

UEBT Biodiversity Barometer

2009-2016



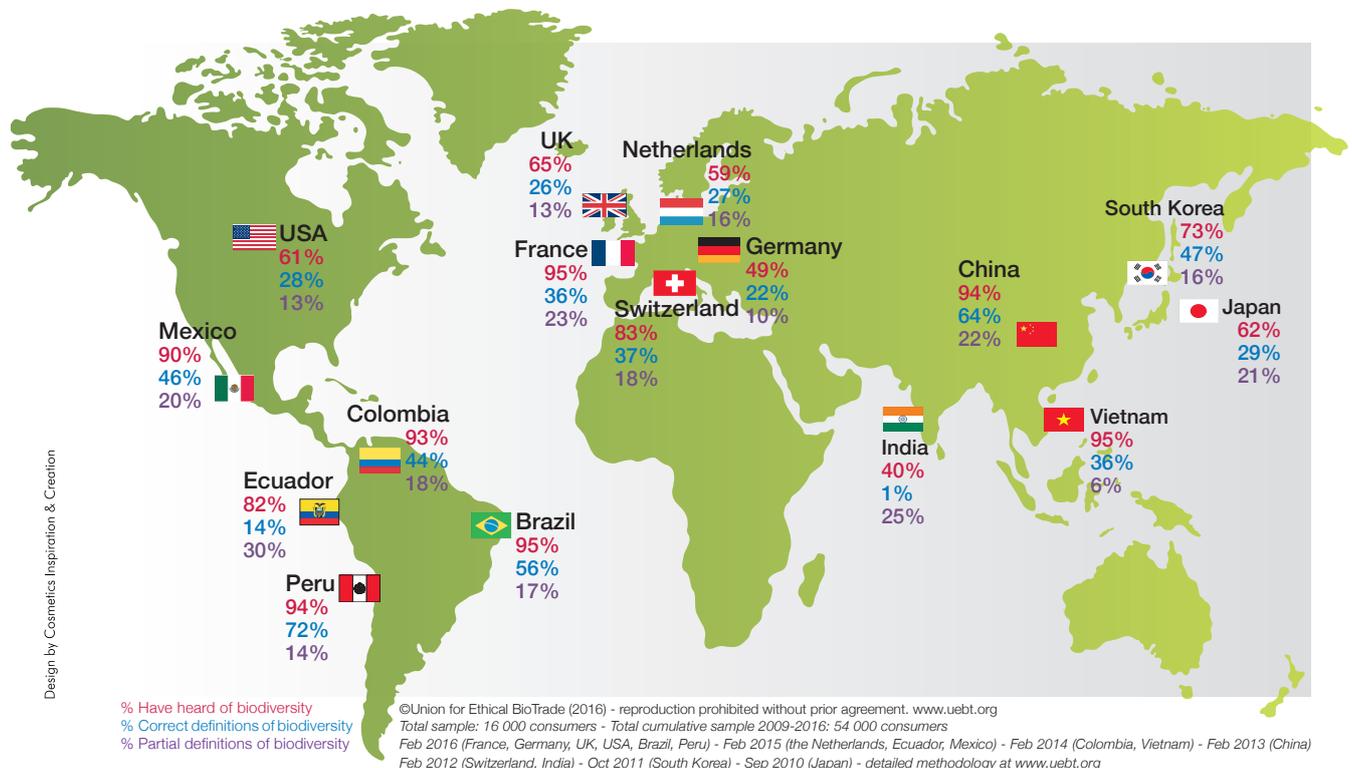
**SOURCING
WITH RESPECT**

Taking stock of eight years of UEBT Biodiversity Barometer

Since 2009, UEBT assessed awareness of biodiversity, and interest in ethical sourcing in 16 different countries. Eight years of research, among 54,000 people, and hundreds of leading companies, has provided several valuable insights that may guide companies and governments in their approaches towards people and biodiversity.

10 Takeaways

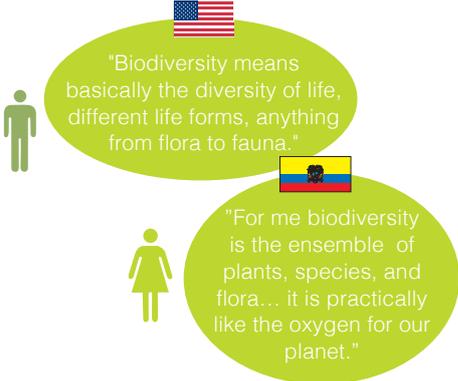
1. The understanding of biodiversity is rising significantly around the world.
2. Biodiversity is a global concept, with high awareness in emerging markets in Latin America and Asia.
3. People want to personally contribute to biodiversity conservation, but they don't know how to do it.
4. Consumers expect companies to respect biodiversity, but there is little confidence that they currently do.
5. Transparency is important. Consumers want to know whether sourcing practices respect people and biodiversity. They would like more, externally validated information.
6. Consumers are convinced of companies' respect for people and biodiversity mainly through brand reputation, as well as through authentic stories and images in brands' communication.
7. Millennials have the highest awareness of biodiversity and can identify brands that respect biodiversity. They value companies taking concrete actions for people and biodiversity.
8. Few international brands have positioned themselves around sourcing practices with respect for people and biodiversity. Natura Cosmetics leads the way in Latin America.
9. Corporate communication on biodiversity by beauty, food, and beverage companies is on the rise, but still falls short of expectations.
10. References to access and benefit sharing (ABS) are rising in corporate communications.



Understanding of biodiversity continues to increase

The word biodiversity is relatively new, as it was only coined in the mid 1980s. Since UEBT started measuring in 2009, awareness has risen in all of the core countries of the UEBT Biodiversity Barometer, particularly in Germany and the USA. Understanding of what biodiversity means has grown even more significantly over the last years. To illustrate, the total number of people that defined biodiversity correctly has more than doubled in the USA since 2009. In France and Germany it increased with approximately 70%.

Evolution of Biodiversity Awareness	Have heard of Biodiversity		Correct definition of Biodiversity	
	2016	VS 2009	2016	VS 2009
	61%	+13	28%	+16
	95%	+8	36%	+15
	65%	+6	26%	+8
	49%	+20	22%	+9
	95%	+1*	56%	+12*



USA: "Biodiversity means basically the diversity of life, different life forms, anything from flora to fauna."

Romania: "For me biodiversity is the ensemble of plants, species, and flora... it is practically like the oxygen for our planet."

Basis: Total sample - April 2016 - USA, France, UK, Germany, Brazil

*Brazil: vs 2010

Youth drives awareness

Change comes from respondents below 30 years of age, who are both significantly more aware about biodiversity, and have a better understanding. They learn about the importance of biodiversity at school and want to personally contribute to biodiversity conservation.



France: "I have heard about biodiversity, linked to discussions with friends and documentaries on tv. It means the diversity of species in nature."



Peru: "I've heard mention of 'biodiversity' in relation to Peru. We have different products, biodiversity such as food, mining, cultures."

Peru and India

Countries like Peru and India also show significant increase in awareness rates between 2012 and 2016, although part of the increases in Peru should be attributed to change in the survey methodology.

Outreach needed to meet 2020 targets of the United Nations

Despite these very positive trends, governments need to continue raising awareness to meet the 2020 biodiversity targets of the United Nations:

"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".



"It is obvious that if we are going to achieve a much higher level of awareness of the importance of biodiversity, of its values, of what we can do to protect it, we need to take additional efforts."
David Ainsworth, UN Convention on Biological Diversity.

Biodiversity, close to the heart of Latin Americans

Six countries in Latin America - Brazil, Colombia, Ecuador, Mexico, Peru and Venezuela – make up 35% the world’s megadiverse countries – those countries harboring the majority of the Earth’s species and high numbers of endemic species. Together, these Latin American countries also hold almost 450 million inhabitants. The UEBT Biodiversity Barometer shows a close connection between people and biodiversity: high biodiversity in these countries goes hand in hand with high biodiversity awareness and ability to describe it. In Latin America, unlike in other parts of the world, biodiversity is a well-known concept - as familiar to people as sustainable development or global warming.



Proud to be biodiverse

Biodiversity is a cause of pride in the continent. Many respondents in Latin America (over 95%) say it is important to personally contribute to biodiversity conservation. When illustrating what biodiversity means, many Brazilians, Colombians, and Ecuadorians look to the Amazon, one of our planet’s most known ecosystems that these countries share. In Peru and Mexico, biodiversity is also deeply rooted in local cuisines, world famous for the variety of natural and traditional ingredients, such as ancient corns and grains.



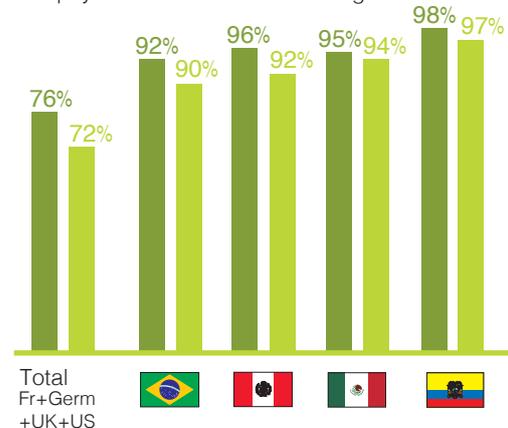
High expectations towards companies

High awareness translates in high expectations towards companies. 95% say they expect companies to respect biodiversity, and 93% say they would be more interested in buying from a company that pays attention to biodiversity.



Expectations towards companies

- Consider important that companies have policies that respect biodiversity
- More interested in buying product from companies that pay attention to ethical sourcing



Basis: All sample - April 2016 - France, Germany, UK, USA, Brazil, Peru - April 2015 - Ecuador, Mexico

Additional countries in 2016: Peru and Ecuador

To enrich the UEBT Biodiversity Barometer, UEBT conducts consumer research in additional countries each year. In 2016, Peru and Ecuador were included again, in addition to the five core countries. The tragic earthquake in Ecuador unfortunately caused delays, which means the consumer survey will be incorporated in mid 2016.

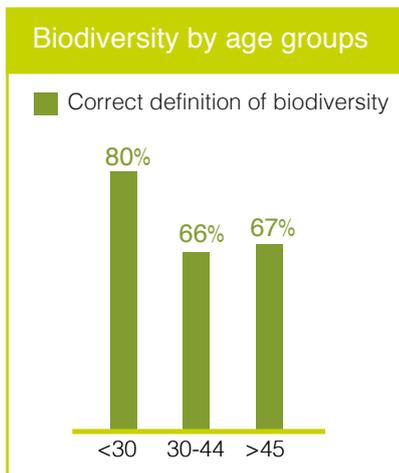


"Yes, often, in the press, the media. They always mention this word. Etymologically, bio is life, diversity, meaning biodiversity of life, or species."



Young Peruvians best informed

Among the respondents in Peru, the young ones were best informed about biodiversity. Most important sources of awareness were education, followed by TV and radio, internet and newspapers. Of the young respondents, 55% mentioned school as the source of awareness. This is significant in a country where 47% of the population is younger than 24.



Basis: Total sample - April 2016 - Peru

Expectations towards companies

More so than in other parts of the world, Peruvian respondents expect companies to have policies in place that respect biodiversity, while trust in companies is equally low. Like in other countries, company reputation, concrete stories, and use of labels can be used to convince respondents that brands respect people and biodiversity.

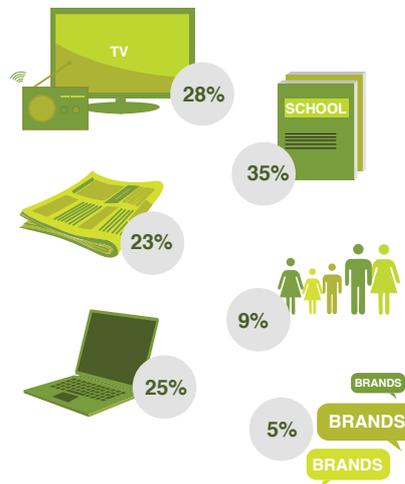
Peru - a country on the move

Over the past decade, Peru has been one of the region's fastest-growing economies, with an average growth rate of almost 6%. Strong growth in employment and income has sharply reduced poverty rates, from 66% in 2005 to 22% in 2015. The World Bank estimates that in 2014 alone, 221,000 people escaped poverty in the country.

...also with regard to biodiversity awareness.

The 2016 UEBT barometer survey results show high awareness and understanding of biodiversity among internet users in Peru. 94% of the respondents say that they have heard of biodiversity, 54% say they know exactly what it means. When asked to define biodiversity, 72% provided a correct definition. This is significantly higher than what was found in 2012, which can partly be attributed to the rapid changes in the country, and partly to the change in survey methodology.

Source of biodiversity awareness



Basis: Have heard of biodiversity - April 2016 - Peru

Change in survey methodology in Peru

Economic growth has increased internet use in Peru. Internet connection rates grow with 10% year on year, and is currently at around 40% of the population. The 2016 UEBT Biodiversity Barometer research was conducted among internet users in cities like Lima, Trujillo, Arequipa, Lambayeque, Piura and others.

Towards increased transparency in company communications

Biodiversity is now firmly on the radar of the top beauty and food companies. Over the last five years, attention for biodiversity in corporate communications has steadily risen. In the beauty industry, for instance, the number of companies mentioning biodiversity has tripled since 2009.

The amount and quality of information on biodiversity in corporate reporting remains limited. Often, references are restricted to a few supply chains such as palm oil or paper. Looking forward, it is clear that corporate reporting will need to link the concept of biodiversity with its discussion of policies and practices along all its supply chains. Information will need to be clearer and more comprehensive. This is essential to respond to consumer expectations towards companies and to build public trust. An emerging issue in corporate communications is Access and Benefit Sharing (ABS). In 2016, twelve companies of the top 100 beauty industry mentioned ABS, compared to only one in 2009. Such increased attention follows the adoption of new international and EU rules on ABS in 2014. As companies establish policies and procedures to comply with evolving ABS rules around the world, references to ABS should continue to rise.

What are companies saying about biodiversity?	Beauty		Food and beverages	
	Top 100		Top 100	
	2016	change since 2009	2016	change since 2012
Companies reporting on sustainable development	65	+21	87	-5
Companies reporting on biodiversity	38	+25	63	+10
Companies reporting on biodiversity in the supply chain	33	+24	36	+5
Companies reporting on Access and Benefit Sharing	12	+11	4	+2

Basis: Research conducted by UEBT in April 2016 based on the Beauty's Top 100 of Women's Wear Daily, and the 2015 Food and Beverage Top 100 of the Food Engineering Mag.

Companies fail to convince, but change may be ahead?

Over the last years, eight out of ten respondents consistently indicated they expect companies to have sourcing policies that respect biodiversity. Since 2009 the importance of information and external verification of commitments to ethical sourcing of biodiversity have also been repeated over and over again.

Against a backdrop of such expectations, and growing biodiversity awareness among consumers and companies, consumers remain unconvinced about companies' respect for biodiversity. The lack of consumer confidence has remained unchangingly low over the years.

Yet, a few consumers are cautiously optimistic that companies are starting to pay attention to ethical sourcing of biodiversity. Especially with regard to local and small companies.



"I think the awareness of it is increasing...although many companies are still relying on conventional forms of profit maximization."

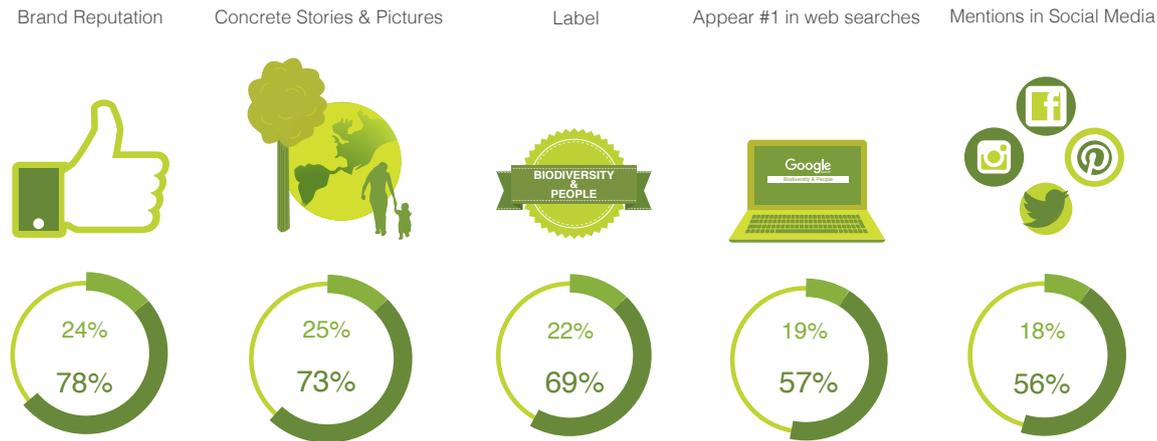


Basis: All sample - April 2016 - France, Germany, UK, US, Brazil

What convinces the consumer?

Brand reputation is most important when it comes to persuading people that companies respect biodiversity and people. Reputation can be built through authentic storytelling and external validation of respect for people and biodiversity.

Consumers are convinced by concrete stories and images of what happens in supply chains. Millennials in particular are interested in radical transparency, looking for real time information at their fingertips. Yet, discussions in social media, or simply the number of internet search hits do not provide them with enough certainty.

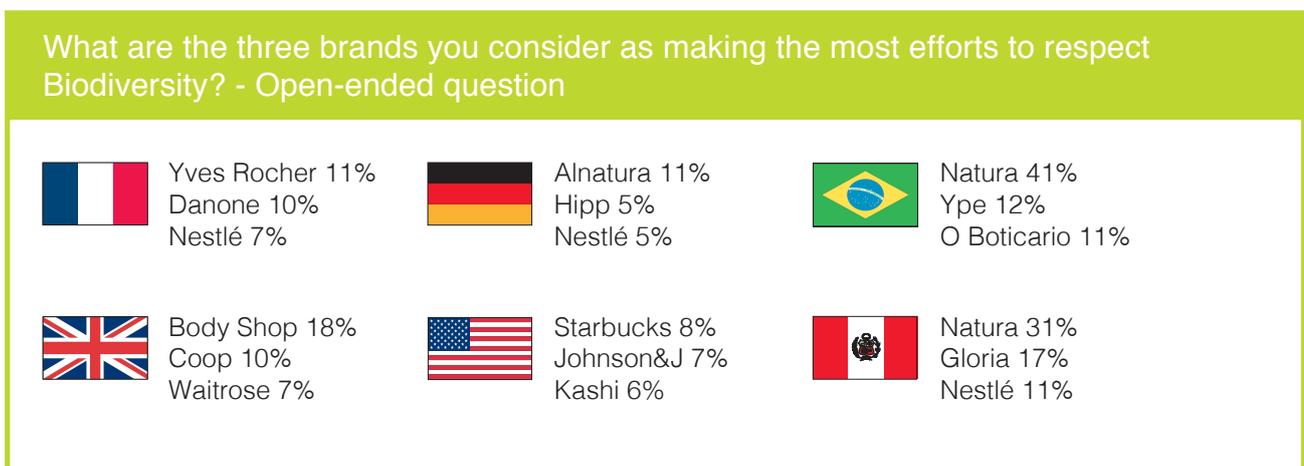


What convinces consumers that a brand is actually involved in respecting biodiversity and people?
Basis: Respondents - France, Germany, UK, US, Brazil

Where are the biodiversity champions?

When asked to name companies that respect biodiversity, only half of the respondents is able to provide any names. In Latin America, only one brand is strongly associated with respect for biodiversity. Natura Cosmetics is consistently named by a significant number of respondents, particularly in Brazil, but also increasingly in Peru, Colombia and Mexico. In other regions, brands like The Body Shop, Yves Rocher, Nestlé, Coop, have repeatedly been mentioned, but by significantly fewer respondents and their listings fluctuate from year to year.

This means there is still ample opportunity for brands to distinguish themselves on the basis of ethical sourcing of biodiversity. Credible stories about concrete actions can give consumers the chance to fulfill their interest in contributing to the respect for people and biodiversity.



Basis: Brands / companies quoted highest excl labels/distributors - April 2016: France, Germany, UK, USA, Brazil, Peru

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. For more information, please see www.ethicalbiotrade.org

Street interviews

Random passersby are interviewed in countries where the consumer research for the Biodiversity Barometer is conducted. UEBT selects footage to illustrate the outcomes of its consumer research. People interviewed in the videos are not the same as those participating in the consumer surveys, and video interviews are not based on national representative samples.

Company reporting

To assess attention for ethical sourcing of biodiversity in company reporting, UEBT reviews communication materials of the top 100 beauty and food & beverage companies in the world. The review includes publically 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.



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Contact UEBT

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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
Rte des Jeunes 9
1227 Carouge, Switzerland
Phone: + 41 22 5661585
info@ethicalbiotrade.org

Brazilian
Representation
Sao Paulo, Brazil
Phone: + 55 11 99431 1880
brazil@ethicalbiotrade.org