



UNION FOR
ETHICAL
BIOTRADE

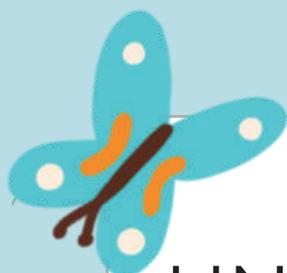
SOURCING[®]
WITH RESPECT

UEBT

Biodiversity Barometer

2020





Rounding up the UN Decade on Biodiversity

2020 marks the end of the United Nations Decade on Biodiversity. These ten years have seen increasing discussions and efforts on biodiversity, which is a topic now high in all agendas. 2020 will also mean the last edition of the UEBT Biodiversity Barometer, which has served to measure awareness of biodiversity and inform these efforts. Every year since 2009, UEBT has tracked the growing awareness of biodiversity and its growing effect on purchasing decisions of consumers. Over 74,000 people were surveyed in 16 countries, and their responses provided valuable insights to companies and governments working on biodiversity.

Since the start of the UEBT Biodiversity Barometer, we've witnessed how people around the world are realizing that we are in the midst of a biodiversity crisis. Consumers have become more demanding, asking for more information on natural ingredients and looking for regenerative and fair sourcing practices. Food and beauty businesses are responding, with biodiversity increasingly considered in business, R&D, sourcing and reporting strategies. The trend is only expected to continue, and though this is the last Biodiversity Barometer in its current form, UEBT will continue to monitor and communicate on these issues, as well as of course continue our broader work achieve a world where all people and biodiversity thrive.

For the 2020 UEBT Biodiversity Barometer, consumer research was conducted in Brazil, France, Germany, Switzerland, UK, and the USA in March 2020, just as the COVID crisis started. This report summarizes the results and presents the learnings from this decade long research conducted by UEBT, with the support of IPSOS, an independent research company.

The UEBT Team



10 insights looking back and into the future

1. Respect for biodiversity is gaining importance among consumers. This trend will likely be reinforced by people's awareness of the link between biodiversity, health and well-being post-COVID 19. To remain relevant, brands and companies need to pay serious attention to biodiversity.

2. Well-being is a **rising consumer interest**. It is not seen as an individual pursuit, but rather connected to the world around us. Respect for all people and biodiversity is more and more part of well-being.

3. Respect for people and biodiversity is receiving more attention in purchasing decisions: consumers feel good when their purchase makes a positive contribution to society.

4. Trust is the new currency. But trust levels remain low, and consumers **want more evidence** of practices that respect all people and biodiversity.

5. Consumers' call for **transparency** on product ingredients and their origins is growing louder. They want more information, preferably externally validated.

6. With the rise of social media, consumers look for concrete examples and evidence on ethical sourcing practices for fact checking and sharing.

7. Gen Z & Millennials, are more aware about biodiversity than older generations. They also actively look into brands' behavior and value companies that 'walk the talk'.

8. Brands still have a unique opportunity to position themselves around sourcing with respect for people and biodiversity. Natura Cosmetics has gained such recognition in Brazil, its home market, with 55% consumer recognition.

9. Corporate communication on biodiversity by beauty, food, and beverage companies has steadily increased over the last 10 years. More systematic and transparent reporting against clear indicators is expected.

10. As consumer interest in naturals continues to increase, so does biodiversity-based research and development. Complying with evolving rules on Nagoya Protocol and Access and Benefit Sharing (ABS) is an ever-growing imperative.

2020 - BIODIVERSITY AWARENESS - FROM NICHE TO MAINSTREAM

Since 2009, more than **74,000 people** were surveyed, of which **6,000 in 2020**. Awareness and understanding of biodiversity have significantly grown over the last decade, a trend that is expected to continue.



In 2020, 78% of respondents say they heard about biodiversity (Brazil, France, Germany, UK and the USA). Up from 67% in 2010. Significant increase in awareness was observed in Germany (+32), UK (+20), USA (+16). More and more respondents are able to correctly define biodiversity in all countries, except from Brazil, where understanding has slightly dropped.



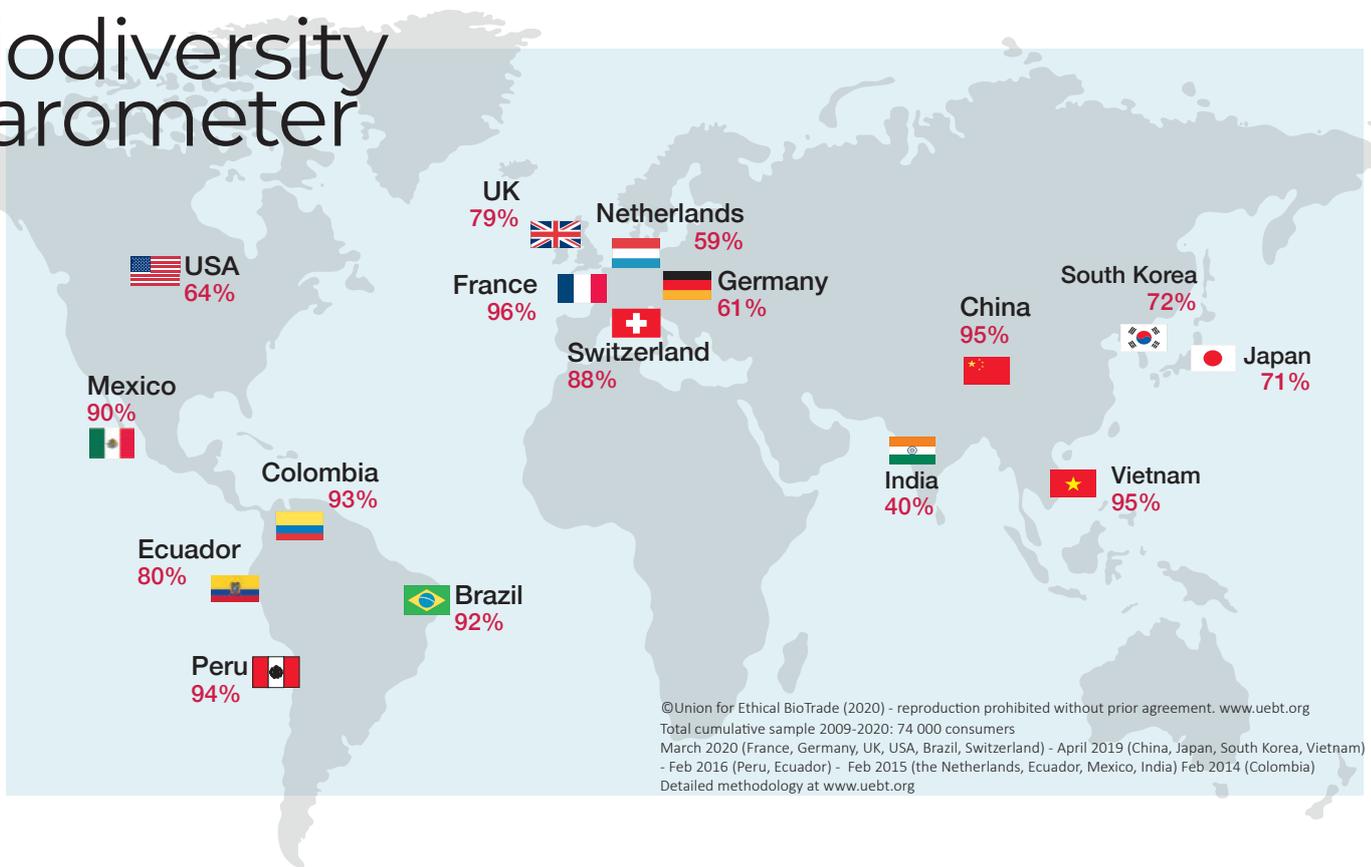
Awareness of Biodiversity	change vs 1 st wave	% correct definition	change vs 1 st wave
96%  FR	+9	44%  FR	+23
61%  DE	+32	27%  DE	+14
79%  UK	+20	32%  UK	+14
64%  USA	+16	26%  USA	+15
92%  BR	-2	40%  BR	-4
88%  CH	+6	39%  CH	+2

Q1 - Personally, have you ever heard of "biodiversity"? / Score on Total "I have heard of it" / Q2 - In your opinion, what does biodiversity mean? (open-ended question) - Basis - all sample - 1st wave- 2009 for France, Germany, UK, USA, Switzerland - 2010 for Brazil - 2012 for Switzerland

2020 - BIODIVERSITY AWARENESS AROUND THE WORLD

The UEBT Biodiversity Barometer covered a total of **16 countries in 11 years** of research and tracked how biodiversity has become a global notion. Awareness is high in Latin America and Asia, two regions known for their rich flora and fauna.

Biodiversity Barometer



The UEBT Biodiversity Barometer has served as one of the global indicators recognized by the CBD to track its target on people's biodiversity awareness around the world. While the 2020 target has not been achieved yet, the barometer shows we're on a path of steady growth.



I am extremely encouraged by UEBT's contributions to the convention's objectives over the last decade, particularly with regards to identifying the steady increase of consumer awareness on biodiversity, ethical and sustainable sourcing as documented in the biodiversity barometer."

Ms. Elizabeth Maruma Mrema,
Executive Secretary, CBD Diversity.



Aichi Target 1: By 2020, at the latest, people are aware of the values of biodiversity and the steps they can take to conserve and use it sustainably.

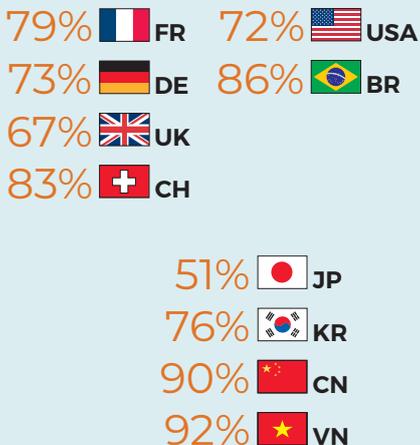
SOURCING WITH RESPECT- BUILDING A SHARED FUTURE FOR LIFE ON EARTH

Consumers expectations are evolving rapidly in these challenging times. Consumers wish to make more ethical choices and expect companies to make a positive contribution to society. Ethical purchases contribute to a feeling of well-being, the UEBT Biodiversity Barometer finds 77% of surveyed consumers feel good when buying products from companies that respect biodiversity and people (81% in Asia in 2019). Even more so younger consumers: 80% of 25-34 years of age feels good when buying products that respect biodiversity (versus 77% all sample); 82% believes it makes a positive impact by doing so.

The COVID-19 crisis is causing consumers to more seriously consider the health and environmental impacts of their shopping choices.

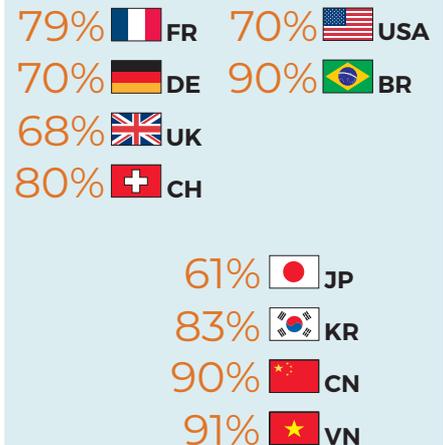
77%

It makes me **feel good** when I buy a product that respects biodiversity and people. In **Asia**, this was 78% in 2019.



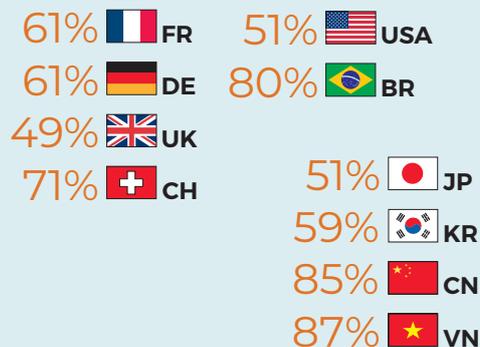
76%

I think I can have a **positive impact** on society by buying products from companies that respect biodiversity and people. In **Asia**, this was 81% in 2019.



62%

I **buy products** from companies that I know respect biodiversity and people. In Asia, this was 70% in 2019.



Q6B. To what extent do you agree with each of the following statements about biodiversity and nature?
Total "Agree"
Base: all sample - 2019 for Asia

TRANSPARENCY - THE NEW NORMAL?

Transparency ranks higher on the list of consumer expectations year after year. When asked about what information respondents wanted to see on product packaging, highest ranks were given to: First, the list of product ingredients; second, the origins of ingredients; and third, the impact on biodiversity. Respondents in France and Brazil appear to be particularly interested in these issues. Asian respondents also showed strong interest in transparency in the 2019 survey, particularly those in China and Vietnam. Survey responses show that importance is given to labels that validate company's ethical practices, especially in Brazil (90%) and France (82%).

“81%

The impact on biodiversity

Highest score: 92%  BR

“88%

The list of ingredients/components

Highest score: 91%  FR
 BR

“78%

The social impact of the sourcing of the ingredient

Highest score: 89%  BR



“82%

The origin of the ingredients

Highest score: 90%  FR

“76%

A label that certifies company's ethical practices

Highest score: 90%  BR

“77%

The fair compensation for the various actors in the supply chain

Highest score: 88%  BR

Q7. For each of the following elements, please tell us how much important it is for you to get this information on the packaging?
Total "Important" - Basis - all sample

“

Since 2019, UEBT developed a label certifying sourcing with respect for people and biodiversity. Products of Ekos (Natura Cosmetics, Brazil) and Weleda are the first to carry the UEBT label.



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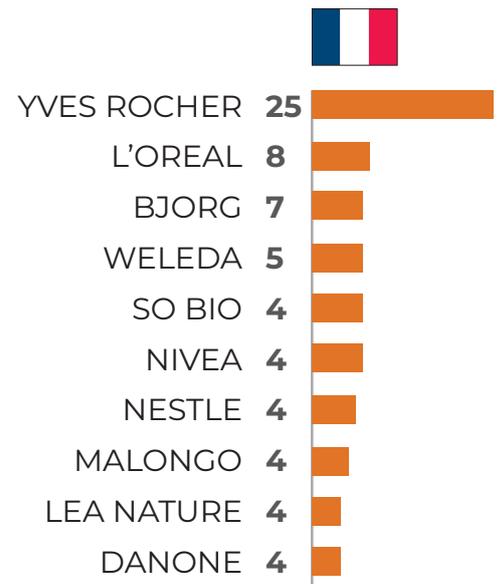
BRANDS AND BIODIVERSITY – WHO FILLS THE VOID?

While awareness on biodiversity is growing, few brands have been able to position themselves around biodiversity. When asked for three beauty and food brands that take most action on people and biodiversity, only a few brands clearly stood out. Just one brand (Natura, in Brazil) gains more than 25% recognition. Interestingly, only 58% of consumers could name at least one brand. Millennials and GenZ (16-35 years) could name more brands (65%).

FRANCE: YVES ROCHER



“
35%
Of female
respondents of
females 45 years
old and more
mention
Yves Rocher



GERMANY: NIVEA



“
Among female
respondents,
Weleda scores
highest at
15%
while Nivea
is at 11%



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity?
Base: At least one quotation - labels removed from the top 10





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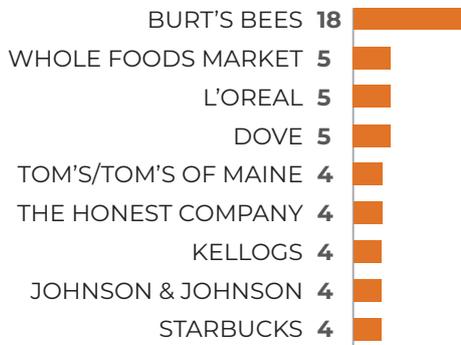
UK: THE BODY SHOP



“ 45% Of female respondents of 30-44 years old mention The Body Shop



US: BURT'S BEES



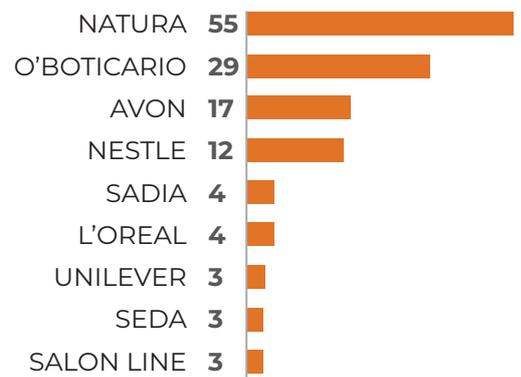
“ 35% Of female respondents of 30-44 years old mention Burt's Bees



BRAZIL: NATURA



“ 74% of higher income mention Natura



SWITZERLAND: WELEDA



“ 14% of female respondents quoted Weleda



A DECADE OF LOW CONSUMER TRUST IN COMPANIES

Consumers have high expectations regarding companies' ethical sourcing practices. 82% of respondents considers that companies have a moral obligation to assure a positive impact on people and biodiversity. In 2019, 83% of Asian respondents expected the same.

For the last decade confidence in business has remained very low. In Western countries, confidence rates have been steady at 41%; in France it has even fallen to 22%. Higher income and higher educated consumers generally have the least amounts of confidence in business.

Only in Asia - China and Vietnam - 75% of respondents consider that companies pay serious attention to ethical sourcing of biodiversity.

Trust goes up when sourcing practices are verified independently (72% in Western countries). Respondents that demonstrated a high awareness on biodiversity also have the highest levels of trust in independent verifications (82%).



“There is a strong belief among consumers that companies should have a positive impact on society but trust still needs to be built”
IPSOS

Q6: Here is a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?
Total "Agree" - Basis - all sample
2019 results for Japan, South Korea, China, Vietnam.



82%

I think companies have a **moral obligation** to assure they have a positive impact on people and biodiversity



41%

I am confident that companies **pay serious attention to ethical sourcing** of biodiversity



72%

I have more faith in a company whose commitment to ethical sourcing of biodiversity is **verified by independent organizations**



INCREASING ATTENTION FOR BIODIVERSITY IN COMPANY REPORTING

Each year, UEBT analyses how much attention cosmetic and food companies pay to biodiversity in their corporate reports and websites. Research conducted in early 2020 shows that references to biodiversity continue to increase: in the beauty sector, it was 49% of companies - from 13% in 2009. In food and beverages, it was 80% of companies - from 53% in 2012.

In 2020 we observed most growth in the food sector, as a result of increasing global attention to biodiversity and new biodiversity related business initiatives. Yet, the depth and quality of information reported is still limited, related to specific supply chains, such as palm oil or paper. To increase relevance, more systematic and transparent reporting against clear indicators would be required.

Companies reporting on biodiversity

	Beauty		Food & Beverage	
	2020	2009	2020	2012
■ Companies reporting on sustainable development	69	44	98	91
■ Companies reporting on biodiversity	49	13	80	53
■ Companies reporting on biodiversity in the supply chain	40	9	60	41



It is encouraging to see the growing attention for biodiversity among business. This now needs to be translated into concrete action to generate positive impact for people and biodiversity. We also look forward to more systematic and transparent corporate reporting against clear indicators on such actions."

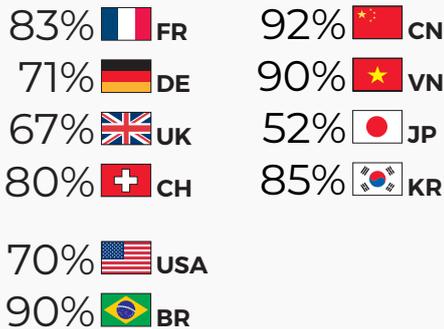
Rik Kutsch Lojenga,
Executive Director, UEBT



FACT CHECKING AND SOCIAL MEDIA

“77%

I would like companies to **inform me about the concrete actions**



“48%

Like to **share good actions** on social media



As consumers increasingly engage in fact checking, their **appetite for information** is growing. 77% of responders want more information about concrete actions – even 80% in Asia.

As the COVID crisis accelerates the move to digital, the search for more facts and figures is set to continue.



Sustainability is becoming a topic of discussion on social media.

The use of the hashtag #biodiversity is growing on platforms like Instagram, and almost half of the respondents **likes to share ethical actions on social media**.

Brazil stands out in this sense, with (76%), among the world's top three in social media usage. (Source: [The Rio Times](#)).

Q6: Here is a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?
Total "Agree" - Basis - all sample
2019 results for Japan, South Korea, China, Vietnam.

GROWING IMPORTANCE OF SOCIAL MEDIA

With internet and social media use on the rise, which only accelerates during the COVID crisis, consumers are acquiring more information on the sustainability credentials of their purchases. According to a recent Global Web Index research, 25% of beauty buyers look at their favorite brand to provide eco-friendly products. Brands are under consumer pressure to green their products and be able to offer positive messages around sustainability and ethical practices.

Eco-Consumers actively research brands on:

Social networks	41%
Product/Brand sites	34%
Video Sites	25%
Independent Review Sites	22%
Blogs on product/Brands	22%



In the UK and the USA, 4 in 10 eco-consumers say their main source of information is social media, 10 percent more than the average internet user. As such, social media trumps the number of searches on brand sites or video sites.⁽¹⁾

(1) source: GlobalWebIndex's Strategic Insights Analyst Q2 2019
- eco-consumers are those who say they try to buy organic/natural products and would pay more for sustainable/eco-friendly products
Base: 44 733 eco-consumers aged 16-64
Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands and services?

Spate, a search engine intelligence platform, found that USA consumer searches related to sourcing with respect for people and biodiversity are on the rise.

Searches around sustainability, green beauty, and ethical have risen as consumers are looking for ways to consume more consciously.

Rise in Google Searches

Sustainable	+20%
Eco-System	+7,8%
Ethical	+9,2%
Clean Beauty	+25,5%
Green Beauty	+20,4%
Biodiversity	+0,8%

Source: Spate U.S. Google Search from Jan-Sep 2020 vs. Jan-Sep 2019
Ranked by volume of searches



Sustainability is top of mind for fashion and beauty bloggers and not just in luxury

Conor Begley,
Co-Founder of
Tribe Dynamics



Moreover, more mindful influencers are on the rise, as they share a more eco-conscious lifestyle. Micro-influencers such as Carmen Jenny (@carmitive), Emma Slade Edmondsdon (@emsladedmondson) or Corinna (@kissnundkarma) are promoting more sustainable lifestyle, social justice and educate on many aspects of wellness and mindful living.

One of the leading companies measuring social media impact, Tribe Dynamics, sees a growing trend of content tagged #sustainability, especially concerning luxury fashion brands.

METHODOLOGY



UEBT CONSUMER SURVEY: UEBT commissions independent market research companies to conduct consumer research for the UEBT Biodiversity Barometer. Interviews are conducted with national representative samples of 1000 persons per country. To correct sampling disparities, a post-stratification weighting of results, based on socio-demographic variables, is applied.

For cost reasons, UEBT opts for internet surveys where possible. In some countries face-to-face interviews and phone interviews are used. Different methods may slightly influence research outcomes.

The research between 2009 and 2020 has been conducted by IPSOS on behalf of UEBT. The survey also included in 2017 and 2018, street interviews or testimonials available on line.

For more information, please see www.biodiversitybarometer.org

COMPANY REPORTING: To assess attention ethical sourcing of biodiversity in company reporting, UEBT reviews communication materials of the top 100 beauty and food & beverage companies in the world (Source WWD for the Beauty ranking). The review includes publicly available documents only, such as statements on websites, sustainability reports, and policies. UEBT only assesses if issues related to ethical sourcing of biodiversity are mentioned, the quality of the reporting or the actions undertaken doesn't influence the rankings.

UEBT is independent, impartial and objective in its dealings with governments, political parties, other organisations and individuals.

The 2020 Biodiversity Barometer was undertaken with the support of:

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*The research on Brazil and Switzerland was conducted, in part, with the support of the BioTrade Facilitation Programme: Linking trade, biodiversity and sustainable development. UNCTAD and UEBT gratefully acknowledge the financial contribution of the Swiss State Secretariat for Economic Affairs - SECO.

Contact UEBT

UEBT is a membership-based, non profit organisation www.ethicalbiotrade.org.

Union for Ethical BioTrade
Secretariat
De Ruyterkade 6
1013 AA, Amsterdam, Netherlands
Phone: + 31 20 22 34 567
info@ethicalbiotrade.org

Financial administration
p/a CR Gestion et Fiduciaire SA
Rue de la Vallée 3
1204 Geneva, Switzerland
Phone : + 41 22 5661585
info@ethicalbiotrade.org

Local UEBT representation offices:
Brazil: Brazil@uebt.org
Madagascar: Madagascar@uebt.org
Laos, Myanmar, Vietnam:
Vietnam@uebt.org