



THE UNIVERSITY OF
SYDNEY

x



A 'Regen' Revamp

Linking regenerative farming to the Harris Farm Markets customer experience



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Executive Summary

Climate change is a major challenge facing humanity, and every industry has a part to play in reducing environment-altering greenhouse gas (GHG) emissions. Harris Farm Markets (HFM) is aiming to become carbon neutral by 2050 and to achieve this, they aim to lower emissions through carbon insetting in their supply chain.

One way to accomplish this is by increasing their range of regeneratively farmed products, which are considered low emission. Despite extensive online resources, HFM have in-store limited promotional strategies to encourage the purchase of regenerative products. Hence, our aim was to increase sales of these regenerative products to lower overall emissions at the production end of their supply chain and allow for carbon insetting.

Our objectives that formed the basis for our project were guided by HFM's 3 pillars of sustainability: good for the Earth; good for the business; and good for our family. We determined to reach our solution, we needed to research implementable methods for lowering carbon emissions within the HFM supply chain, develop recommendations that increase carbon insetting for the business and improve the image of HFM as an environmentally-sustainable alternative to larger supermarkets.



Utilising design thinking, we iterated our final concept through user testing and empathising with user needs. We aimed our recommendations at the different demographics of consumers, in hopes that promotion and education of products in the regeneratively farmed range will increase in-store sales.

Our solutions propose improved and more widespread labelling of regenerative products to promote increased awareness and recognition of this line of product. We have also modelled informative posters for displays that drive education and understanding of the nature and positive impact of regenerative farmers. Additionally, we recommend expanding the distribution in-store of recipe cards that utilise regeneratively farmed products. Currently, the HFM blog has a number of different recipes and making these more available to the public is essential. Including them alongside regenerative product displays and by the registers allows potential consumers to visualise how they can integrate these products into their cooking.

Overall, we anticipate that when implemented, these propositions will increase education and sales of regeneratively farmed products in HFM stores, thus creating a stronger market for lower emission farming and in turn, encouraging more agricultural producers to adopt environmentally sustainable farming practices.



Introduction

Anthropogenic modifications to the natural environment over the past century have significantly escalated climate change. Atmospheric GHG, particularly carbon dioxide, methane and nitrous oxide, promotes the trapping of heat within Earth’s atmosphere, accelerating global warming (Al-Ghussain, 2018). Life on Earth is already experiencing effects of a warmer climate: increased frequencies and magnitudes of natural disasters, rising sea levels, ocean acidification and biodiversity loss (WWF, n.d.).

Australia is the 14th biggest emitter of GHGs (CSIRO, 2021). Figure 1 depicts the nation’s major sources of emissions, with the agricultural industry alone producing 14.1% of total emissions (Department of Industry, Science, Energy and Resources (DISER), 2021). Notably, the Land Use, Land Use Change and Forestry (LULUCF) sector in Australia lowers atmospheric GHGs by adopting more sustainable forestry practices, reducing land cleared for human activity, and improving soil health to promote carbon sequestration (DISER, 2021).

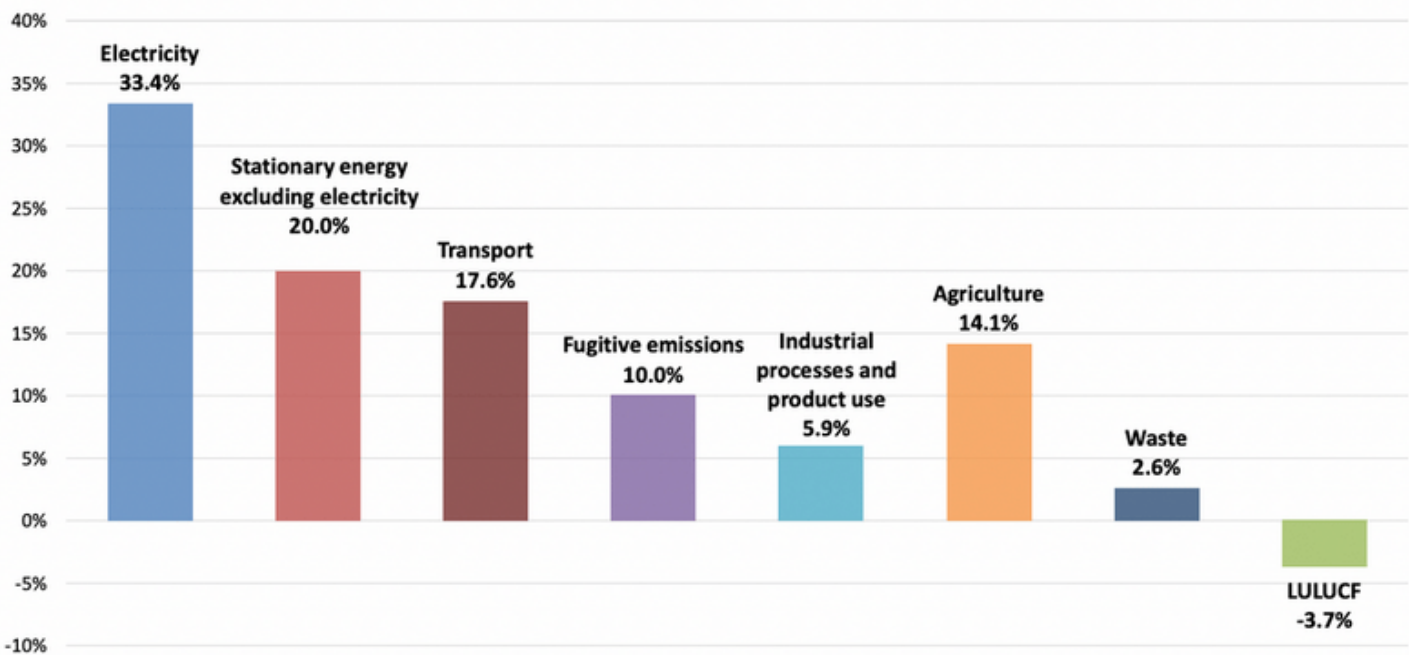


Figure 1: Adapted from DISER, 2021. Greenhouse gas emissions by sector in Australia as of September 2020.



This report draws inspiration from the LULUCF sector success and highlights the need to introduce sustainable land management practices into the agricultural sector.

Traditionally, agricultural practices require significant volumes of finite resources to maximise yield, including fossil fuels, and irrigation water (La Rosa, Siracusa, & Cavallaro, 2008). These practices often render farmland unusable, destroying soil structure, removing nutrients, promoting erosion, and disrupting natural environmental cycles (Larsen et al., 2014).

Without changing the way the agricultural industry functions, food production will continue to produce significant GHG emissions, leaving a greater extent of farm land unviable (ABS, 2021). This creates an inhospitable environment for crop and livestock production, further worsening the climate crisis.

Regenerative agriculture is a contemporary approach to farming that seeks to minimise the negative environmental impact of current farming practices (Burns, 2021). Farming methods support and strengthen the natural ecosystem, rejuvenate damaged soils, and enhance the sequestration of carbon into the terrestrial biomass (Gosnell, Gill & Voyer, 2019).

Supporting regenerative agriculture is essential for food production and distribution industries, enabling the reduction of their overall carbon footprint through carbon insetting, a process by which companies reduce their GHG emissions within their own supply chain. This differs from the better-known carbon offsetting, where companies invest in carbon-reducing projects outside of their own supply chain to compensate for their emissions (Tipper, Coad & Burnett, 2009).

This report will provide insights as to how the Australian food retailer, Harris Farm Markets, can inset their carbon emissions by supporting regenerative agriculture. HFM already stocks approximately 164 regenerative products, primarily meat, dairy, and alcohol. Despite endeavours to strengthen the demand for these products, particularly online, the range available and their promotion in-store has not yet created enough awareness in the community for the products.

Problem Statement

At HFM, there are limited in-store promotion strategies to spotlight regeneratively farmed products, leading to a lack of consumer awareness of regenerative products.

This leads to our project's aim.



To develop marketing strategies that increase sales of regeneratively farmed products in HFM stores, as well as educate consumers on the importance of supporting regenerative agriculture.



Key objectives

To address our problem statement and aim, our objectives are based on HFM's three pillars of sustainability:



Good for our earth

Research effective methods for reducing carbon emissions in the HFM supply chain through carbon insetting.



Good for our business

Improve the image and presence of HFM as an environmentally sustainable alternative to bigger supermarket chains.



Good for our family

Develop an in-store marketing strategy to support farmers by raising awareness for regenerative agriculture and increase education in the community about regenerative farming.

Research Approach

We utilised design thinking as our research methodology as it is an iterative, non-linear process, lending itself well to an open-ended brief with a human-centred approach. Design thinking involves specifying stakeholder needs through primary research before designing solutions that accommodate these needs. Research methods we used to gather these insights include space mapping, semi-structured interviews and empathy mapping (Tomistch et al., 2021). These techniques enabled us to understand how regenerative agriculture could tangibly be used as a catalyst for insetting carbon within the HFM supply chain. As Cross (2004) posits, designing processes that place user needs at the centre of operations is key in producing effective outcomes for stakeholders.

Thus, we implemented a five step process of cyclical iteration, based on a structure outlined in Meinel, Leifer & Plattner (2011).

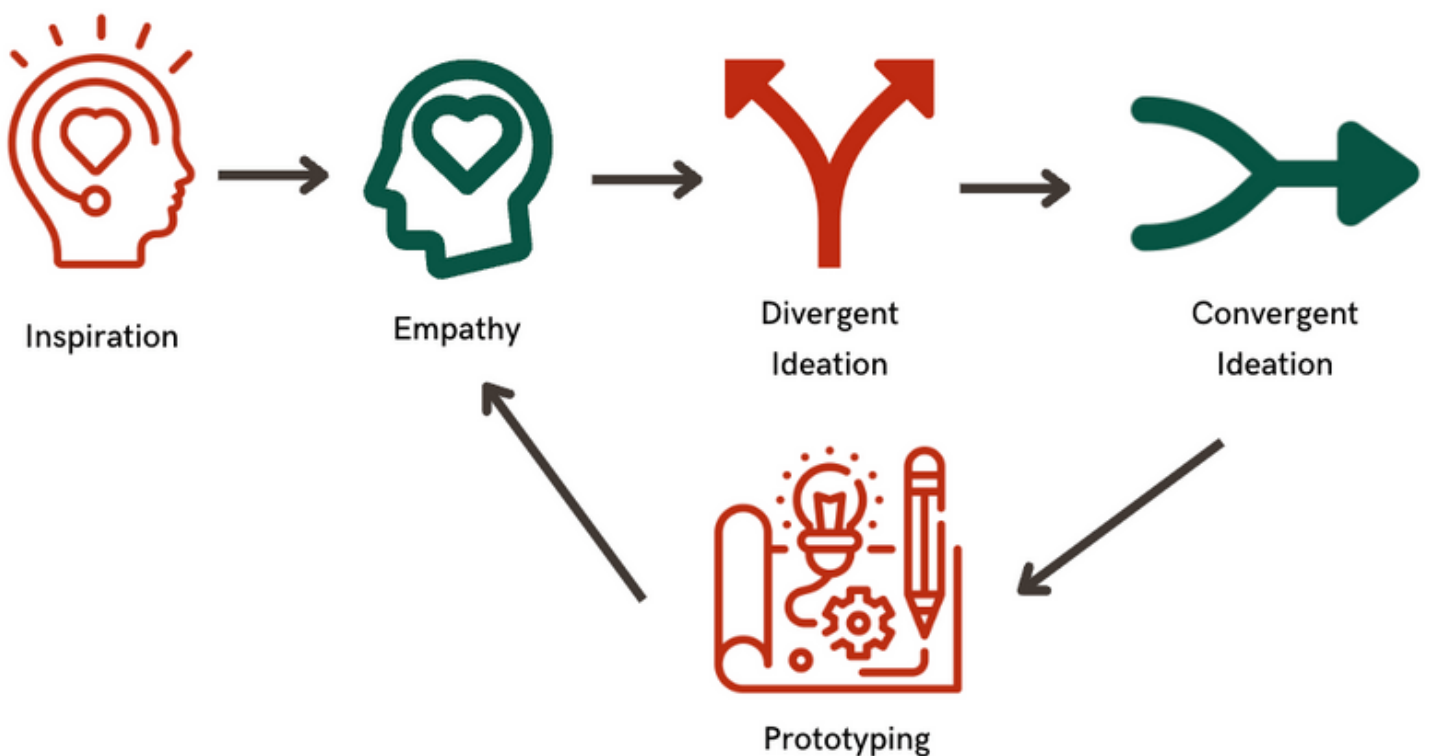


Figure 2: Design thinking process. Adapted from Meinel, Leifer & Plattner (2011)

Research Methodology

As seen in Figure 2, we began with an inspiration phase, sourcing a wide-casting literature review on regenerative agriculture and market incentives to form the basis of our initial idea.

The next step was the empathy phase, where we gathered primary research relating to our project aims, visiting both city and suburban HFM stores, conducting contextual observations, and space mapping. From this, we constructed two user personas through empathy mapping, acting as sample customers we would empathise with when ideating.

After this, we began the ideation phase, where the first stage, divergent thinking, let us to put all potential ideas out on the table. We walked through each of them through the lens of our user personas. In the second stage of ideation, known as convergent thinking, we narrowed our idea to encompass an interactive display at Harris Farm Stores that showcased the supply chains of various foods by inspecting their fit against our objectives.

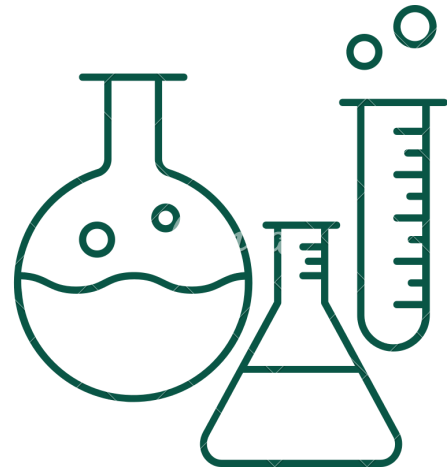
We then tested this idea with both HFM store & area manager and found the practicality of this idea was not feasible. We went back to the drawing board and prototyped a final idea, elaborated on in the discussion section of this report.

By utilising design thinking as our methodological approach, we were constantly iterating based on expert and user input; shaping our idea around stakeholder feedback.



Interdisciplinary Profiles

The science background of Hannah, Melissa and Diana facilitated a pragmatic, research-based approach to the project.

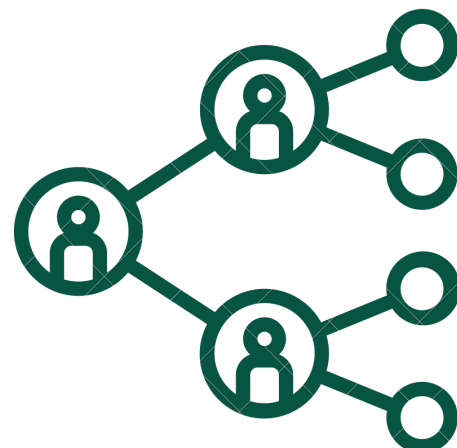


These students focused on sourcing primary research and case studies on regenerative farming and HFM as a business, placing them in a broader context where this project sits.



With a background in design and the humanities, Rafe utilised his primary research skills to manage the rollout of the project and the ideation and prototyping phase of our final recommendations.

Shavil used his experience in International business to lead problem solving initiatives, focusing his research on addressing business-centric and supply chain issues.





Key findings

Insetting carbon emissions through regenerative agriculture

Regenerative agriculture encompasses a wide range of practices that work to reinvigorate farmland and sequester atmospheric carbon into the terrestrial biosphere (Gosnell, Gill & Voyer, 2019). Some of these practices include eliminating soil tillage to reduce disturbances, utilising compost to increase soil organic matter, improving ground cover to protect surfaces from erosion, and rotating a diverse range of crops to help diminish the ongoing threat of pests (Gosnell, Gill & Voyer 2019). Importantly, these practices improve water, air and soil quality so that vegetative cover can last all year-round and as a consequence, food production can be maintained (Schulte et al., 2021). Importantly for Australian farmers, regenerated land outperforms conventionally farmed land during extended drought, with regenerative practices being shown to reduce drought stress (Popescu, Nenciu, & Vladut, 2022). Furthermore, LaCanne & Lundgren (2018) found that although crop yield decreased by 29% after corn farmers switched to regenerative agriculture, the practices were 78% more profitable as a result of lower external input costs and market demands. Thus regenerative farming can decrease overall long-term cost by reducing inputs such as fertiliser and seeds, creating a more sustainable income for farmers (LaCanne & Lundgren, 2018).

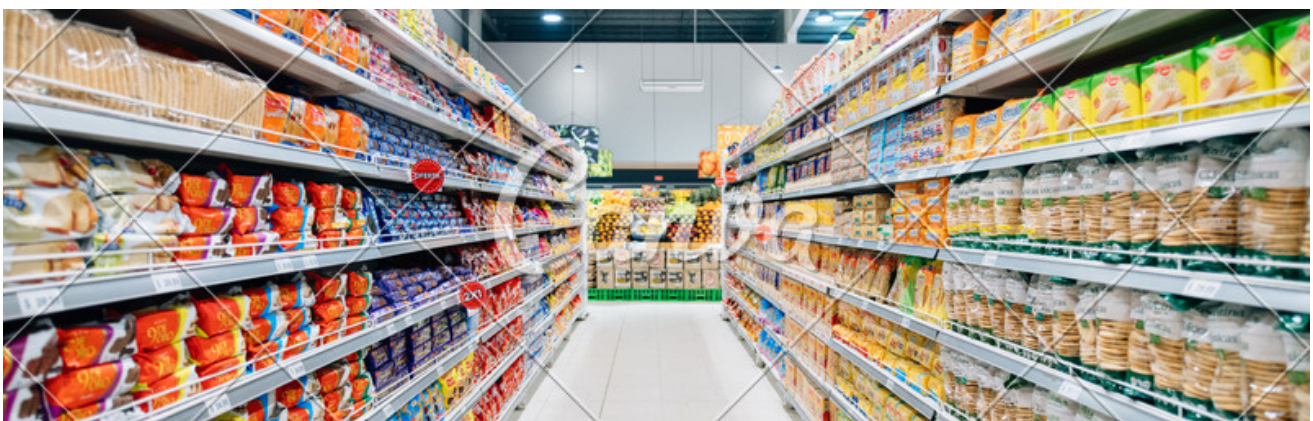
Despite its encouraging potential, there are significant barriers that prevent farmers from participating in regenerative agriculture. Importantly, farmers are cautious to change due to financial risks and initial investments required, and the time and resources it takes to adopt new farming methods (Gosnell, Gill & Voyer, 2019). Other barriers include a lack of education on the benefits of regenerative farming, low levels of bottom-up control in farming communities to drive change, and the fact that yield is still the overall measure for success, rather than environmental impact or long-term profits (Gosnell, Gill & Voyer, 2019). Therefore, incentives for farmers to adopt new practices are required for wide-spread adoption of regenerative agriculture.



Key findings

Factors that influence purchasing choices

According to the Harvard Business Review, expectations of retail customers have changed dramatically since the COVID-19 pandemic, from introducing health and safety measures, to offering a simple e-commerce experience. As a result, retailers must make their in-store experience significantly differentiated for those still visiting in-person. The HBR conveys that *“They [retailers] have to give people a reason to visit that is so compelling, it justifies their exposure to health risks and overcomes the inertia of the behaviours they adopted during the shutdown.”*, (Yohn, 2020). These factors range from product placement in-store, to choosing products that permeate individual needs at a given time. Our project aim specifies that we need to examine what influences purchasing choices to encourage HFM customers to purchase regenerative products. Therefore, a distinction must be made between researching what influences consumer choices generally, and what influences consumer choices for ‘ethical’ products. Jayawardhena, Morrell & Stride (2016) offers an exposè on ethical consumption behaviours in supermarket shoppers, finding through a sample of 688 UK shoppers that consumer preferences are determined before they enter the supermarket, and the greatest factor influence on consumer decision making are their preconceived ideas. However, the authors also posit that consumers cannot be boxed into categories such as ‘ethical consumers’ and ‘non-ethical consumers’ due to consumer habits being vastly different from person to person.



Key findings

Bogomolova et. al (2020) extends this by conducting a wide-ranging co-design session with supermarket staff and consumers, harnessing their thoughts to design a marketing campaign that encourages healthier, more ethical food choices. Participants in these co-design workshops had an average age of 45 years old, were mostly women and had an average family size of 3, seemingly similar to the typical HFM customer we saw during in-store space mapping. This research showed that rather than lowering prices, dispersing items across the store with distinguishable tags on the shelf, as seen below, and in-store experience workshops, gave consumers more information and education regarding healthier choices and were most effective in influencing their purchases.

Primary Research

Our primary research consisted of three elements: empathy mapping of HFM customers in-store, space mapping customer interactions, and conducting semi-structured interviews with both HFM store and area managers. This research comprised the 'empathy phase' of this project, with team members studying the Broadway and Pennant Hills stores as bases to understand customers and their in-store behaviours. We tested our initial idea with Mujeeb, a HFM Area Manager, and Andrew, the HFM Broadway Store Manager, and modified our concept according to their feedback. This iteration was a key step in our aforementioned design thinking methodology; constantly shifting the parameters and scope of our project to meet stakeholder needs.

All primary data collected was qualitative, and as such we collated this data through the use of affinity diagramming (Tomistch et. al, 2021). As seen in Figure 3 (on page 15), we organised all collected data points under common groupings to gain insights and understanding of the evidence before us.



Key findings

Five key insights gained from our primary research:

‘Different customers, different stories’: This quote from Mujeeb encapsulates the idea that designing a one-size-fits-all solution does not suit HFM’s diverse customer base.

Retail is timing and simplicity: All retail visual merchandising must suit the convenience of customers. Always design with ease of use in mind, as food shopping tends to be a quick process where people make irrational decisions based on their environment.

Different HFM stores have different clientele: A seemingly obvious insight that we were oblivious to when initially ideating. City HFM stores cater to convenience and sustainability, while suburban HFM stores cater to health and quality produce.

Big signs around the store work: Using large signs and labels on the shelves boost sales and garner a positive sales experience. The more visible things are, the more they will sell.

‘Go with the flow’: A quote from Andrew that captures a key insight that all marketing should be seamless with the HFM experience. HFM’s core value of ‘market over supermarket’ is key to design solutions that encourage people to purchase specialised products.

(See Figure 3 for Affinity Diagram)



Figure 3: An Affinity Diagram of all collated primary research data points. Based on process outline in Tomitsch et al (2021).

Harris Farm Market’s Current Market Landscape

HFM currently utilises a wide range of marketing devices to entice customers to purchase certain specialised products. Our team decided to focus on in-store promotion strategies as visual merchandising is the primary tangible medium where sales can be impacted directly by marketing actions by an organisation (Danaher et al, 2020). HFM’s current in-store marketing landscape comprises five main components: labels on shelves, banner posters hanging and on windows, recipe book handout after purchase, in-store exhibitions and store layout. Adjusting store layout is difficult as every HFM store is laid out differently to meet market needs and locations. Similarly, implementing in-store exhibitions is difficult as each store harbours a variety of factors that disqualify different types of exhibitions and requires significant planning. Thus, our solution focuses on labelling on shelves, effective banner posters and incorporating regen recipes in the recipe book handed out post-purchase.

Discussion



The importance of reducing carbon emissions in the HFM supply chain was at the forefront of our research aims and objectives, helping to guide us in producing a comprehensive set of recommendations in support of positive climate action.

As identified in our problem statement:

A lack of in-store promotion strategies to spotlight regeneratively farmed products meant that consumers lack awareness of the environmental benefits of these products and thus lack motivation to purchase them.

Therefore, our recommendations aim to educate consumers on why supporting farmers who participate in regenerative agriculture and why purchasing their products is vital for HFM to make a difference and decrease carbon emissions along their supply chain.





Recommendation #1

Labelling

Our first recommendation focuses on increasing the visibility of regeneratively-farmed products in-store through new and more consistent labelling. There are a select few products currently on the shelves that have “I’m regen” labels, however these are limited and do not create a cohesive and recognisable product line. This inconsistent and inconspicuous labelling can be seen in Figure 4, a picture taken of the shelves in the HFM Broadway store.



Figure 4: A shelf of products that all utilise regenerative agriculture with only one small tag and no signage.

Recommendation #1

Following our findings, the easiest way to boost in-store purchases in a market setting is to make the product stand out to consumers. In order to achieve this, we propose a design upgrade to HFM’s current “I’m Regen” labelling system as well as encouraging a wider implementation of regenerative farming promotion material in stores. These new labels can be dispersed around the store wherever regenerative products are located. We have modelled the upgrades made to the current upgraded “I’m Regen” labels, shown in Figure 5, including information about where the products have been grown, how they have been grown and the environmental implications of these.



Figure 5: A custom redesign of a potential label to be hung on shelves that focuses on the key benefits of regenerative agriculture.





Recommendation #2

Education

Secondly, we suggest the implementation of educational, in-store displays for the regeneratively farmed product range. For HFM, it is essential when spotlighting products in the regeneratively farmed range to make sure that consumers are aware of why the product is special, its value in terms of cost and its environmental impact. Currently, the online HFM blog details what regenerative farming is, and what consumers can do to support these farmers, however this is not translated to in-person. This unfortunately leaves consumers questioning the significance of the “I’m Regen” labels and as such, they are less inclined to buy products in this range.

Importantly, we found that sustainable products are valued less on their own; for instance if something is carbon neutral, there is no real evidence that market customers see this as a value proposition. However, taste, health and connection to the supply chain have all been perceived as extremely valuable. Therefore to satisfy this, our educational displays would include information about what regenerative farming is, and its benefits both environmentally and socially.

A great deal of information regarding regenerative farming has been detailed on the HFM blog website, and therefore could be utilised in an in-store format. The social benefits of regenerative farming would then be communicated through images of the farmers and growers who supplied the products so that customers can empathise with them and are more likely to be drawn to purchase the products. This will be further beneficial if customers are already inclined to contribute to positive climate change action.

We have designed mock-ups of posters to be included alongside these displays to showcase regenerative products and included this promotion media below in Figure 6.

Recommendation #2



Figure 6: A custom redesigned banner poster to be hung over regenerative products (in this case, Muloon Creek Natural Farms eggs) to inform customers on the benefits of regenerative agriculture.



Recommendation #3



Product Integration

Finally, our third recommendation aims to demonstrate to potential customers how these products can be integrated into their usual purchasing habits and cooking, through recipe cards or pamphlets.

The HFM blog already includes numerous regenerative recipes, and we suggest that these be adapted to a paper format and displayed either near regen products on the shelf or at the front registers. This will hopefully increase product awareness and show consumers how these products can be easily integrated into their cooking.



Figure 7: Examples of recipes currently on the Harris Farm blog website that could be adapted to a paper format to be displayed in store

A significant hurdle for encouraging customers to try new products is the consumer being unable to visualise its integration into their lifestyle. This strategy would be important in showcasing to prospective consumers how to assimilate regenerative products into their regular shop whilst also decreasing concerns over its taste or quality compared to their usual purchases.

Evaluation of Recommendations

In order to analyse the potential effectiveness of our recommendations, we again utilised design thinking methods to assess them in terms of their desirability, feasibility and viability.

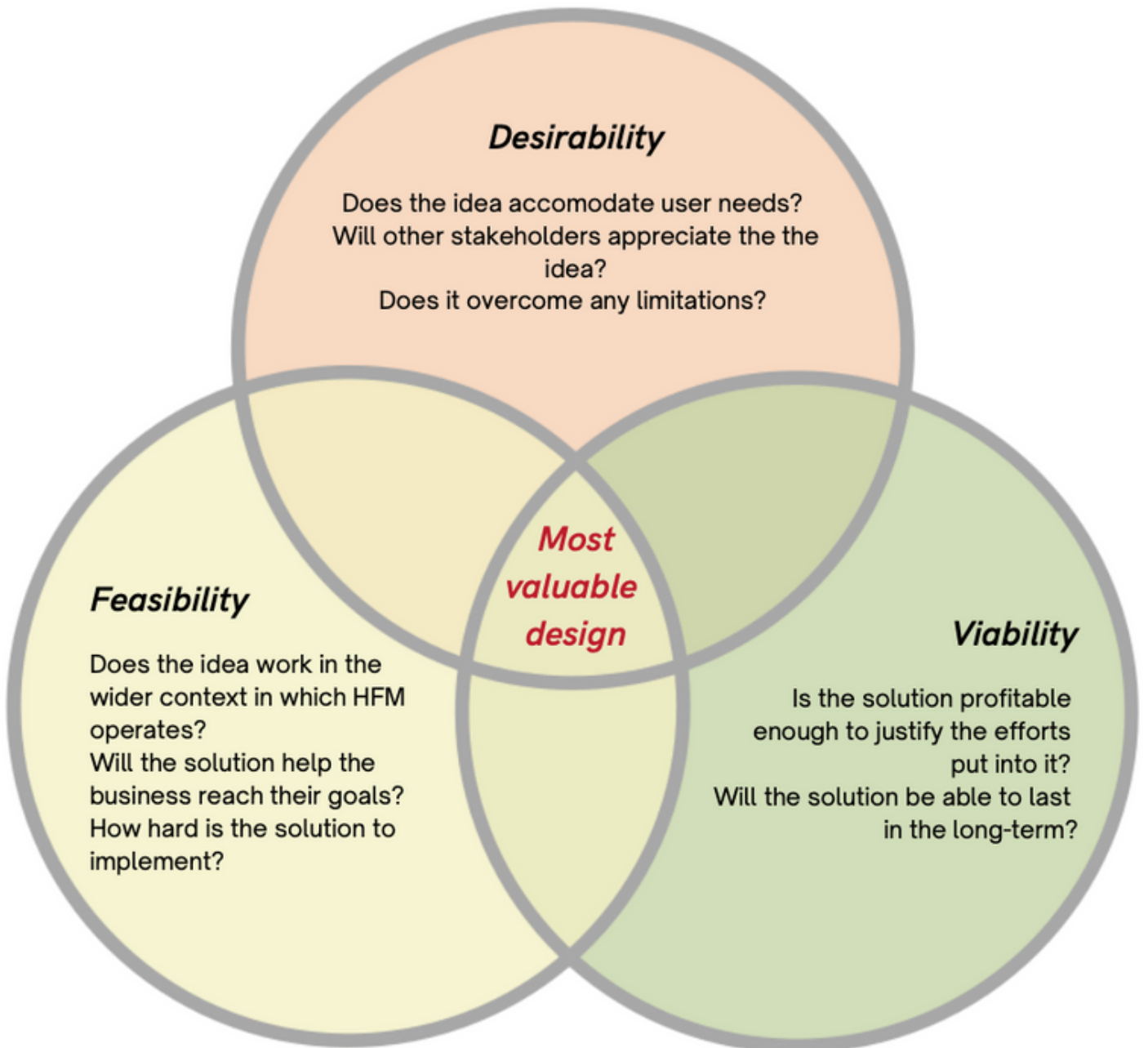


Figure 8: Venn Diagram

Adapted from "ICPU_Day_11_Turning ideas in to action" powerpoint on the canvas webpage.

Limitations

Desirability

A 2021 survey found that less than 20% of people were aware of regenerative farming, and 70% of those said that products are more appealing when labelled distinctly (Agriculture and Horticulture Development Board, 2021). This tells us there is a potential market for regenerative items, they just need greater visibility as well as education. Moreover, despite the simplicity of our marketing strategy, it addresses HFM's desire to lower carbon emissions and support farmers at the opposite end of the supply chain. (National Farmers Federation Canberra, n.d.)

Feasibility

In discussing our ideas with HFM managers, we iterated simple, low-cost solutions, based around pre-existing promotion strategies. Technically, there is low risk involved and operationally, minimal involvement is required from staff after initial implementation. There are also increasing numbers of potential consumers are guaranteed to ensure the market and industry feasibility.

Viability

Our solutions are low-cost to implement, require little to no ongoing costs for the business, have the potential to increase foot-traffic from environmentally-conscious shoppers and importantly, will increase the profits from regenerative products. Sales will be driven by customer preference, choosing more sustainable options, reducing the carbon footprint of both the business and consumer whilst having minimal effect on the bottomline costs for either party involved.



Limitations

Business Operation Risks

Having a blanket marketing approach and assuming that they all attract similar demographics does not account for the diversity of consumers within and between stores. However, our group has considered this limitation, and as such we recommended an additional step in our solution. This involved creating store-specific empathy maps to account for store demographics and create more targeted displays.

Limitation to our design thinking approach

We favoured an iterative, non-procedural approach that hoped to capture all possible user needs. However, projects that utilise design thinking methodologies usually span over several months, not a few weeks. This brief timeframe inhibited us from delving deep into the ‘empathy’ phase of our project and examining both HFM customer and organisational needs when defining our solution (Tomitsch et al, 2021).

Greenwashing

Environmental claims can be a great marketing tool when realising the need for increased awareness and education of regenerative agriculture. However, without substantial and accurate scientific evidence to support information, companies can be subject to misleading consumers, constituting the term ‘greenwashing’ (Love & Eccles, 2022). This is used to describe misrepresenting the extent to which a product or service is minimising carbon emissions. The identified problem with reporting and claiming sustainable action is the lack of mandate and auditing, as Harris Farm Market have complete discretion over what regenerative standard-setting guideline to follow, our surface solution to graphically communicate on product tags and signage may not be as transparent and detailed with information.

Conclusion

In a climate where consumers are becoming more conscious of the environmental impact of their purchasing choices, our solutions provide a simple yet effective way for HFM to enhance their sustainability profile through carbon insetting. Working within the parameters of a design thinking methodology, we have crafted recommendations aimed at increasing the education and promotion of the regeneratively farmed range at HFM, whilst aligning with the business' 3 pillars of sustainability.

By promoting a lower-emission range, HFM can improve their sustainability image in comparison to bigger supermarkets, thus attracting more consumers who value environmentally friendly options, whilst reducing the business' overall carbon footprint. The HFM family will also significantly benefit; farmers through increased sales and profitability, and consumers through increased education on sustainable food choice and new opportunities to reduce their carbon footprint. In doing so, customers and their purchasing choices can become the driving factor for change, allowing HFM to expand their range of regeneratively farmed products and reduce carbon emissions.



Conclusion

Wider Implications

On a wider scale, educating consumers about lower-emission products has the potential to create awareness of the carbon footprint associated with their other choices, both in terms of product selection and lifestyle decisions. It will also enable a greater diversity of people to participate in reducing climate change; many consumers who include animal products in their diet are often discouraged from exploring lower emissions options as they are advised that reducing meat and dairy consumption is the only significant way to reduce their carbon footprint. Regeneratively farmed livestock subvert this assumption as eco-friendly alternatives to conventionally farmed animal products.

HFM is an innovator in the sustainable shopping movement, as seen in the adoption of “Imperfect Picks” and “Re-purposeful Picks” in larger supermarkets. This opens the door for other companies to begin offering and promoting regeneratively farmed products, thus vastly increasing the impact of this concept throughout food production and retailing industries. Increasing sales of regeneratively farmed produce will also undoubtedly augment interest within agricultural networks as it emerges as a viable option for farmers. This will have far-reaching impacts on the overall carbon emissions in the agricultural sector, much broader than HFM itself.

Furthermore, increased prevalence of these practices could lead to future certifications, which would create even stronger incentives for producers to implement regenerative agriculture. Hopefully, initiatives such as these will increase the proportion of not only HFM suppliers, but global food suppliers who support regenerative agriculture.



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