Survey
"Consumption patterns and biodiversity: Consumer behaviour"
Executive Summary

STUDY PRESENTATION

Context and study goals

This study is a continuation of the Conference that concluded the International Year of Biodiversity: "*How to better communicate the socio-economic value of biodiversity? - A green future and benefits for all - Biodiversity and social responsibility*" (which was held on December 14th, 2010, at Bois du Cazier in Charleroi, Belgium) and of the discussions that took place during this conference and the implementation of the 2009-2013 federal plan for the integration of biodiversity in 4 key federal sectors.

It aims at analysing consumers' consumption patterns as well as their knowledge and awareness regarding biodiversity, as provided in the 'economic' section of the plan.

The main objectives of this study include:

- Determine the current level of knowledge and understanding of biodiversity
- Identify the main sources of information (current and expected)
- Identify the main concerns of Belgians regarding biodiversity
- Measure the level of involvement and commitment (current and potential) of Belgians in terms of biodiversity (daily involvement, personal actions, etc.)
- Define their level of knowledge regarding the brands/distributors/labels involved in the preservation of biodiversity as well as the level of trust placed in them
- Highlight the main drivers (current and potential) and the main obstacles to adopt more 'responsible' consumer behaviour
- …

This market study covers all types of products, consumer goods and services in all sectors and business areas, and notably the following sectors/industries:

- The food industry
- The sector of life sciences, including chemistry
- The financial sector
- The distribution sector, including within the sectors mentioned above.

And notably for the following goods and services:
- Pollination
- Well-being and health (pharmaceuticals, cosmetics, nutrition, etc.)
- Banking and insurance services/products

Methodology

Self-administered questionnaire on the Internet amongst 1.219 Belgian consumers aged 16 to 79 years old.

MAIN RESULTS

Concerns and perceptions of Belgian consumers

In a context of economic 'crisis,' the Belgians are primarily concerned about the **economic situation**, but also about **health.**

The environment and biodiversity share third place with **education, crime, poverty** and **food quality**.

The **overall level of concern** of Belgians towards environmental issues appears relatively **mixed** and are **shared** by all categories of the population.

Participants attribute a **very important role to nature in the economy**. 83% of participants believe that the goods and services provided by nature are an important or very important basis of the economy.

Overall, respondents' perceptions appear rather **favourable** (or even very favourable) to a more 'environmentally friendly' approach. These perceptions, however, are more mixed regarding the priority given to issues related to the economic situation and the fear of having to restrict oneself.

Respondents seem to have a very **'general'** perception of environmental issues → no distinction between the different aspects: **'everything is very urgent'**.

Overall, interviewees feel that the various market players demonstrate a **low level of commitment** to the preservation of the environment and biodiversity; and the commitment scores are comparable for the various players. The scores relating to '**disengagement'** appear significantly higher for other countries and for businesses compared to consumers and public institutions.

At the individual level, 44% of respondents report that they often (if not always) pay attention to their ecological footprint.

Finally, however, there is a significantly greater willingness to adopt **voluntary behaviour** than **regulated behaviour.**

Notoriety and awareness regarding the various issues

The majority of respondents report having 'at least' heard about the different issues related to the environment (sustainable development, pollination, ecosystem, biodiversity, etc.).

More specifically, respondents demonstrate a good level of knowledge on biodiversity; although some issues related to biodiversity remain unclear in the minds of respondents.

Consumption behaviour and habits

In view of the various measures or approaches tested (the 'behavioural' sector focusing on actions linked to general behaviour in every day life, the 'food' sector focusing on the behaviour linked to the purchase of food products, and the 'chemical' sector focusing on the behaviour linked to the purchase of non-food products), the level of engagement appears fairly low.

The 'behavioural' sector appears to currently have the highest potential of engagement followed closely by the 'food' sector while the 'non-food (chemical)' sector is lagging behind. However, this sector, especially 'cosmetics,' could be a potential lever for action if the value for money of eco-friendly products was similar to that of regular products.

Obstacles and drivers of responsible consumption

80% of respondents say they have heard of 'responsible consumption'.

Several factors seem to **encourage** (drivers) consumers to opt for a more 'responsible' consumption:

- The fact that children are made aware of this concept in schools
- The sense of 'duty' towards future generations

The two main **obstacles** to a more responsible consumption are mainly due to the belief that:

- Responsible consumption is more expensive
- Responsible consumption is restrictive

Level of trust in brands and labels

The level of attention paid to 'environmental' brands and labels is slightly higher for brands and labels of 'food' products than for products of the 'non-food (chemical)' sector, especially for cosmetics.

The majority of respondents think that 'environmental' brands and labels are reliable...

Communication, messages and information

Regarding the communication on biodiversity and the environment, the level of satisfaction is also quite mixed: the greatest cause of dissatisfaction comes from the frequency of information (considered insufficient).

Respondents would primarily favour 2 kinds of information sources: first, education and, second, television.

Measures envisaged and expectations towards public authorities

To promote the preservation of the environment and biodiversity, the key behaviours that participants would be willing to adopt are as follows:

- Reducing waste
- Reducing consumption
- Reducing car use

And their expectations towards public authorities are mainly to:

- Inform and educate the general public on this issue
- Facilitate access to environmentally friendly products
- Set a good example
- Better monitor and sanction behaviour disrespecting the environment

Conclusions and recommendations

Regarding the preservation of the environment and biodiversity, it is extremely difficult to identify 'homogeneous' consumer groups since one can find very engaged and very disengaged consumers in all categories of the population.

Despite the relatively low level of engagement currently observed, our various analyses have allowed us to identify several strengths on which to build and several potential action levers to improve the engagement of consumers, namely the importance to clarify and inform consumers about the impact that each step/measure can have on protecting the environment and biodiversity