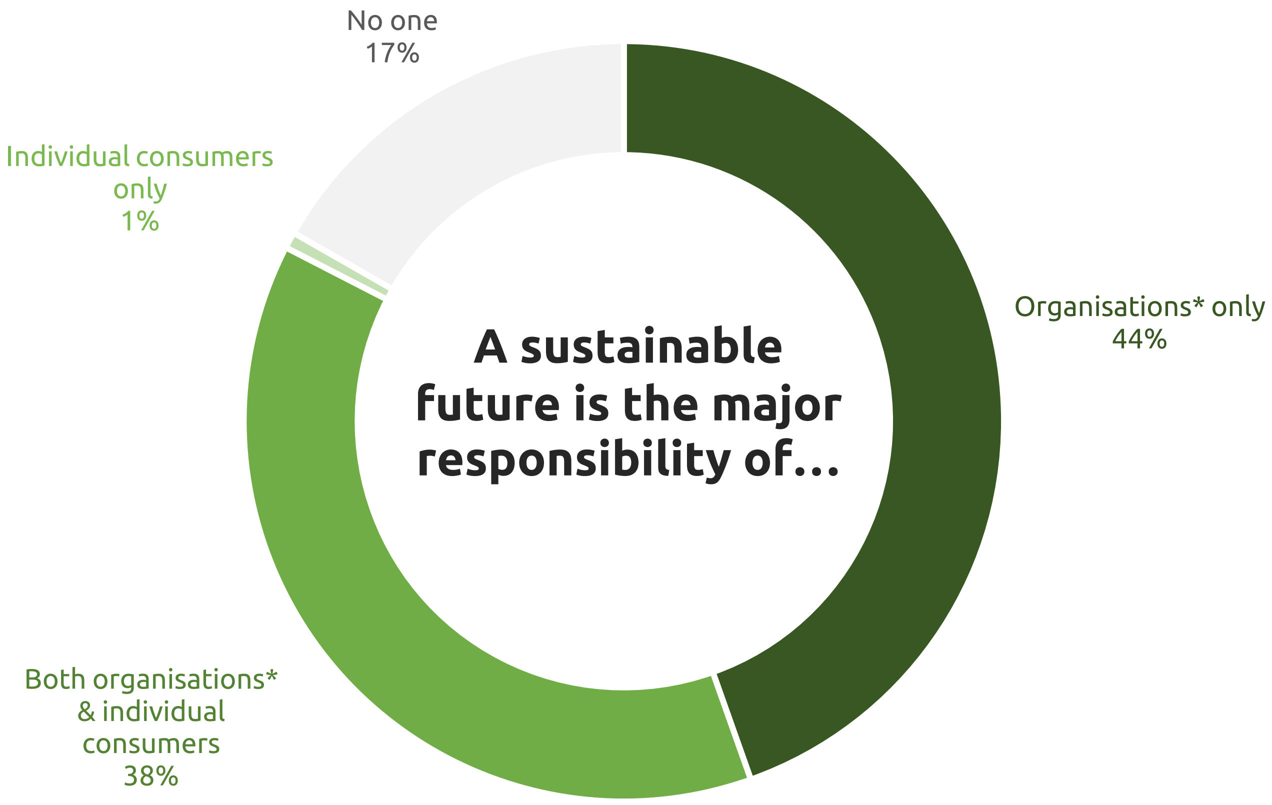
Q. Thinking about achieving a sustainable future, how much responsibility do you think should be taken by…?
Base: Australian consumers 18+ (n=1,250)

Perceived major responsibility

More than 2 in 5 Australian consumers believed that a sustainable future was a major responsibility of organisations, <u>not</u> individual consumers.

Almost 2 in 5 felt it should be a collective responsibility between organisations and individual consumers.

Less than 1 in 5 did not consider it to be a major responsibility for anyone.



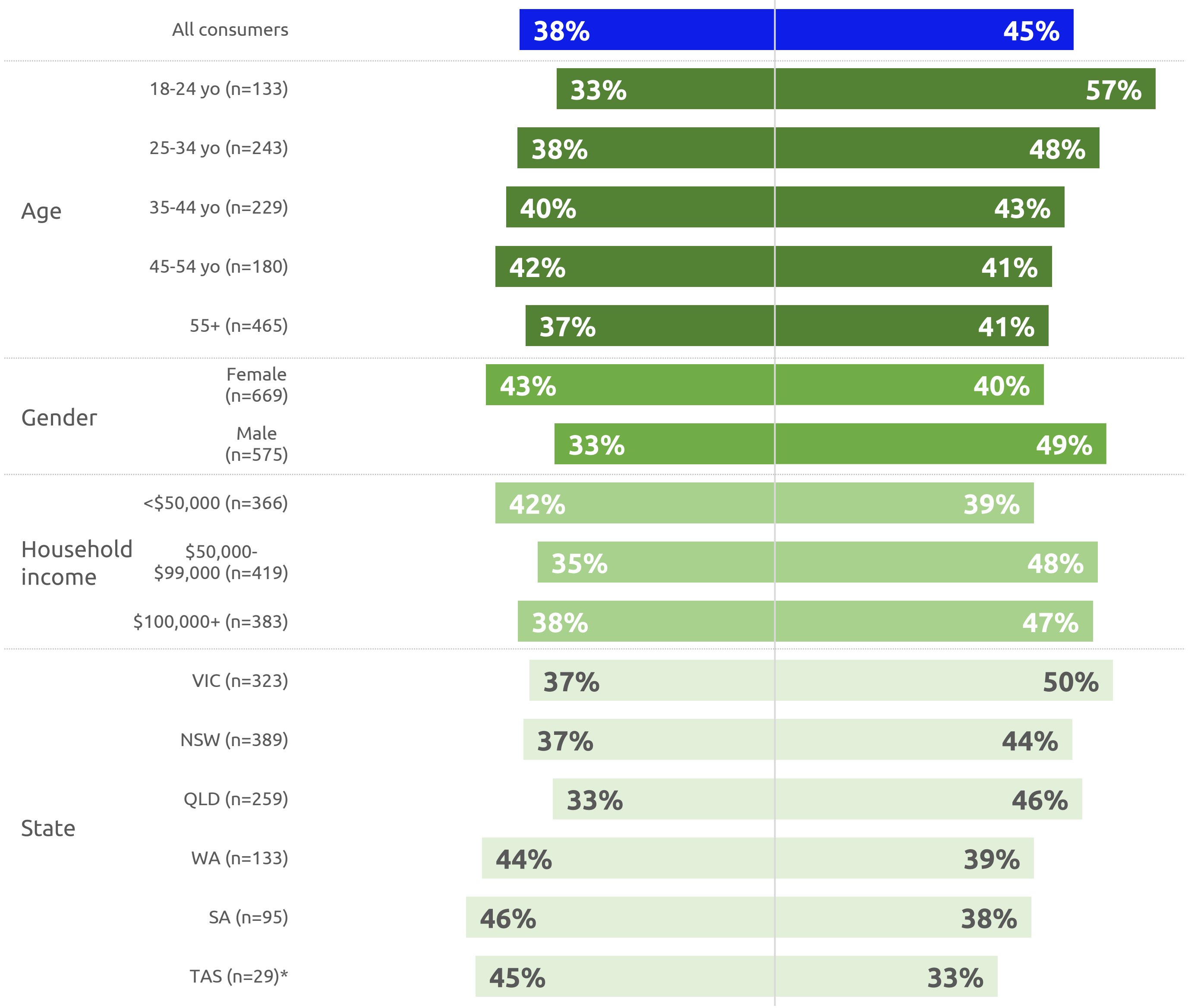
Q. Thinking about achieving a sustainable future, how much responsibility do you think should be taken by…?
Base: Australian consumers 18+ (n=1,250) *Organisations include Government, Manufacturers, Retailers, Global organisations

A sustainable future is the major responsibility of…

Both organisations & individual consumers

Highest among…

- 35 to 54 year olds
- Females
- Lower income households
- WA, SA & TAS residents



Organisations only

Highest among…

- 18 to 24 year olds
- Males
- Middle & higher income households
- VIC, NSW & QLD residents

Q. Thinking about achieving a sustainable future, how much responsibility do you think should be taken by…?
Base: Australian consumers 18+ (n=1,250) *CAUTION: Small sample size (n<50)

Sustainability in day-to-day purchases

What makes a product sustainable…

19%

Longevity / durability / good quality

"…I believe it means that it's durable and made from high standard materials, something that would last years and years."

18%

Sustainable / ethical production

"A product is sustainable if it has been ethically made, this means labour force, materials and production using carbon neutral materials and ethical treatment of animals, people and environment."

16%

Able to be recycled / reused / biodegradable

"For me personally, if the product is made out of recycled materials or reused products then I would consider it a sustainable product. Similarly, if I know the product that I am going to buy can be recycled by proper authorities with right management in the background then I would also consider it to be sustainable as well."

Q. In your opinion, what makes a product sustainable?
Base: Australian consumers 18+ who provided a valid response (n=1,217). Unweighted.

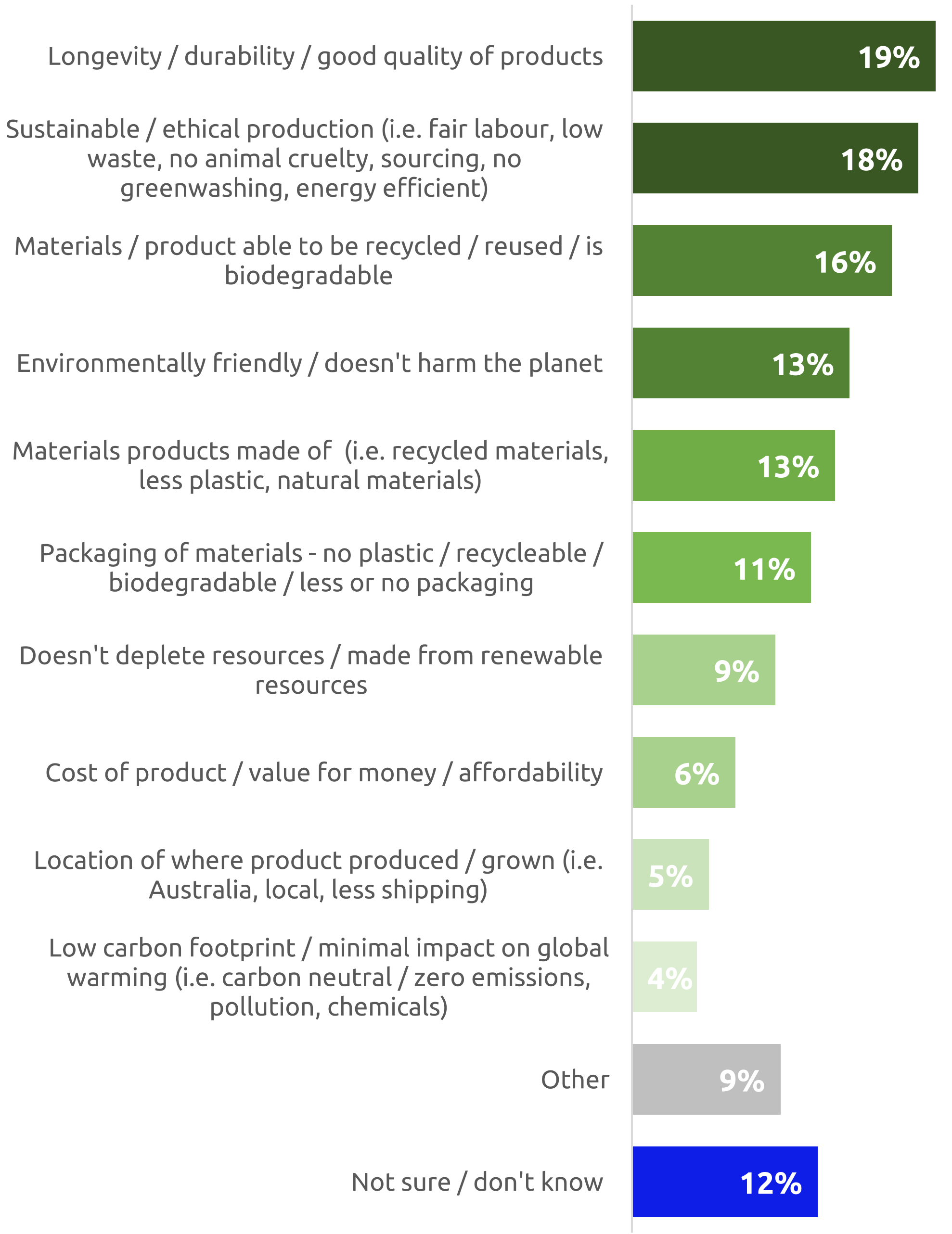
Sustainable products

When asked what makes a product sustainable, almost 1 in 5 mentioned the longevity, durability or quality.

This was followed by sustainable / ethical production practices and being able to recycle / reuse the product.

Over 1 in 10 said they were unsure about what makes a product sustainable.

What makes a product sustainable…



Q. In your opinion, what makes a product sustainable?
Base: Australian consumers 18+ who provided a valid response (n=1,217). Unweighted.

% Australian consumers purchased in the 3 months prior…

90%
~18.8 million
snacks / drinks

87%
~18.1 million
pantry / fridge essentials

84%
~17.6 million
cleaning products

82%
~17.1 million
personal care / beauty products

82%
~17.2 million
paper products

76%
~16.0 million
food / kitchen storage

52%
~10.8 million
fashion / footwear

39%
~8.1 million
homewares

35%
~7.4 million
electronics / tech

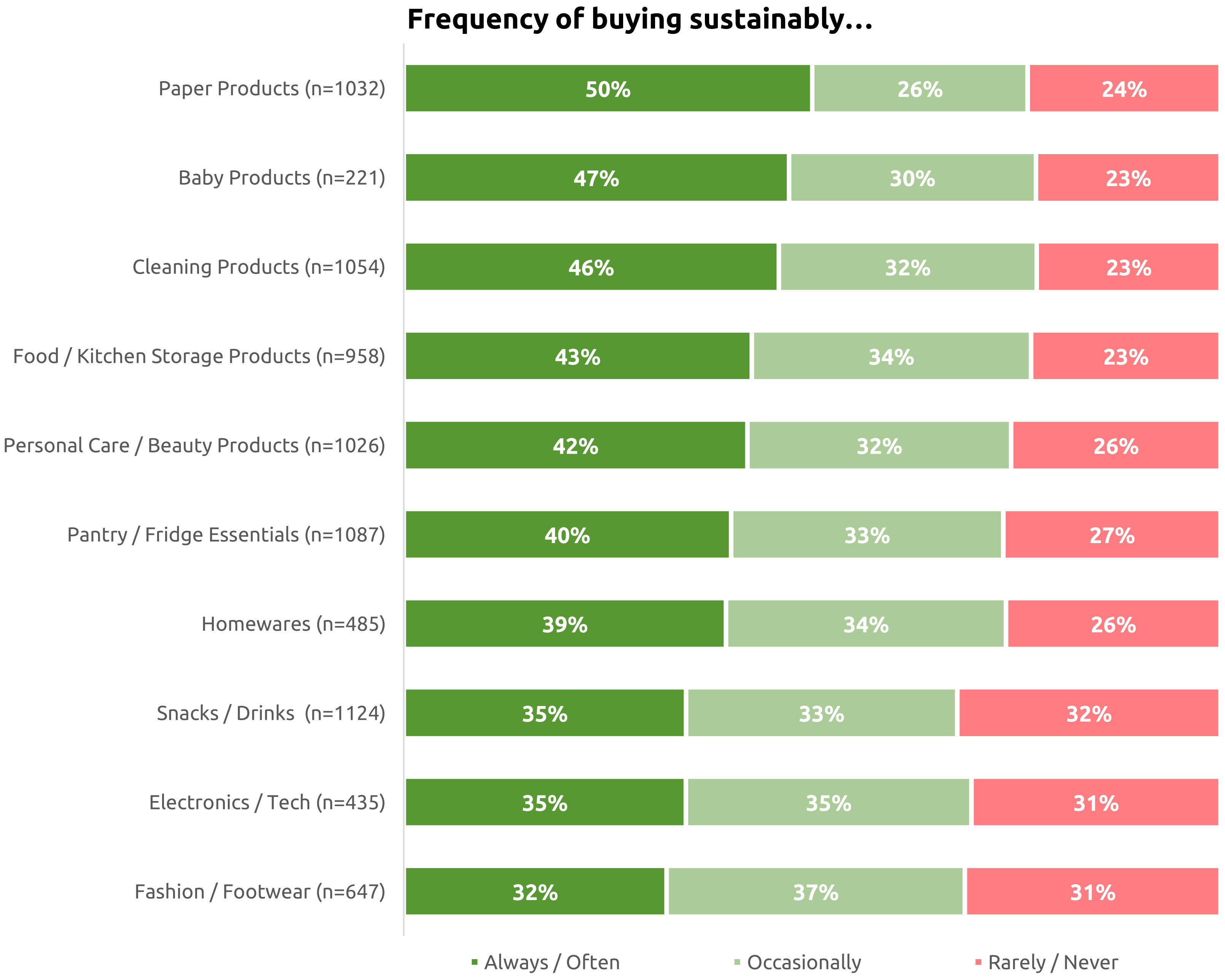
17%
~3.6 million
baby products

Q. In the last 3 months , which of the following have you purchased?
Base: Australian consumers 18+ (n=1,250)

Sustainable purchasing

When purchasing paper, baby and cleaning products, up to 1 in 2 Australian consumers always or often purchased sustainably.

Australian consumers were least likely to purchase sustainably in the fashion / footwear, snacks / drinks and electronics / tech categories (with around 1 in 3 purchasing always or often).



Q. In the last 3 months, when you purchased the following, did you…?
Base: Consumers who had purchased in each product category

Across at least one of the day-to-day product categories…

64%
~13.3 million
often or always purchased sustainably

84%
~17.6 million
occasionally, often or always purchased sustainably

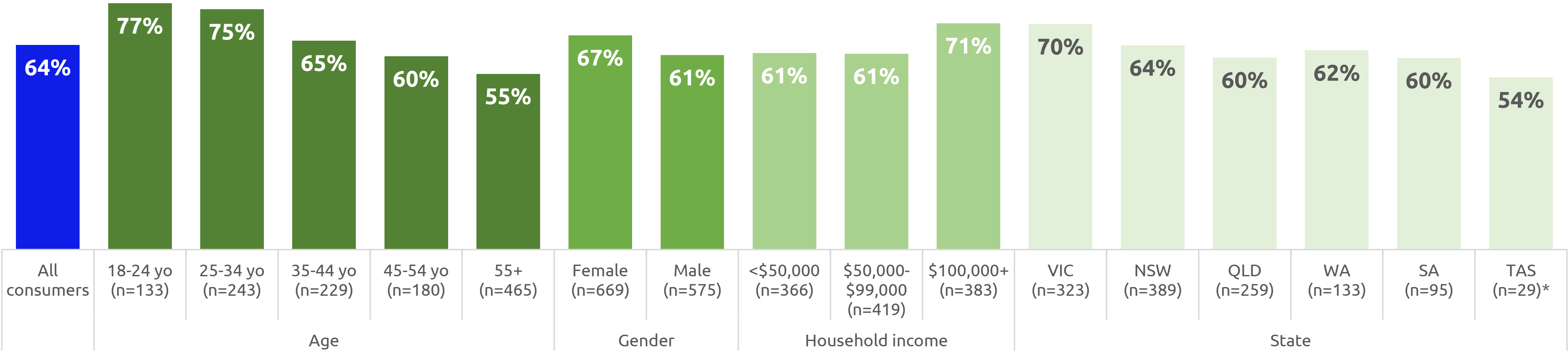
On average, the number they did this for was…

2.7
product categories

4.7
product categories

Q. In the last 3 months, when you purchased the following, did you…?
Base: All respondents (n=1,250)

% often / always purchase sustainably across at least one day-to-day product category



Highest among…

- Younger consumers
- Females
- Higher income households
- Victorian residents

Q. In the last 3 months, when you purchased the following, did you…?
Base: Australian consumers 18+ (n=1,250) *CAUTION: Small sample size (n<50)

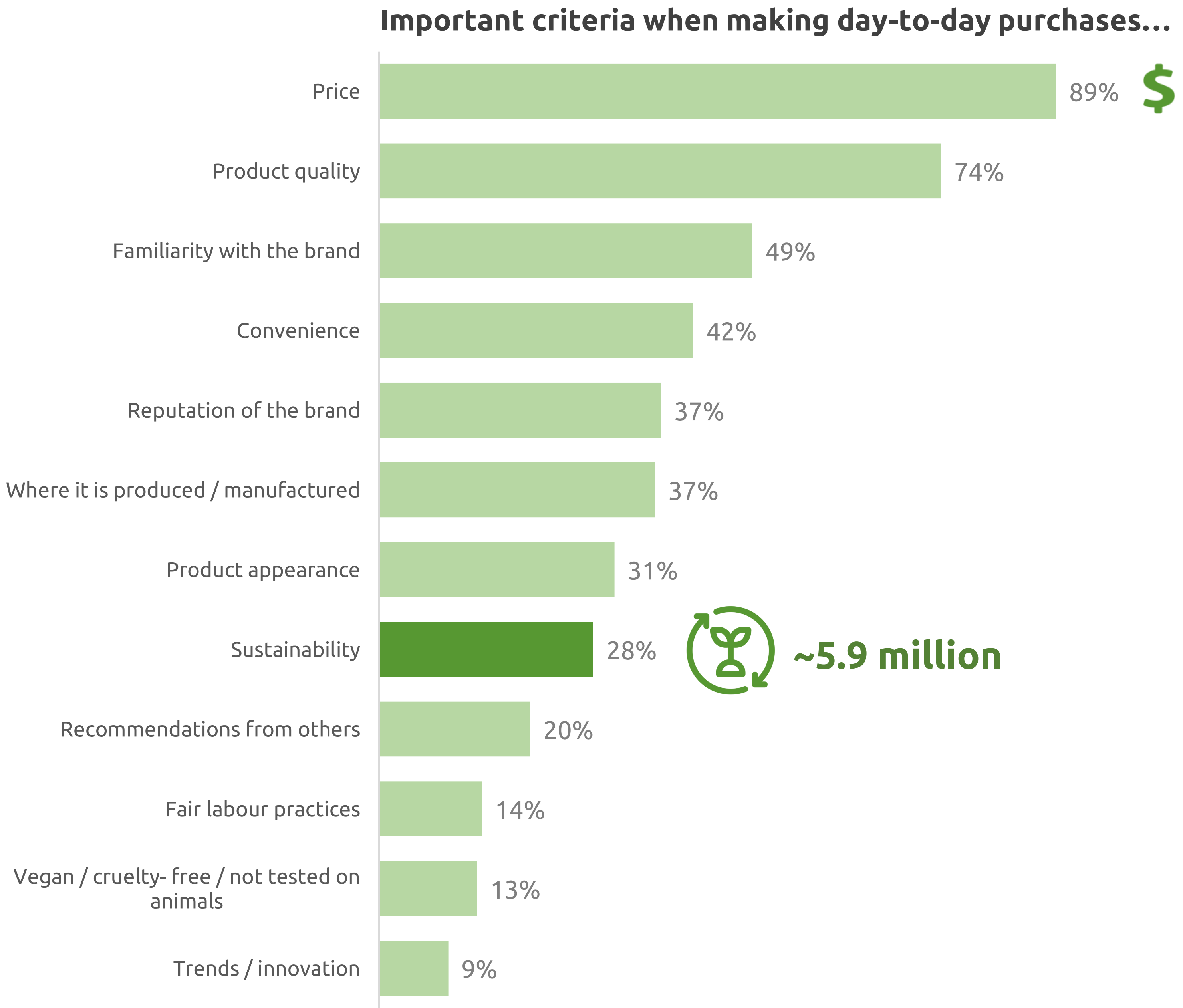
Purchasing criteria

Price dominates day-to-day purchasing decisions, considered important by around 9 in 10 Australian consumers, with product quality a clear second, considered important by around 3 in 4.

Despite high levels of sustainable purchasing, when competing against other purchasing criteria, just over 1 in 4 considered sustainability important.

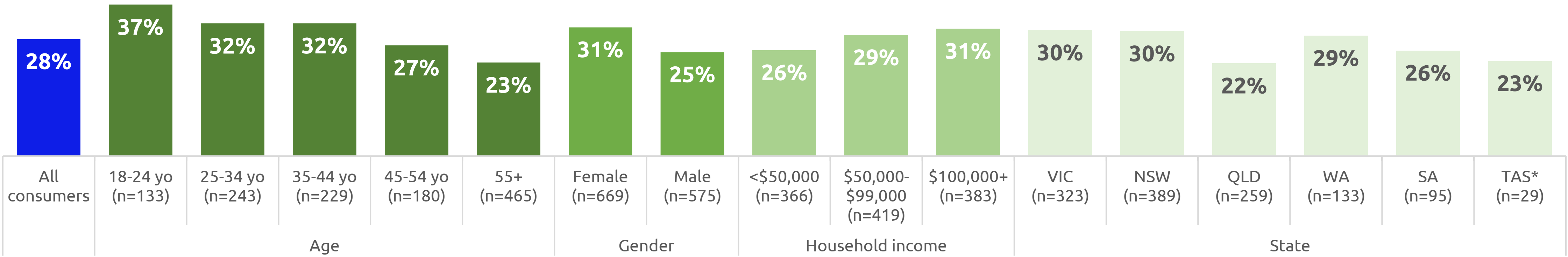
4.4

is the average number of criteria considered important



Q. And when purchasing these types of products, in general, which of the following criteria are important to you?
Base: Australian consumers 18+ (n=1,250)

% who considered **sustainability important** when making day-to-day purchases



Highest among...

Younger consumers

Females

Higher income households

Victorian, NSW and WA residents

Q. And when purchasing these types of products, in general, which of the following criteria are important to you?
Base: Australian consumers 18+ (n=1,250) *CAUTION: Small sample size (n<50)

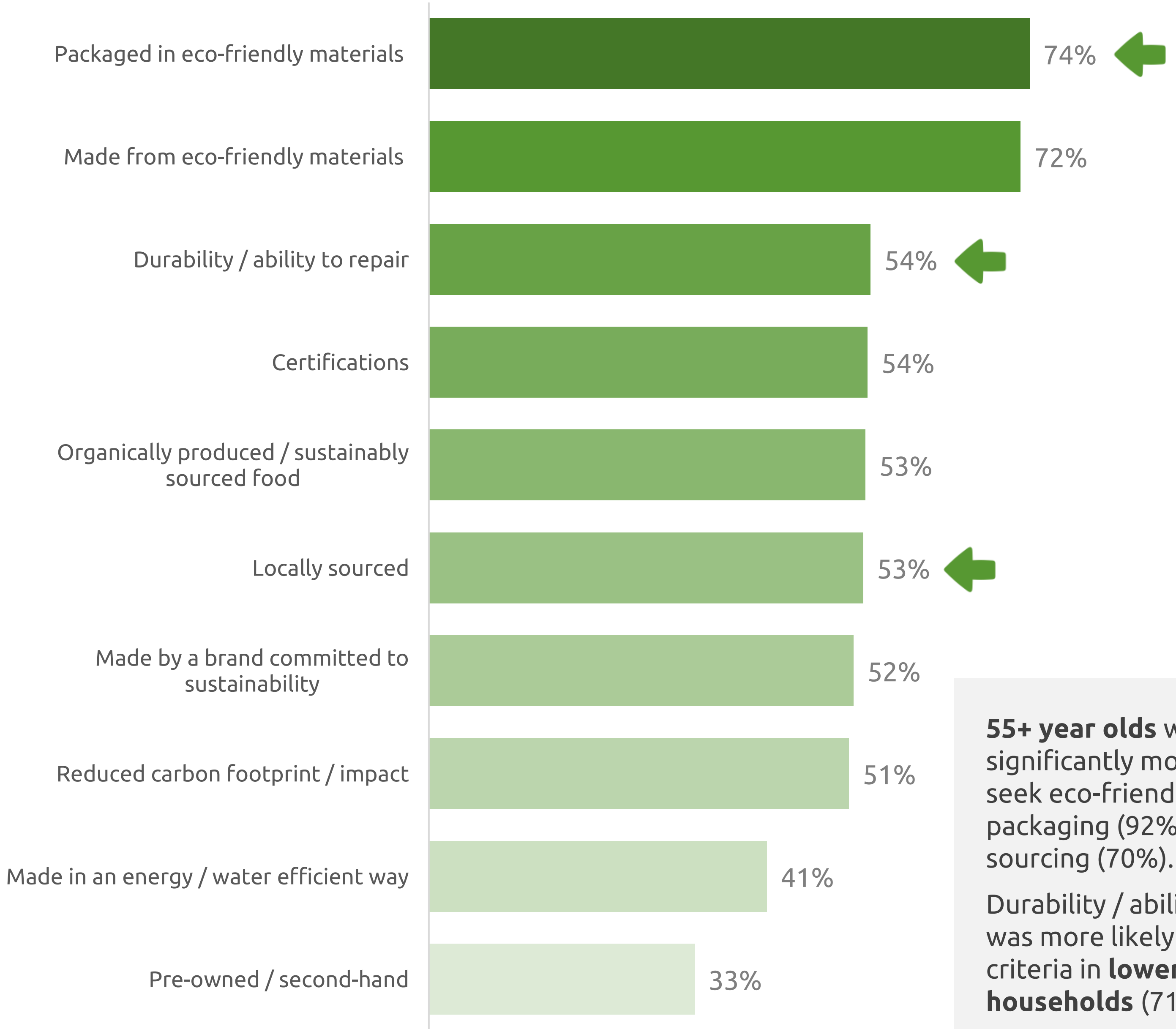
Sustainability criteria

The materials used to manufacture and package products were the top 2 criteria used by sustainably conscious consumers to work out whether a product is sustainable (cited by almost 3 in 4).

A broad range of other criteria were cited by around 1 in 2.

Manufacturing in an energy / water efficient way and purchasing second-hand were less considered criteria.

Considerations when purchasing sustainably…



55+ year olds were significantly more likely to seek eco-friendly packaging (92%) and local sourcing (70%).

Durability / ability to repair was more likely to be a criteria in **lower income households** (71%).

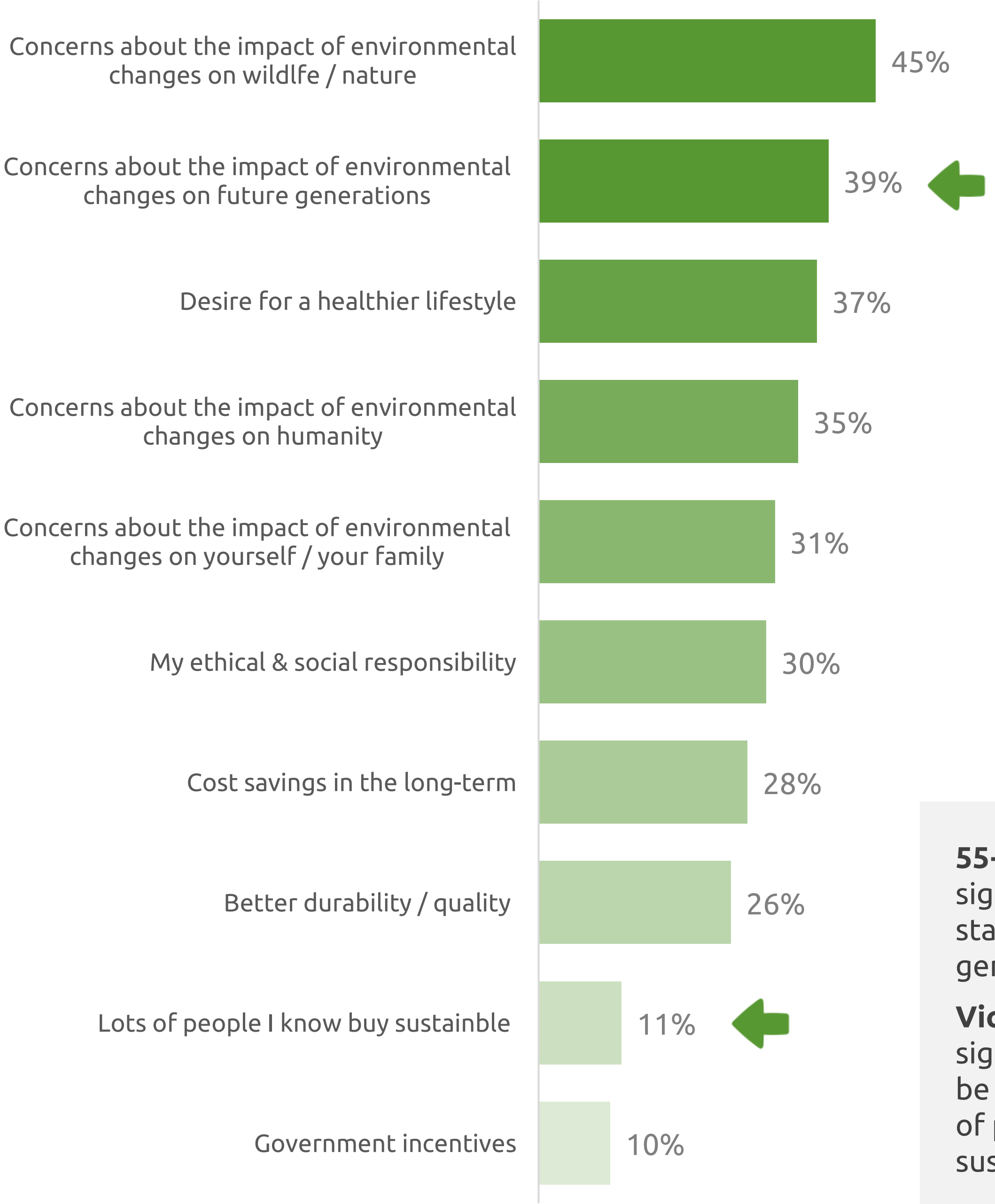
Q. To work out whether a product is sustainable, which of the following criteria do you typically consider?
Base: Consumers who considered sustainability an important factor (n=315)

Motivations & Barriers

Reasons for purchasing sustainably

Almost 1 in 2 sustainably conscious consumers were driven by concerns for wildlife / nature, with concerns for future generations and desire for a healthier lifestyle the next most common reasons.

Popularity and Government incentives were the least likely to be motivators (at around 1 in 10).



55+ year olds were significantly more likely to state concerns for future generations (53%).

Victorians were significantly more likely to be driven by knowing lots of people who buy sustainable (22%).

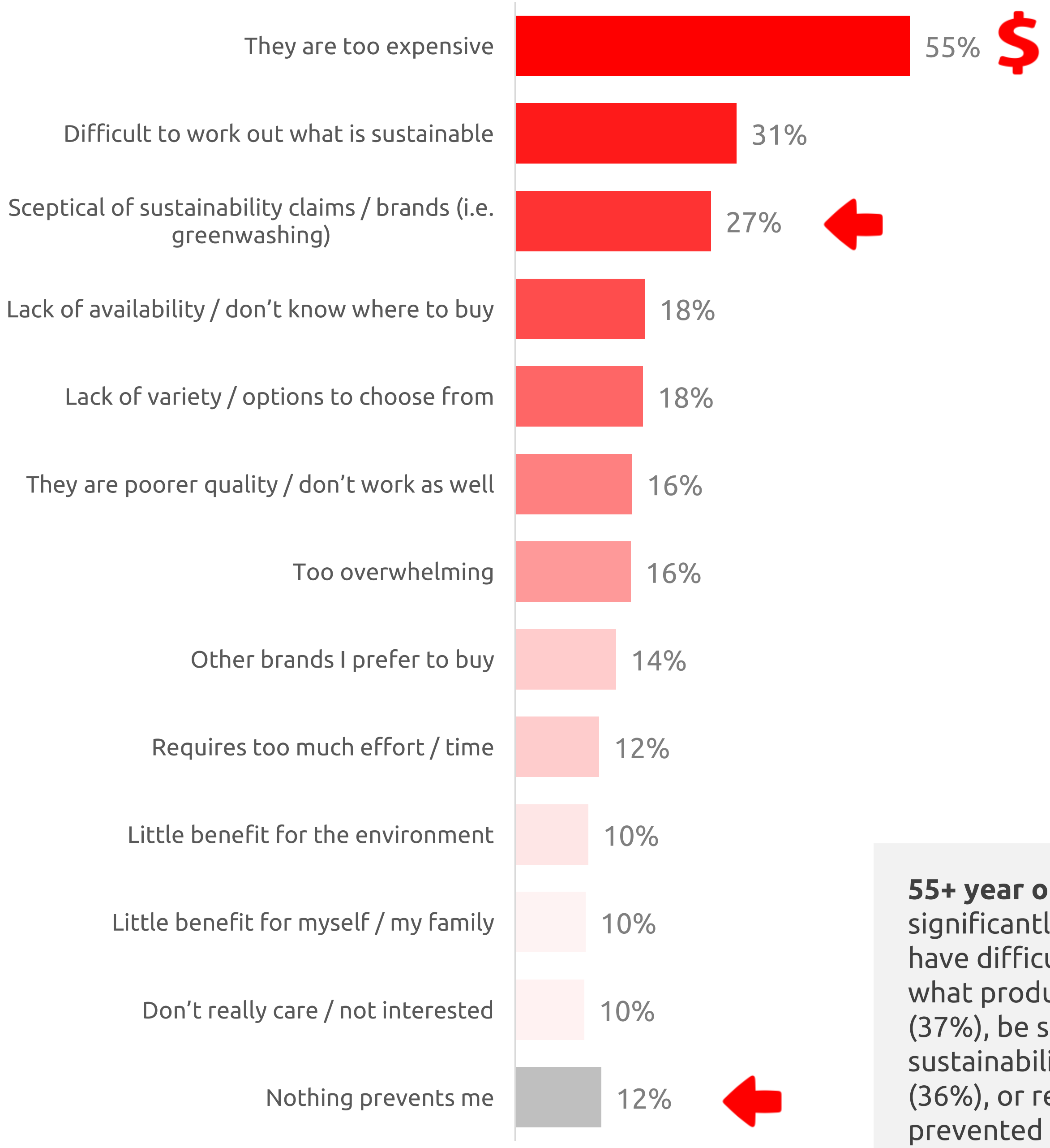
Q. Which of the following are your top 3 reasons for purchasing sustainable product alternatives?
Base: Australian consumers who considered sustainability an important criteria (n=351)

Barriers to purchasing sustainably

More than 1 in 2 Australian consumers report that the expense of sustainable products is a barrier to purchasing sustainably.

Outside of expense, 1 in 3 find it difficult to work out what products are sustainable and more than 1 in 4 are sceptical of sustainability claims / brands.

Doubts about the benefits of buying sustainably are only barriers to around 1 in 10.



55+ year olds were significantly more likely to have difficulty to work out what products are sustainable (37%), be sceptical of sustainability claims / brands (36%), or report that nothing prevented them (18%).

Q. Which of the following, if any, prevent you from buying sustainable alternatives
Base: Australian consumers 18+ (n=1,250)

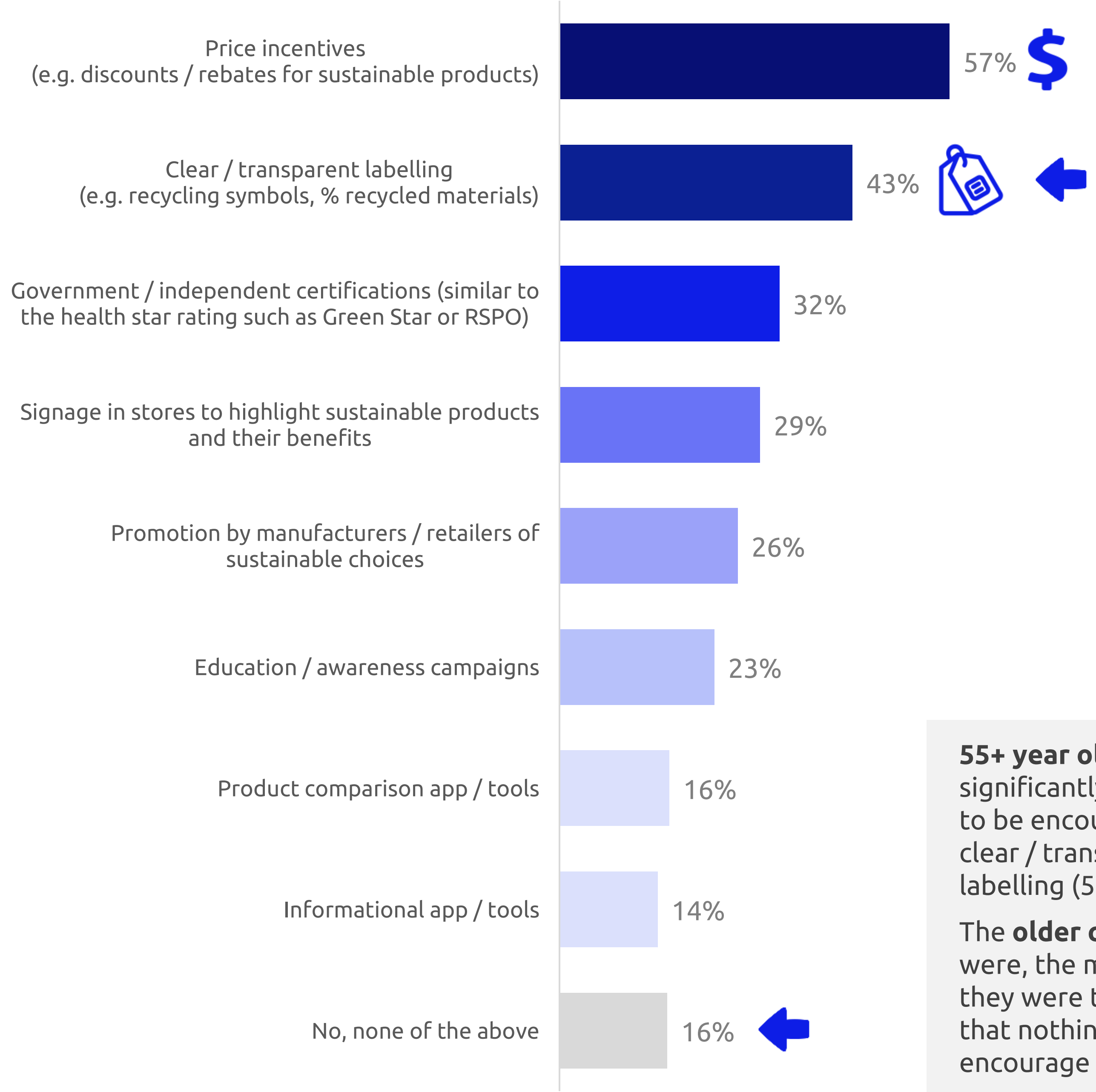
Encourage buying sustainable alternatives

84% of consumers state that they could be encouraged to buy more sustainable alternatives.

Consistent with price being the most important purchasing criteria and expense being the number one barrier to purchasing sustainably, almost 3 in 5 would be encouraged by price incentives.

Clear and transparent labelling was second (at just over 2 in 5).

Informational and product comparison app / tools were not as popular.



55+ year olds were significantly more likely to be encouraged by clear / transparent labelling (50%).

The **older consumers** were, the more likely they were to indicate that nothing would encourage them.

Q. Would any of the following help or encourage you to buy more sustainable alternatives?
Base: Australian consumers 18+ (n=1250)

Reusables

Reusables

46%

~9.5 million

own a reusable cup for take-away drinks

Usage

39% all the time

36% most of the time

20% some of the time

4% rarely

74%

~15.4 million

own a reusable water bottle

Usage

58% all the time

29% most of the time

11% some of the time

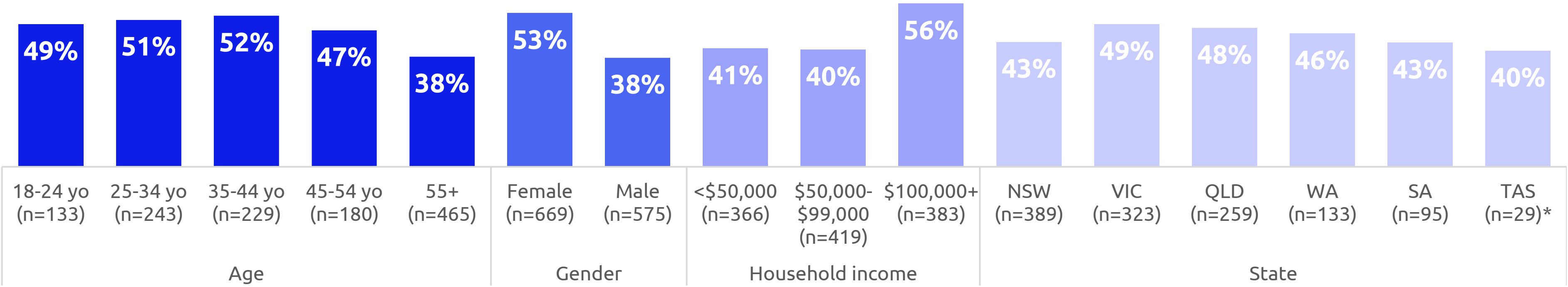
2% rarely

Q. Do you own a reusable cup for take-away drinks and / or a reusable water bottle? Base: Australian consumers 18+ (n=1250)
Q. How often do you use a reusable cup? Base: Own a reusable cup (n=571)
Q. How often do you use a reusable water bottle? Base: Own a reusable water bottle (n=923)

46%

own a reusable cup for take-away drinks

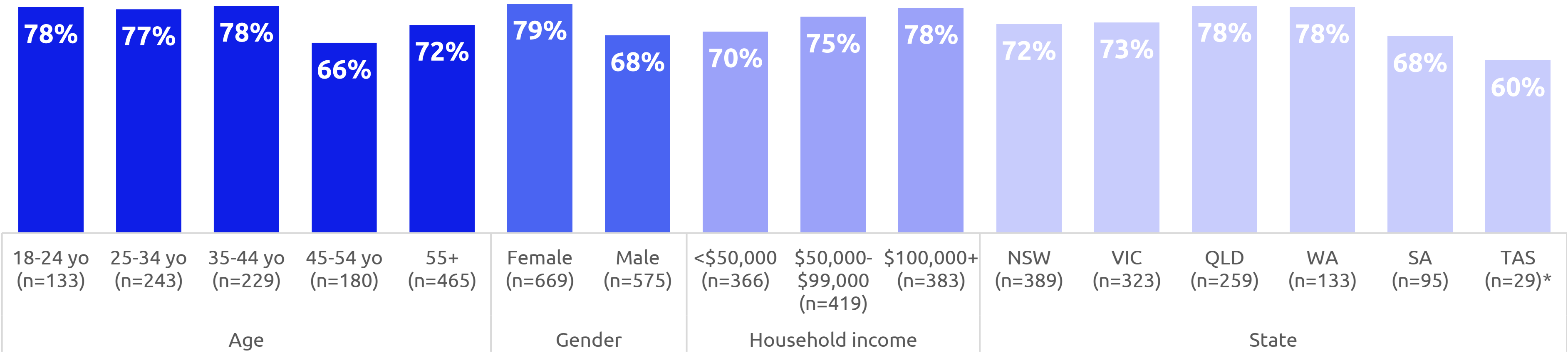
Highest among…
Females
Higher income group
VIC & QLD residents



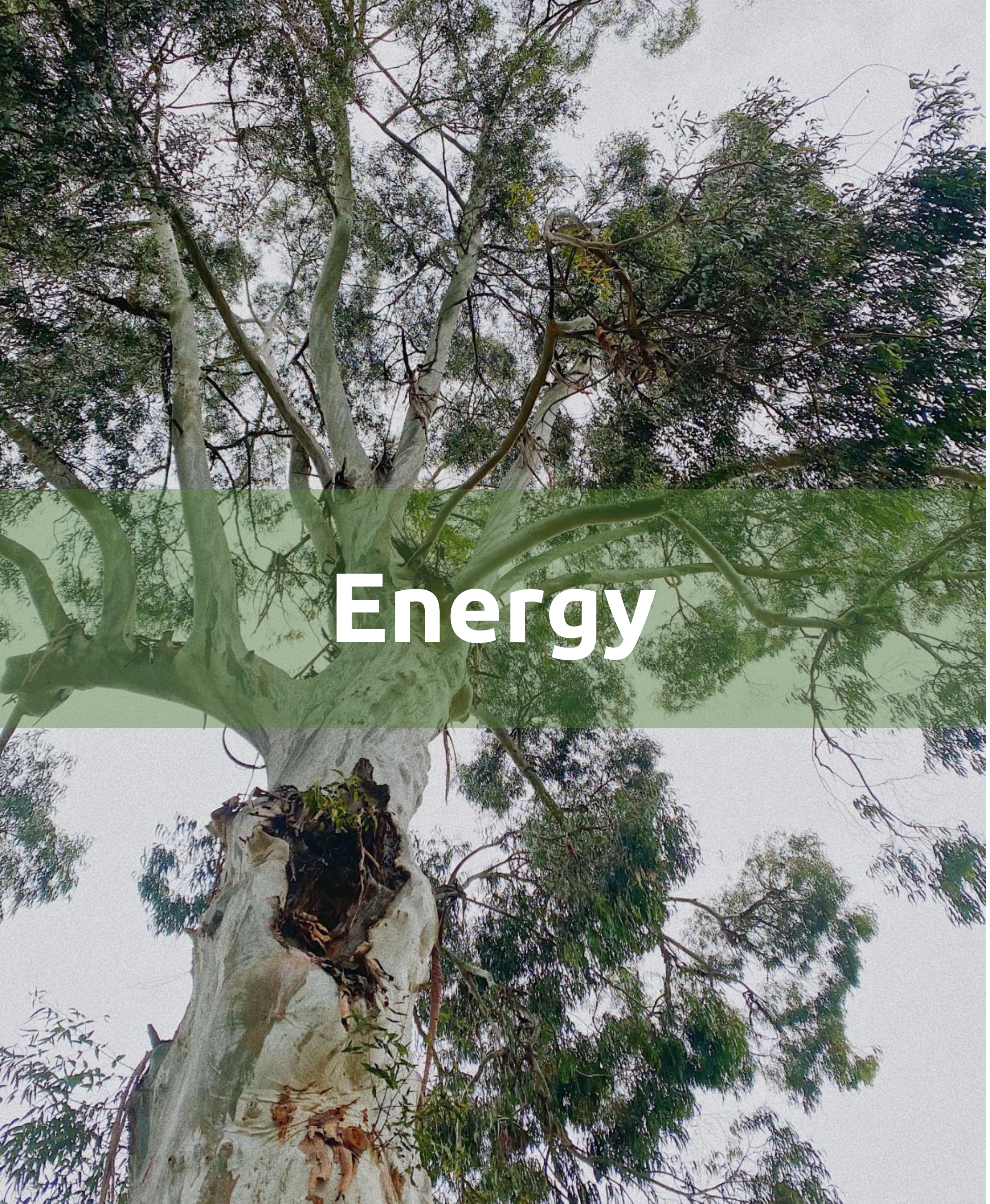
74%

own a reusable water bottle

Highest among…
Females
18 to 44 year olds
QLD & WA residents



Q. Do you own a reusable cup for take-away drinks and / or a reusable water bottle?
Base: Australian consumers 18+ (n=1,250) *CAUTION: Small sample size (n<50)



Energy

Gas / Electricity Provider

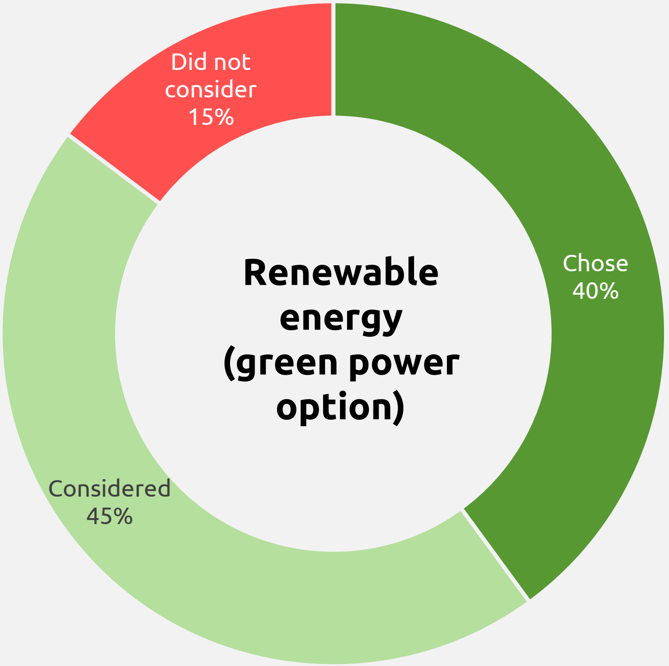
2 out of 5 Australian consumers who had chosen a new gas / electricity provider in the year prior had chosen a green power option.

Of those considering a new provider in the following year, it is estimated that 2 out of 5 would choose a green power option*.

Very few consumers were not open to considering green power options (15% of those who had chosen a provider and 9% of those who were considering changing providers).

15%

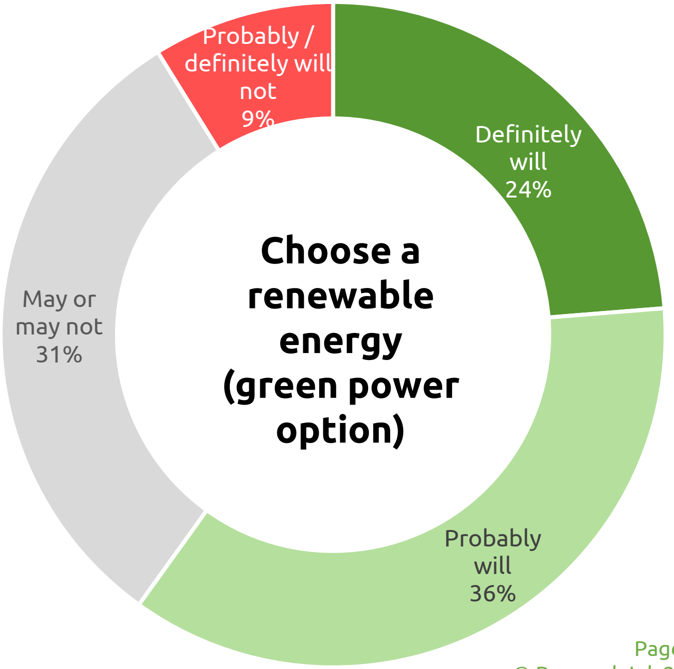
had chosen provider in the year prior



Q. Have you done any of the following in the last 12 months?
Base: Australian consumers 18+ (n=1,250)
Q. Did you choose a renewable energy (green power) gas / electricity option?
Base: Chose a new provider in last 12 months (n=183)

11%

were considering a new provider in the next year



Q. And are you considering doing any of the following in the next 12 months?
Base: Hadn't considered a new provider in last 12 months (n=1,067)
Q. How likely are you to choose a renewable energy (green power) option when choosing your new gas / electricity provider?
Base: Considering a new provider in next 12 months (n=143)

The **Urban & Hauser formula has been used to estimate the likelihood of each behaviour. This formula takes into account the difference between respondents' stated intentions and their actual real-life behaviours by down-weighting their responses as follows: **Potential Take Up** = ((% Definitely Would x 0.9) + (%Probably Would x 0.4) + (%May or May Not x 0.1))*

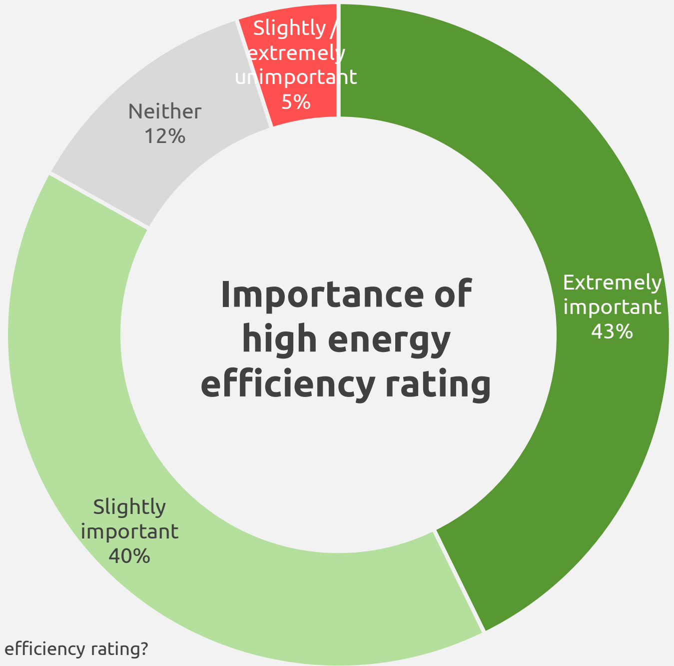
Small / Large Appliances

A high energy efficiency rating was of some importance to most Australian consumers when buying small / large appliances (over 8 in 10).

For recent purchasers, more than 2 in 5 considered it *extremely important*, whereas for future purchasers, almost 1 in 2 did.

41%

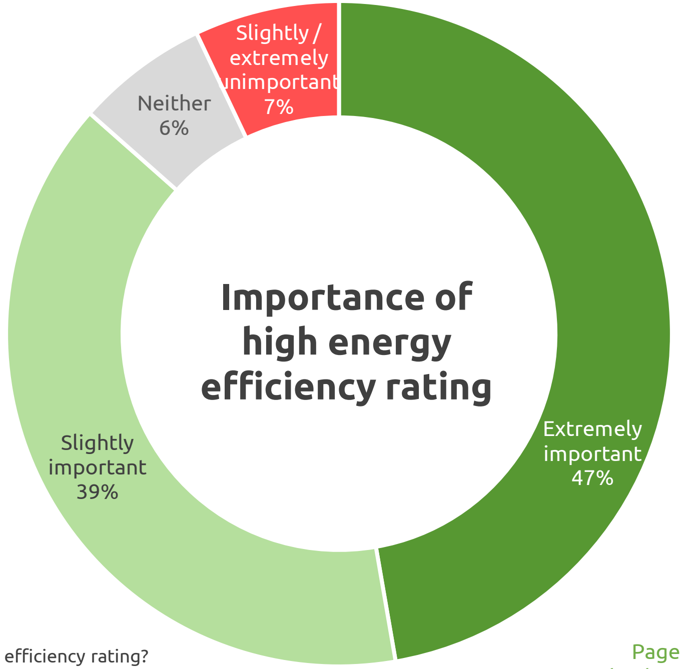
had bought in the year prior



Q. Have you done any of the following in the last 12 months?
Base: Australian consumers 18+ (n=1,250)
Q. How important is it to you that your new small / appliance has a high energy efficiency rating?
Base: Bought in last 12 months (n=504)

21%

were considering buying in the next year



Q. And are you considering doing any of the following in the next 12 months?
Base: Hadn't bought in the past 12 months (n=746)
Q. How important is it to you that your new small / appliance has a high energy efficiency rating?
Base: Were considering buying in next 12 months (n=153)

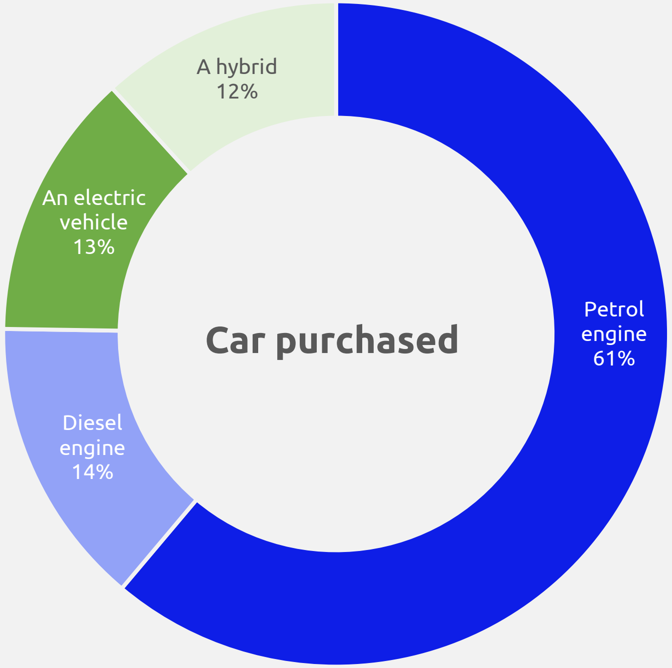
Motor

Motor vehicles

1 out of 4 Australian consumers who had bought a new car in the year prior had purchased an electric or hybrid vehicle.

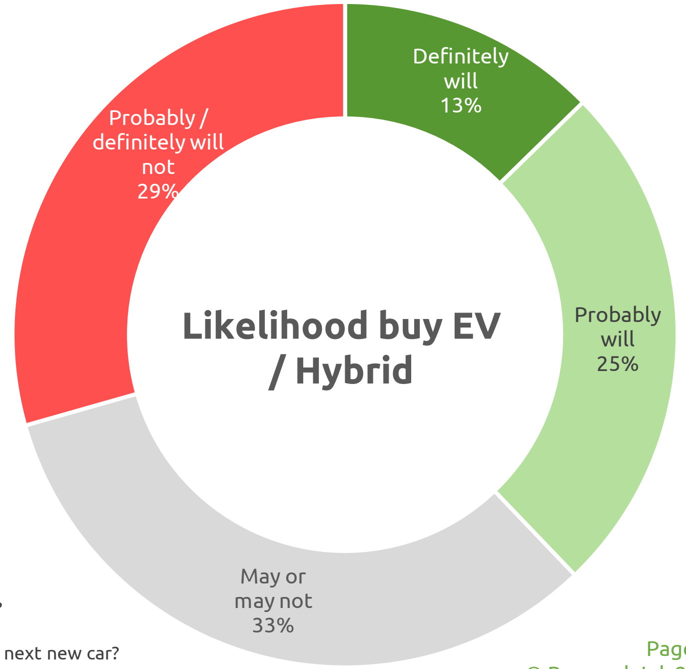
Of those considering buying a new car in the following year, it is estimated that 1 out of 4 would choose an electric or hybrid vehicle*, and only 29% would be unlikely to consider buying an electric or hybrid vehicle.

12% had bought a car in the last year



Q. Have you done any of the following in the last 12 months?
Base: Australian consumers 18+ (n=1,250)
Q. Which of the following best describes your new car…?
Base: Bought in last 12 months (n=152)

27% consider buying a car in the next year



Q. And are you considering doing any of the following in the next 12 months?
Base: Hadn't bought a new car in last 12 months (n=1,098)
Q. How likely are you to buy an electric vehicle (EV) or hybrid vehicle for your next new car?
Base: Considering buying a new car in next 12 months (n=291)

The **Urban & Hauser formula has been used to estimate the likelihood of each behaviour. This formula takes into account the difference between respondents' stated intentions and their actual real-life behaviours by down-weighting their responses as follows: **Potential Take Up** = ((% Definitely Would x 0.9) + (% Probably Would x 0.4) + (% May or May Not x 0.1))*

Finance

Financial service providers

2 out of 3 considered it important that their new financial provider took into account environmental factors when making investment decisions.

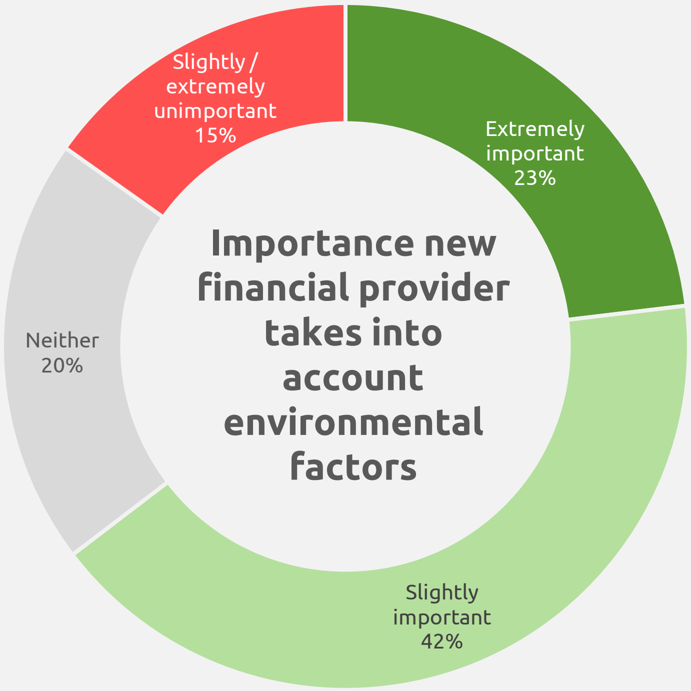
Expectations were high among consumers, with almost 1 in 4 considering it extremely important.

17%

had chosen a new financial service provider in last year

11%

were considering a new financial service provider in next year



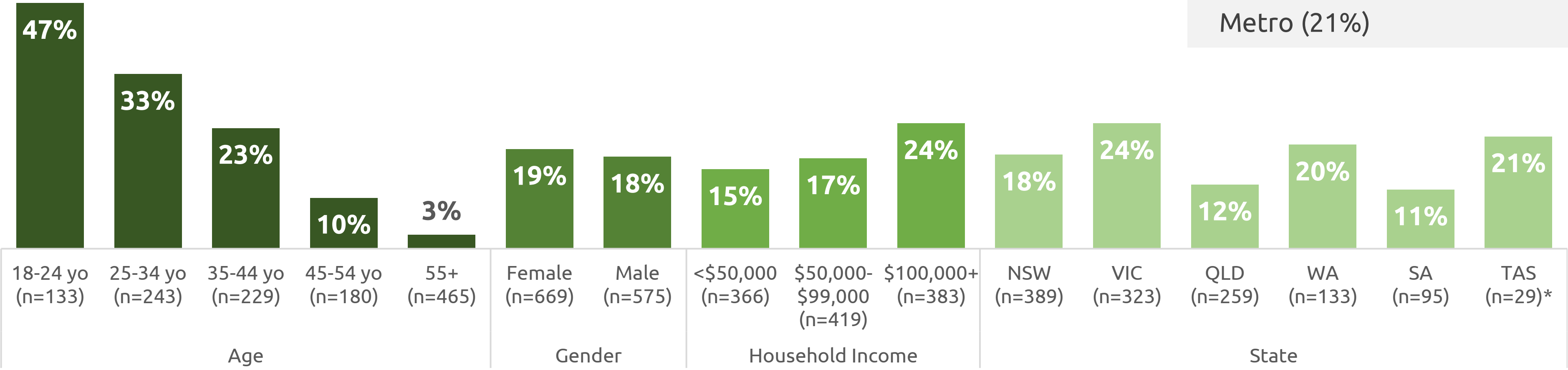
Q. Have you done any of the following in the last 12 months? Base: Australian consumers 18+ (n=1,250)
Q. How important is it to you that your new financial services provider takes into account environmental factors when making investment decisions?
Base: Chosen new provider in last 12 months or considering in the next 12 months (n=318)

Online Engagement

18%

~3.8 million

followed / engaged with sustainable brands / influencers on social media



Highest for…

18 to 24 year olds

Higher income households

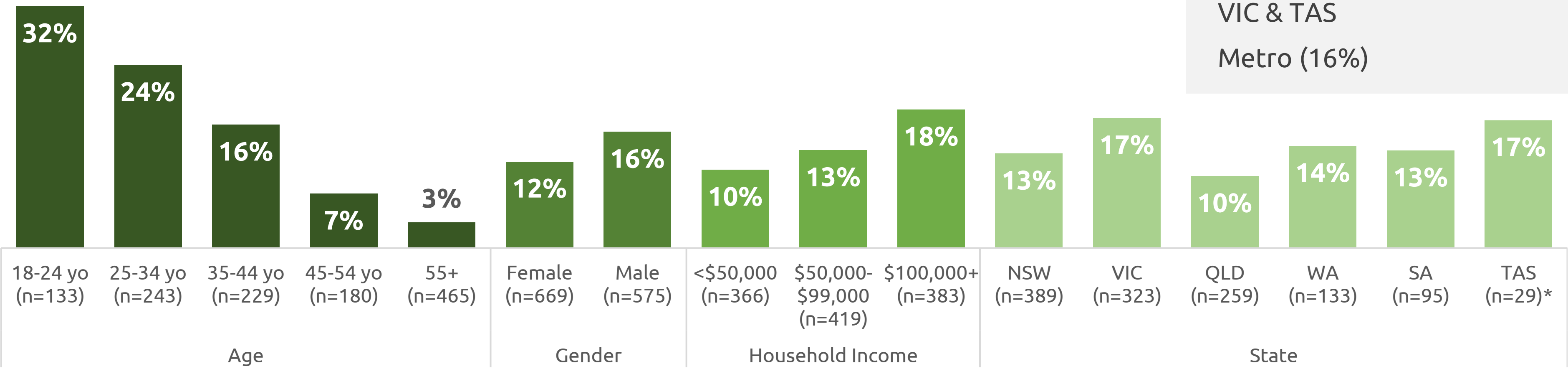
VIC & TAS

Metro (21%)

14%

~2.8 million

shared / recommended sustainable products online



Highest for…

18 to 24 year olds

Higher income households

VIC & TAS

Metro (16%)

Q. Do you follow or engage with any sustainable brands or environmental influencers on social media?
Q. And have you shared / recommended sustainable products online (e.g. social media, Google reviews) in the past 12 months? Base: Australian consumers (n=1250)

Sustainability Segments

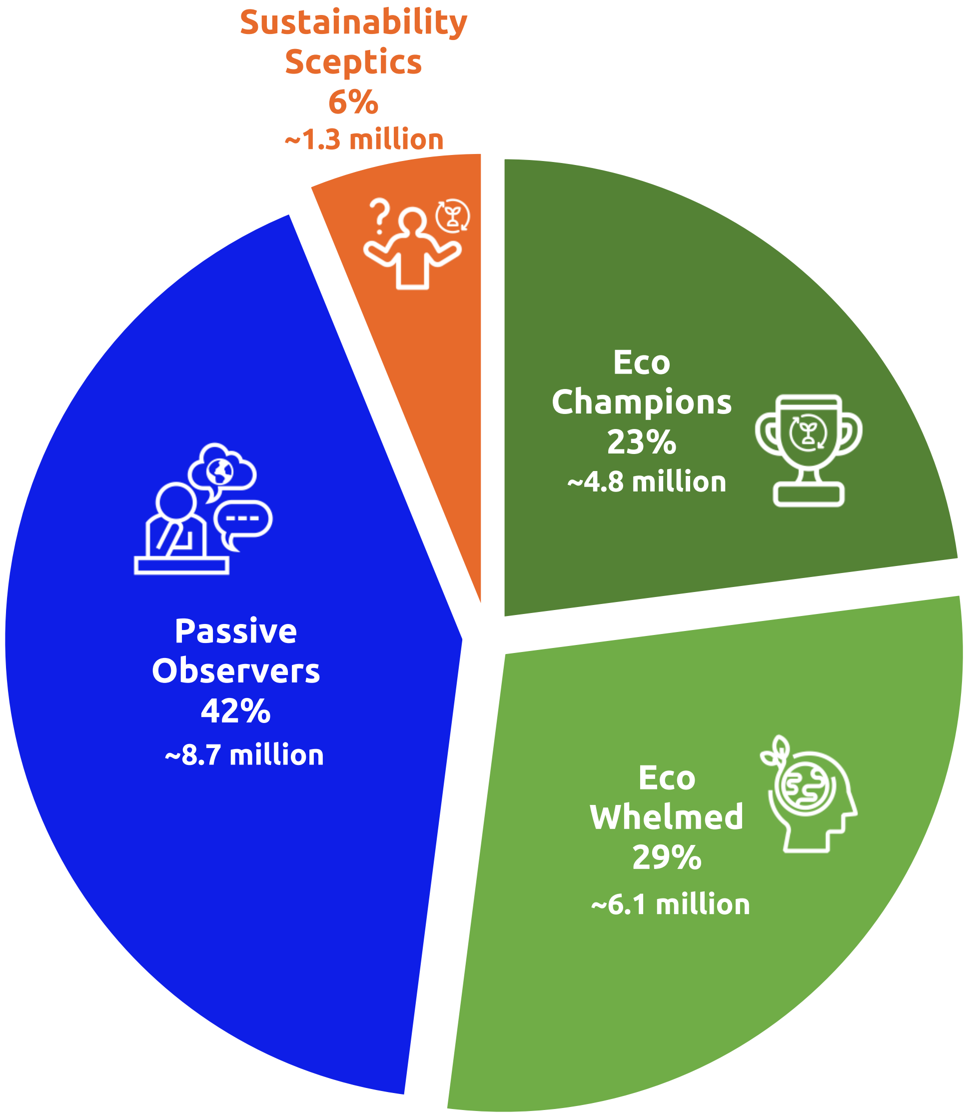
About the segmentation

Research Ink wished to understand if there were segments within the market based on sustainability attitudes that could assist local brands in helping Australians looking to purchase more sustainably, do so.

A Latent Class Analysis was performed including 12 statements across 4 dimensions…

- Perceived threat
- Perceived effectiveness
- Scepticism
- Self-efficacy

The analysis included all respondents (n=1,250), with 4 segments identified of varying sizes (pictured to the right).



Eco Champions

Concerned, optimistic & engaged

This segment is characterised by **deep concern for environmental issues** and the potential impact on their own lives and those of future generations. They embody **a collective sense of accountability** for the environment and are the most likely to engage with sustainable brands.

For this segment, **sustainable purchases are a priority**, as they believe these decisions have a meaningful impact on the environment. Most **feel confident** in their sustainable purchase decision-making and around half feel that sustainability claims are honest and authentic. However, they would be even more inclined to choose sustainable alternatives if identifying these products were easier and if they were more accessible.

Many feel that the Australian media is downplaying the severity of environmental issues.

Passive Observers

Mixed concerns, but responsibility shouldn't be with consumers

This segment has **mixed levels of concern about the environment** but are more likely than not to believe that if people were more responsible it would make a difference.

They are more likely to place the **burden of responsibility** on organisations than individual consumers. They do not necessarily believe that individual sustainable purchasing will have an impact with it being a lower priority to them.

They have the second highest level of **scepticism towards sustainable brands** and **environmental claims** made by companies and tend to believe that the **Australian media is exaggerating environmental issues** to some extent.

Eco Whelmed

Worried & overwhelmed

This segment is characterised by **concern and worry about environmental issues**, anticipating both personal and generational impacts. They **emphasise collective efficacy**, though are less convinced than the Eco Champions that **sustainable purchasing decisions will have an impact.** Consistent with these beliefs, they place greater responsibility on organisations than individual consumers, particular the Government and manufacturers.

1 in 2 **feel overwhelmed** to some extent when making sustainable purchasing decisions, the highest of all the segments. The majority would be more likely to choose sustainable alternatives if identifying these products were simpler.

They are uncertain about portrayal of environmental issues in the Australian media and harbor **slight scepticism towards sustainable brands** and **environmental claims** made by companies.

Sustainability Sceptics

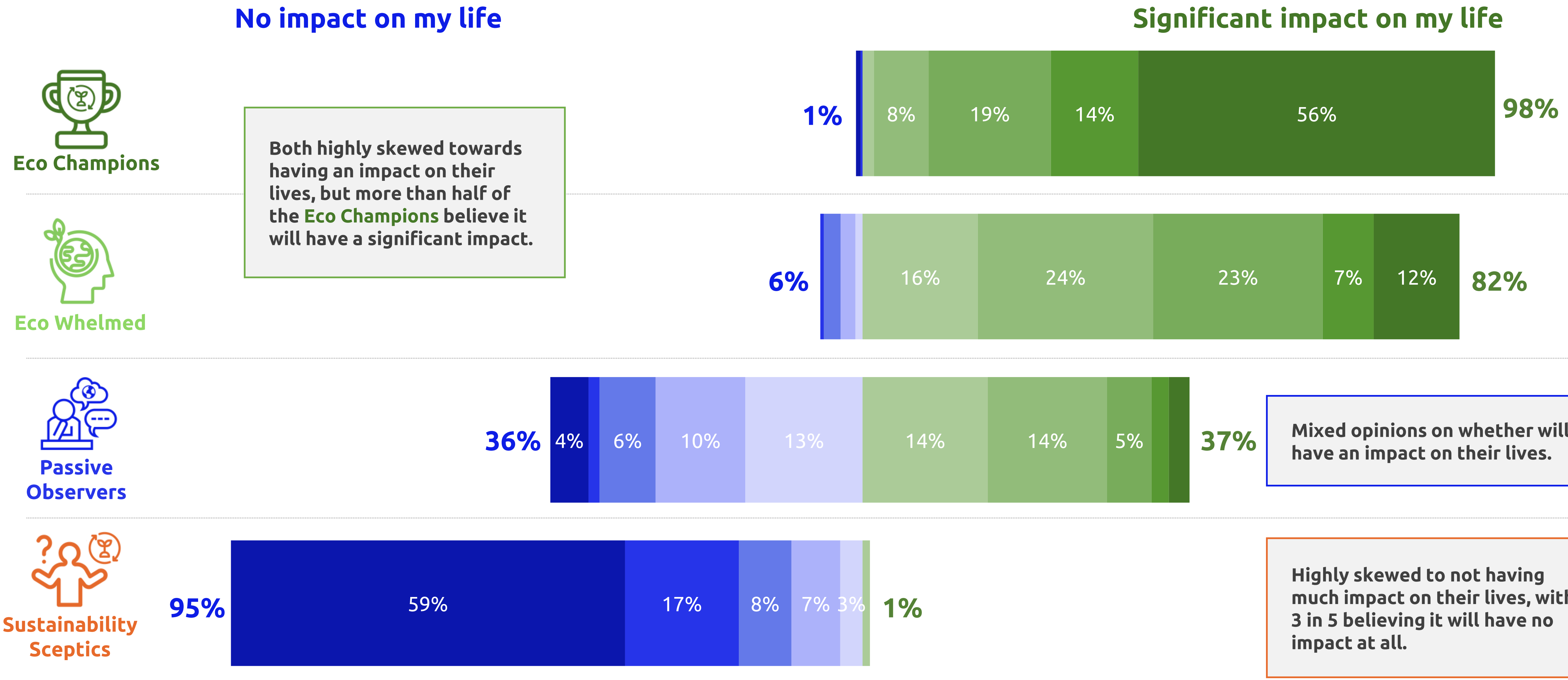
Lacking concern & distrustful

This segment is defined by **a lack of concern for environmental issues and scepticism** about these issues impacting their own lives or future generations.

They perceive the Australian media to be exaggerating the severity of environmental problems and **view sustainability as a passing fad**.

Distrustful of the environmental claims made by companies, they see little value in making sustainable purchases. They are largely uninterested in sustainable options and accountability, seeing little personal or familial benefit. This segment is predominantly composed of older consumers.

In the coming years, environmental issues will have…



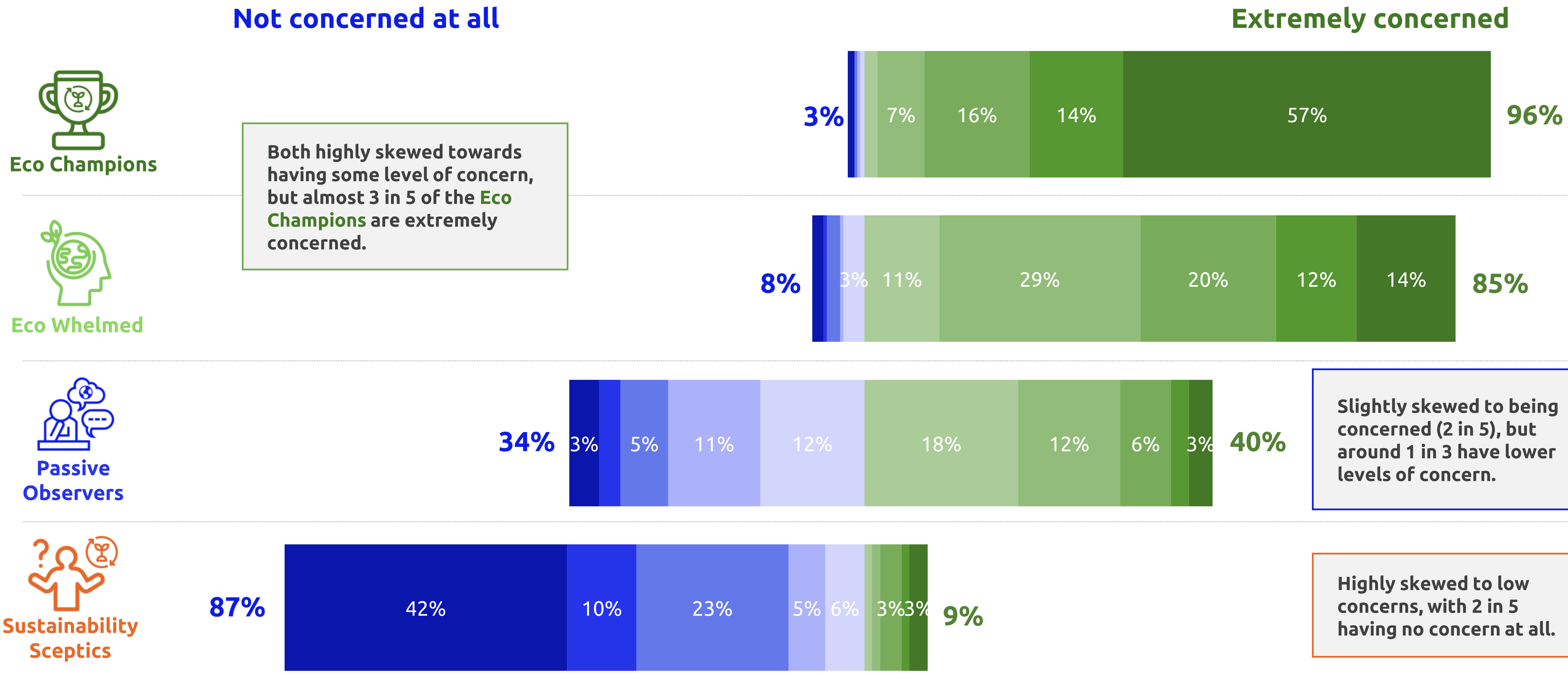
Both highly skewed towards having an impact on their lives, but more than half of the Eco Champions believe it will have a significant impact.

Mixed opinions on whether will have an impact on their lives.

Highly skewed to not having much impact on their lives, with 3 in 5 believing it will have no impact at all.

Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

When I think about the environment, I am...



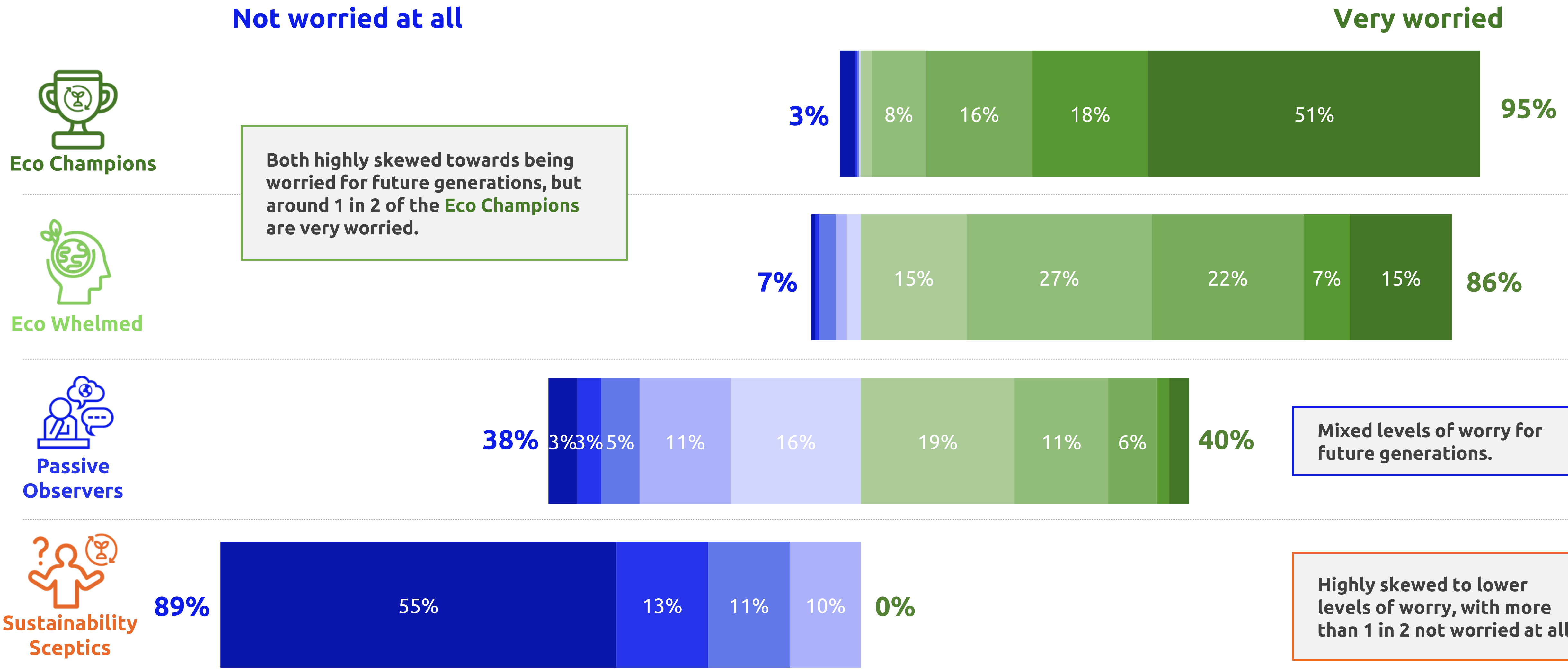
Both highly skewed towards having some level of concern, but almost 3 in 5 of the Eco Champions are extremely concerned.

Slightly skewed to being concerned (2 in 5), but around 1 in 3 have lower levels of concern.

Highly skewed to low concerns, with 2 in 5 having no concern at all.

Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

When thinking about the impact of the environment on future generations, I am...



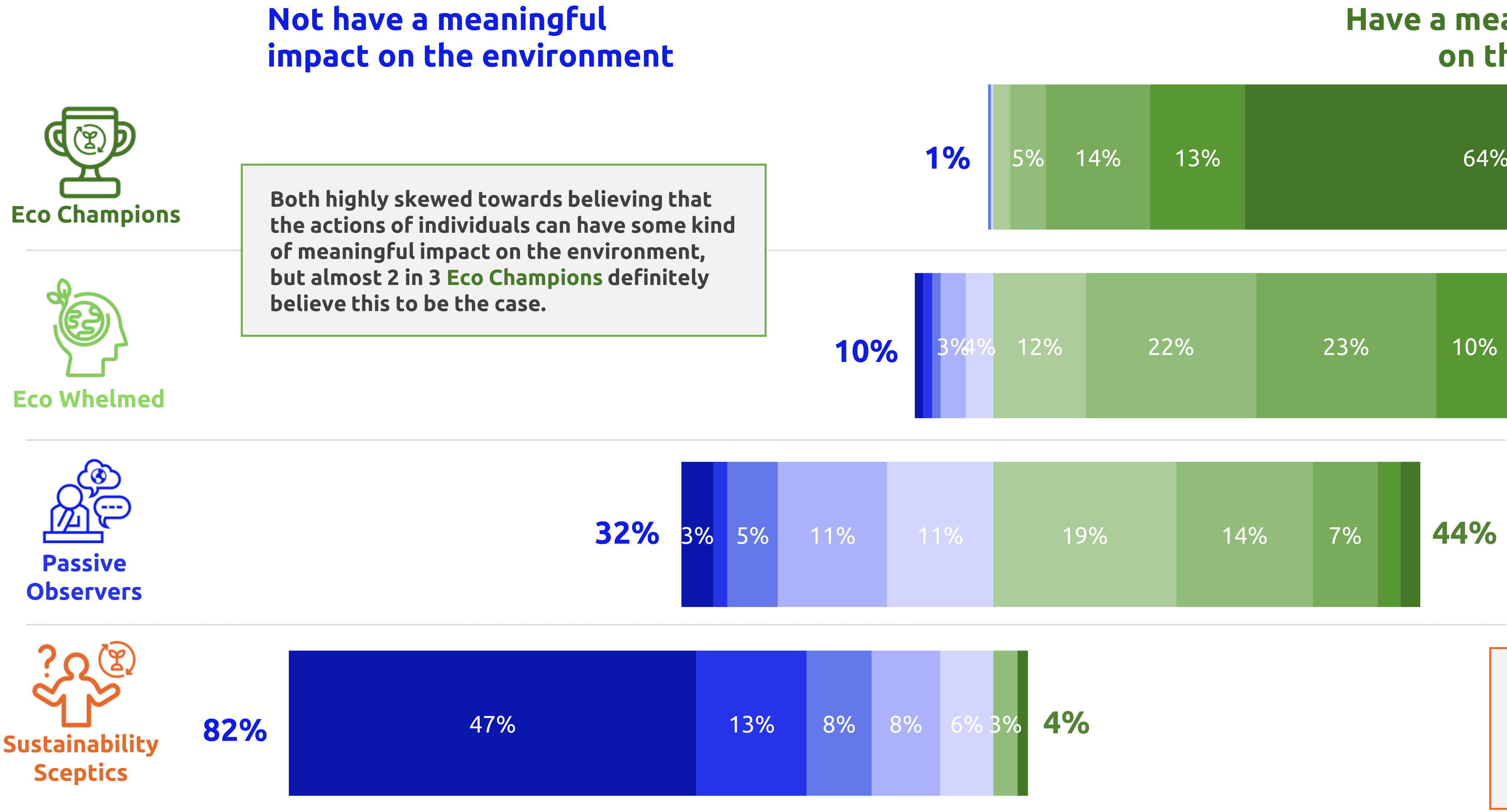
Both highly skewed towards being worried for future generations, but around 1 in 2 of the **Eco Champions** are very worried.

Mixed levels of worry for future generations.

Highly skewed to lower levels of worry, with more than 1 in 2 not worried at all.

Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

An individual's actions does…



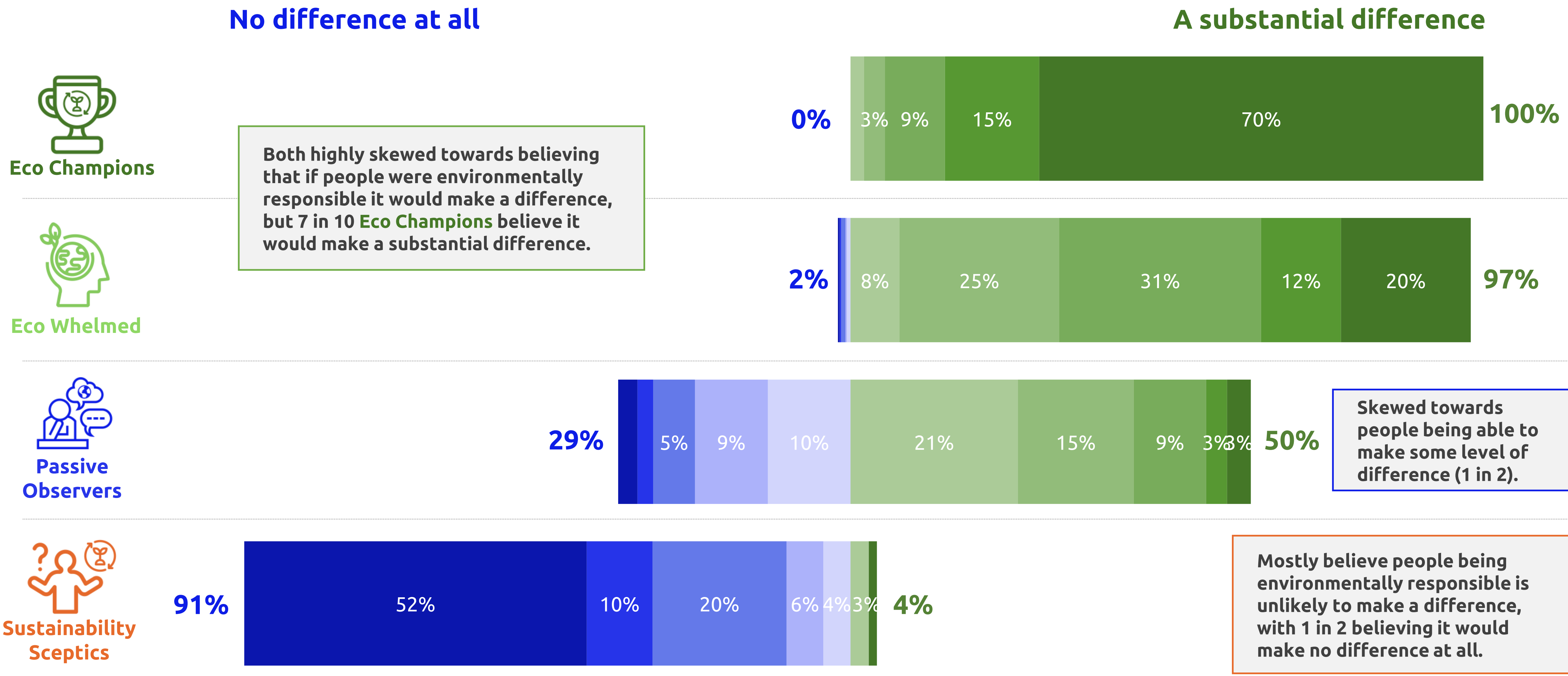
Both highly skewed towards believing that the actions of individuals can have some kind of meaningful impact on the environment, but almost 2 in 3 Eco Champions definitely believe this to be the case.

Slightly skewed to believing individuals can have some impact (2 in 5), but 1 in 3 have doubts.

Highly skewed to belief that individuals are not likely to have a meaningful impact, with almost 1 in 2 believing they have no impact.

Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

If more people were environmentally responsible it would make...



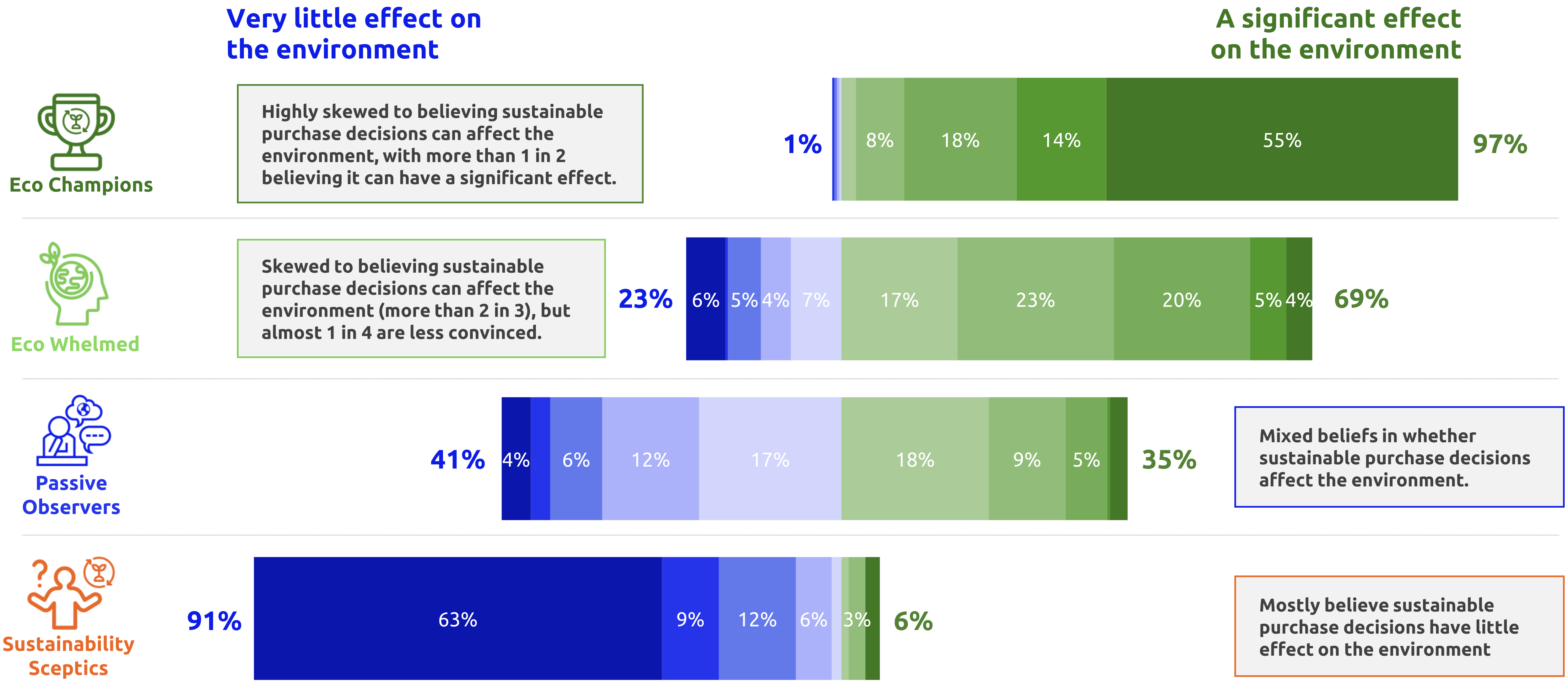
Both highly skewed towards believing that if people were environmentally responsible it would make a difference, but 7 in 10 Eco Champions believe it would make a substantial difference.

Skewed towards people being able to make some level of difference (1 in 2).

Mostly believe people being environmentally responsible is unlikely to make a difference, with 1 in 2 believing it would make no difference at all.

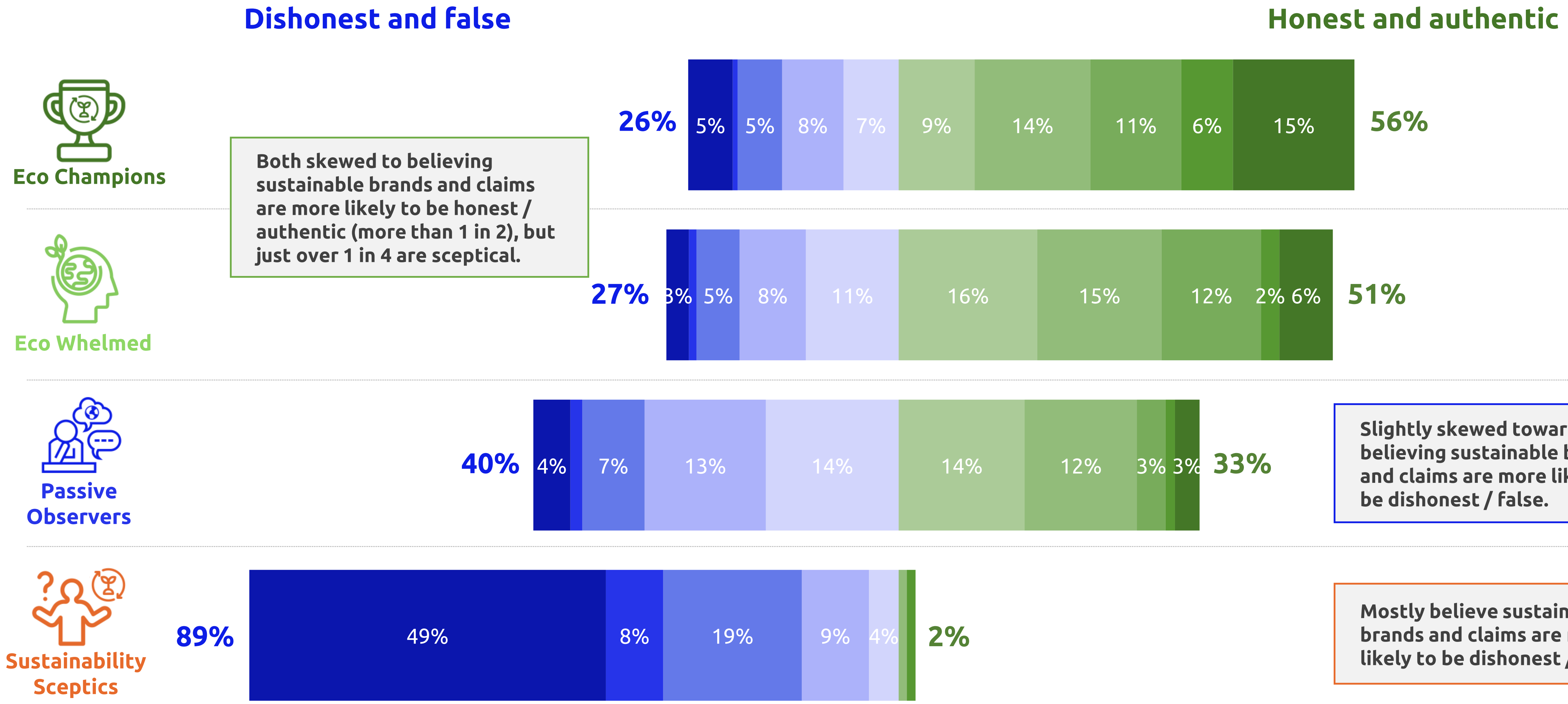
Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

I think making sustainable purchase decisions has...



Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

The sustainable brands and environmental claims made by most companies are…



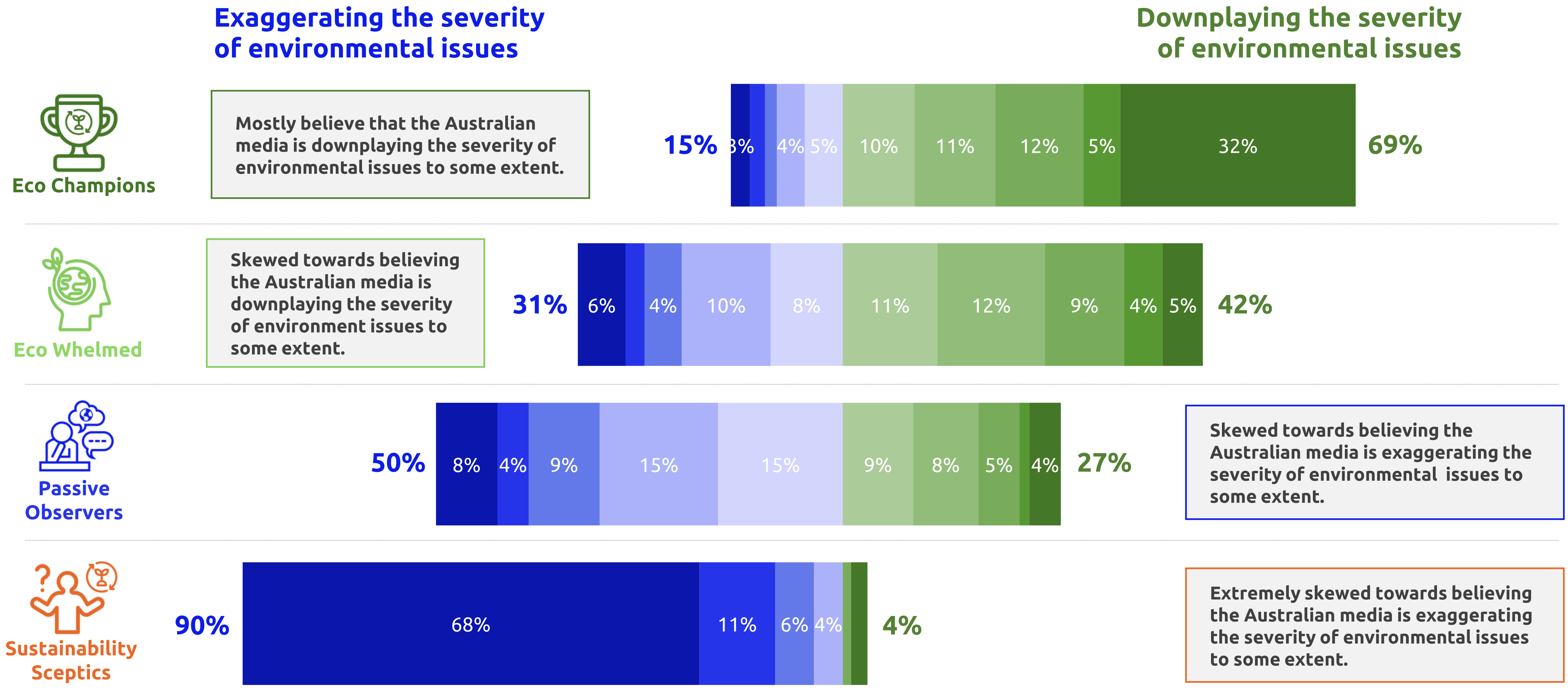
Both skewed to believing sustainable brands and claims are more likely to be honest / authentic (more than 1 in 2), but just over 1 in 4 are sceptical.

Slightly skewed towards believing sustainable brands and claims are more likely to be dishonest / false.

Mostly believe sustainable brands and claims are more likely to be dishonest / false

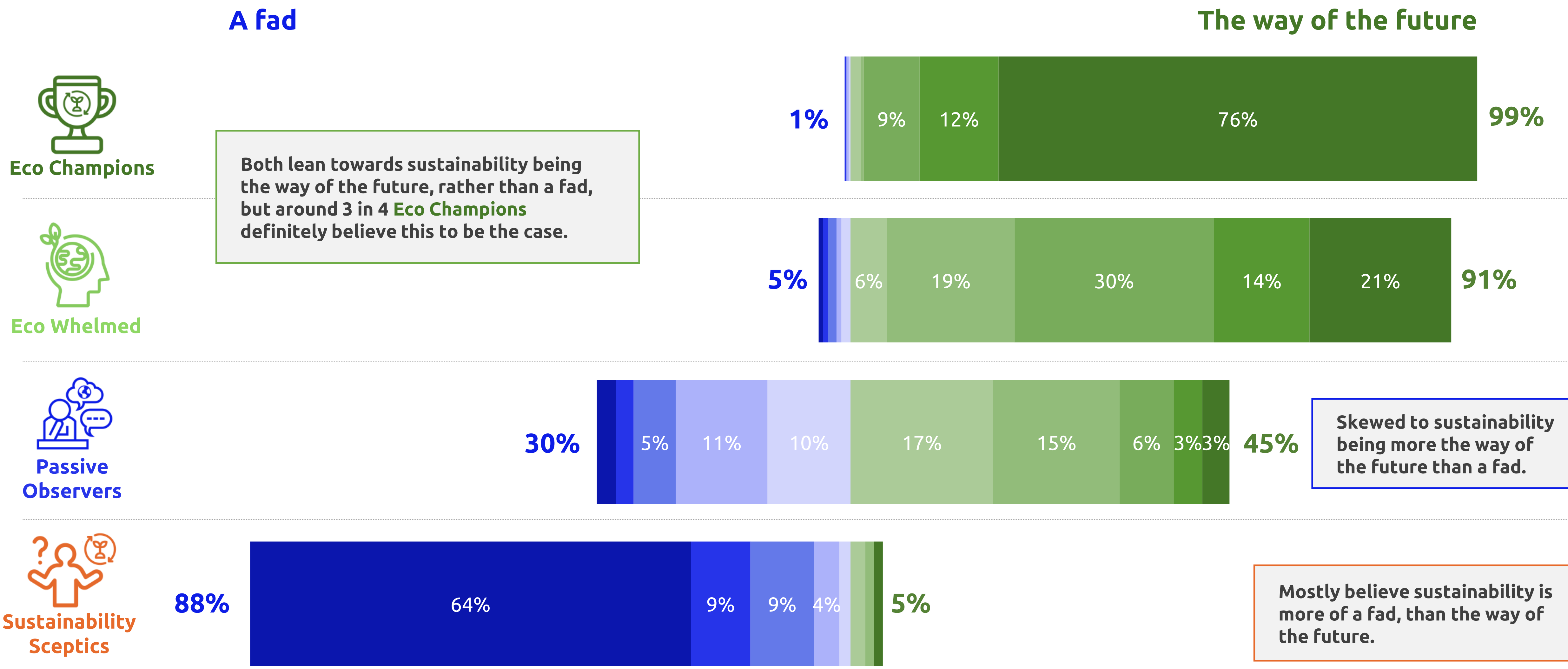
Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

In general, the Australian media is...



Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

Sustainability is...



Both lean towards sustainability being the way of the future, rather than a fad, but around 3 in 4 Eco Champions definitely believe this to be the case.

Skewed to sustainability being more the way of the future than a fad.

Mostly believe sustainability is more of a fad, than the way of the future.

Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

When it comes to making sustainable purchase decisions, I feel…

Extremely overwhelmed — **Extremely confident**

Eco Champions

Skewed to being more confident than overwhelmed when making sustainable purchasing decisions.

Eco Whelmed

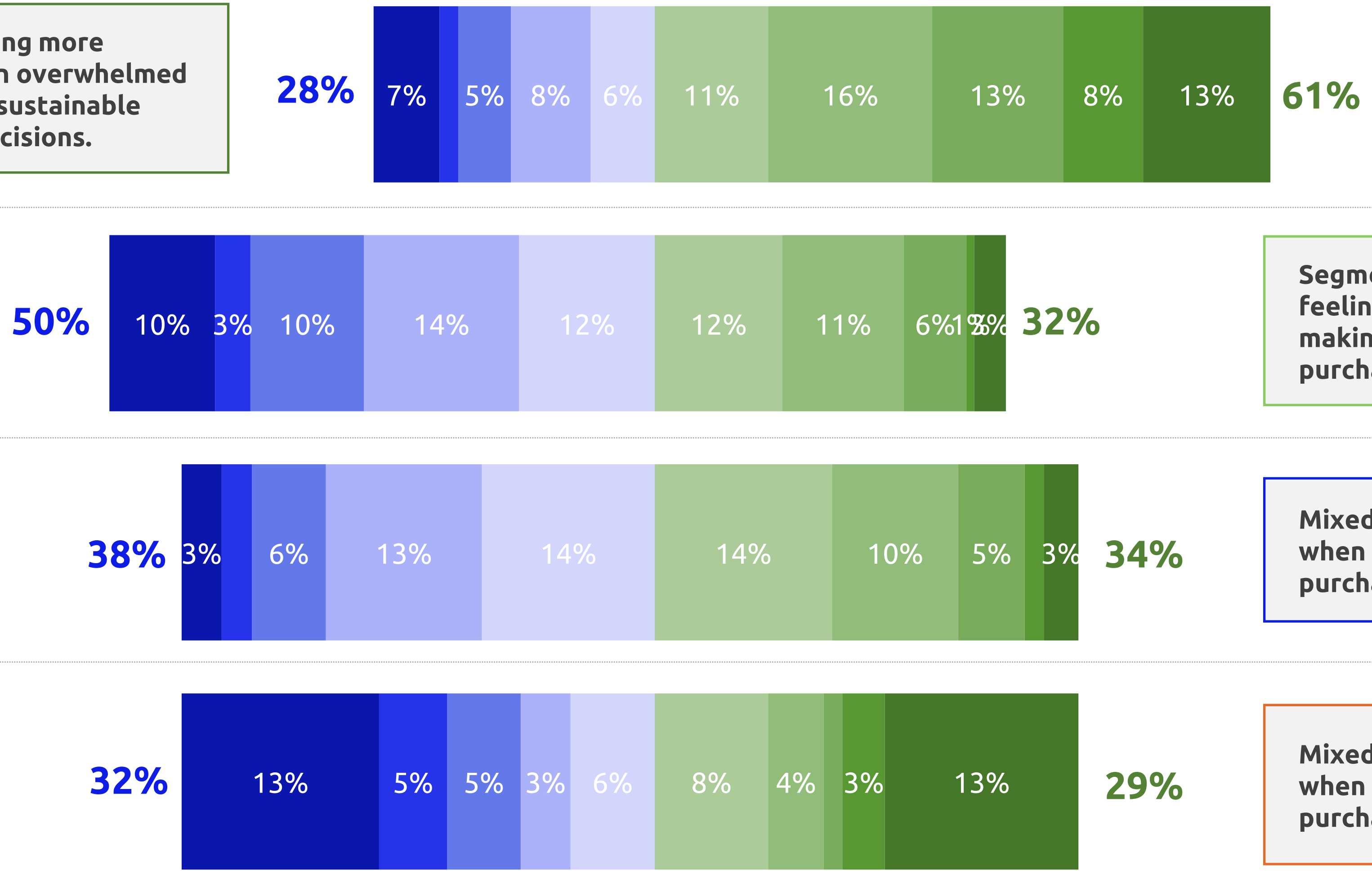
Segment most likely to be feeling overwhelmed when making sustainable purchasing decisions.

Passive Observers

Mixed levels of confidence when making sustainable purchasing decisions.

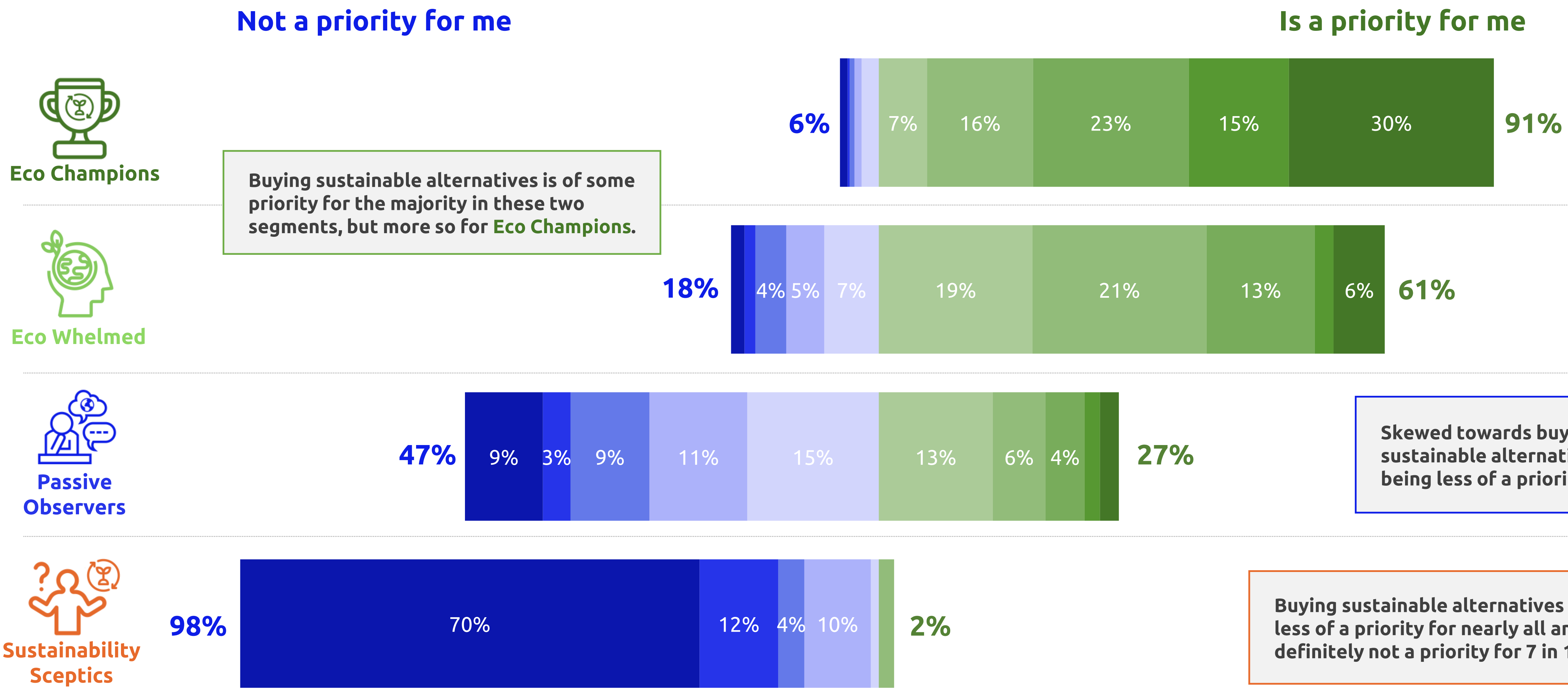
Sustainability Sceptics

Mixed levels of confidence when making sustainable purchasing decisions.



Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

Buying sustainable alternatives is...



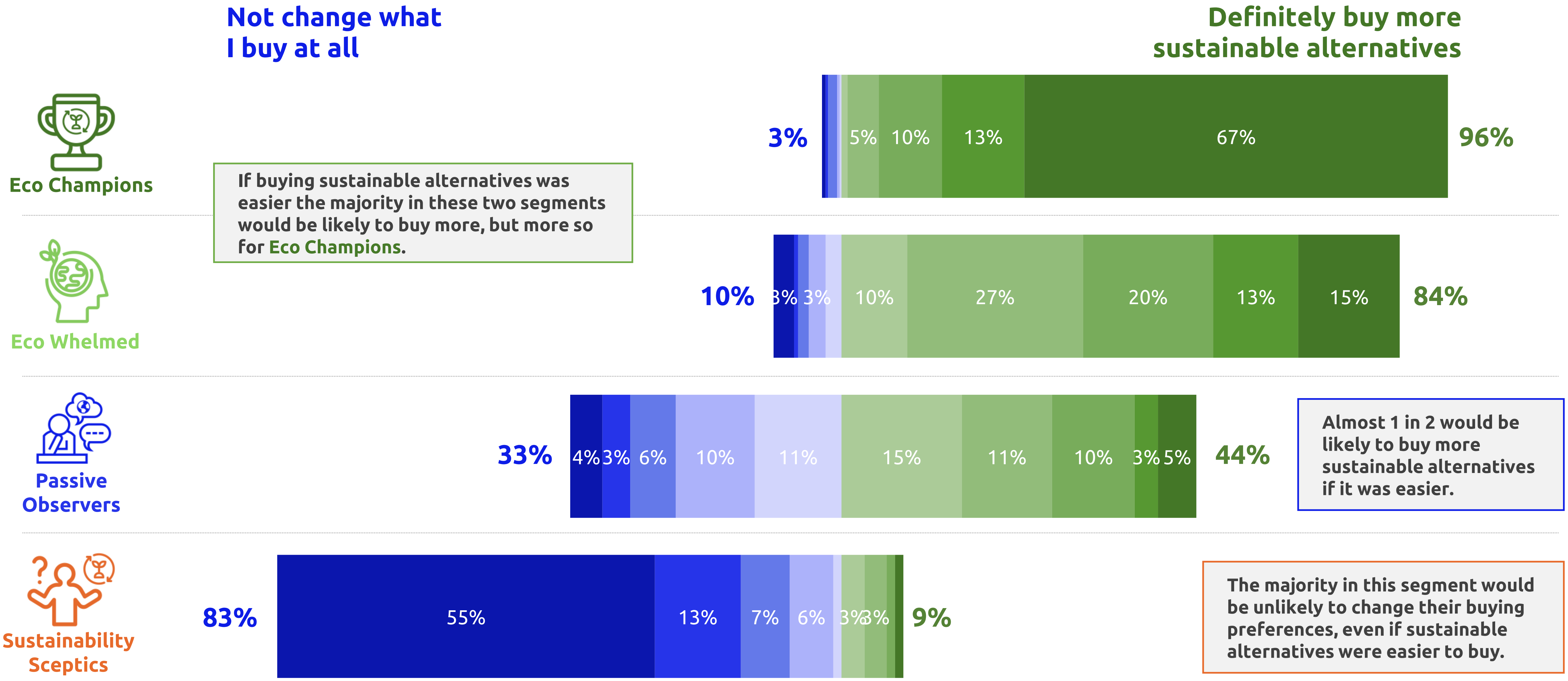
Buying sustainable alternatives is of some priority for the majority in these two segments, but more so for Eco Champions.

Skewed towards buying sustainable alternatives being less of a priority.

Buying sustainable alternatives is less of a priority for nearly all and is definitely not a priority for 7 in 10.

Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

If buying sustainably was easier, I would...



Q. In the next section, please read each statement and select a point on the scale that best reflects your beliefs.
Base: Australian consumers 18+ (n=1,250)

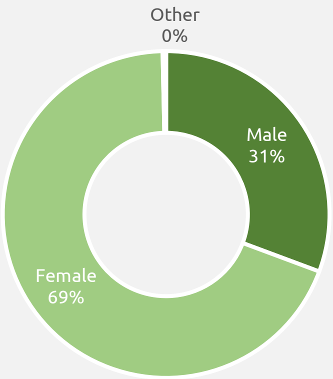
Eco Champions

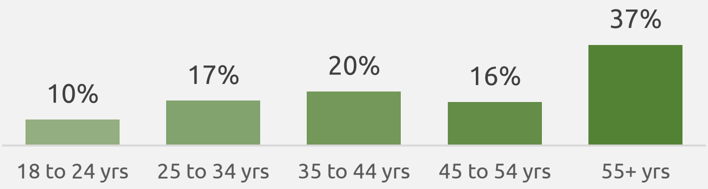
Concerned, optimistic & engaged (n=291)

Skewed to females

Age profile similar to Eco Whelmed & Passive Observers

Even spread of income





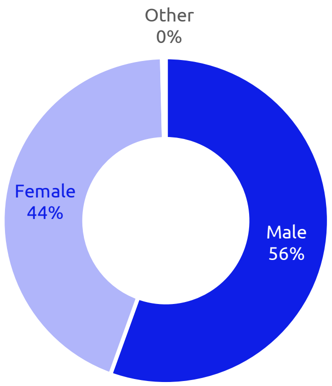
Passive Observers

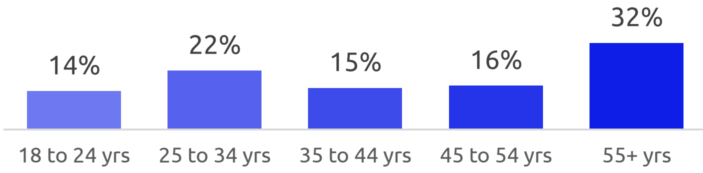
Mixed concerns, but responsibility shouldn't be with consumers (n=517)

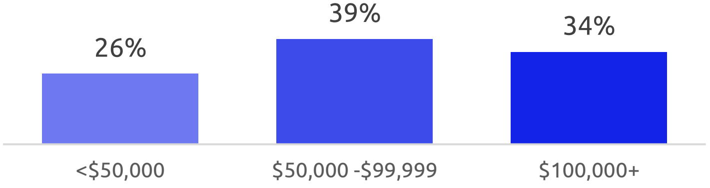
Slightly skewed to males

Age profile similar to Eco Champions & Eco Whelmed

Slightly skewed to middle / higher income







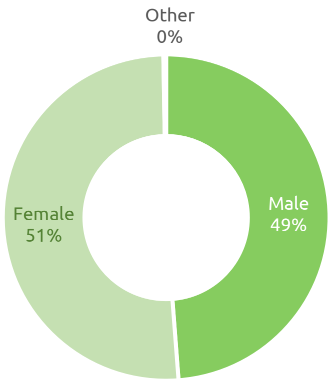
Eco Whelmed

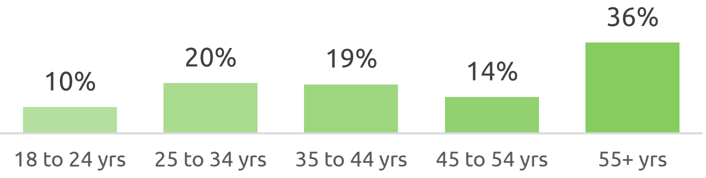
Worried & overwhelmed (n=363)

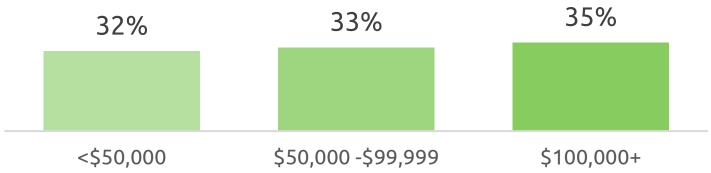
Even mix of males / females

Age profile similar to Eco Champions & Passive Observers

Even spread of income





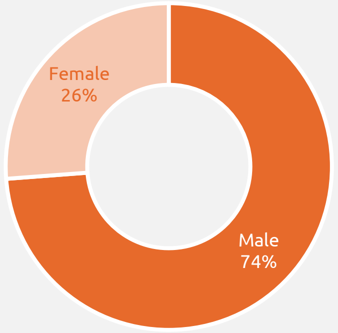


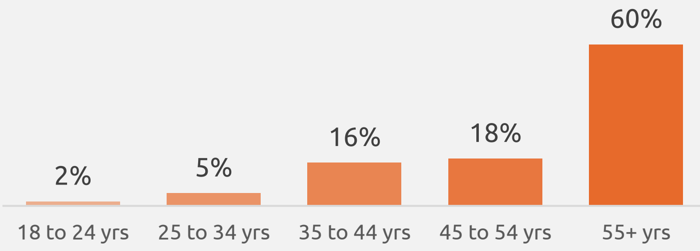
Sustainability Sceptics

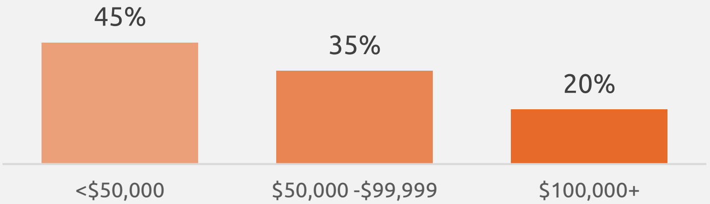
Lacking concern & distrustful (n=79)

Skewed to males and 55+ yrs

Skewed to lower income (consistent with retiree status)







Perceived Major Responsibility by Segment

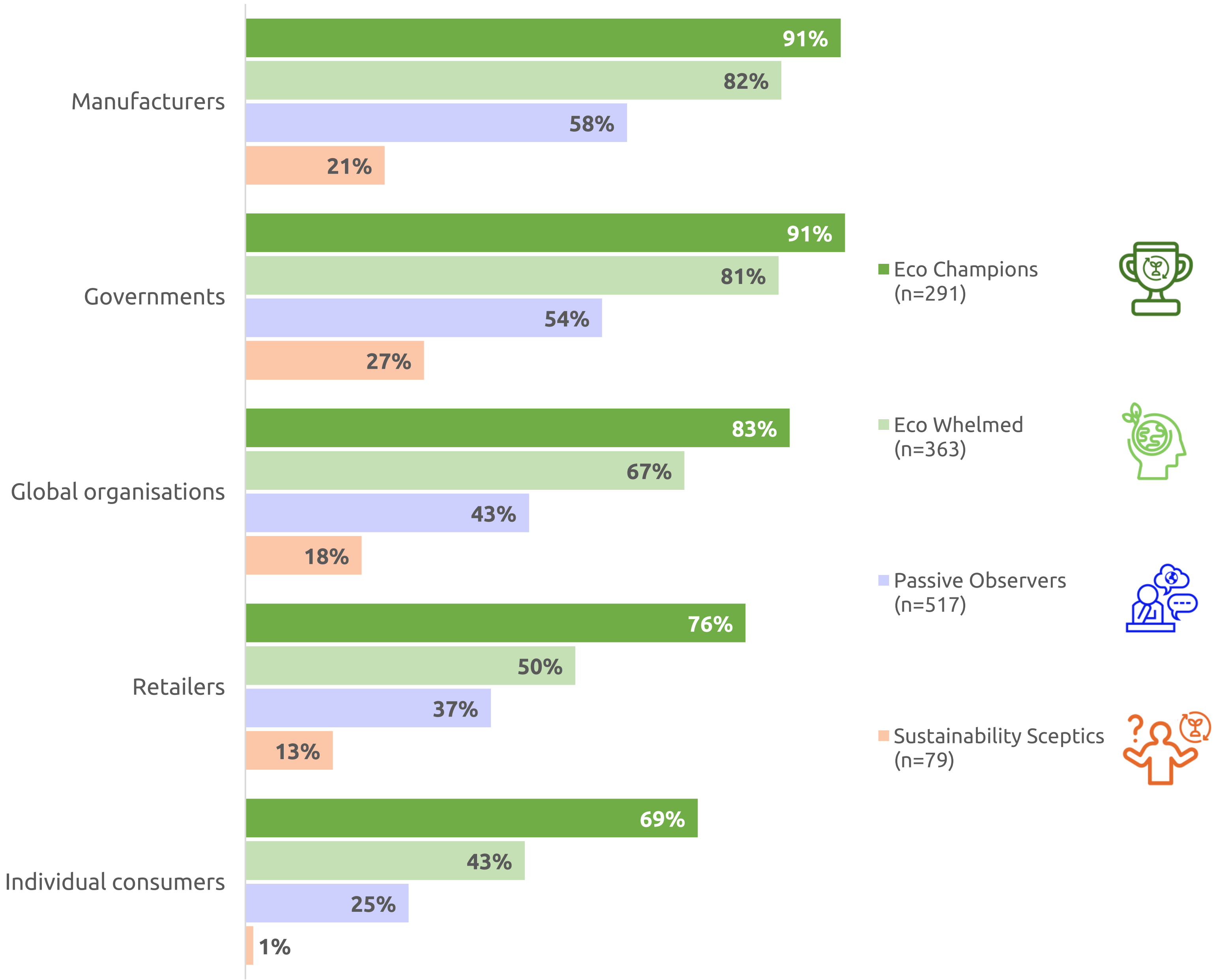
9 out of 10 Eco Champions believed that Manufacturers and the Government have a major responsibility for a sustainable future. However, more than 2 out of 3 also believed that consumers do.

8 out of 10 Eco Whelmed believed that Manufacturers and the Government have a major responsibility for a sustainable future, but only 2 in 5 believed consumers do.

Passive Observers had a similar pattern of results to the Eco Whelmed but were less likely to consider anyone to have a major responsibility, particularly consumers.

Very few **Sustainability Sceptics** (27% or less) attributed major responsibility to an organisation and almost none (1%) did to consumers.

Major responsibility for a sustainable future…



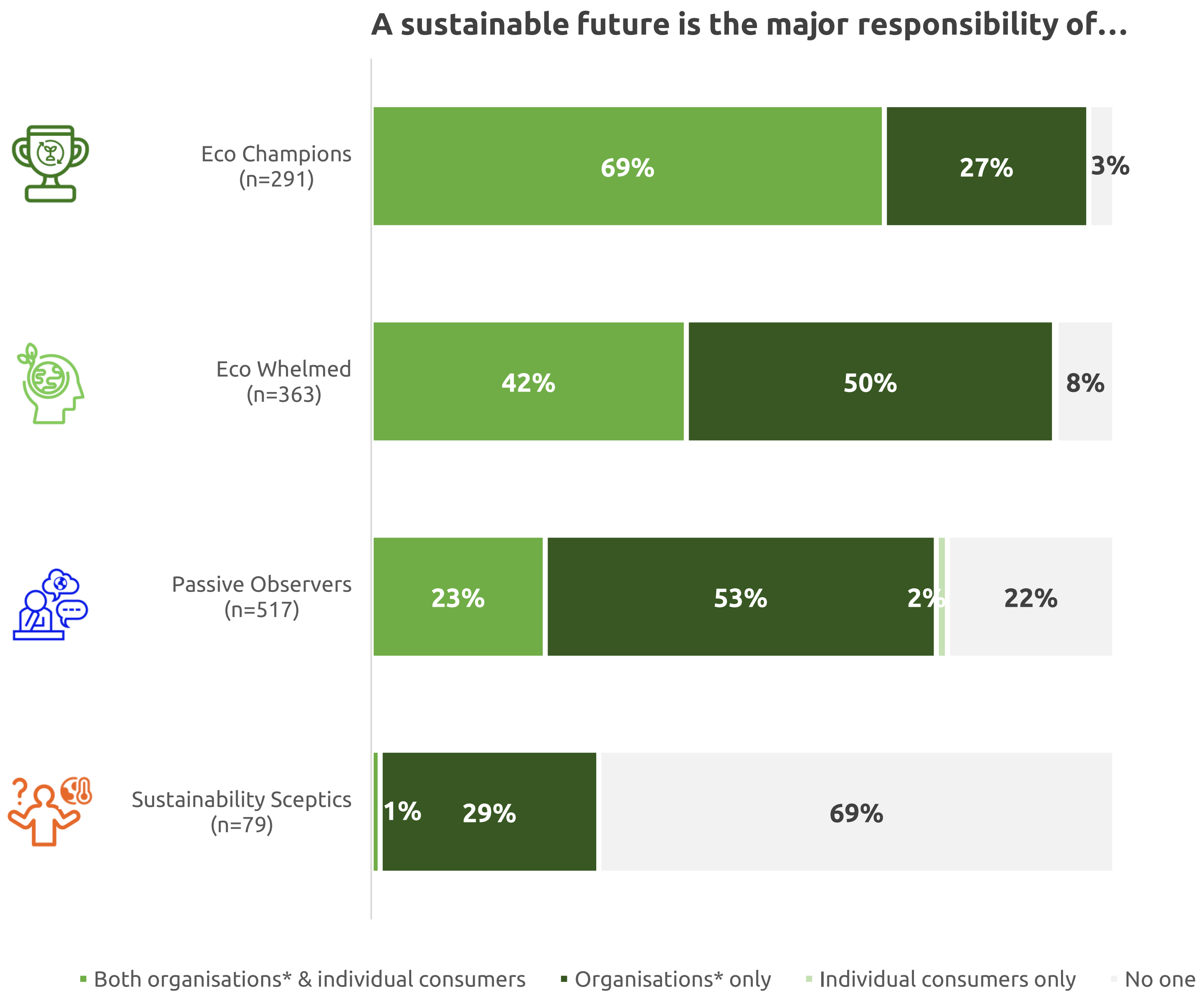
Q. Thinking about achieving a sustainable future, how much responsibility do you think should be taken by…?
Base: Australian consumers 18+ (n=1,250)

7 out of 10 collective

2 out of 5 collective
1 out of 2 organisations only

~1 out of 4 collective
~1 out of 2 organisations only

~2 out of 3 no one
~1 out of 4 organisations only



Q. Thinking about achieving a sustainable future, how much responsibility do you think should be taken by…?
Base: Australian consumers 18+ (n=1,250) *Organisations include Government, Manufacturers, Retailers, Global organisations

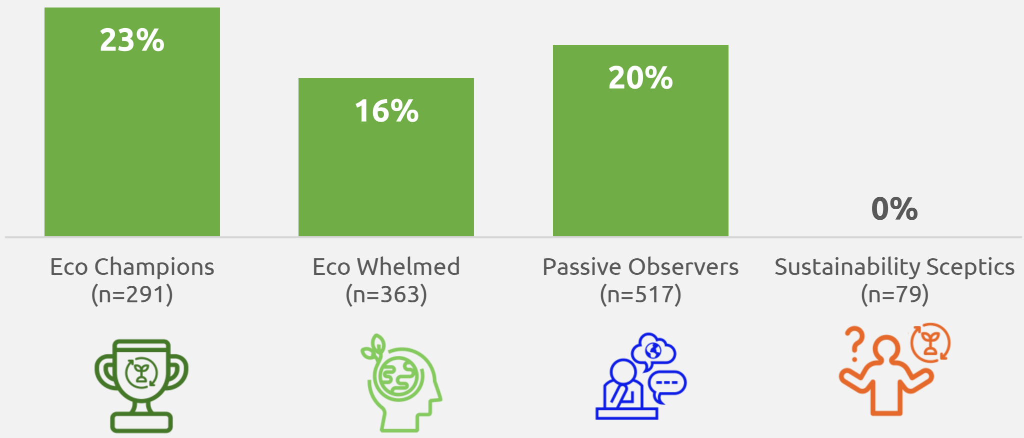
18%

~3.8 million

followed / engaged with sustainable brands / influencers on social media

Eco Champions are significantly more likely to have followed or engaged with a sustainable brand or influencer on social media, almost 1 in 4 having done so.

Sustainability Sceptics are unengaged.

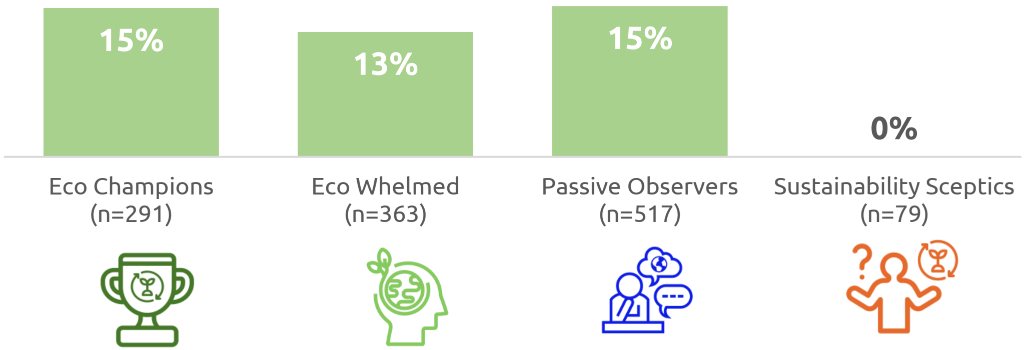


14%

~2.8 million

shared / recommended sustainable products online

Online advocacy of sustainable products is similar across **Eco Champions**, **Eco Whelmed** and **Passive Observers**.



Q. Do you follow or engage with any sustainable brands or environmental influencers on social media?
Q. And have you shared / recommended sustainable products online (e.g. social media, Google reviews) in the past 12 months? Base: Australian consumers (n=1250)

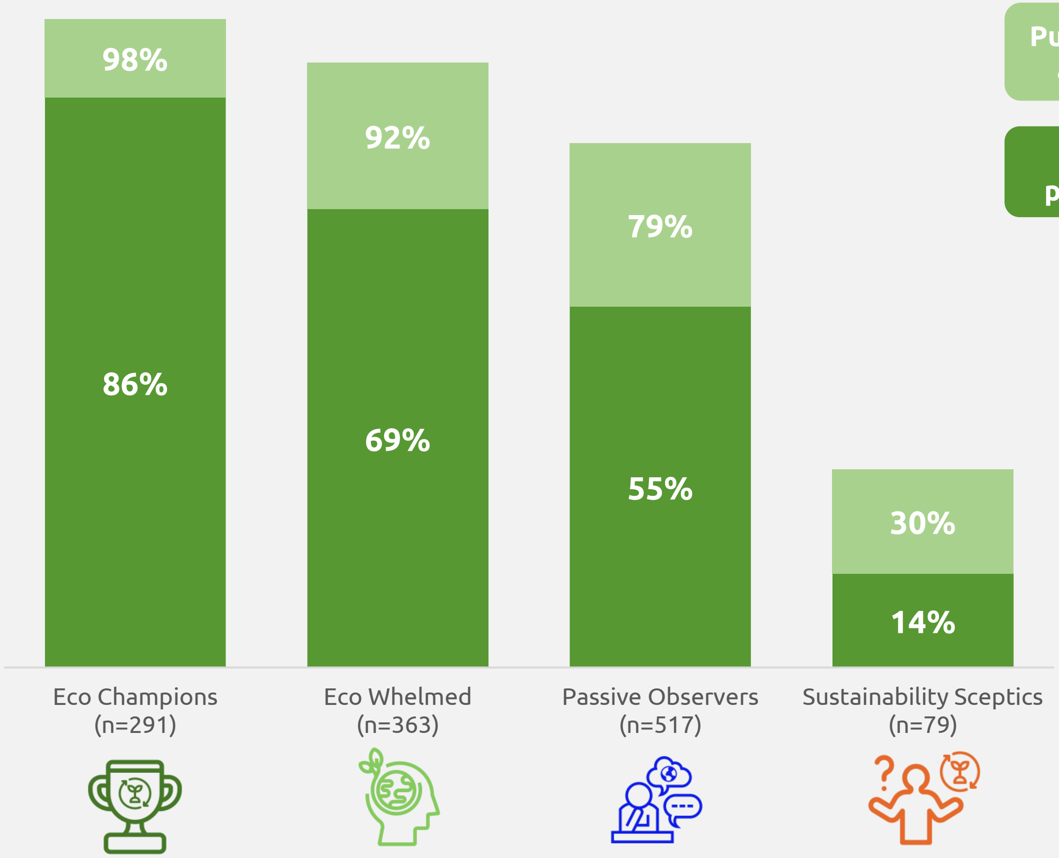
Almost 9 out of 10 **Eco Champions** often or always purchased sustainably across at least one day-to-day product category.

Frequent sustainable purchasing was also relatively high for the **Eco Whelmed** (more than 2 out of 3) and **Passive Observers** (more than 1 in 2).

On average, **Eco Champions** often or always purchased sustainably across 4.1 product categories.

For the **Eco Whelmed** the average was 2.6, whereas for **Passive Observers** it was 2.2.

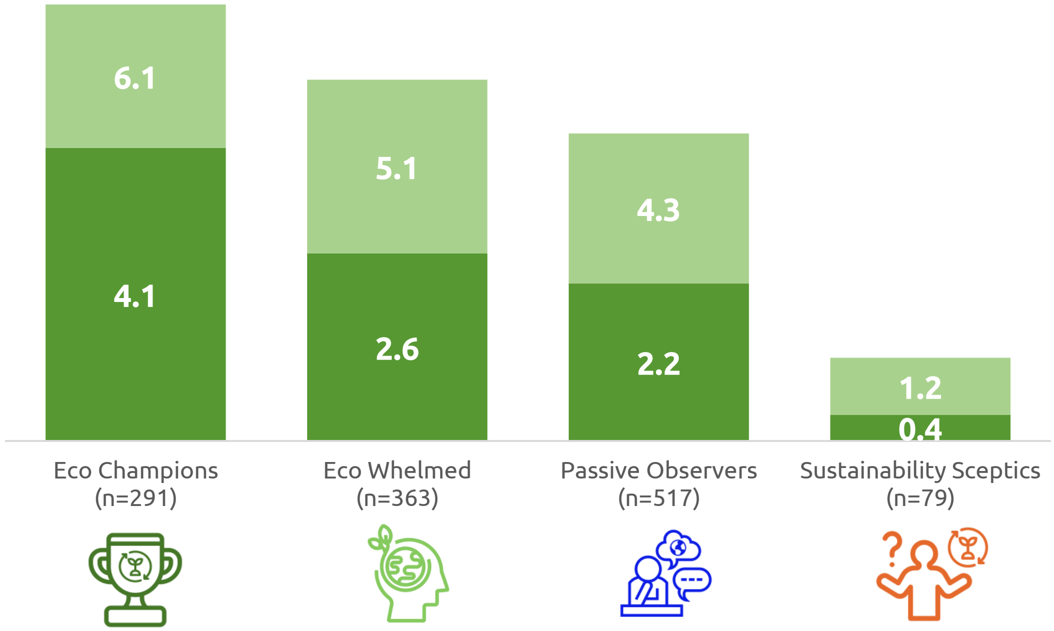
For at least one of the day-to-day product categories



Purchased sustainability at least occasionally

Often / always purchased sustainably

Average number of the day-to-day product categories

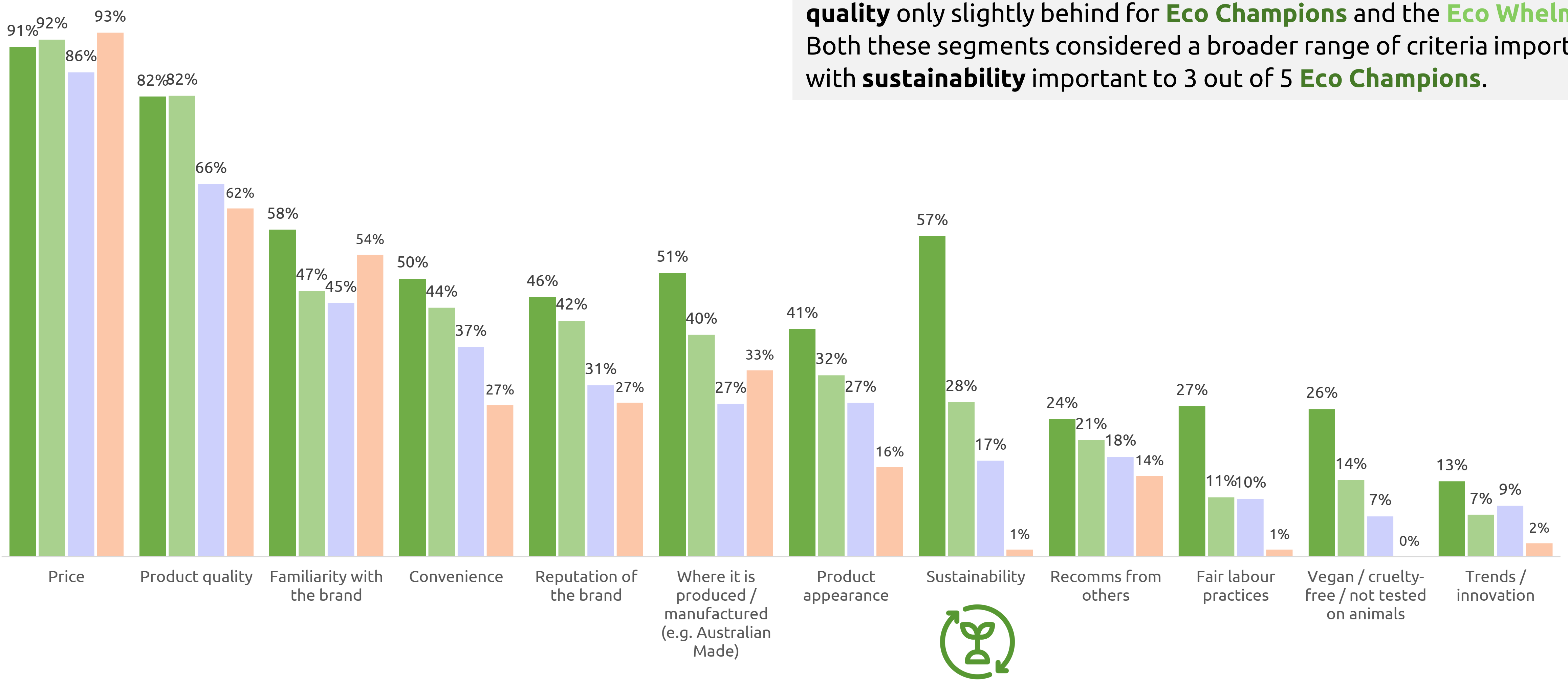


Q. In the last 3 months, when you purchased the following, did you…?
Base: Australian consumers 18+ (n=1,250)

Important criteria when making day-to-day purchases...

	Eco champions (n=291)	Eco Whelmed (n=363)	Passive Observers (n=517)	Sustainability Sceptics (n=79)
Average no. of important criteria	5.7	4.6	3.8	3.3

Price was the most important criteria across all segments, with **product quality** only slightly behind for **Eco Champions** and the **Eco Whelmed**. Both these segments considered a broader range of criteria important, with **sustainability** important to 3 out of 5 **Eco Champions**.



Q. And when purchasing these types of products, in general, which of the following criteria are important to you?
Base: Australian consumers 18+ (n=1,250)

What makes a product sustainable…?

Eco Champions tend to include a greater range of criteria when describing sustainable products

	Eco Champions	Eco Whelmed	Passive Observers	Sustainability Sceptics
Longevity / durability / good quality of products	15%	20%	20%	21%
Sustainable / ethical production (i.e. fair labour, low waste, no animal cruelty, sourcing, no greenwashing, energy efficient)	29%	20%	11%	5%
Materials / product able to be recycled / reused / is biodegradable	21%	18%	14%	9%
Environmentally friendly / doesn't harm the planet	16%	15%	12%	3%
Materials products made of (i.e. recycled materials, less plastic, natural materials)	18%	12%	11%	2%
Packaging of materials - no plastic / recycleable / biodegradable / less or no packaging	19%	12%	7%	2%
Doesn't deplete resources / made from renewable resources	13%	11%	5%	5%
Cost of product / value for money / affordability	2%	7%	9%	6%
Location of where product produced / grown (i.e. Australia, local, less shipping)	6%	6%	3%	4%
Low carbon footprint / minimal impact on global warming (i.e. carbon neutral / zero emissions, pollution, chemicals)	7%	5%	2%	3%
Other	7%	8%	11%	11%
Not sure / don't know	3%	6%	16%	35%

Top descriptor for Eco Whelmed, Passive Observers & Sustainability Sceptics

Top / common descriptors for both Eco Champions and Eco Whelmed

Common descriptors for Eco Champions

Some confusion regarding affordability & sustainability for Passive Observers

Higher levels of uncertainty for Passive Observers & Sustainability Sceptics.

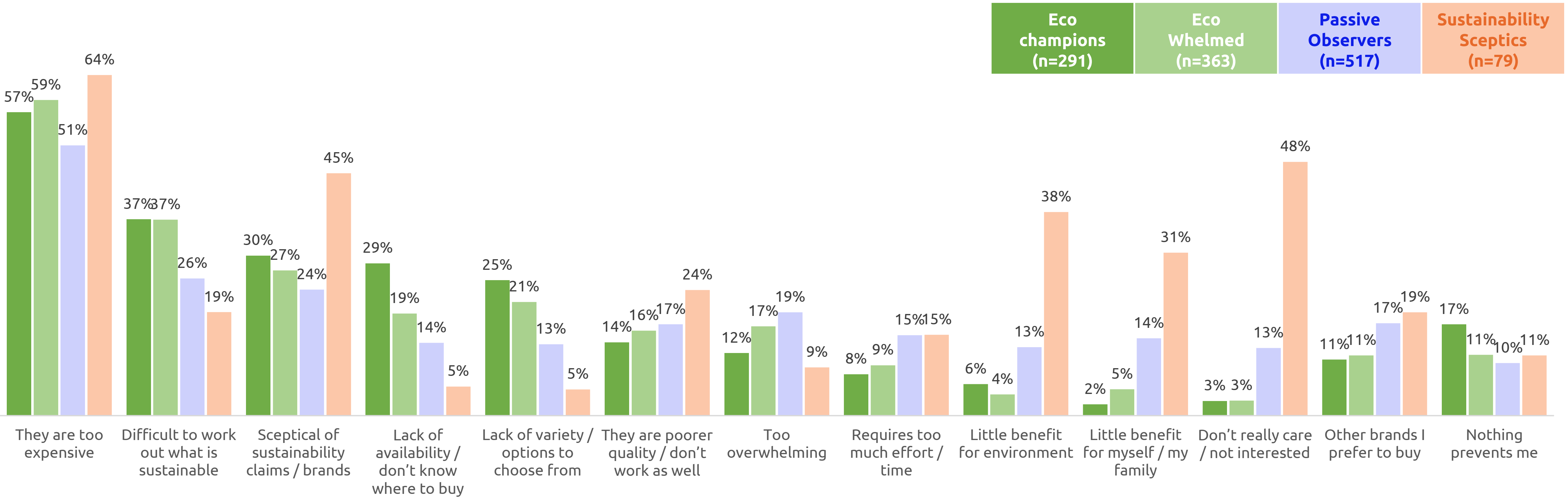
Q. In your opinion, what makes a product sustainable?
Base: All consumers, 18+ who volunteered a response

Expense was the most likely barrier to sustainable purchasing across all segments.

Difficulties working out what is sustainable and **scepticism regarding claims / brands** followed for the **Eco Champions**, **Eco Whelmed** and **Passive Observers**.

Not surprisingly, scepticism, a lack of interest and little perceived benefit were top barriers for the **Sustainability Sceptics.**

Barriers to buying sustainable alternatives….

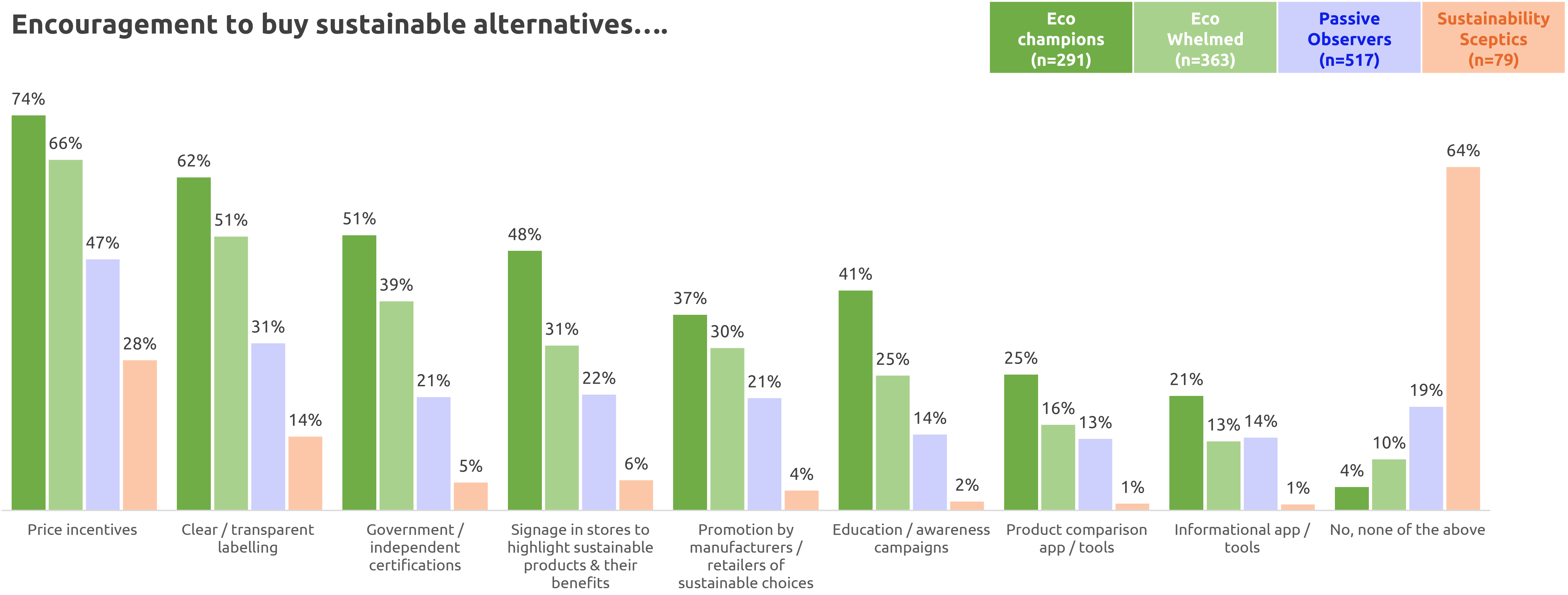


Q. Which of the following, if any, prevent you from buying sustainable alternatives?
Base: Australian consumers 18+ (n=1250).

Price incentives was the most likely way to encourage sustainable purchasing across all segments, followed by **clear / transparent labelling**.

However, for the **Sustainability Sceptics**, only 1 in 3 could be encouraged to buy more sustainable alternatives.

Encouragement to buy sustainable alternatives....



Q. Would any of the following help or encourage you to buy more sustainable alternatives?
Base: Australian consumers 18+ (n=1250)

Eco Champions
Concerned, optimistic & engaged

Eco Champions are the most motivated and best equipped to make sustainable purchase decisions.

Making it easier to identify and verify sustainable options through labelling and in-store signage, providing a greater range of options, and trying to keep these options price competitive, are likely to assist them in further reaching their individual goals of contributing to a more sustainable future.

This segment is the most likely to be reached through social media campaigns.

Passive Observers
Mixed concerns, but responsibility shouldn't be with consumers

The largest of the segments, they often don't have an overt drive or sense of responsibility to buy sustainably, but their behaviours infer a propensity to change.

Using fewer criteria when making purchasing decisions, price is more of a focus, and therefore making sustainable options affordable may elevate these products into their consideration set.

They appear to have a more limited knowledge of what makes a product sustainable, but also a tendency to be distrustful of information provided. Straight-forward and genuine information, delivered via product labelling and social media campaigns, may build brand trust with this segment, and diversify their brand / product preferences to include sustainable options.

Eco Whelmed
Worried & overwhelmed

The Eco Whelmed have high levels of concern about the environment but are the most overwhelmed when trying to make sustainable purchasing decisions.

They are looking for manufacturers and the Government to build their trust and make these decisions easier, through clear / transparent labelling, certifications and better affordability.

Sustainability Sceptics
Lacking concern & distrustful

The Sustainability Sceptics are unlikely to want to change their attitudes towards sustainability nor purchase sustainable alternatives unless there is a clear personal benefit. They are therefore not a key target for sustainable brands.

Appendix

Appendix: Sample profile

The sample collected was representative of the population by State, but had some very small differences for interlocking age and gender. Weighting was applied to correct for these.

	Sample	Australian Population 18 yrs+*
Male	46%	49%
Female	54%	51%
Other	<1%	-
18 - 24 years	11%	11%
25 - 29 years	10%	9%
30 - 34 years	10%	10%
35 - 39 years	10%	9%
40 - 44 years	8%	9%
45 - 49 years	7%	8%
50 - 54 years	7%	8%
55 - 59 years	6%	7%
60 - 64 years	7%	7%
65 and over	24%	22%
NSW	31%	31%
VIC	26%	26%
QLD	21%	20%
WA	11%	11%
SA	8%	7%
TAS	2%	2%
ACT	1%	2%
NT	<1%	1%

**Table 7 Estimated resident population, by age and sex - on 30 June 2022, Australian Bureau of Statistics*