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UEBT Biodiversity Barometer

Trends and opportunities on consumer
awareness

2024 Summary





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Background and methodology



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Background

Since 2009, UEBT, an international nonprofit organization that promotes the sourcing with respect for people and biodiversity, has measured consumer awareness of biodiversity and how it affects purchasing decisions in order to ...



Track the evolution of consumer awareness of biodiversity over the years

Understand consumer perception on importance of biodiversity and their role in preserving it

Evaluate consumers' expectations of brands on biodiversity

Identify brands considered leaders in biodiversity

Understand how ethical sourcing influences consumer purchasing decisions

Methodology



6 countries:

UK, France, Germany, USA, Brazil, China



Online self-administrated survey



Men and women, 16 to 75 years old

Minimum and maximum ages vary by country. To allow comparison to previous waves, the same gender and age distributions were used in each country.



National representative sample in terms of **gender and age**



June 2024 – survey taken

- Wave 2022: August
- Wave 2020: March

Methodology

UEBT commissions independent market research companies to conduct consumer research for the UEBT Biodiversity Barometer. Interviews are conducted with nationally representative samples of 1,000 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 were used in certain years. Different methods may slightly influence research outcomes.

The research in 2024 was conducted by Toluna- Harris Interactive. Between 2009 and 2020 the research was conducted by IPSOS on behalf of UEBT.



For or more information, please see www.biodiversitybarometer.org

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

The 2022 Biodiversity Barometer was undertaken with the financial support of:

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Top insights



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Top 7 insights



1

Evolution of the awareness and understanding of biodiversity

Since the last wave in 2022, consumer **awareness of biodiversity has improved overall**. Nearly 9 out of 10 consumers claim to understand what it means with scores **progressing in France, UK, and in the US**, while it remains stable in Brazil and China, where it was already very high.

High biodiversity awareness also entails a solid understanding of its meaning. Consumers can identify its correct definition with great certainty. However, it is also commonly associated with definitions that refer to the measurement of the health of nature and the life forms inhabiting specific areas.

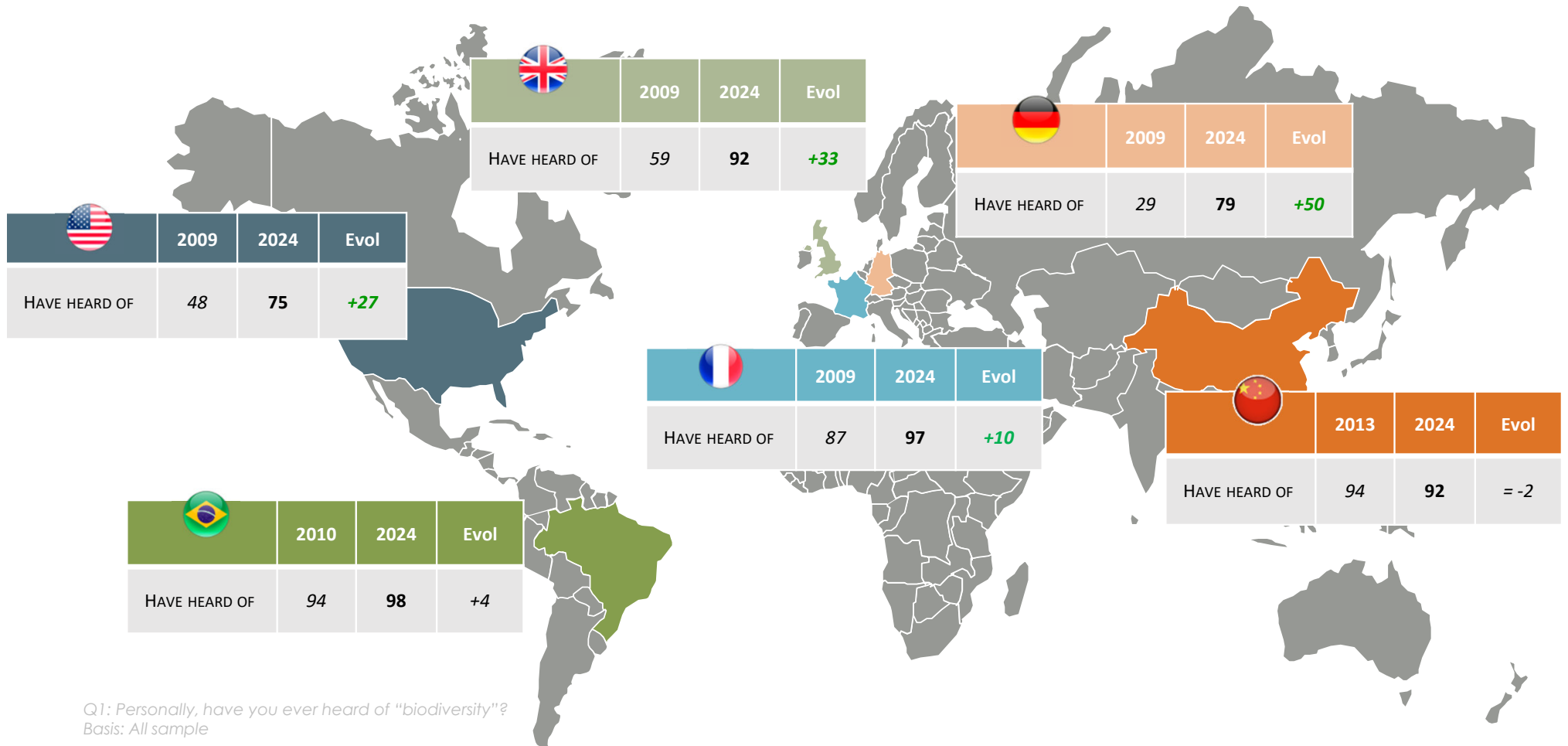
2

Consumers exhibit a proactive attitude toward biodiversity and recognize their role in conserving it

Consumers firmly believe that individuals have a direct relationship with **biodiversity** (especially in Germany and Brazil), impacting not only their own well-being but also that of future generations. **Consequently, they see it as their obligation to protect and regenerate nature and biodiversity**. This sentiment however **has decreased in the highest level of agreement**. This is especially true in France and China; both are on the decline.

Biodiversity awareness & definition

Biodiversity awareness has significantly increased since the inception of the Biodiversity Barometer in 2009. It is now at 72% or more in all countries surveyed, compared to its lowest score of 29% in 2009.



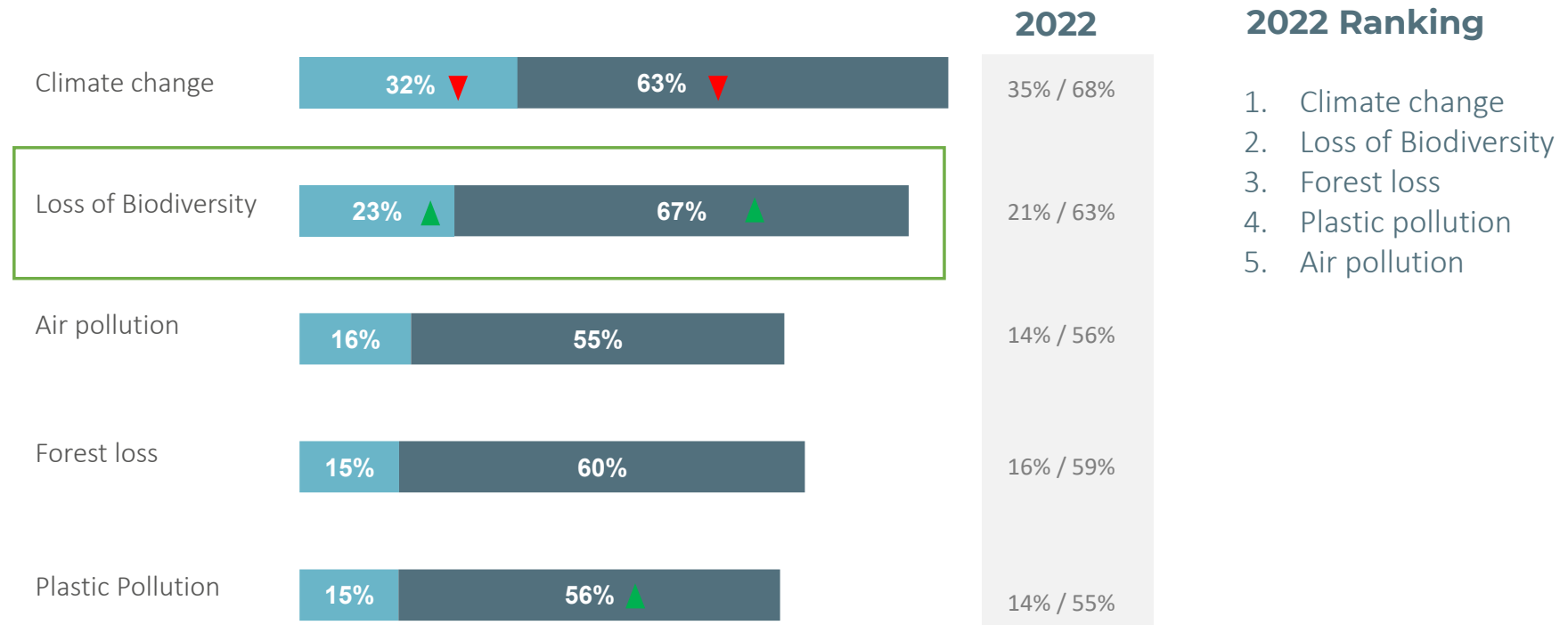
Q1: Personally, have you ever heard of "biodiversity"?
Basis: All sample

+X pts : significant evolution versus first wave

Biodiversity importance

Biodiversity is gaining increasing importance in the minds of consumers. It is recognized as a critical global issue, ranking as the **second most urgent global environmental concern** following climate change, which is decreasing in importance compared to the previous wave.

Q6. Here is a list of global environmental issues. Please rank them in the order of how personally important they are to you.



Most important (% Ranked 1st)

Aggregated top 3 ranking

▲ Significant increase versus 2022
▼ Significant decrease versus 2022

Total sample





3

Top 7 insights



Consumers expect brands to commit to safeguarding biodiversity and respecting human rights.

- Consumers expect brands to inform them about the concrete actions they take to ensure respect for biodiversity and ethical practices when sourcing the natural ingredients used in their products.
- Consumers feel the most important company actions to address global issues related to biodiversity are reforestation (although decreasing), fair prices or decent wages – all of which are evaluated as “very important”. Also deemed very important is ensuring no child labor in the farms (a new action added in this wave). A decrease is observed with actions related to plastic reduction and packaging – including products with a sustainability certification or an eco-label.
- To meet the growing expectations from consumers, stronger, more concrete and tangible measures are required from companies to prove they are genuinely committed.

4

Consumers are increasingly less assured that companies are genuinely committed to ethical sourcing practices.

Across the different countries a mixed picture of consumer confidence is observed:

- France and the US: confidence remains stable but continues to be low
- UK: business confidence is on an upward trajectory despite being low overall
- Germany, Brazil and China: confidence is on the decline but remains the highest in Brazil and China.

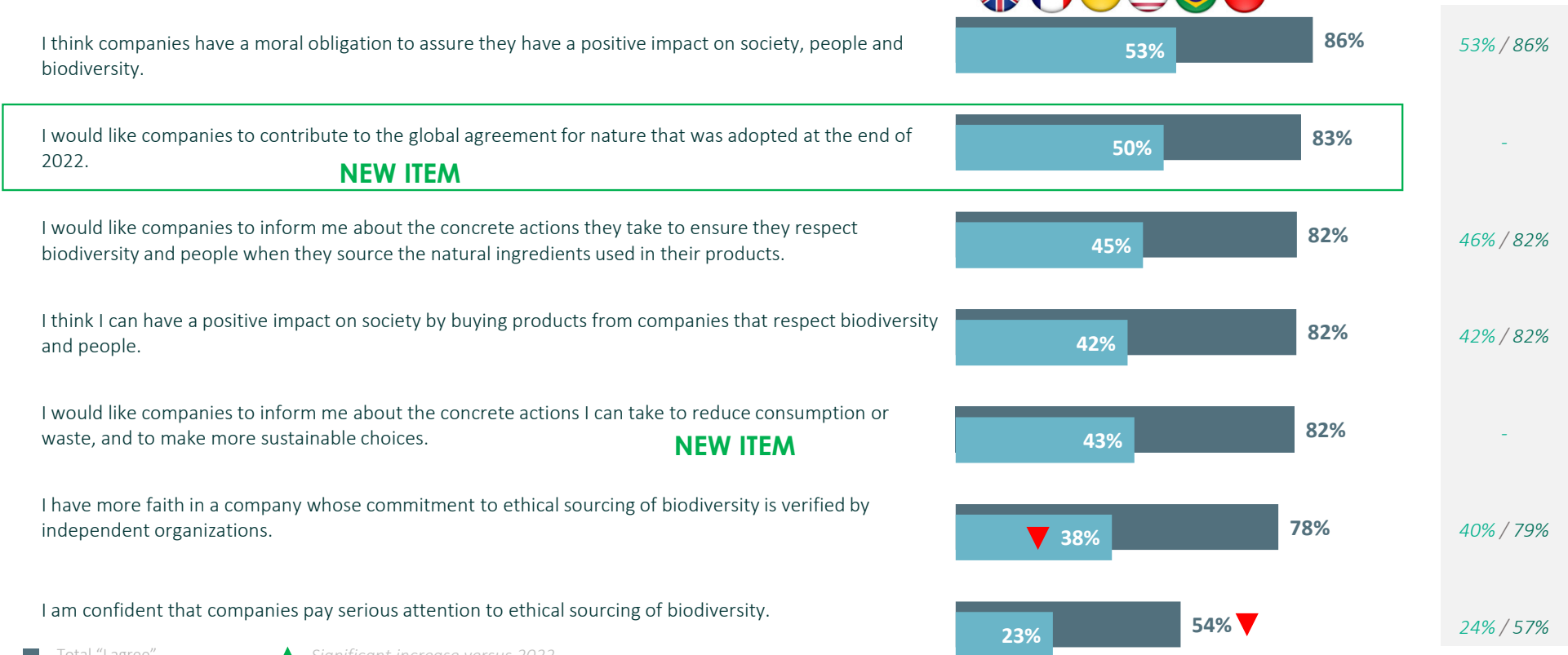
Companies' involvement in biodiversity

There is a global agreement that companies should safeguard both biodiversity and human rights. Consumers desire corporations to align with global nature initiatives. However, they remain less assured that companies are genuinely focusing on ethical sourcing practices.

Q4. Here are a number of statements about the involvement of companies in sourcing with respect for people and biodiversity. For each of them, could you please indicate whether you completely agree with it, somewhat agree, somewhat disagree or completely disagree?



2022



NEW ITEM

NEW ITEM

Total "I agree"
 Total "I completely agree"
▲ Significant increase versus 2022
▼ Significant decrease versus 2022
⋯ Total sample



Top 7 insights



5

Consumers are convinced that their purchases from biodiversity-conscious brands can have a positive impact on society.

- This sentiment is especially true among Brazilian and Chinese consumers and is increasing in the Anglophone countries.
- They want to be informed, either through the packaging or product website on the impact the product has on biodiversity. It is the second most important information consumers expect, behind the list of ingredients and before the origin of the ingredients.

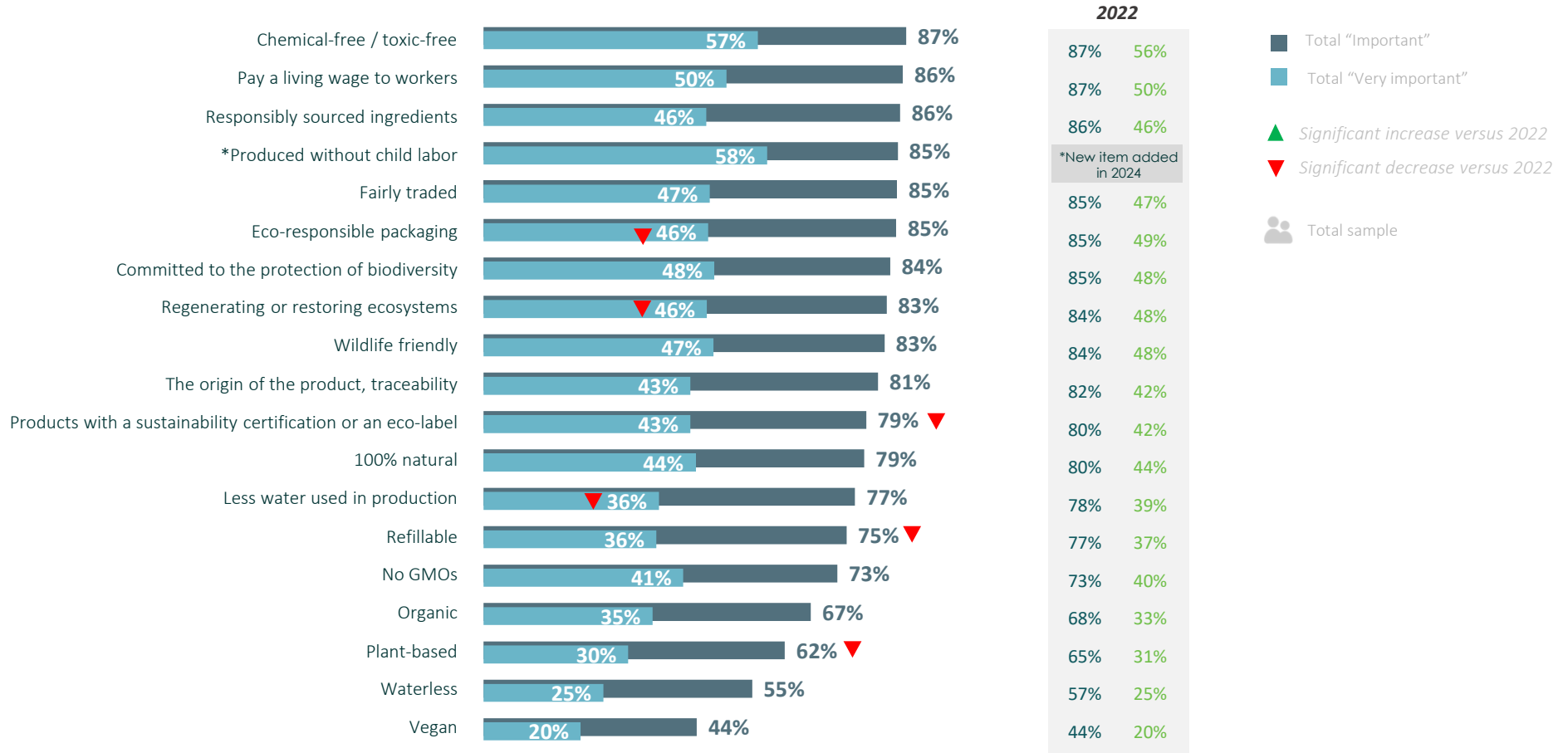
6

When choosing a product, the highest importance is placed on products free from chemicals and toxins, responsibly sourced, and providing fair wages. Avoidance of child labor is now also considered a crucial factor.

- In contrast, packaging considerations have become less important compared to 2022, including products with a sustainability certification or an eco-label, which can be explained by decreasing consumer confidence in businesses.

Purchase drivers

Purchasing products that are free from chemicals and toxins, responsibly sourced, and provide fair wages to workers remain a top priority. However, the avoidance of child labor is now considered a crucial factor. In contrast, packaging considerations have become less important compared to 2022, including products with a sustainability certification or an eco-label.



Q7. We will now discuss your purchasing habits. Below is a list of criteria that can be attributed to products and the way they are produced. Please let us know to what extent each is important to you when choosing a product.



Top 7 insights



Brands and Biodiversity

When asked to name **3 beauty or food brands that people feel are taking the most concrete actions to respect people and diversity**, a clear leader appears in nearly every country, especially in Brazil.



THE BODY SHOP

The Body Shop in the UK (22%)



YVES ROCHER
Bretagne, France

Yves Rocher in France (22%)



Nivea in Germany (17%)



Burt's Bees in the US (10%)



Natura in Brazil (61%)

L'ORÉAL

L'Oréal in China (23%)



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Top 100 Beauty and Food Companies and Biodiversity

Additional research done by the UEBT team



Top 100 Beauty companies from the 2023 annual ranking by sales (WWD)

Public-facing communications and actions on biodiversity

While the majority of the top 100 beauty companies in the world talk about biodiversity in public channels, fewer than half of these companies publicly communicate about actions in supply chains or sourcing areas to promote positive impact on people and biodiversity



SOURCE: Top 100 Beauty Companies List is from the 2023 WWD Beauty Inc's annual ranking of the world's largest beauty companies by sales

Top 100 highest scoring food companies in the Nature Benchmark 2023 (WBA) Public-facing communications and actions on biodiversity

UEBT dove deeper into the biodiversity actions in supply chains of the top 100 highest scoring food companies in the Nature Benchmark of the WBA. Almost all of these companies share publicly they are taking action to in supply chains to promote positive impact on people and biodiversity



SOURCE: UEBT decided to use the World Benchmarking Alliance lists since they hand select companies based on turnover, size, influence and then ranks them via their Nature Benchmark. UEBT took the 2023 Nature Benchmark and extracted the 100 highest ranked companies from the WBA Nature Benchmark, in the Food/Ag category. We then went deeper to look at these on biodiversity actions in supply chains.



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Thank You!

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