

Key findings of the UEBT Biodiversity Barometer

Biodiversity is a global issue

For the first time in UEBT's Biodiversity Barometer, research on biodiversity awareness was conducted in seven countries. Seven thousand respondents across France, Germany, UK, USA, Brazil, South Korea and Japan, shared what they knew about biodiversity and related notions. And the results are impressive - the Barometer shows that people are aware of biodiversity across the globe.

70% of people surveyed have heard of biodiversity.



Awareness of biodiversity is growing

56% to 60% to 65%
growth in awareness 2009 to 2011

In France, Germany, UK and USA, 2011 is the third year of the Barometer and data shows that biodiversity awareness has grown from 56 to 65%. In addition, concepts related to biodiversity such as the ethical sourcing of biodiversity, biopiracy and benefit sharing are increasing in many countries.

International Year of Biodiversity

33% of people have heard of the International Year of Biodiversity.

The United Nations named 2010 the International Year of Biodiversity. This was a global campaign and aimed to encourage the recognition of biodiversity's value and the consequences of its ongoing loss, as well as placing biodiversity firmly on the political agenda. In total 1 in 3 respondents had heard about the International Year of Biodiversity; however, not all said they knew exactly what it was. In countries where biodiversity awareness is particularly high such as Brazil and France, the International Year of Biodiversity awareness was also high, 42 and 70 % respectively.

Who is the most aware?

Consumers with higher incomes, higher levels of education and younger consumers were all more aware of biodiversity and better able to define it than others in the survey.



What does biodiversity mean?

Nearly **1 in 3** can correctly define biodiversity.

Although more and more people have heard of biodiversity, raising awareness is still a priority and not everyone who has heard of the word knows what it means. Both the number of people who can correctly define biodiversity and the definitions given differ between countries.



South Koreans are the champions for giving the correct definition of biodiversity.
“It refers to the diversity we can find in an ecosystem.”



Brazilians are aware of how biodiverse their own country is.
“Brazil is known to be the most biodiverse country on the planet, especially in the Amazon rainforest.”



Many of the incorrect definitions given in Germany were focused on organic products, illustrating the importance of the sector.
“Biodiversity is using many organic ingredients.”



In the US biodiversity is often confused with the social diversity in the country.
“Diversity among people of different races and religions.”



In the UK some people confuse biodiversity with biotechnology.
“Biodiversity is using biotechnology in different ways for fuel and food production.”



How do people hear about biodiversity?

Globally, TV programmes and documentaries play an overwhelming role in informing people about biodiversity. Over 50% of the respondents said this was how they learned about biodiversity, whereas only 16 % cited government statements and campaigns. Communication from brands has played a role in raising consumer awareness of biodiversity, notably in France and Brazil, but it still remains one of the least important awareness raising factors. These results highlight an opportunity for brands to connect with consumers on biodiversity and related issues.

55% heard about biodiversity through TV programmes and documentaries.

How did you learn about biodiversity?		Rank
TV programmes and documentaries	55%	1
Articles in newspapers and magazines	38%	2
Advertisement on Television	19%	3
Statements by politicians and government	16%	5
Web sites and blogs	14%	7
Brand communication	8%	9

Basis : Have Heard of Biodiversity (list provided)
Feb 2011 (France, Germany, UK, USA, Brazil)

What do consumers know about ideas related to biodiversity?

The awareness of ideas related to biodiversity is also strong in many regions. In some countries, the awareness of these related notions has significantly improved over the last few years. In Germany, for example, awareness of conservation of biodiversity increased from 25 to 48%, and the ethical sourcing of biodiversity from 26 to 41% respectively. Similarly, in France, more people knew about the conservation of biodiversity and ethical sourcing than in previous years. However, these notions are still secondary when compared to fair trade and deforestation.



What makes consumers buy products containing natural ingredients from Africa?

Over **50%** said improving livelihoods of African producers and protecting African biodiversity, would motivate them to buy products made with African natural ingredients.

Reflecting the continent's rich natural heritage, in 2011, the Barometer investigated attitudes towards African biodiversity. Respondents were asked to rank a number of criteria that would motivate them to buy a product containing natural ingredients of African origin. A significant number said improving the livelihoods of African producers was important although a high quality and efficient product is a precondition.

What would make you buy a product that contains natural ingredients from Africa?

Reason	Percentage	Ranked 1st or 2nd
Buying this product helps improve the living conditions of African producers	53%	Yes
Buying this product helps preserve biodiversity in Africa	52%	Yes
I do not pay attention to ingredients of African origin; I'm only interested in the quality and effectiveness of the product	42%	No
These ingredients are traditionally used in Africa which proves their effectiveness	27%	No
I associate these ingredients with the abundance and exoticism of Africa's flora and fauna	26%	No

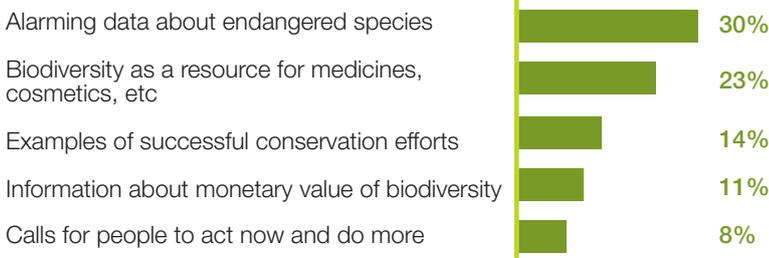
Basis : Total Sample (ranking)
Feb 2011 (France, Germany, UK, USA, Brazil)

What motivates people to want to protect biodiversity?

Traditionally, when organisations and governments talk about biodiversity they talk about how endangered it is and call on us to act immediately before it is too late. In recent years reference has increasingly been made to biodiversity's value, both in terms of the services it provides as well as its importance as a resource for products we use in daily life. Recently experts have suggested that biodiversity messages should be more positive and try to inspire behaviour change rather than playing on people's guilt. While alarming data is still seen to be a strong motivator, calls to act now and do more were the least motivating. 23% said information about the importance of biodiversity to daily lives would be the most motivating, highlighting the opportunity of more positive communication messages.

23% of people think that highlighting the importance of biodiversity to our daily lives is the most encouraging of all biodiversity conservation messages.

Which message is most likely to encourage people to conserve biodiversity?



Basis : Total Sample
Feb 2011 (France, Germany, UK, USA, Brazil)



The beauty and wonder of nature is a particularly motivating conservation message for German respondents.



Messages highlighting the monetary value of biodiversity are particularly motivating for Americans.



The UK favours messages that highlight the use of biodiversity in medicines and cosmetics used in our everyday lives.

Consumers trust a company more if its practices have been verified by an independent third party

One of the themes highlighted by the Barometer is the high level of mistrust consumers have towards cosmetics and personal care companies. Less than half of respondents said they trusted companies in the cosmetics and personal care sector, and the majority said they would trust a company more if its practices had been verified by a third party.

84% would stop buying products if they knew the brand did not respect the environment or ethical trading practices.

Consumers want more transparency in the cosmetics and personal care sector



Basis : Respondents
Feb 2011 (France, Germany, UK, USA, Brazil)

What are companies saying about biodiversity?

80% of consumers want to be better informed about companies' sourcing practices but only 27% of the top 100 beauty companies mention biodiversity in their communication.

While in the 2011 analysis only a small number of the top 100 companies mention biodiversity in their reports, this is double that recorded in the 2009 analysis, illustrating progress in biodiversity communication.

	2009	2010	2011	Variation 2011 vs 2009
Companies reporting on sustainability issues	44%	52%	52%	⬆️ +8
Companies reporting biodiversity	13%	21%	27%	⬆️ +14
Companies reporting on biodiversity sourcing practices	9%	12%	19%	⬆️ +10
Companies mentioning biodiversity related issues like traditional knowledge and intellectual property rights	2%	3%	5%	⬆️ +3

Basis : UEBT analysis of top 100 beauty companies (WWD)

How is biodiversity portrayed in the media?

UEBT's Biodiversity Barometer also looks at the media coverage of biodiversity, in particular concentrating on articles that focus on the cosmetics and personal care industry.

Rising Biodiversity Coverage: 2010 saw a 35% increase in the number of articles written about biodiversity. The International Year of Biodiversity and the meeting of the Conference of the Parties in Nagoya, Japan contributed significantly to this increase.

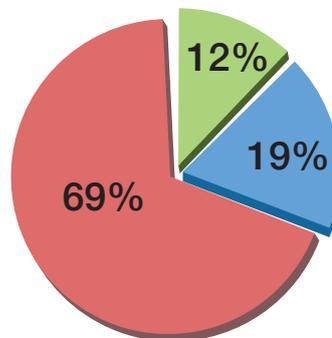
Nagoya Protocol: 66% of the articles that mentioned both biodiversity and the personal care and cosmetics sector were on the Nagoya Protocol and its implications for industry. 97,5% were neutral in tone.

Critical Tone: 69% of articles on biodiversity and issues such as access and benefit sharing within the cosmetics and personal care industry, were critical of the sector.

Proactive Communication: However, coverage that resulted from proactive communication between brands and the press about their biodiversity sourcing practices resulted in positive coverage, suggesting that brands have a lot to gain by communicating on this issue.

Articles about Biodiversity and personal care and specific issues such as ABS

- Positive
- Neutral
- Critical

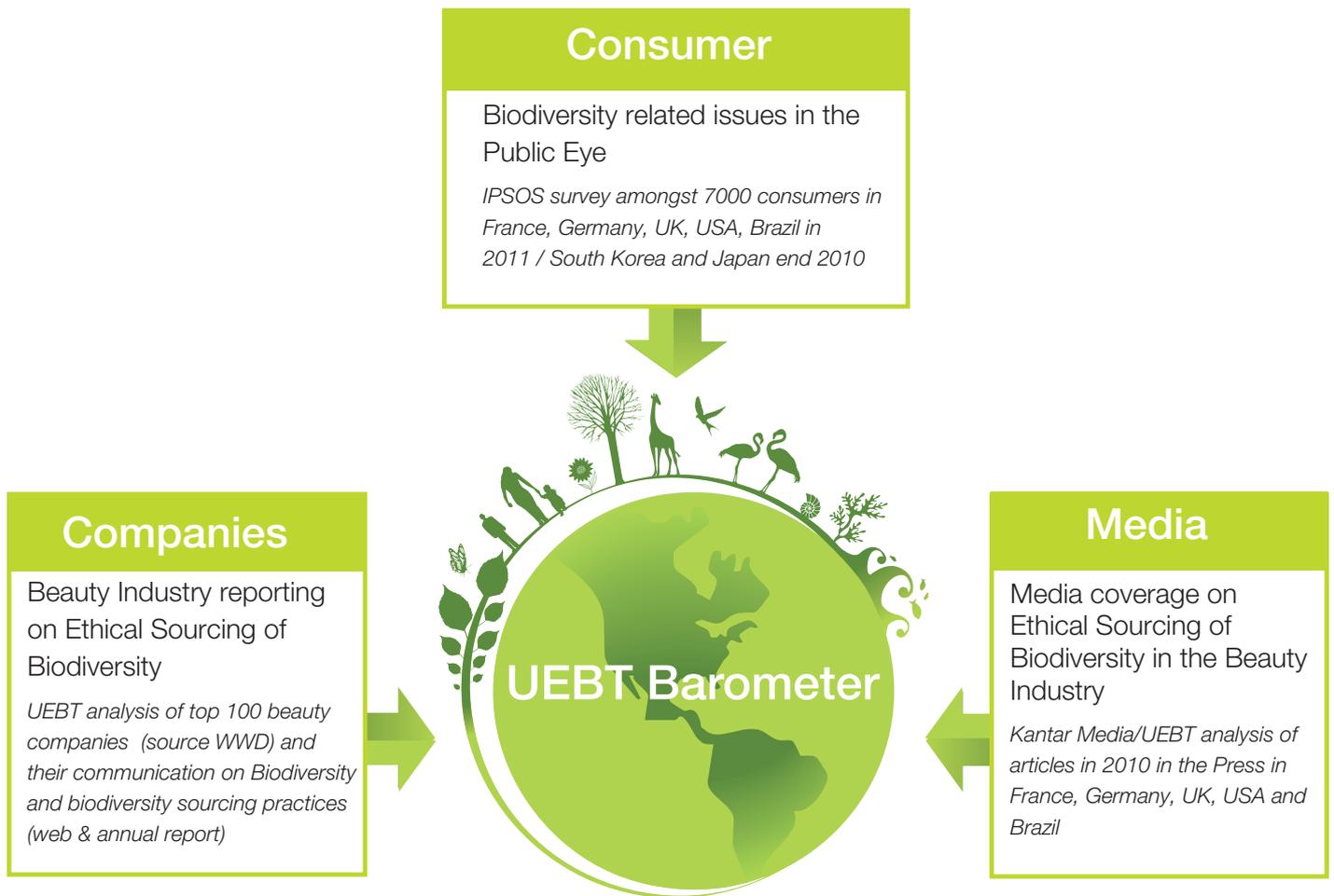


Basis : Kantar Media/ UEBT analysis of articles in the Press in France, Germany, UK, USA and Brazil.

Biodiversity Barometer

UEBT's Biodiversity Barometer provides an annual overview of biodiversity awareness from three different perspectives: the consumer, industry and the media. It answers some important questions, including:

How many people have already heard of biodiversity? How do consumers view the importance of ethical sourcing of biodiversity? How does industry report on biodiversity? How does the media cover biodiversity sourcing practices?



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