

● Carbon

● Biodiversity

● People

WHAT MATTERS BEYOND CARBON

Consumer Survey Report



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Overview

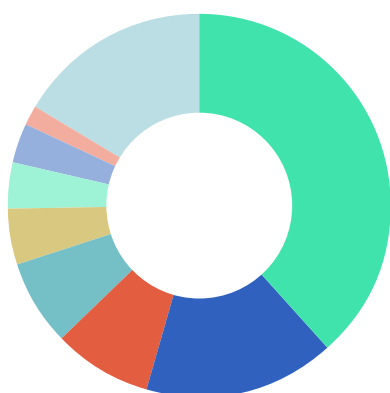
Businesses are increasingly investing in nature-based projects that have an impact beyond carbon to provide additional benefits to our planet.

But there are so many potential benefits that it is hard to choose which projects are the best investment.

This survey is intended to highlight what impact consumers believe business should prioritise across carbon, biodiversity and social.

Demographic

Country



112 United Kingdom

51 Rwanda

24 United States

21 Netherlands

14 Spain

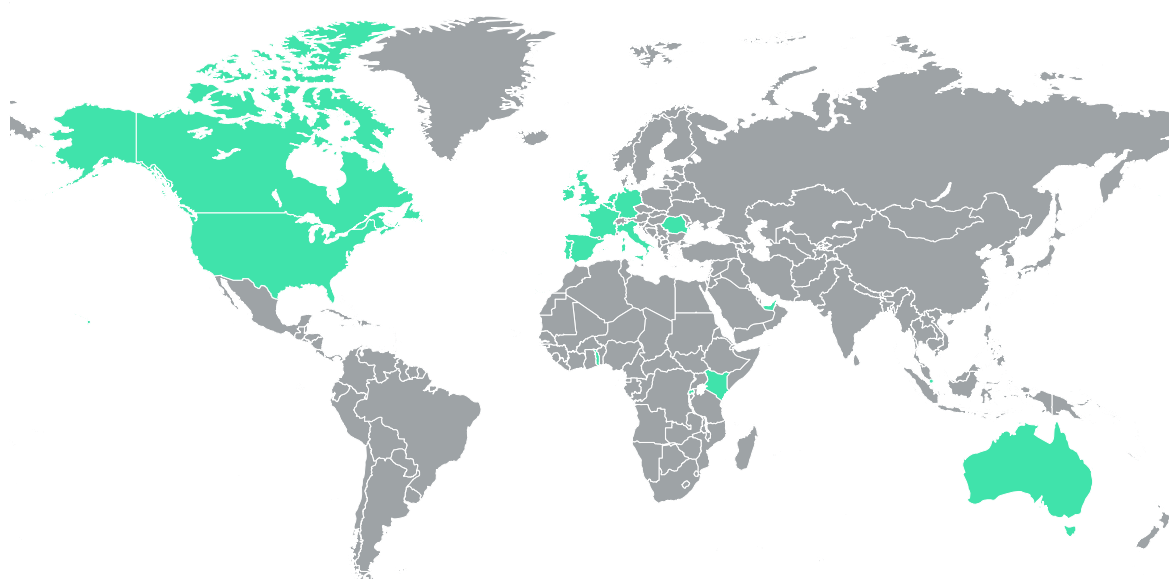
11 Germany

10 Kenya

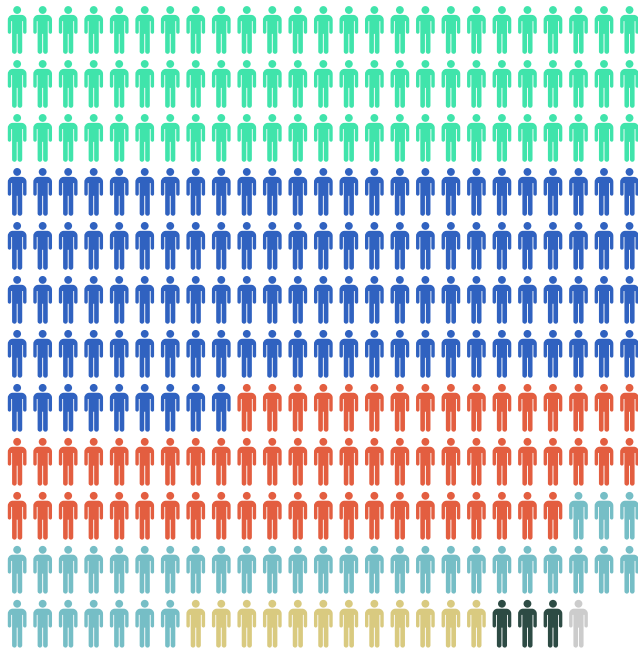
5 Togo

47 Other
(Romania, France, Portugal, Ireland,
Belgium, Canada, UAE, etc.)

The survey garnered responses from a diverse group of individuals, representing a wide range of countries and backgrounds. The United Kingdom had a notable presence among the respondents, with Rwanda, the United States, the Netherlands, Spain, Germany, Kenya, and Togo also represented in the survey. Additionally, there were participants from various other countries, including Romania, France, Portugal, Ireland, Canada, and the United Arab Emirates. This international response pool contributes to the survey's richness and comprehensive nature, offering insights from a wide range of backgrounds and perspectives.

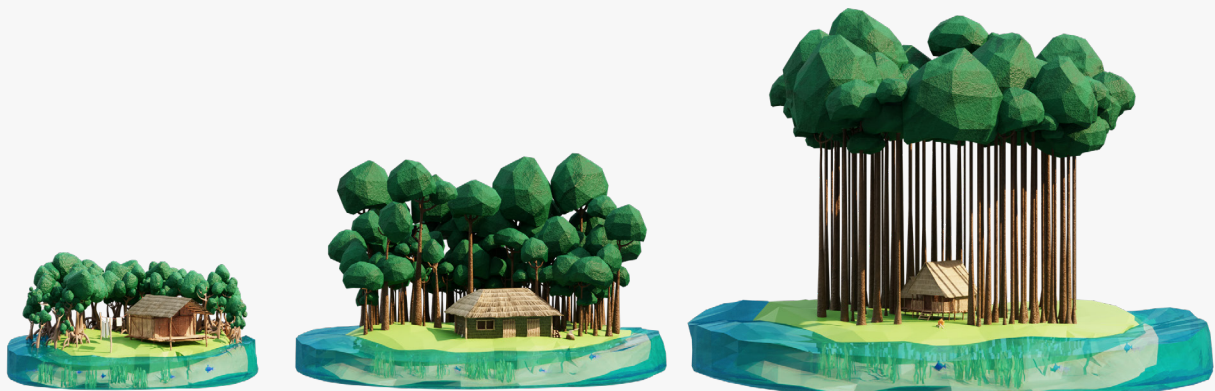


Age



75	18-24
109	25-34
63	35-44
35	45-54
12	55-64
3	67-74
1	75 or older

The survey encompassed a wide range of age groups among its 300 respondents, reflecting a diverse cross-section of society. Participants spanned from 18 years old to 75 years or older, ensuring a broad spectrum of perspectives. This age diversity is valuable as it allows for a comprehensive understanding of opinions and viewpoints from different stages of life.

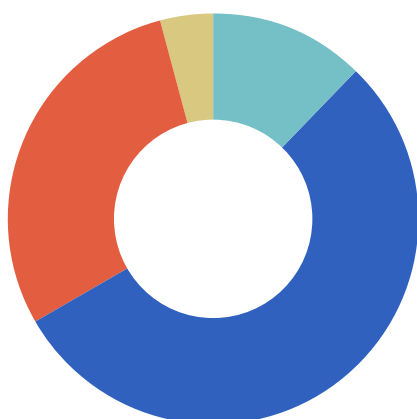


Which best describes your purchasing behaviour?

It's clear that sustainability has become a critical factor in purchasing decisions. With more than 66% of respondents prioritising sustainability and more than half paying more for sustainable products, every business in the world should take note if they haven't already!

In order to focus the remainder of the survey on the importance of different aspects of the decision-making process, only those who responded I only purchase... or I am willing... were asked the subsequent questions.

We admit to having some curiosity about those who responded that sustainability is not important, but it doesn't factor into their decision-making... perhaps a topic for our next consumer report!



54.3%	I only purchase from companies that prioritise sustainability, but I do not pay more for sustainable products
29.3%	I am willing to pay more for sustainable products
12.3%	I consider sustainability important, but it is never/rarely an important consideration in purchasing
4%	I do not consider sustainability important *

Age groups compared

	I only purchase from companies that prioritise sustainability, but I do not pay more for sustainable products	I am willing to pay more for sustainable products	I consider sustainability important, but it is never/rarely an important consideration in purchasing	I do not consider sustainability important
18 to 24	17.33% (13)	38.67% (29)	36.00% (27)	8.00% (6)
25 to 34	11.01% (12)	57.80% (63)	26.61% (29)	4.59% (5)
35 to 44	12.70% (8)	58.73% (37)	26.98% (17)	1.59% (1)
45 to 54	8.57% (3)	67.71% (23)	25.71% (9)	0.00% (0)
Total	36	152	82	12

Earthly's take



It's interesting to see that while a vast majority of all groups are willing to pay more for sustainable products- the percentage grows even higher with age. This is a key data point for brands that often assume that it's primarily younger consumers who are focused on sustainability.



* respondents that selected "I do not consider sustainability important" did not participate in further questions

Carbon

We evaluate and track carbon emissions reduction and removal throughout the life of the project.

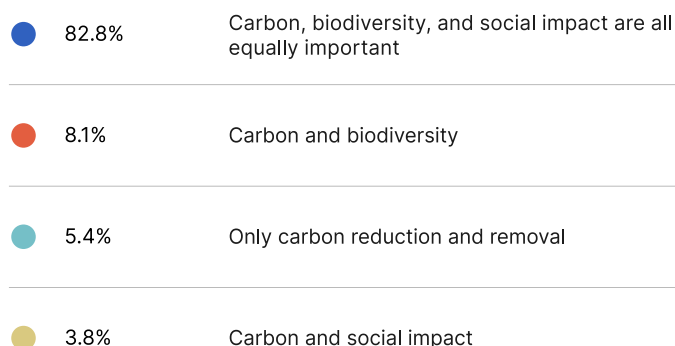
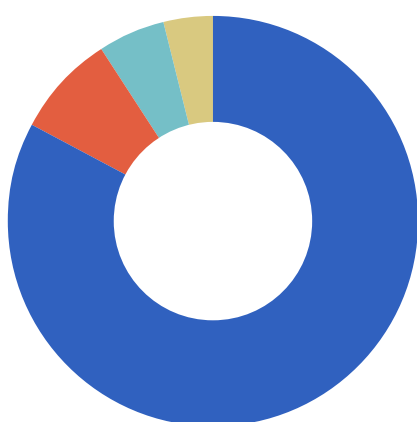
Biodiversity

Biodiversity factors in a variety of measures, including endangered species, area protected or restored, as well as ecosystem services.

People

The people/social pillar measures how a project benefits its local communities. This can include providing education, training, healthcare, profit sharing, or other benefits.

Many companies are investing in climate projects as part of their sustainability efforts. In your opinion, what should companies focus on when selecting projects?



Earthly's take



With so much of the news and conversations focused on carbon, we were very pleased to see that in fact, people understand the importance of all three pillars.

Survey respondent's take



Balance between these factors is essential. Focus on communities/people, providing them education and tools, will help to ensure environmental goals are met.

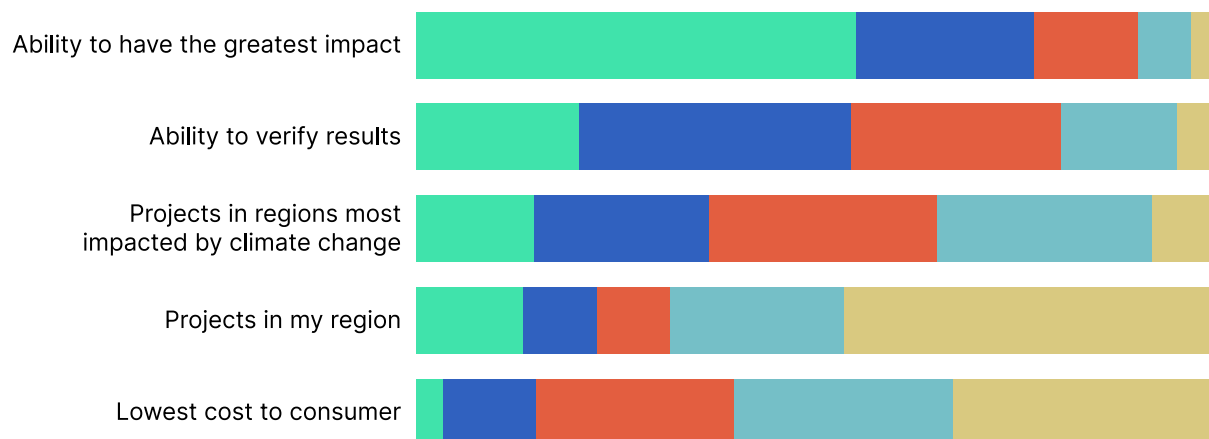
Carbon is often way too heavily relied on and a lot of carbon offsetting schemes are greenwashing attempts. The ecological and social crises are equally important - without functioning ecosystems, we will have no food, and without social equality and economic reform, finite resources will continue to be over consumed and extracted.

Sustainability permeates and includes every aspect of life.

The only way to make the carbon reduction work and to stem biodiversity loss is to bring people along with you.

No one area operates in a silo - they are interrelated and companies need to recognise and act on that fact.

For the companies that you purchase from, what do you think should be the priority in selecting projects?
(highest to lowest)



We often hear from businesses that they feel it's important to prioritise projects in the region(s) where they have their headquarters or offices. We understand - it feels more tangible and personally impactful to focus close to home.

But we're excited to see that consumers get it - the climate crisis is global. We can't solve it one region at a time. We need to focus on impact and results!



Could you explain the reasoning behind the order you've chosen?



cost change
verified location important
local **impact** people
need results help
regions

impact	63
need	27
important	24
regions	16
cost	16
results	13
local	12
help	11
people	10
verified	9
change	7
location	6

Survey respondent's take



I think impact is most important, and that ought to be prioritized over consumer perception of results and location if possible. Humans don't have a great track record of making empathetic decisions.

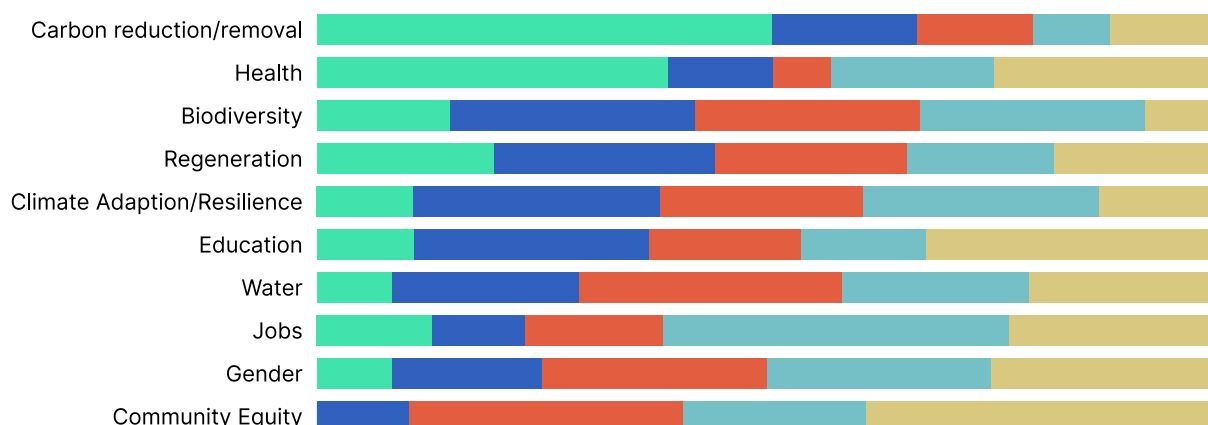
Hard to choose but I do think impact is the most important alongside tangible verification of that impact to ensure greenwashing isn't taking place.

Verifying results is important especially with issues recently surrounding green washing and carbon credits, impact and related value for money can be a good selling point but it's also important to acknowledge funding inequities and make sure support goes where it is most needed.

Fundamentally, providing the greatest impact is most important, but this must be able to be verified. I think there is some need to have projects in the region of customers as they would be able to see it. however, i think it's more important for areas which have been/will be most impacted by climate change to receive most funding.

Please select your top 5 benefits (highest to lowest)

Incorporating specific benefits with Nature-based Solutions demonstrates their versatility and effectiveness in addressing intertwined global challenges. By embracing the power of nature we can not only combat climate change and promote biodiversity, but also improve human health, enhance resilience, and safeguard precious water resources for future generations.



Carbon Reduction / Removal



Biodiversity



Climate Adaptation / Resilience



Health



Water

* the number of respondents who rated the benefit as one of their top 5

- Carbon Removal/Reduction

Focusing on carbon removal and reduction helps combat climate change, resulting in cleaner air and better health due to reduced pollution. Additionally, these efforts, such as reforestation, store carbon and stabilize global temperatures, promoting a healthier and more resilient planet.

- Biodiversity

Preserving biodiversity is essential for ecological stability. It safeguards habitats, maintains balanced ecosystems, and ensures species can adapt to changing conditions, all of which provide critical ecosystem services benefiting both the environment and human well-being.

- Climate Adaptation/Resilience

Climate adaptation and resilience strategies, including nature-based solutions like wetland restoration, protect communities from extreme weather events while preserving vital ecosystems. This approach ensures the long-term sustainability of both communities and the environment.

- Health

Improving air and water quality not only reduces pollution-related health issues but also promotes overall well-being. Access to green spaces enhances mental and physical health, while sustainable practices, such as clean energy sources, benefit both public health and the environment.

- Water

Sustainable water management, including the protection of natural landscapes, improves water quality, ensuring a healthier environment and a clean water supply for communities. Responsible water practices secure a consistent water supply for various needs while protecting aquatic ecosystems and biodiversity, benefiting both the environment and human societies.



Benefits

Please rank the top 3 most important to you (**highest** to **lowest**)

Biodiversity & Regeneration



Improvement
in soil health



Number of endangered
or threatened species
protected



Area of land
protected

These efforts not only enhance the ecological balance but also foster resilience in ecosystems, thereby ensuring the sustained provision of vital ecosystem services such as pollination and carbon sequestration.

Health & Education



Children
educated



Improved
health services



Improved
well-being

Together, these benefits form the foundation of a healthier, more educated, and socially vibrant community. They are key to breaking cycles of poverty, lack of education, and mental health problems, while also providing access to healthcare and reducing preventable diseases.

Jobs & Community Equity



Revenue being distributed to local communities



Improved education & training



Jobs created

The benefits within Jobs & Community Equity cultivate resilient, empowered, and economically thriving communities. Jobs themselves not only contribute to economic growth but also provide individuals with livelihoods, ensuring financial stability.



Water & Climate Adaptation



Access to clean water



Air quality



Water quality

These efforts not only enhance the ecological balance but also foster resilience in ecosystems, thereby ensuring the sustained provision of vital ecosystem services such as pollination and carbon sequestration.

In the categories of Biodiversity & Regeneration, Health & Education, Jobs & Community Equity, and Water & Climate Adaptation, all the top benefits collectively promote ecological sustainability, community development, economic fairness, and climate resilience, underlining their crucial importance for both society and the environment.

Conclusion in the words of our CEO



Innovation is not merely a matter of technology but encompasses understanding the desires and values of our customers.



Our survey, with 300+ contributions, has highlighted a clear path that intertwines sustainability with purchasing behaviours, revealing that more than half of respondents are willing to invest more in sustainable products.

A fascinating insight is the age-agnostic passion towards sustainability, challenging our preconceptions about younger demographics being the sole drivers of this movement. A holistic balance in focusing on communities, people, and avoiding the pitfalls of carbon offsetting schemes, which can sometimes masquerade as greenwashing, has also been highlighted by our respondents. The collective opinion leans towards having a tangible impact as a top priority, albeit with variations across different age demographics. In the realms of benefits, biodiversity, and regeneration, the spotlight is focused on carbon reduction and soil health, respectively. The benefits of education are also highlighted in responses, with a significant emphasis on children's education and improved health services, especially among respondents in the 25-34 age demographic.

In navigating the path forward, it's important that we, as businesses, build these insights into our practices and offerings, crafting a future that is not only sustainable but resonates with the values and priorities of our customers. A huge thank you to all who took part in this research!



Oliver Bolton
co-founder & CEO

Contact us

Earthly connects businesses to high-quality nature-based solutions, helping remove carbon, restore nature and improve livelihoods. Supporting organisations that wish to voluntarily decarbonise and benefit biodiversity and communities around the globe, Earthly accelerates investment towards nature and helps companies go beyond Net Zero to become regenerative, giving back to our planet more than they take.

We'd love to hear from you.
Do get in touch at: hello@earthly.org

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