

# How COVID-19 Might Change Consumers' Attitudes About Sustainability

April 22, 2020 (Earth Day)



# Today's Presenters



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## Topics we will discuss

- Consumers' associations with sustainability and how COVID-19 might change them
- Consumers' changed behaviors & attitudes
- Companies' post-pandemic sustainability strategies



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# Sustainability: different things to different people

- Sustainability: mostly “eco” globally, secondary: socially fair
- However, geographic variations

	REGION					
	Global	North America	Asia-Pacific	Europe	Latin America	Middle East & Africa
Environment	1	2	1	2	3	4
Recycling	2	1	2	3	2	5
Alternative sources of energy	3	3	3	5	1	6
Fair Price	4	5	4	1	4	1
Pollution	5	6	5	6	7	2
Climate change	6	4	6	7	6	8
Fair labor conditions	7	7	7	4	5	3
Community development	8	10	8	8	8	7
GMO (Genetically modified organism)	9	8	9	9	10	10
Charity/donations	10	9	10	10	9	9

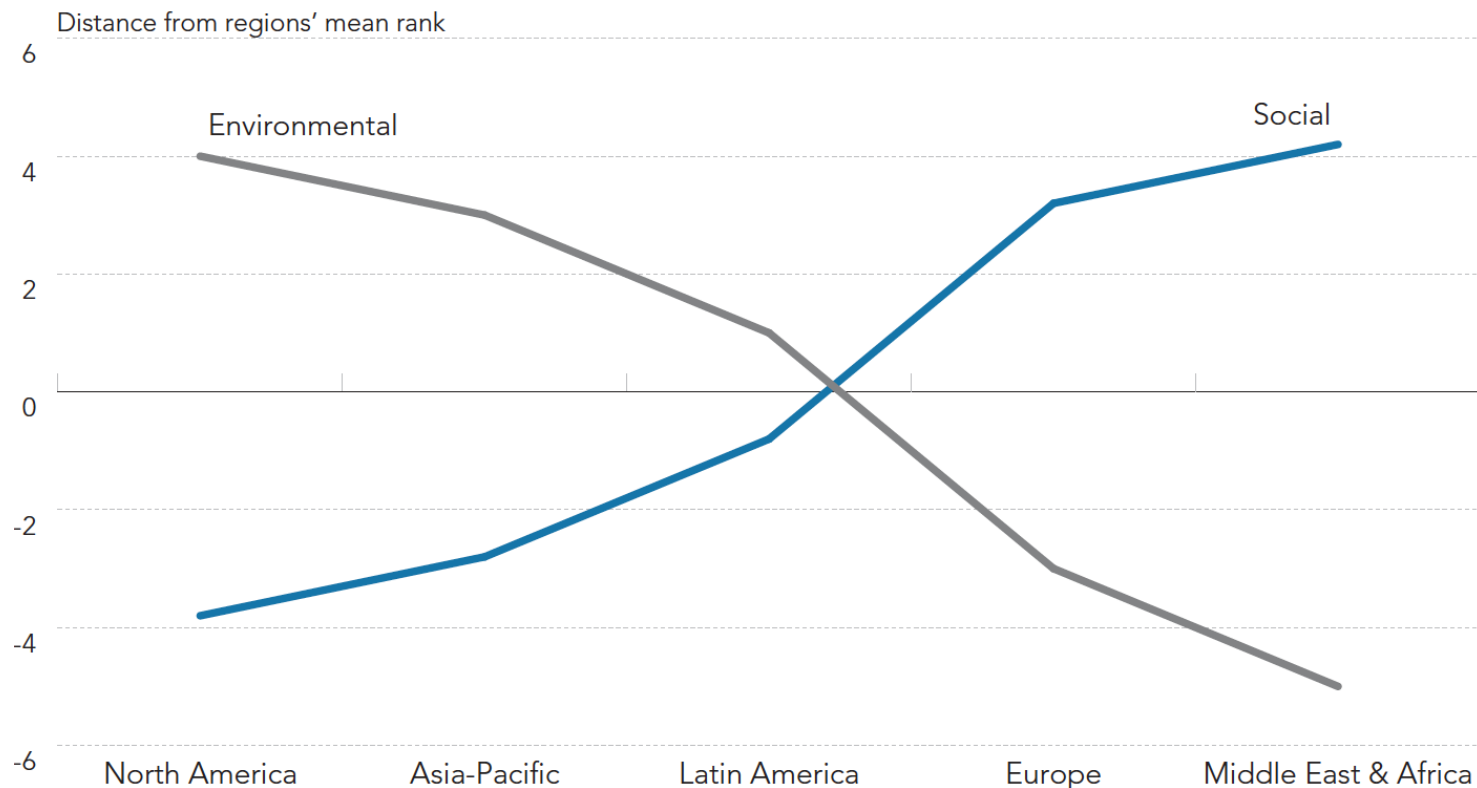
Survey question: We are interested to know how you think about sustainability for all products and services. From the list below, please rank the top 3 issues which you associate with sustainable products. Sample size: 500 per market, 64 markets

Note: Environmental features of sustainability are marked in a darker shade and social features in a lighter shade.

Source: *The Conference Board® Global Consumer Confidence Survey*, conducted in collaboration with Nielsen



# “Eco” vs. “social” associations



Survey question: We are interested to know how you think about sustainability for all products and services. From the list below, please rank the top 3 issues which you associate with sustainable products (environment; recycling; alternative sources of energy; fair price; pollution; climate change; fair labor conditions; community development; GMO (genetically modified organism); charity/donations). Sample size: 500 per market, 64 markets

Divergence from regions' mean rank:  $> 0$  = higher rank,  $< 0$  = lower rank. The “environmental” graph considers consumers' associations with the environment, recycling, alternative sources of energy, pollution, and climate change. The “social” graph considers associations with fair price and fair labor conditions.

Source: *The Conference Board® Global Consumer Confidence Survey*, conducted in collaboration with Nielsen





# Consumers' perceived performance on sustainability

	Region					
	Global	North America	Asia-Pacific	Europe	Latin America	Middle East & Africa
Technology	1	2	1	2	2	1
United Nations (and similar organizations)	2	4	2	1	1	2
Government	3	5	3	3	4	3
Food manufacturers	4	3	5	4	3	10
Utility providers	5	1	4	5	6	8
Auto makers	6	6	7	6	5	6
Financial institutions	7	14	6	11	12	5
Pharmaceuticals	8	15	8	8	9	4
Home appliance makers	9	10	10	7	7	11
Airlines	10	13	9	13	15	7
Home builders	11	7	11	9	13	12
Restaurants	12	8	12	14	8	13
Retailers	13	9	15	10	11	15
Clothing manufacturers	14	12	13	12	14	14
Hotels	15	11	14	15	10	9

Survey question: Which types of organizations are doing the best about global sustainability? Please rank the top 5. Sample size: 500 per market, 64 markets

Source: *The Conference Board® Global Consumer Confidence Survey*, conducted in collaboration with Nielsen



# Barriers to buy brands with better environmental practices

## SURVEY QUESTION:

What most keeps you from buying brands with **better environmental practices**?

For consumers in North America and Europe, a markup for environmentally sustainable features is a particularly big hurdle to buying brands with “**better environmental practices**”



	GLOBAL	North America	Asia-Pacific	Europe	Latin America	Middle East & Africa
Extra cost	29%	41%	25%	37%	25%	29%
Too time consuming to research which brands are truly better	15	12	14	16	22	20
I do not trust companies' environmental claims	14	13	13	17	16	12
I find companies' environmental claims confusing	13	8	15	9	11	12
Not applicable	9	15	7	11	12	8
Do not perform as well	9	4	12	4	5	7
Less convenient to buy/get customer service	8	6	11	3	5	8
Other	3	2	2	3	5	4

Please select one only. Sample size: 500 per market (64 markets)

Source: The Conference Board® Global Consumer Confidence Survey, conducted in collaboration with Nielsen





# Building sustainability into post-pandemic strategies





## Interested in this topic? Want more?

Please review these related sources  
on sustainability from The  
Conference Board.

- [Consumers' Attitudes about Sustainability, February 2020](#) (Publication)  
*Executive Summary and links to part 1 and part 2 of the report*
- [5 Communications Tips to Market Sustainability](#) (GreenBiz Article posted Apr 7, 2020)
- [Do Indian Consumers Really Care about Sustainability?](#) (Publication)
- Unlocking Growth through Sustainable Innovation
  - ✓ [Read the Publication](#)
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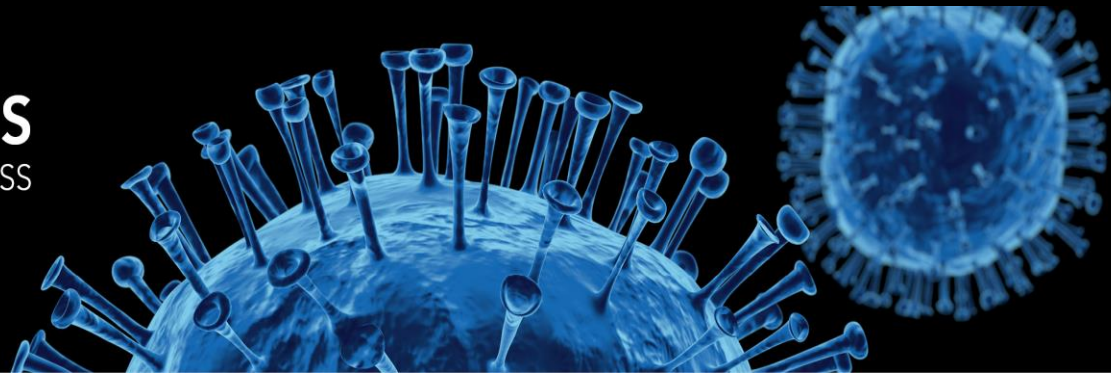


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COVID-19  
**CORONAVIRUS**  
IMPLICATIONS FOR BUSINESS



## Want to hear more about this topic and how the spread of COVID-19 will impact business and the global economy?

The Conference Board has gathered insights and learnings from our thought leaders and member network which we hope will be helpful as you formulate, implement and manage your own crisis response.

Explore all of these resources on our website at <https://www.conference-board.org/COVID-19>.

