

How has the pandemic changed consumers' views toward sustainability?

ERIC ALVAREZ
Genomatica, San Diego, CA, USA

Abstract

In June 2020, Genomatica conducted an online survey of 2,000 U.S. adults to understand how the COVID-19 pandemic has impacted the public's view on sustainability. As a leader in bioengineering and a bio-based ingredient manufacturer committed to sustainability, we were eager to learn where the results would land. Did this new threat and economic uncertainty make individuals less aware of sustainability? Or had the interruption of day-to-day life given them more time to reflect on their personal environmental footprint, what they put on their bodies and what they consume?

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- Sustainability
- Personal Care
- Market Research
- Pandemic
- COVID-19

At the highest level, we found the latter to be true. An overwhelming majority of the people surveyed (85%) reported they've been thinking about sustainability **as much or more** during the COVID-19 pandemic (1). In fact, the 2020 survey revealed that sustainability is not only top-of-mind, individuals would like organizations to take action. Some 56% said they want brands and governments to prioritize sustainability, irrespective of the current challenges associated with the pandemic.

While this is a modest snapshot of findings from the U.S., we believe the broader sentiments apply more globally. In fact, many countries appear to be more engaged and committed to sustainability. For example, only 59% of people in America view climate change as a major threat, compared with 90% in Greece, 81% in Spain and 66% in the U.K (2).

In June 2020, several months into the pandemic, we undertook a survey to understand three key aspects of the sustainability discussion:

1. **Awareness:** How individuals feel about sustainability during the pandemic
2. **Actions:** How their sustainability views impact their behavior and purchasing decisions
3. **Outlook:** How they believe they will approach sustainability once the pandemic subsides

Dramatic before and after photos of smog-free skies went viral, highlighting how poor our previous sense of "normal" really was. It was the same in many European cities, from Paris to Madrid, where the changes could be seen on the ground and even from space. The European Space Agency shared a map that showed a decline in nitrogen dioxide across the continent, with a particularly sharp decrease in areas of Italy during March 2020.

Our survey results show that people took notice. Of the 85% of respondents who were thinking about sustainability as much or more during the pandemic, 45% said they had noticed less traffic, 42% noticed the air was cleaner and 40% noted a reduction in plastic waste (such as takeout containers). A lot of this sentiment carried over to groups that were weathering tough times. Close to half (46%) of those who say they live in areas hit hard by COVID-19 claim they've been thinking more about sustainability.



Source: Genomatica Survey, June 2020.

RECONNECTING WITH THE ENVIRONMENT

In nearly all corners of the world, the COVID-19 pandemic has fundamentally altered daily life. Previous challenges such as battling traffic congestion and getting the kids to school have been usurped by fear of the virus, social distancing rules and the associated economic instability.

As the world's economy slowed, one positive byproduct emerged – a reduction in daily pollution and smog. In early April, Los Angeles, California, experienced its longest period of "good" air quality in over two decades.

Sustainability is in sharper focus because of the pandemic

People surveyed are thinking more, acting more, wanting more



Source: Genomatica Survey, June 2020.

PURCHASING DECISIONS FOR HOUSEHOLD AND PERSONAL CARE PRODUCTS

While broad awareness and interest in sustainability is strong, how do these sentiments translate into consumer purchasing behavior for the household and personal care sector? Are people still willing to make an investment in sustainable household and personal care products?

For many, the answer is yes. More than a third (37%) of those surveyed said they are willing to pay a little more for sustainable products, even during an economic downturn. Of note, 43% of Americans who've been laid off, furloughed or encountered job disruption this year said they would still pay more for sustainable products.

In terms of perceived efficacy, powerful disinfectants such as Clorox® and Lysol® have seen a boost in demand during 2020. This is largely driven by baby boomers, more than a quarter of whom don't trust natural-based cleaners *at all* to protect them against COVID-19. Despite this, natural products are becoming increasingly mainstream. Half of those surveyed (50%) said they felt comfortable using natural cleaning products in 2019.

These findings largely mirror what we have seen in earlier Genomatica surveys. In 2019, we surveyed consumers to understand their views on personal care products (3). The results revealed a real opportunity for personal care brands to market and deliver more sustainable products with greater transparency through education. For consumers, making a sustainable choice depends on a number of factors, including ingredient knowledge and awareness. As one example, consumers indicated they would adopt sustainable face moisturizer (68%) and lipstick (61%) if price and quality stayed the same.



Source: Genomatica Survey, September 2019.

MAKING SUSTAINABILITY ACCESSIBLE

One of the key takeaways from our 2019 survey was that consumers want to make sustainable choices, but confusion and lack of transparency can make this hard to achieve. More specifically, there's a gap in education. Some 96% of all manufactured goods are enabled by chemistry, but the survey showed a large disconnect with consumers who weren't aware that so many everyday products are made with chemicals derived from fossil fuels – including crude oil, coal and natural gas.

For example, nearly half (44%) of consumers didn't think the plastic disposable water bottles are made using ingredients

derived from crude oil. Likewise, 42% didn't realize personal care products like face moisturizers contain crude oil-based ingredients and 66% weren't happy when they found out (34% reported being "bothered," 32% were "disgusted").

A POSITIVE OUTLOOK

The COVID-19 pandemic has been a transformative global event, but our survey indicates that it hasn't caused the general public to deprioritize sustainability. And while it's hard to anticipate what the future will look like, a majority of participants intend to maintain their focus on sustainability. Eighty-six percent of Americans said sustainability will be equally important or even more important when the pandemic subsides.

While sustainability awareness continues to be on the rise, there's still a lot of progress needed to make a significant impact. In 2020, Earth Overshoot Day – the annual milestone of when we have officially consumed more ecological resources than the earth could regenerate in one calendar year – landed on August 22. As with previous years, we'll be running many months in the red.

Fortunately, there are reasons to be optimistic. Nearly half (48%) of those who report being more sustainable during 2020 said they're inspired to find ways to continue that way of life and 42% said they learned that being sustainable was easier than they thought, overcoming some of the barriers to adoption identified in last year's survey.

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ABOUT THE AUTHOR

Eric Alvarez is the business development manager for Specialty Ingredients at Genomatica, a widely recognized leader in bioengineering and naturally-sourced ingredients that is leading the transition to more sustainable materials. Prior to joining Genomatica in April 2019, Eric was senior regional manager, Personal Care EMEA at Innospec Inc. From 2008–2013, Eric served as regional sales manager at Interpolymer. Eric has also founded a cleantech company specializing in natural fibers. With over a 10 year career in personal care and beauty, Eric has successfully contributed to the rise of waterborne polymers and sulfate-free surfactants in Europe.