



How the COVID-19 Pandemic has Impacted Consumer Attitudes About the Environment



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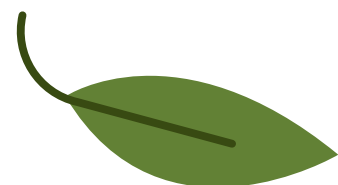


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Introduction

While the trend toward more conscious consumption has accelerated over the last decade, changes in global attitudes and actions have increased more rapidly as a direct result of the COVID-19 pandemic.

Mastercard has conducted global research among consumers in 24 countries to investigate changing attitudes toward the environment, particularly since the start of the pandemic. The research looks at actions people are willing to take to help preserve the environment, what is driving changes in their outlook, as well as their expectations about the role brands should play in creating a more sustainable future.

The study revealed that almost three in five (58%) are now more mindful of their impact on the environment

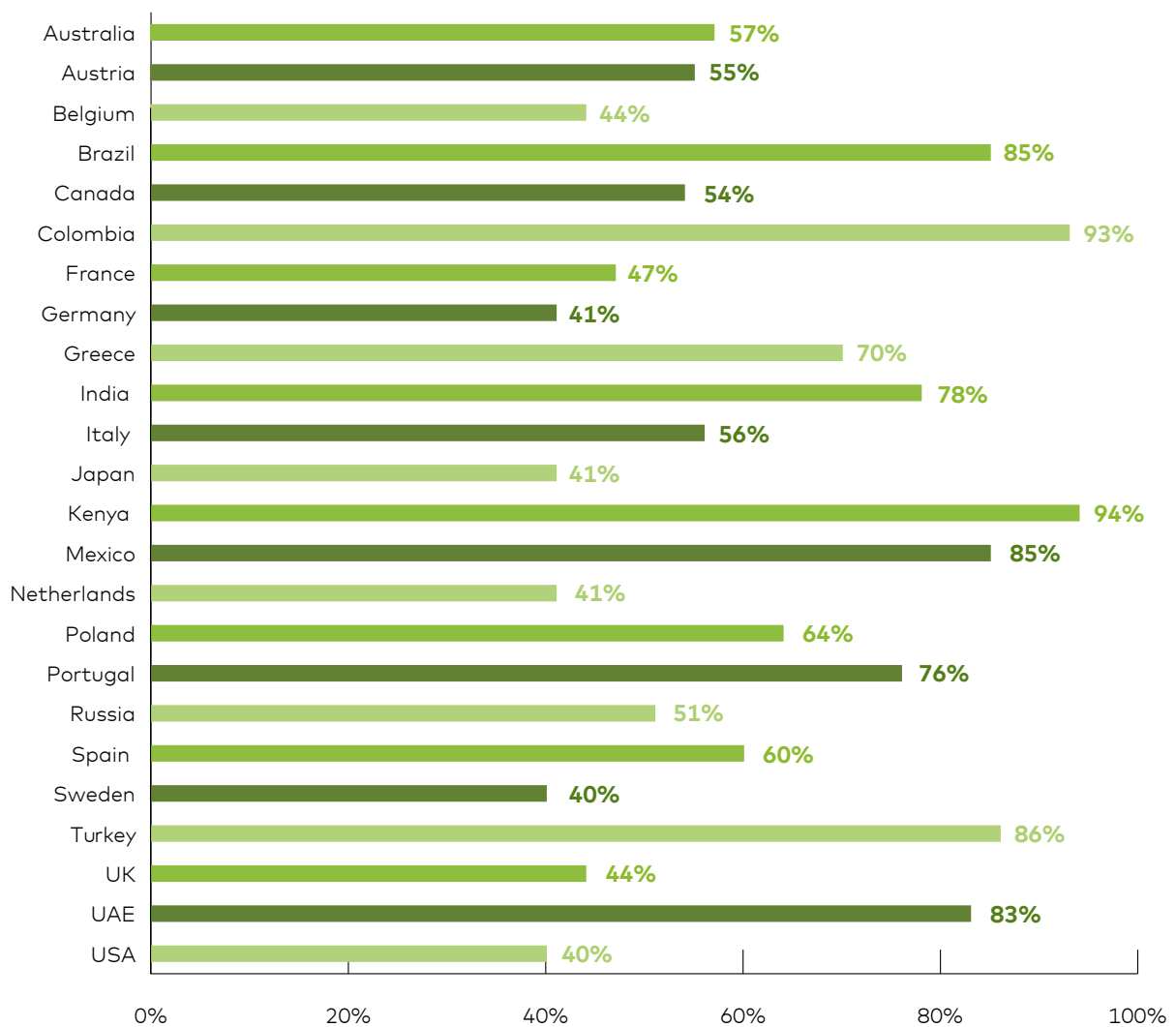
since COVID-19 (1), and 85% said they're willing to take personal action to combat environmental and sustainability challenges in 2021 (2). More than **half (54%) place more importance on reducing their carbon footprint than they had pre-pandemic** (3). This increase in awareness of environmental challenges and climate change is likely driven by consumers having more time to think about the effect they have on the planet during period of reduced travel during lockdown and a rise of sustainability-focused social media content and documentaries.

42%

of consumers who've become more sustainably aware, seeing discarded PPE was a reason for this change in opinion.

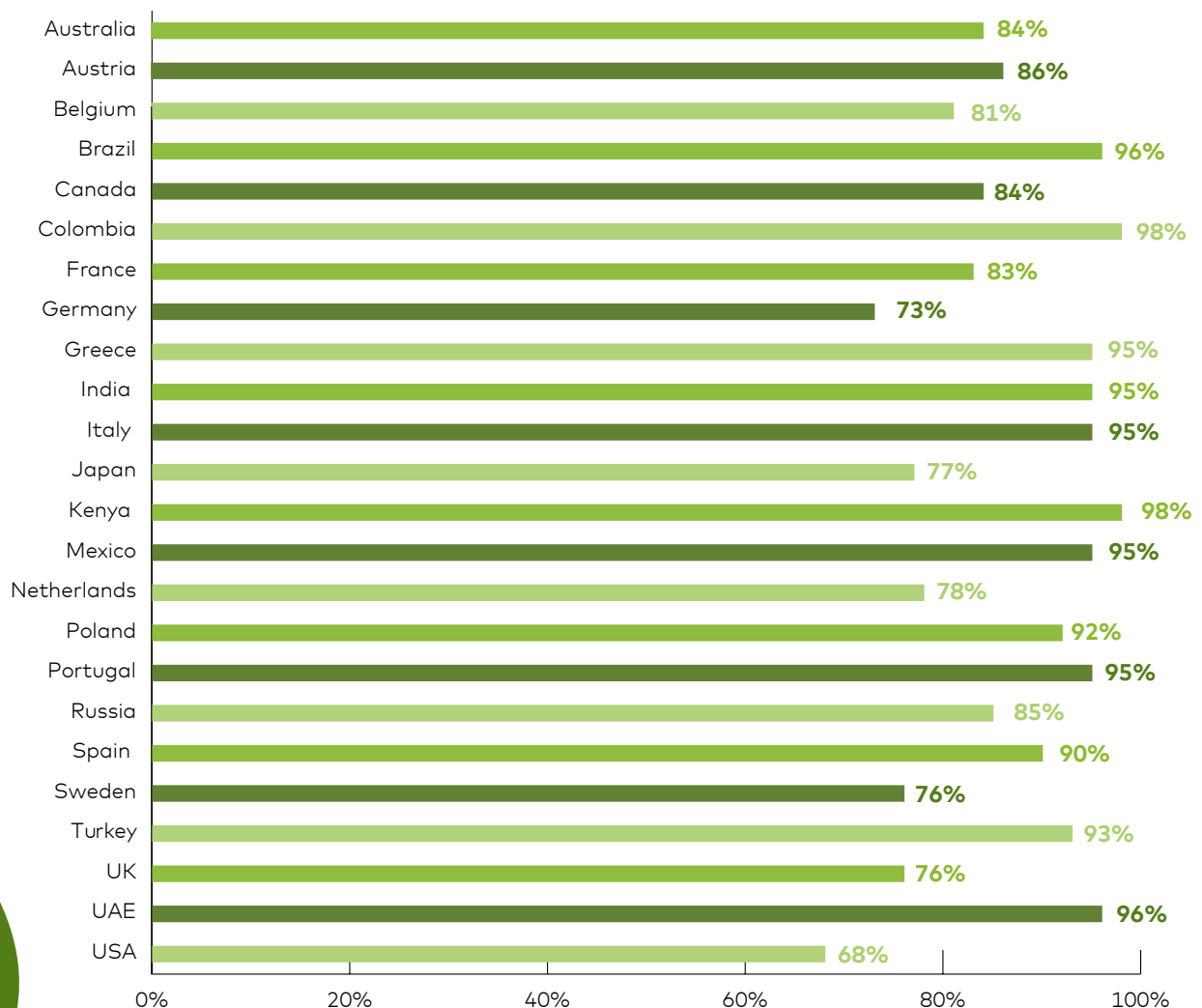
Globally, 58% said they are now more mindful of their impact on the environment since COVID-19

Figure 1:



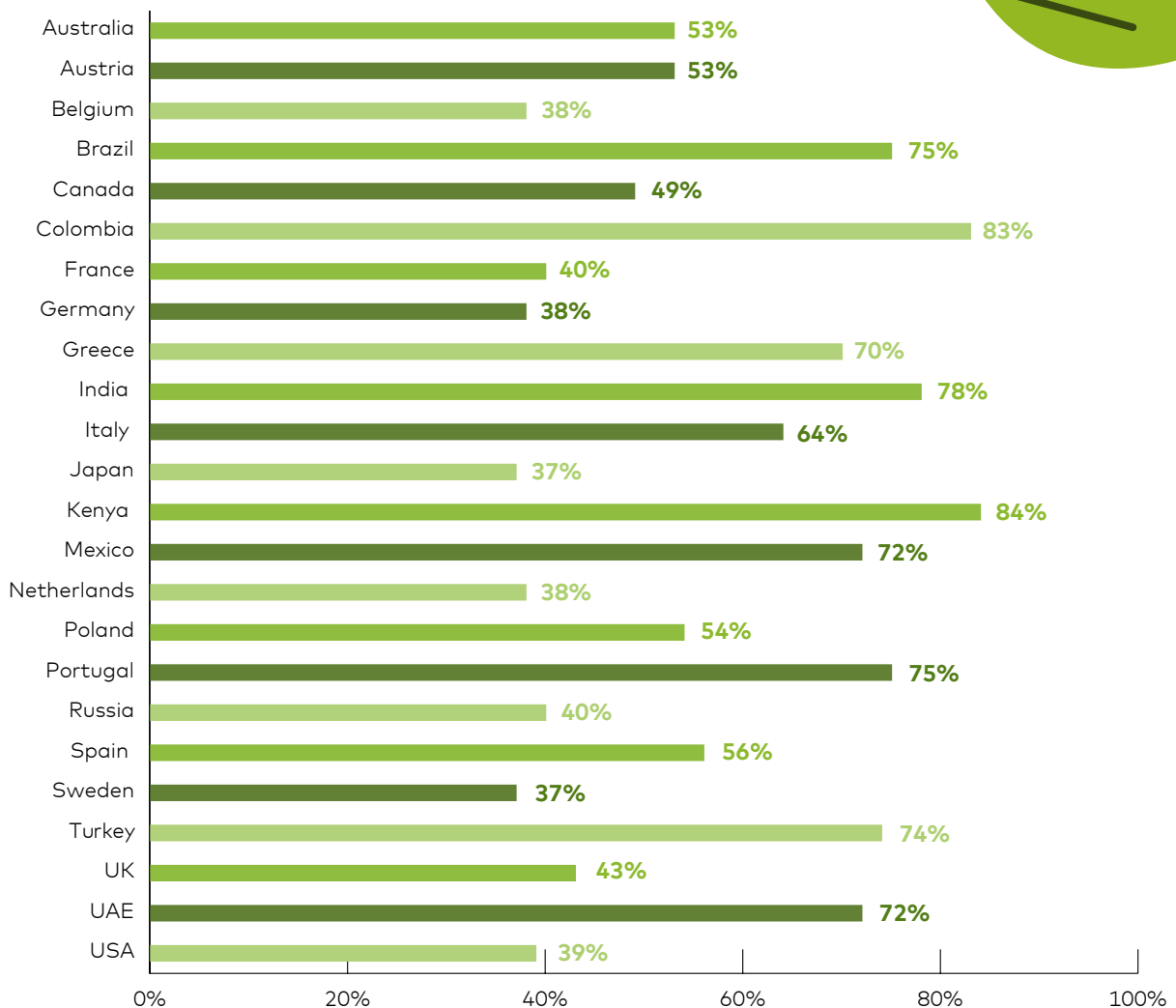
On average, 85% said they're willing to take personal action to combat environmental and sustainability challenges in 2021

Figure 2:



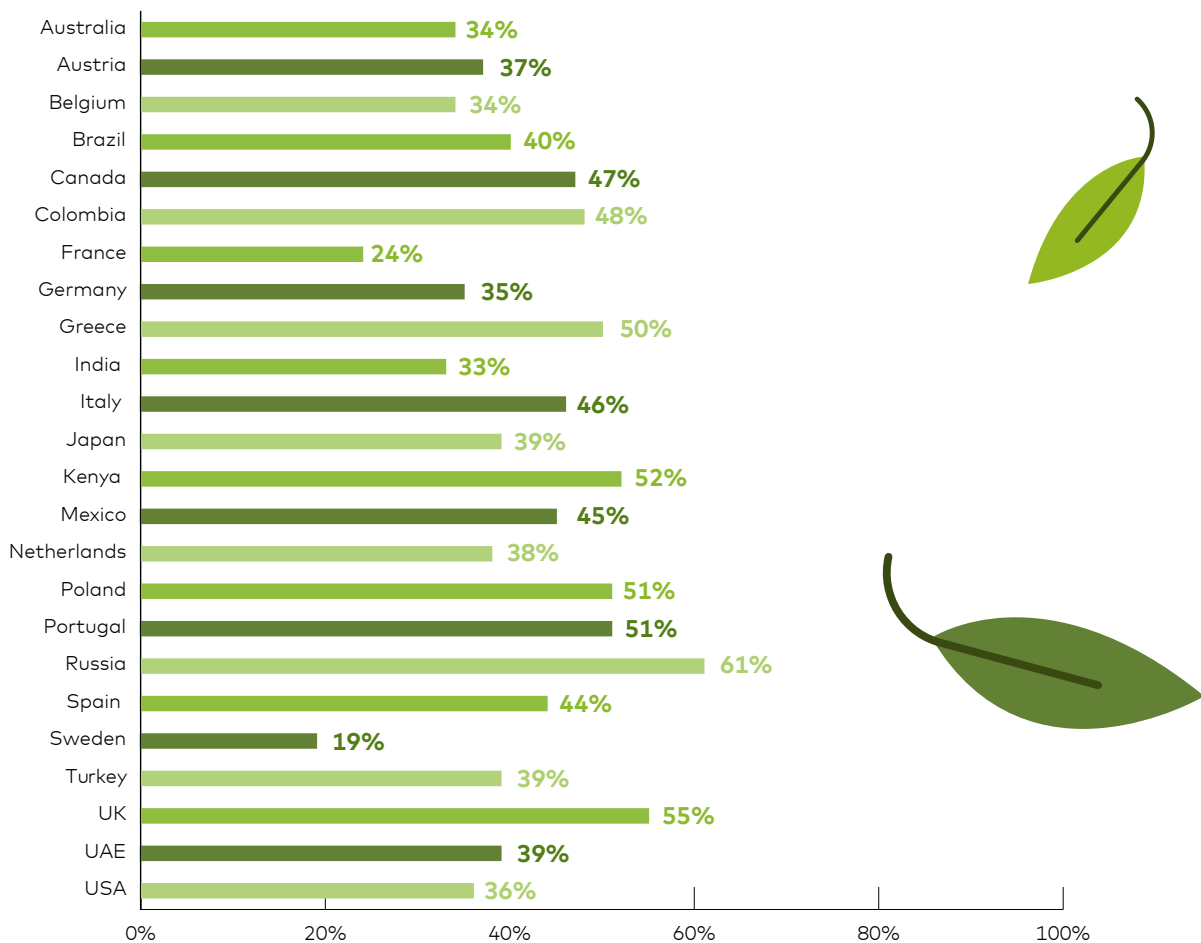
More than half place more importance on reducing their carbon footprint than they had pre-pandemic

Figure 3:



Out of those of who stated environmental and sustainability issues were now more important, 42% revealed that seeing discarded PPE was a reason for this change in opinion

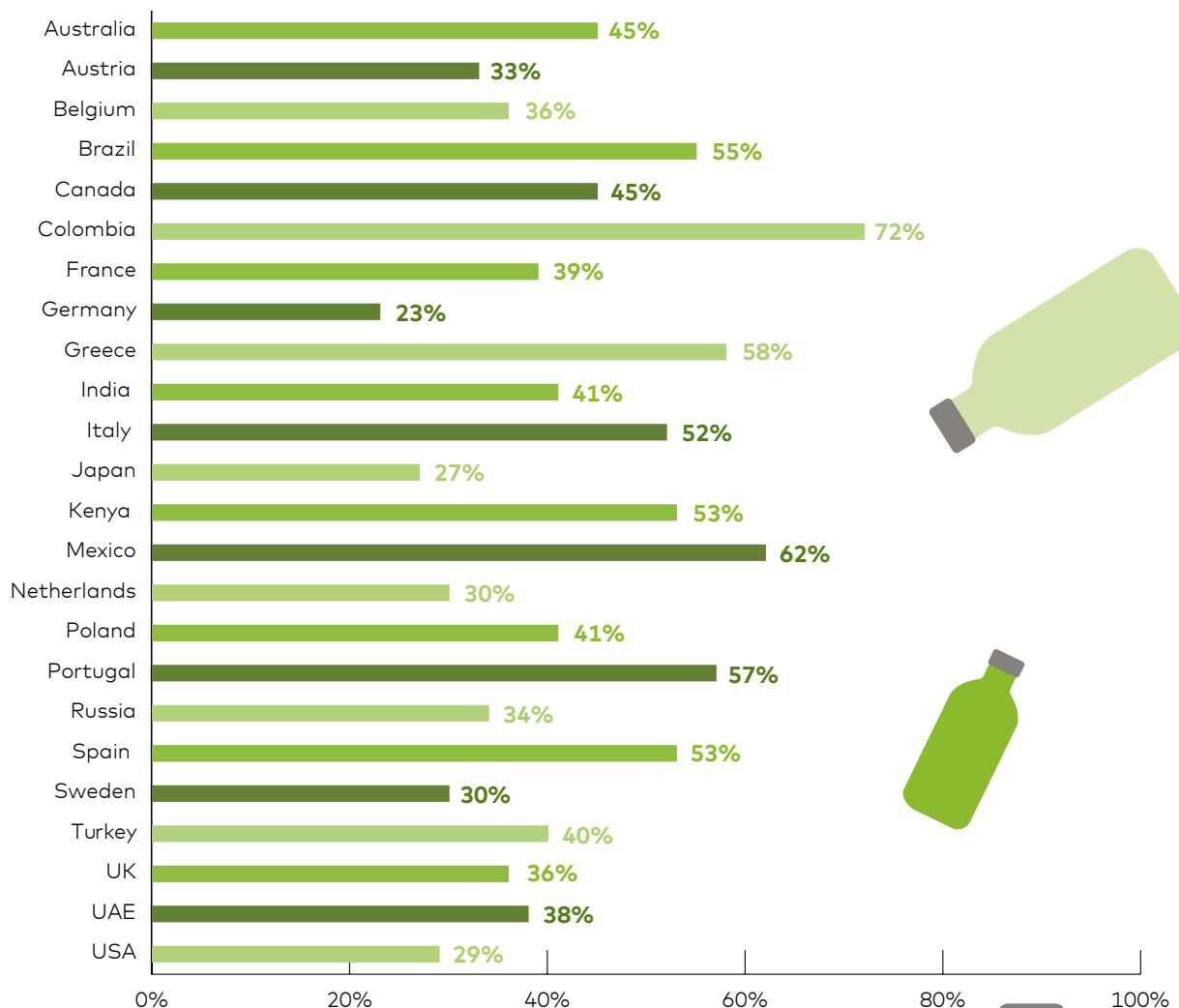
Figure 4:



With the rise in awareness of environmental challenges, consumers are now adopting new personal eco-friendly behaviors which include **recycling more (41%)** (5) and **being more aware of purchases (42%)** (6). Consumers have also placed greater emphasis on building habits that contribute to their own overall health, with **over a third (35%) globally wanting to take part in activities that improve their wellbeing** such as eating more healthy and exercising (7).

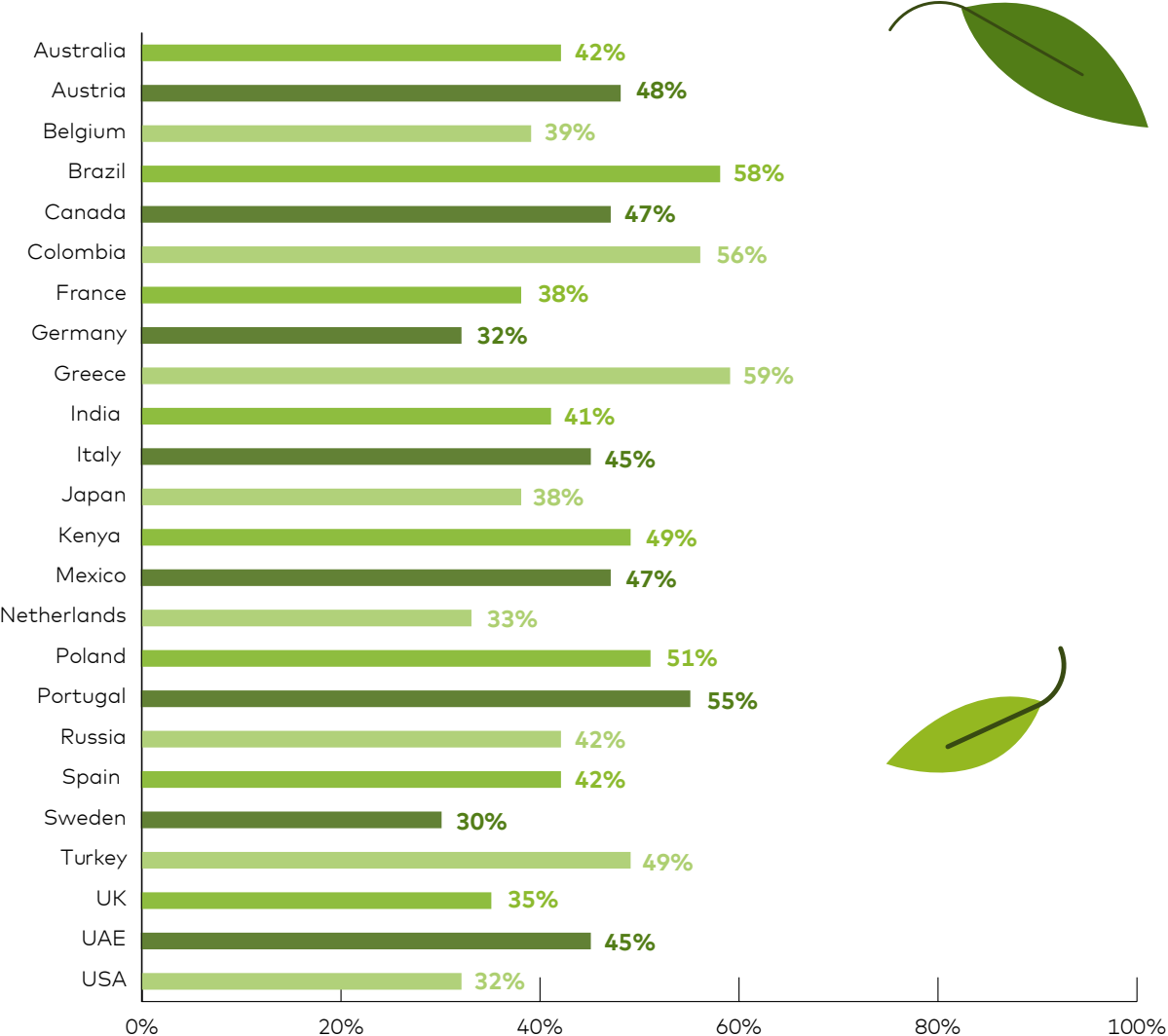
Consumers are now adopting new personal eco-friendly behaviors such as recycling more (41%)

Figure 5:



Consumers are now adopting new personal eco-friendly behaviors such as being more aware of purchases (42%)

Figure 6:

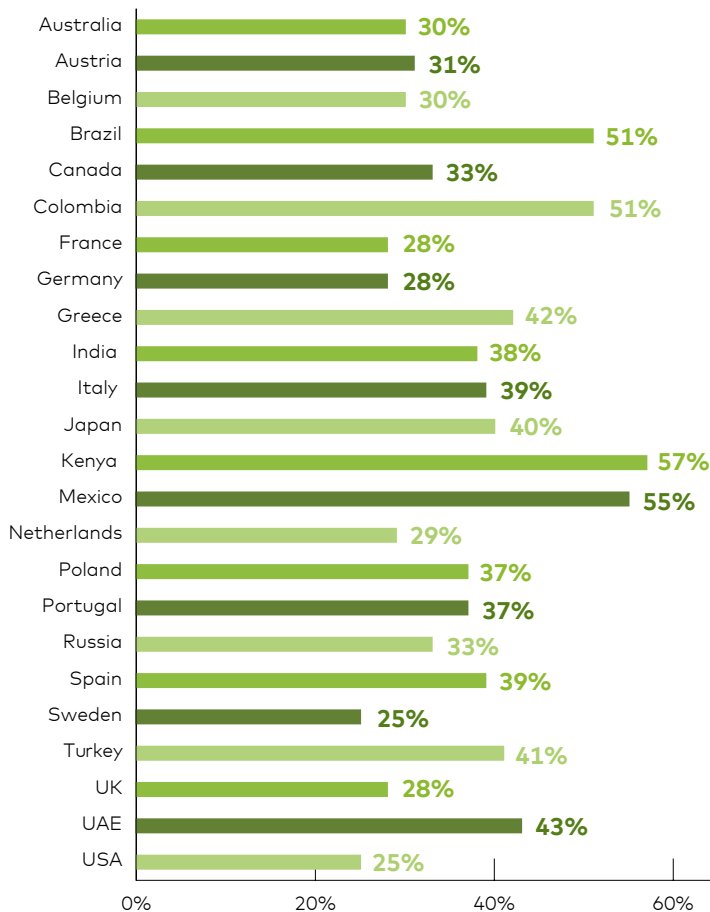


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Consumers have also placed greater emphasis on building habits that contribute to their own overall health

With **over a third (35%)** globally wanting to take part in activities that improve their wellbeing such as eating healthier and exercising, when asked to choose their top three.

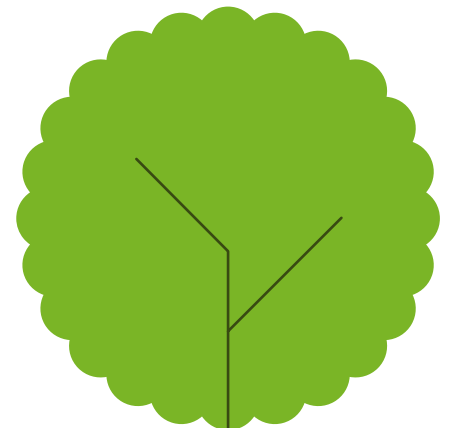
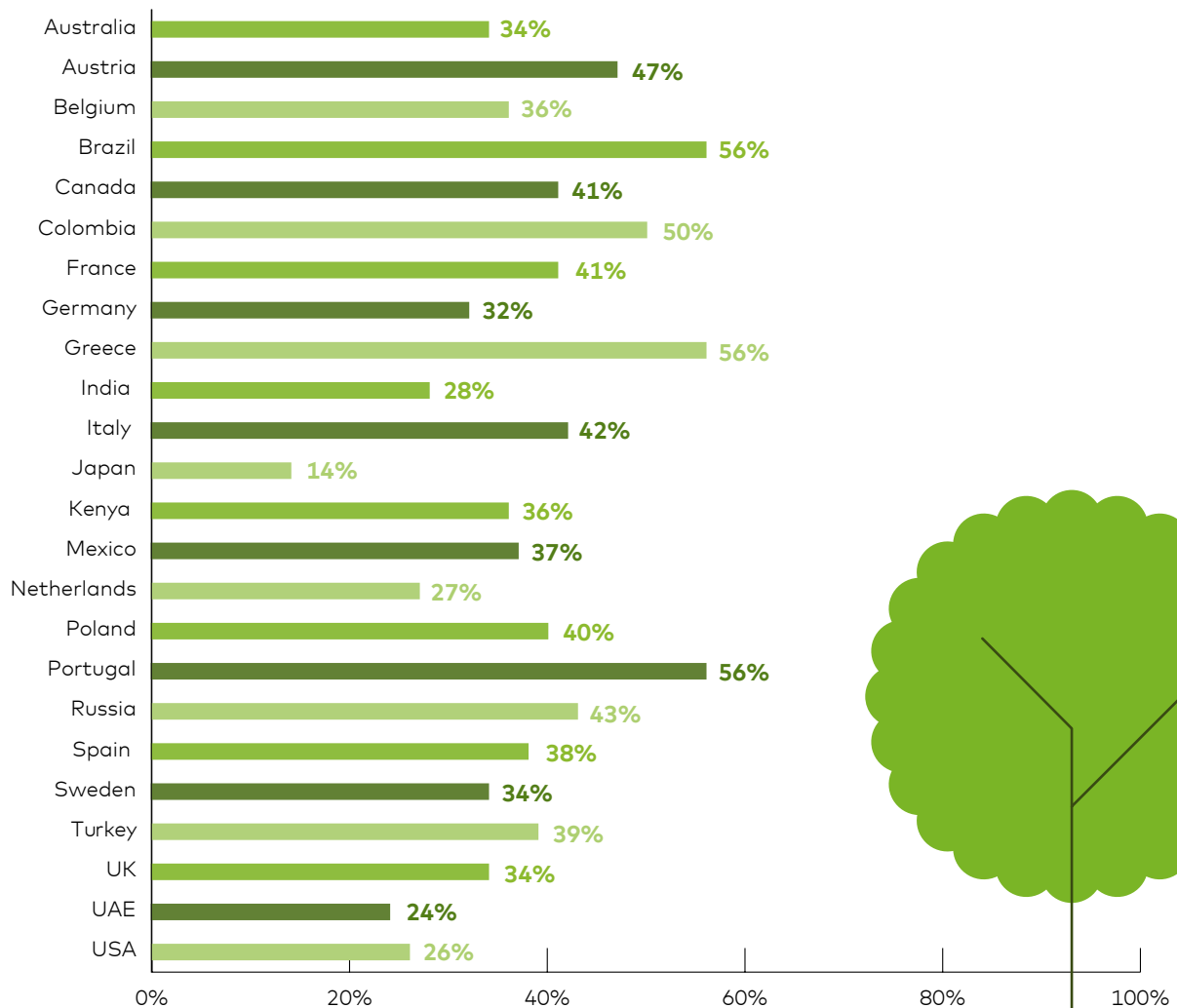
Figure 7:



Alongside improving their health, three of the top effects that the pandemic has had on the world is consumers are now placing more importance on enjoying life. Separately, **more than 1 in 3 wanting to spend time enjoying nature (37%)** (8)

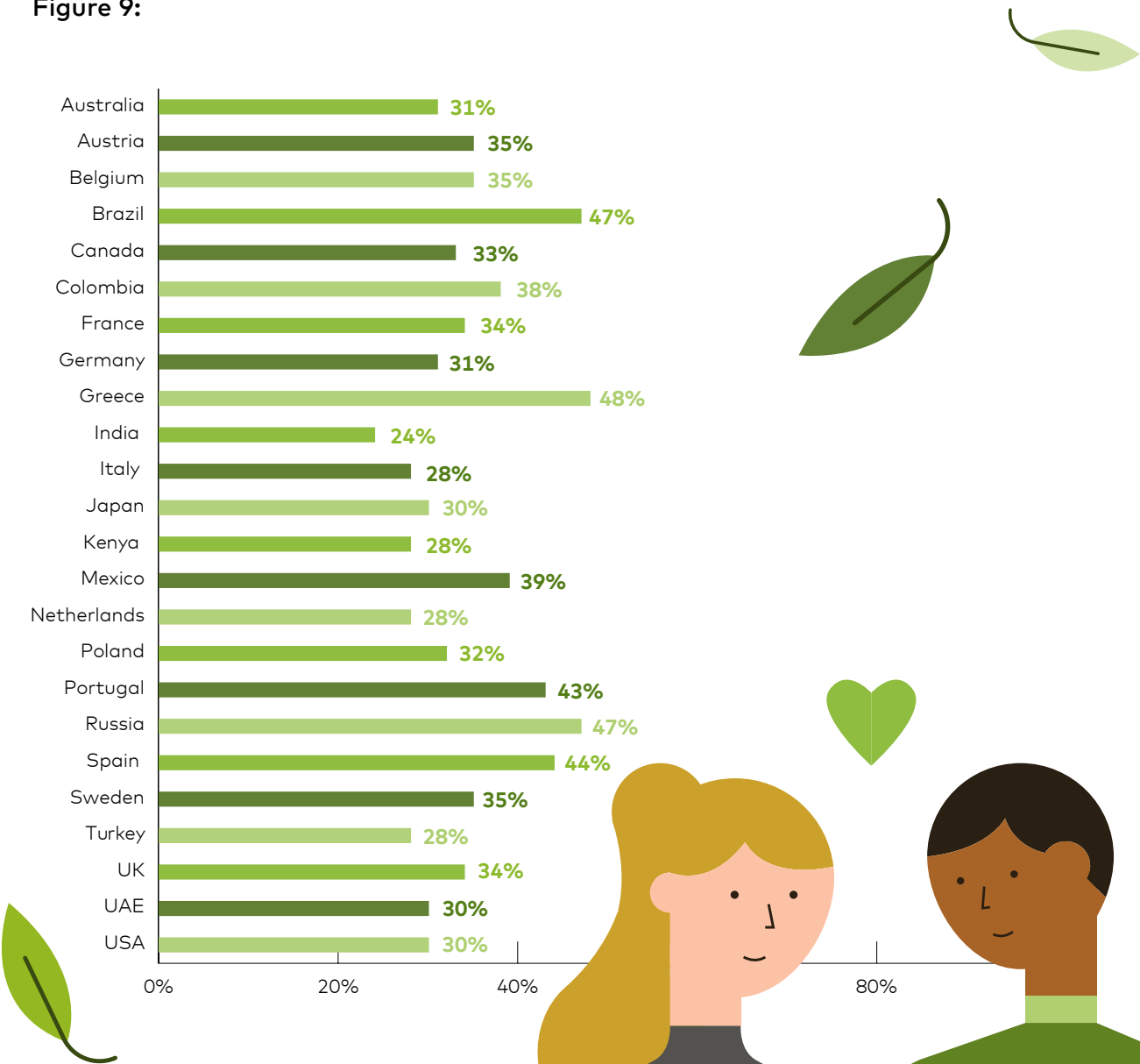
Consumers are now placing more importance on enjoying life, with more than 1 in 3 wanting to spend time enjoying nature (37%)

Figure 8:



Consumers are now placing more importance on spending time with their loved ones with 34% mentioning this in their top three behaviour changes since COVID

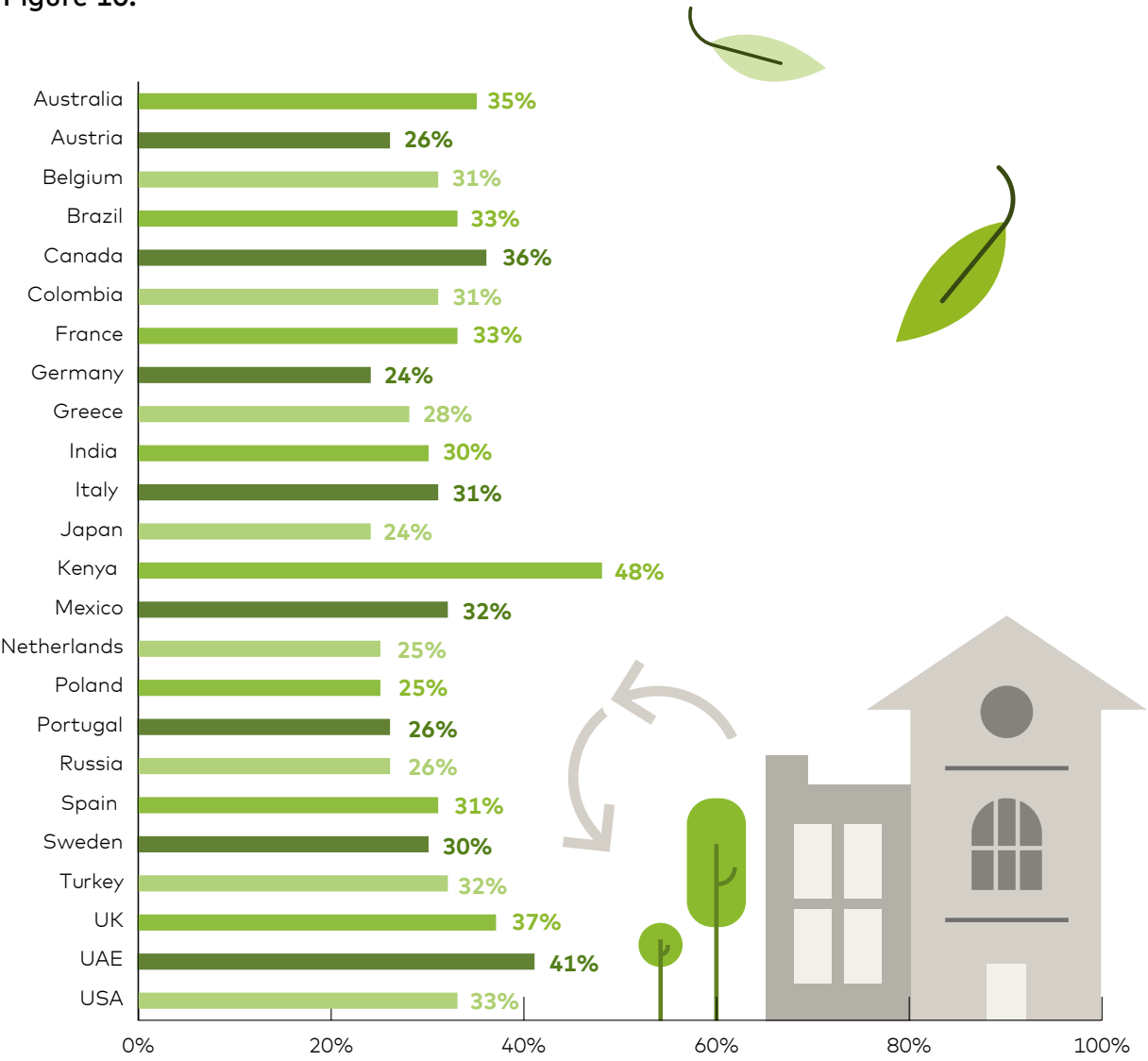
Figure 9:



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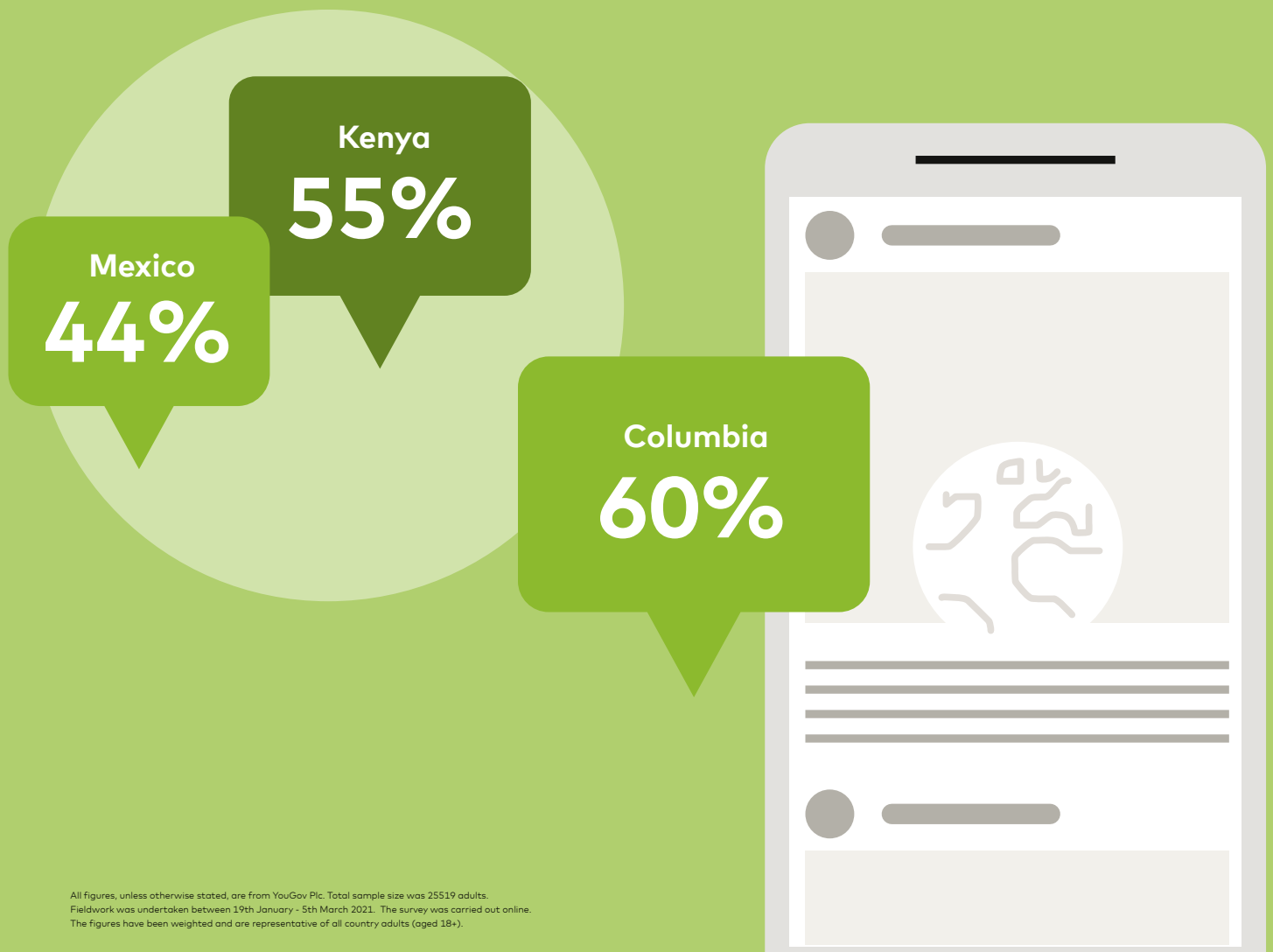
1 in 3 (31%) expecting the wellbeing of staff to be in the top three key focus areas for companies moving forward

Figure 10:



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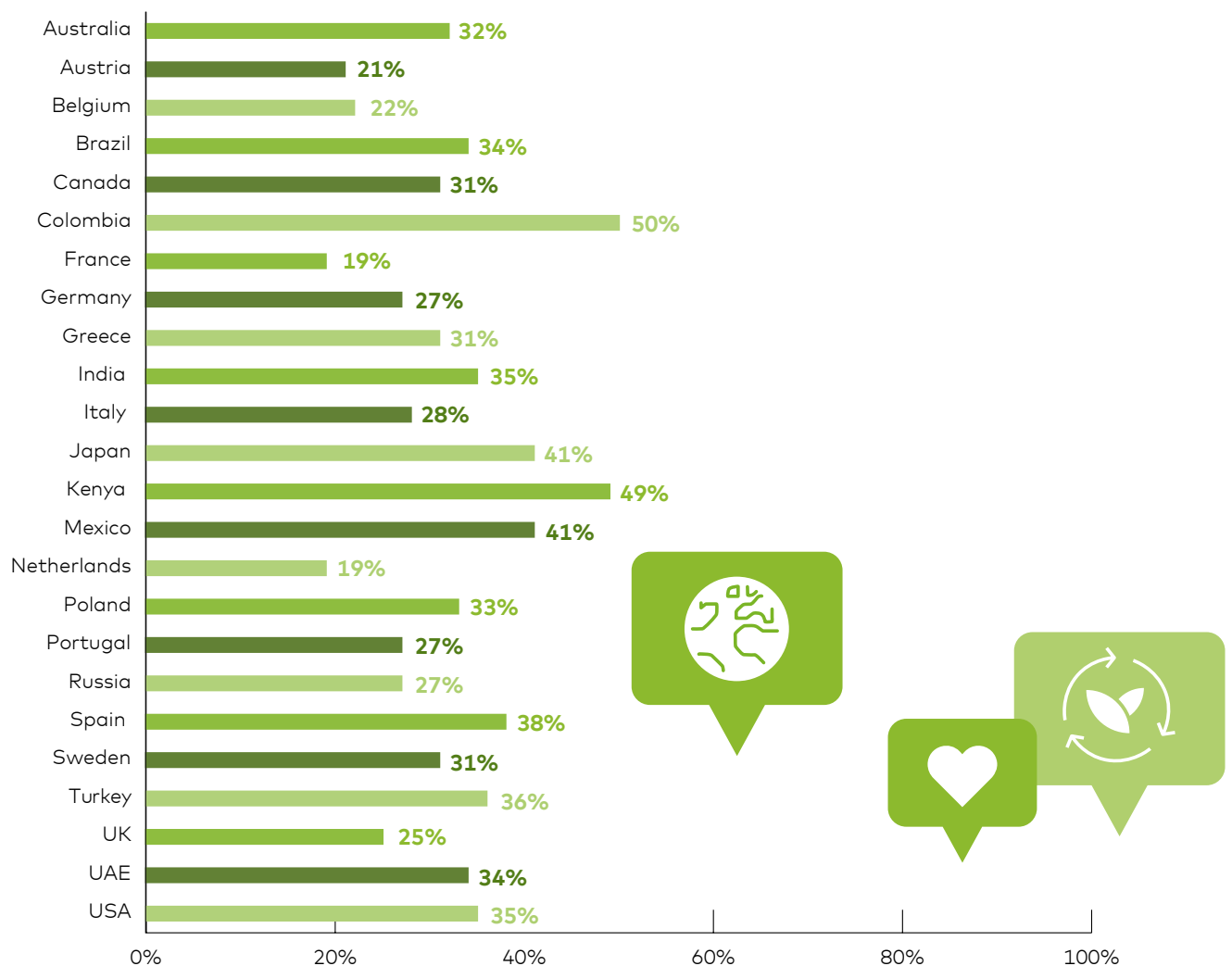
Digital media appears to have played a pivotal role in educating consumers about climate change and environmental issues



A third (32%) of those who have changed their opinion on environmental and sustainability issues across the globe stated that increased news coverage had educated them on environmental issues

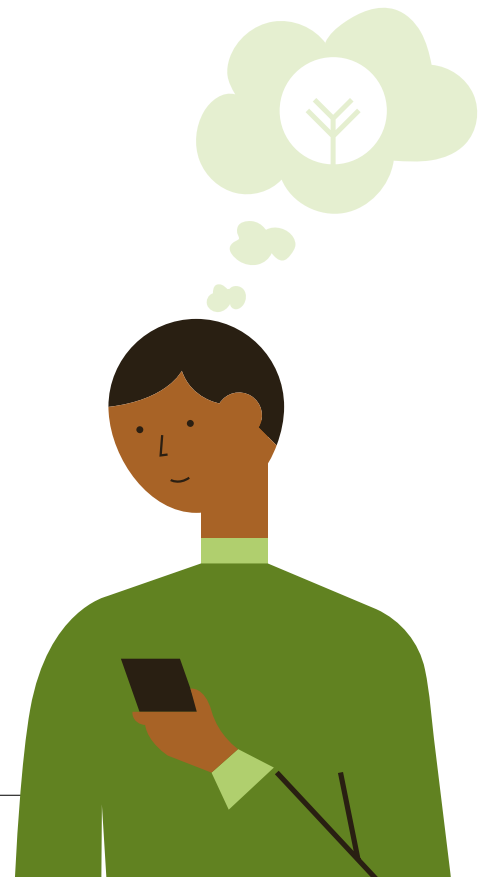
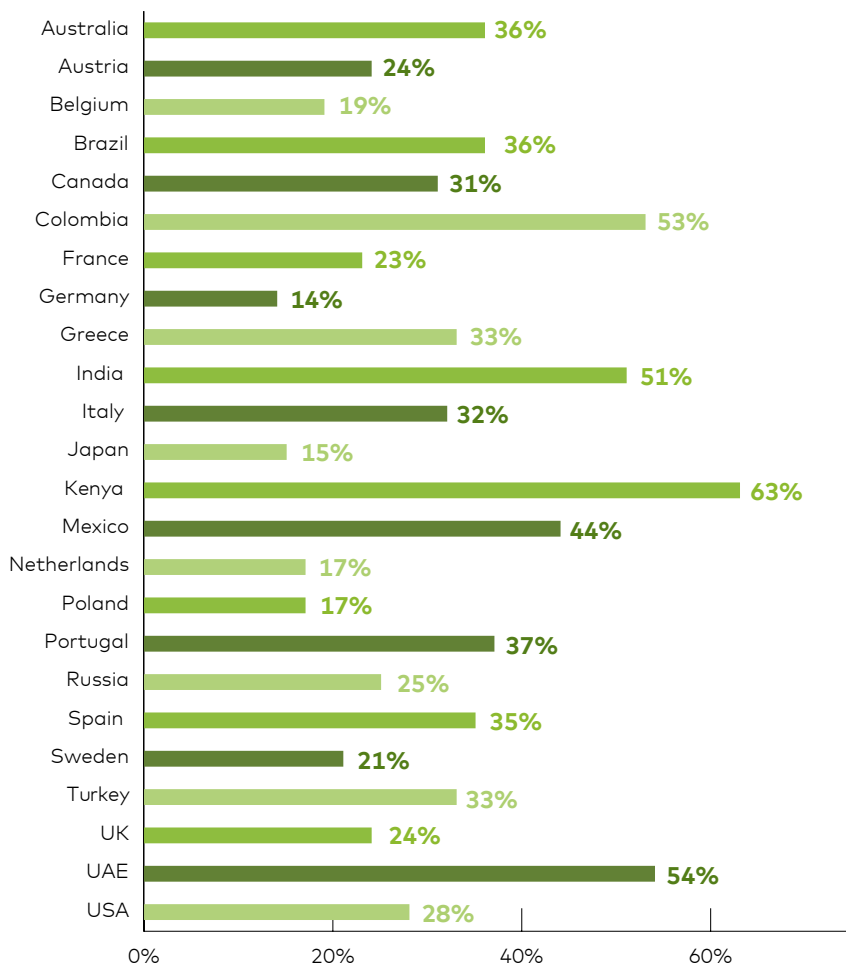
This was particularly prevalent with the 55+ age group where over half (56%) had seen these topics on TV compared to Gen Z at 43%.

Figure 11:



Globally, 30% of consumers admit seeing climate change showcased across social media posts from influential people

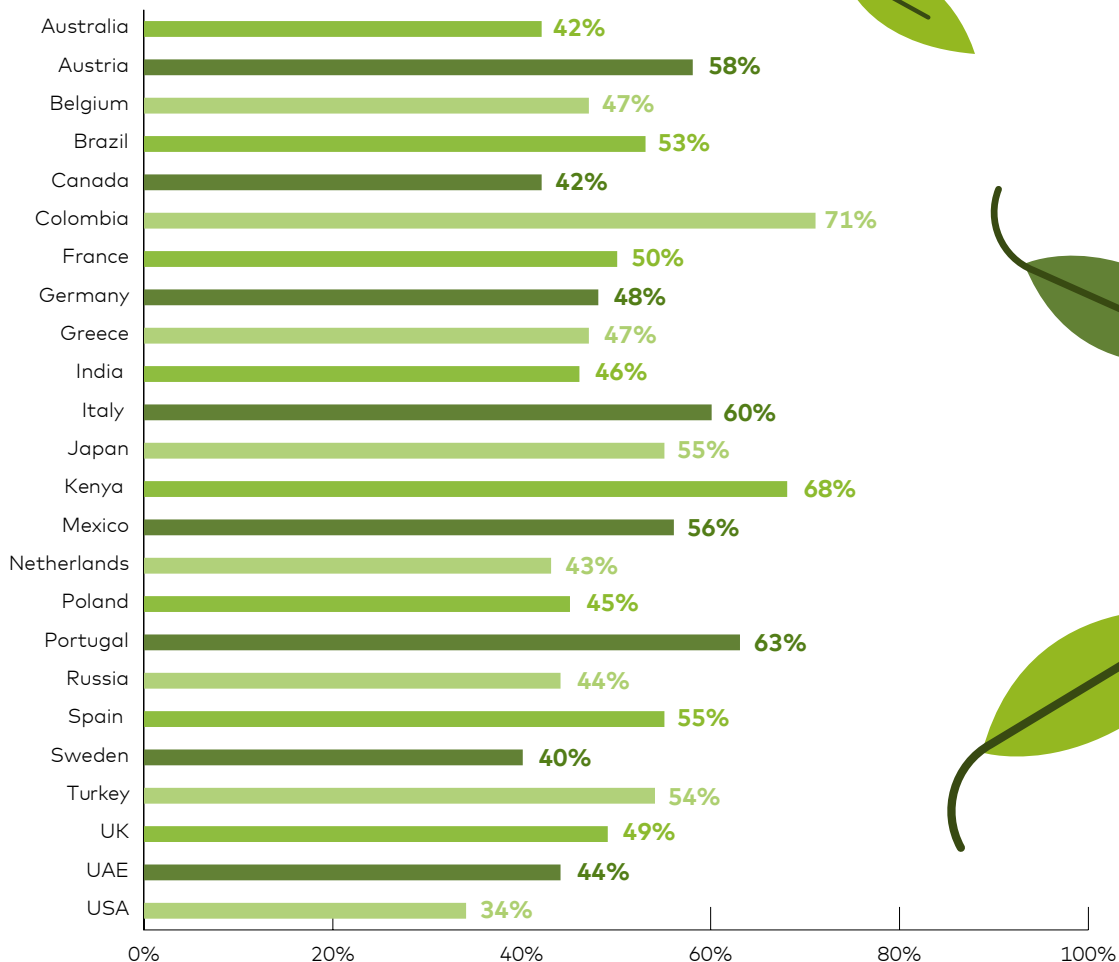
Figure 12:



Social media has increased Gen Z's awareness of environmental issues by 43% compared to the 55+ age group at 21%. Notably in Kenya, social media has been a hugely impactful channel, with over 3 in 5 (63%) seeing environmental issues showcased as a topic, followed by United Arab Emirates (54%) and Colombia (53%) who also saw increased coverage of environmental topics (12).

50% of those surveyed across the globe said television was the key medium showcasing environmental topics

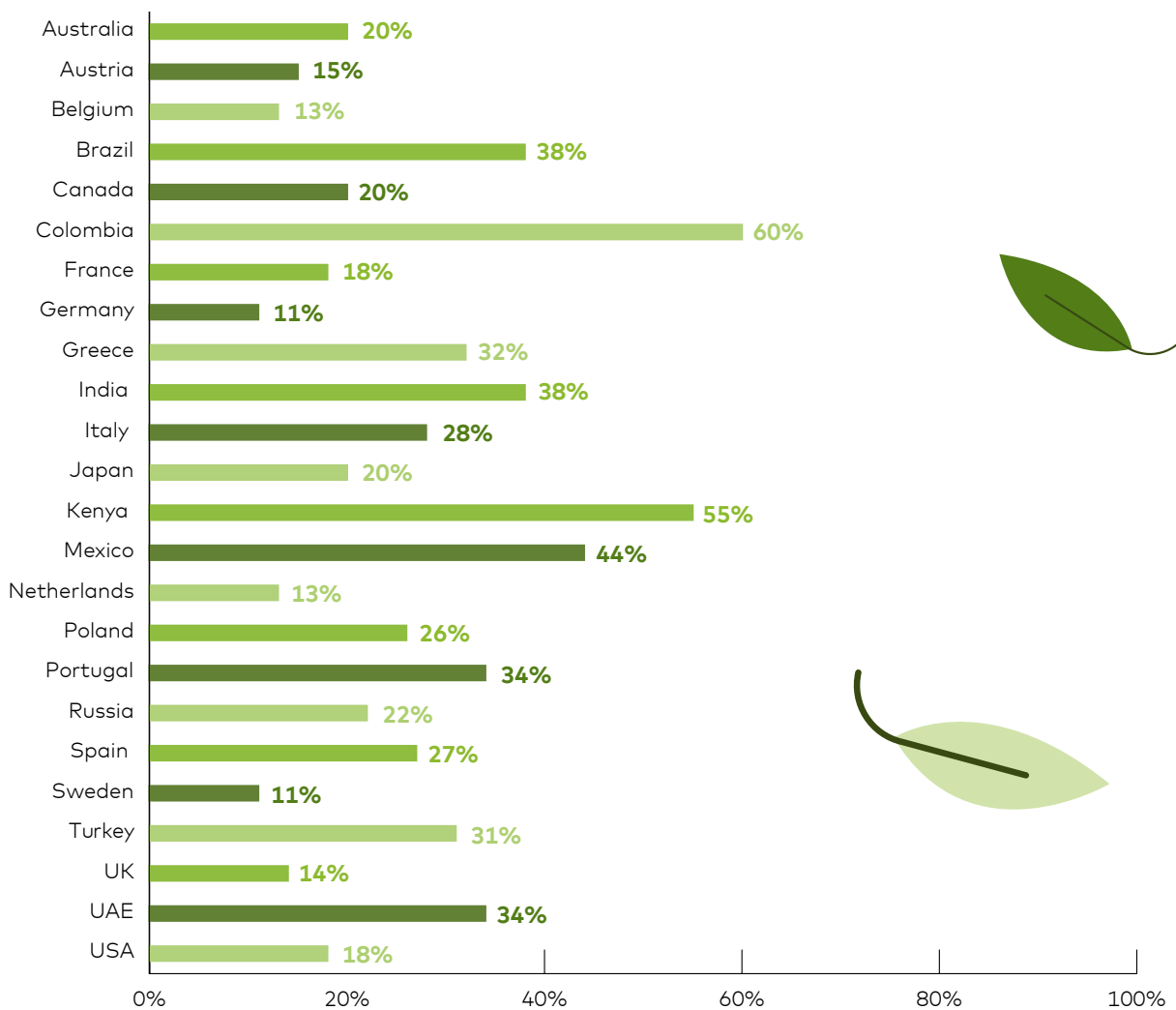
Figure 13:



In Italy, television was the key medium showcasing environmental topics with half (50%) of those surveyed noting an increase. In the UK, environmental documentaries such as David Attenborough's 'A Perfect Planet' were a key factor in educating consumers on environmental issues, with climate activists such as Greta Thunberg encouraging one in ten Brits to act (13).

A quarter (25%) of consumers want to educate themselves further on environmental issues

Figure 14:



Colombians significantly wanted to educate themselves with **3 in 5 (60%)** wanting to improve their learning followed by Kenya (55%) and Mexico (44%) (14).

Discarded PPE prompted consumers to be more sustainably aware



The UK

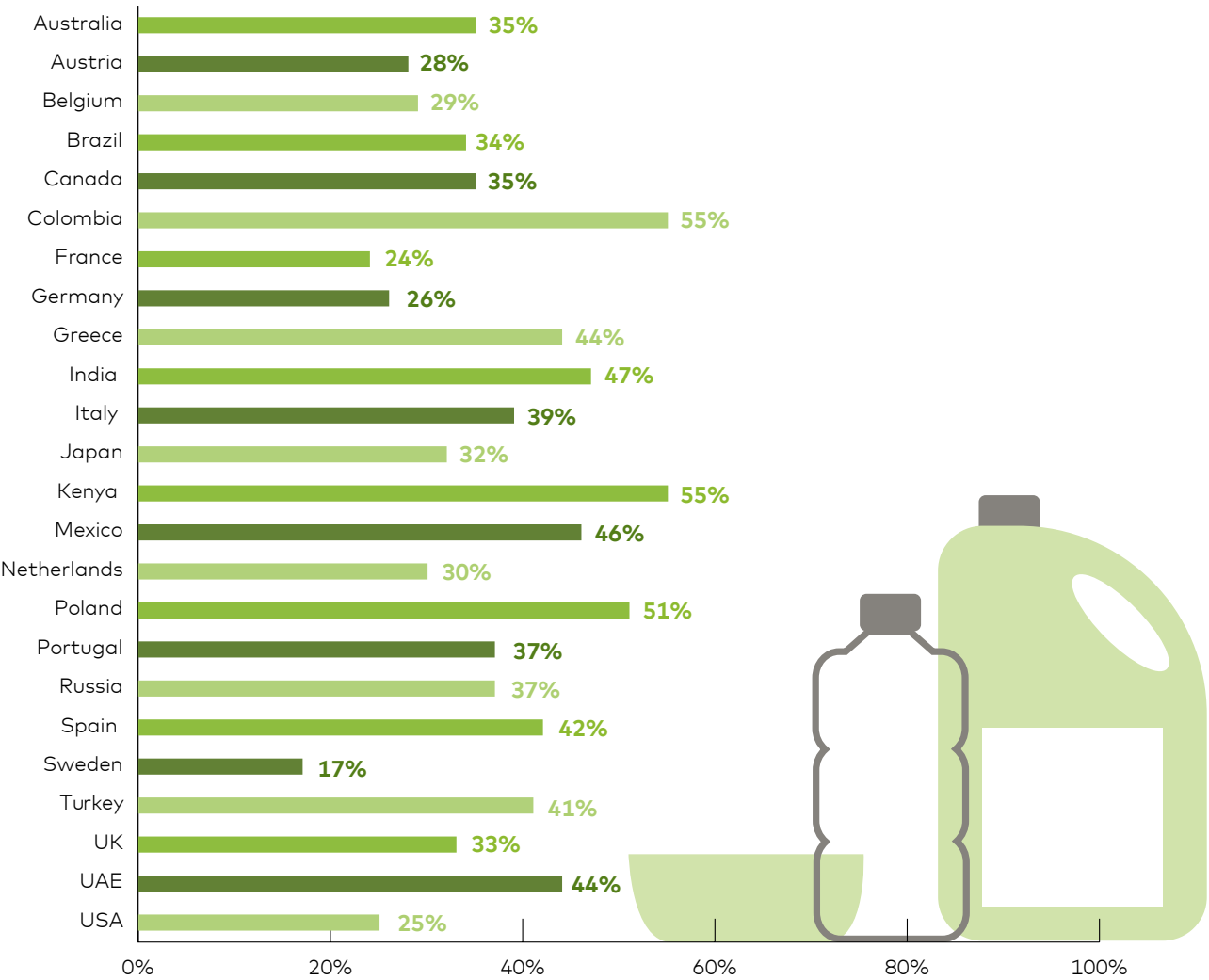
55%

Portugal
and Poland

51%

35% of consumers stated that the increase of single-use plastics was a factor in encouraging better environmental decisions

Figure 16:

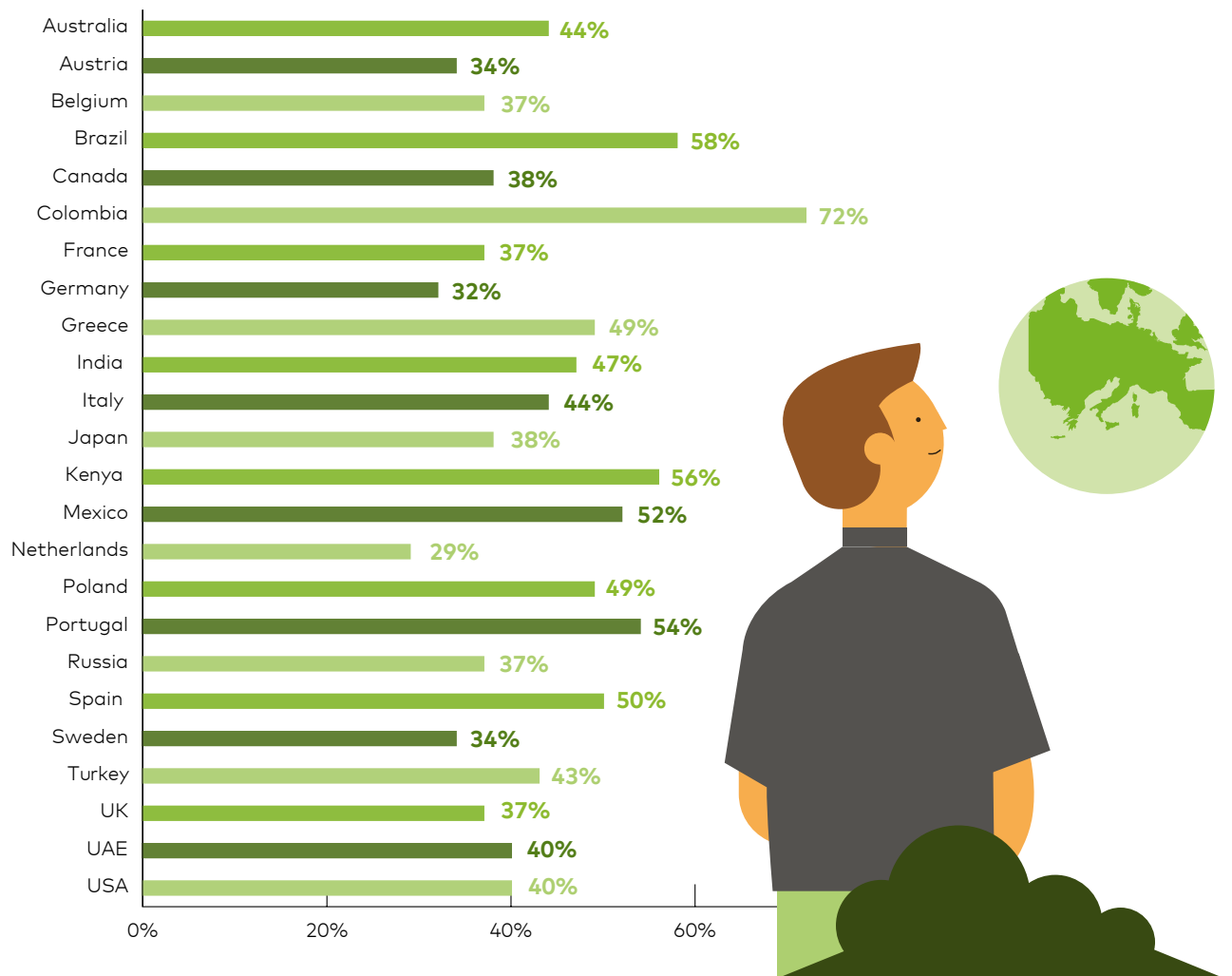


For the consumers who've become more sustainably aware, seeing discarded PPE was a reason for this change in opinion. Most notably in Kenya and Colombia where over half of the nation (55%) were encouraged to act more sustainably because of seeing the likes of single-use takeaway packaging and disposable gloves, followed by Mexico (46%) (16).

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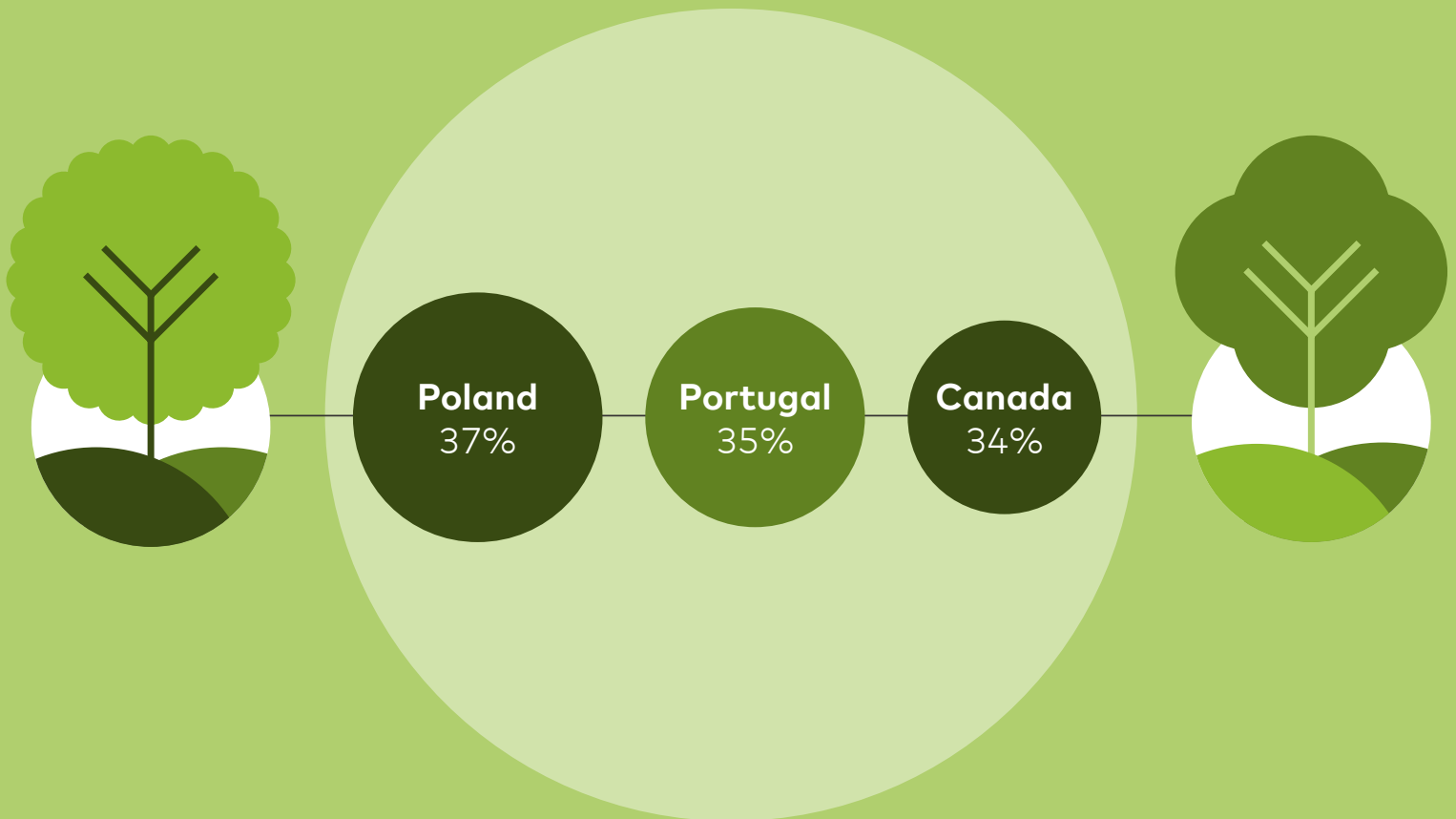
Of those that have changed their opinion of the environment and sustainability, 44% admit to having more time to think about environmental impact

Figure 17:



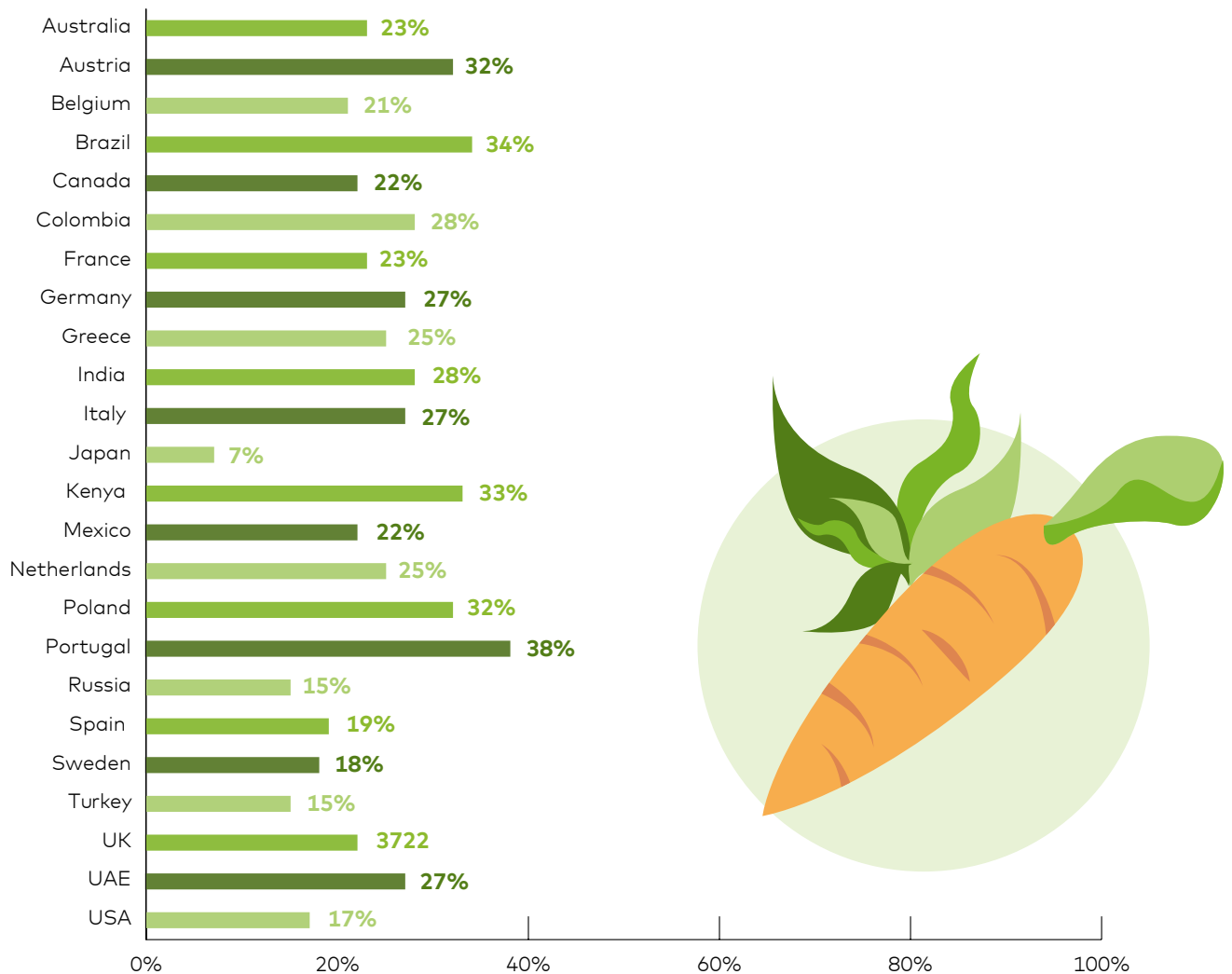
Consumers have had more time to make better environmental choices. Having more time to think about environmental impact is one of the top reasons highlighting how the pandemic has shifted behaviors, with 44% admitting this has been a pivotal factor. Almost 3 in 4 Colombians (72%) agreed that the extra time (due to reduced travel, lockdowns, etc) had supported them thinking more about their environmental impact with 1 in 2 of those in Spain also admitting the same (17).

The pandemic has led to consumers wanting to develop more sustainable and healthier habits and behaviors



Nearly a quarter of the globe surveyed want to adopt a more environmentally friendly diet (24%)

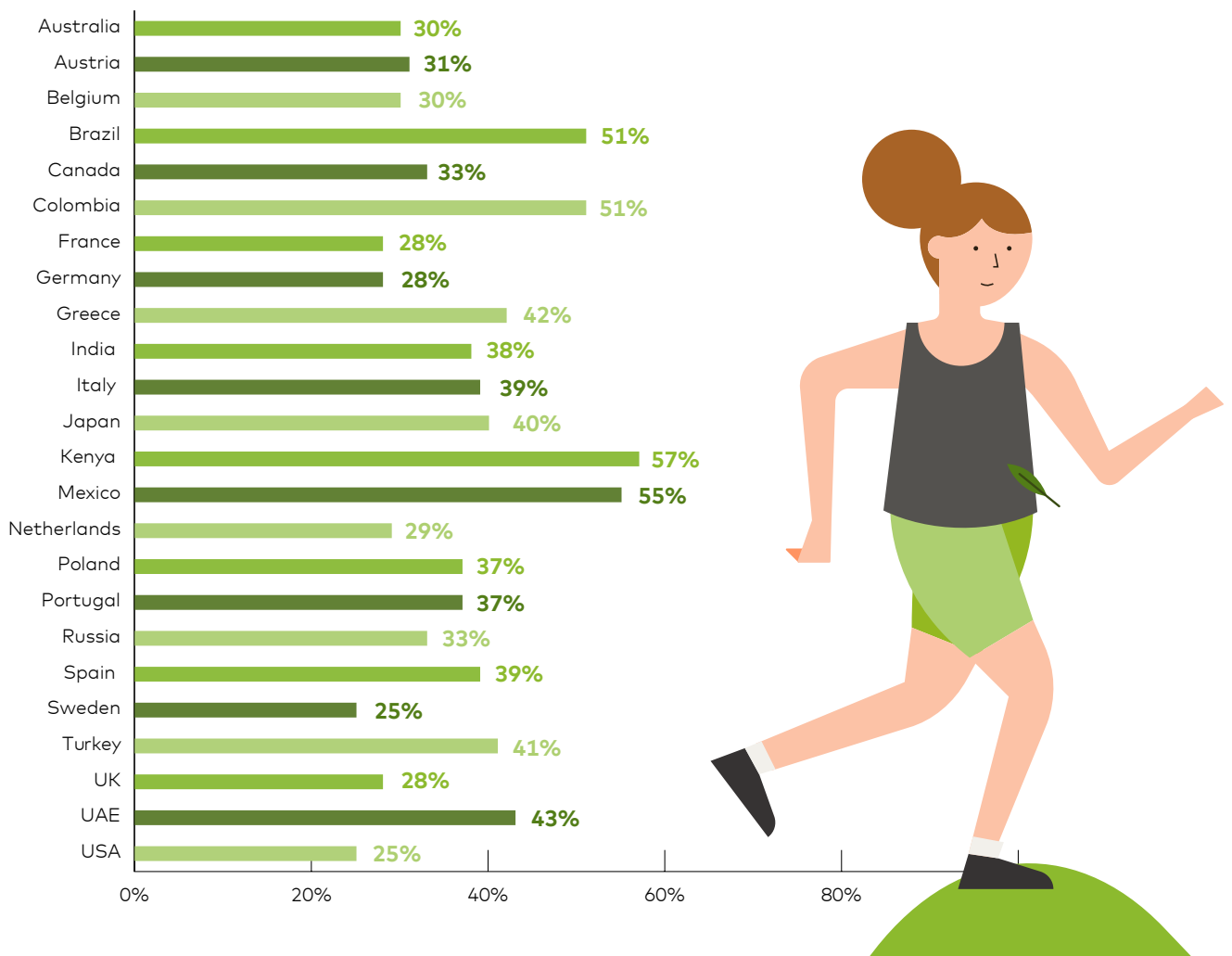
Figure 19:



Purchasing less in general was a top three environmentally friendly habit, with 10% more women wanting to adopt this behavior compared to men. Top countries likely to reduce their shopping: Poland (37%), Portugal (35%) and Canada (34%) (18).

Exercising and enjoying wellbeing activities has become a key focus across the globe with 1 in 3 taking more active steps to lead a healthier lifestyle for the first time since the start of the pandemic

Figure 20:



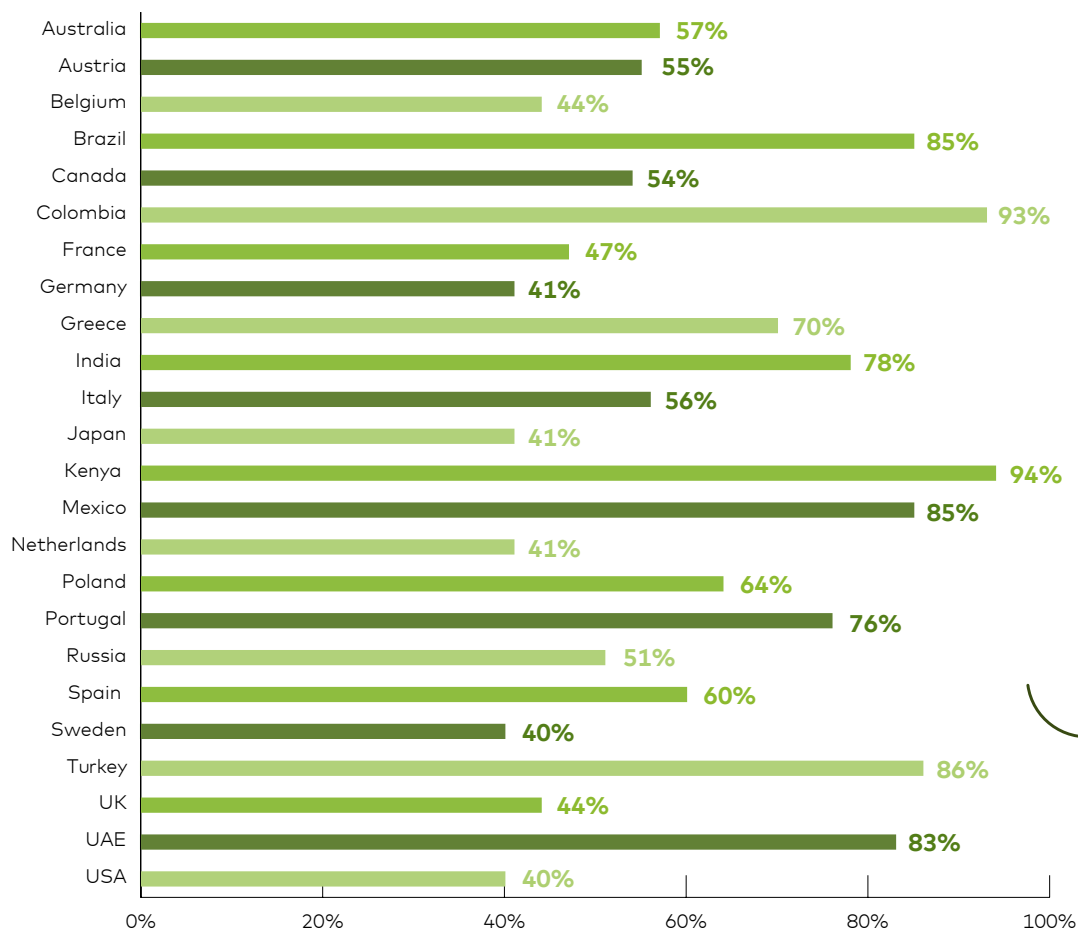
Consumers are now taking active steps to become healthier. Exercising and enjoying wellbeing activities has become a key focus across the globe with 1 in 3 taking more active steps to lead a healthier lifestyle. Improving wellbeing was particularly important for the Kenyans where over half of their nation (57%) were actively supporting wellness in their lives for the first time, followed by Mexico (55%) and Brazil (51%) (20).

Consumers are now more conscious of their environmental impact and want to reduce their carbon footprint



The pandemic has undoubtedly driven a more conscious consumer, with almost 3 in 5 (58%) globally now more aware of their impact on the environment compared to pre-pandemic

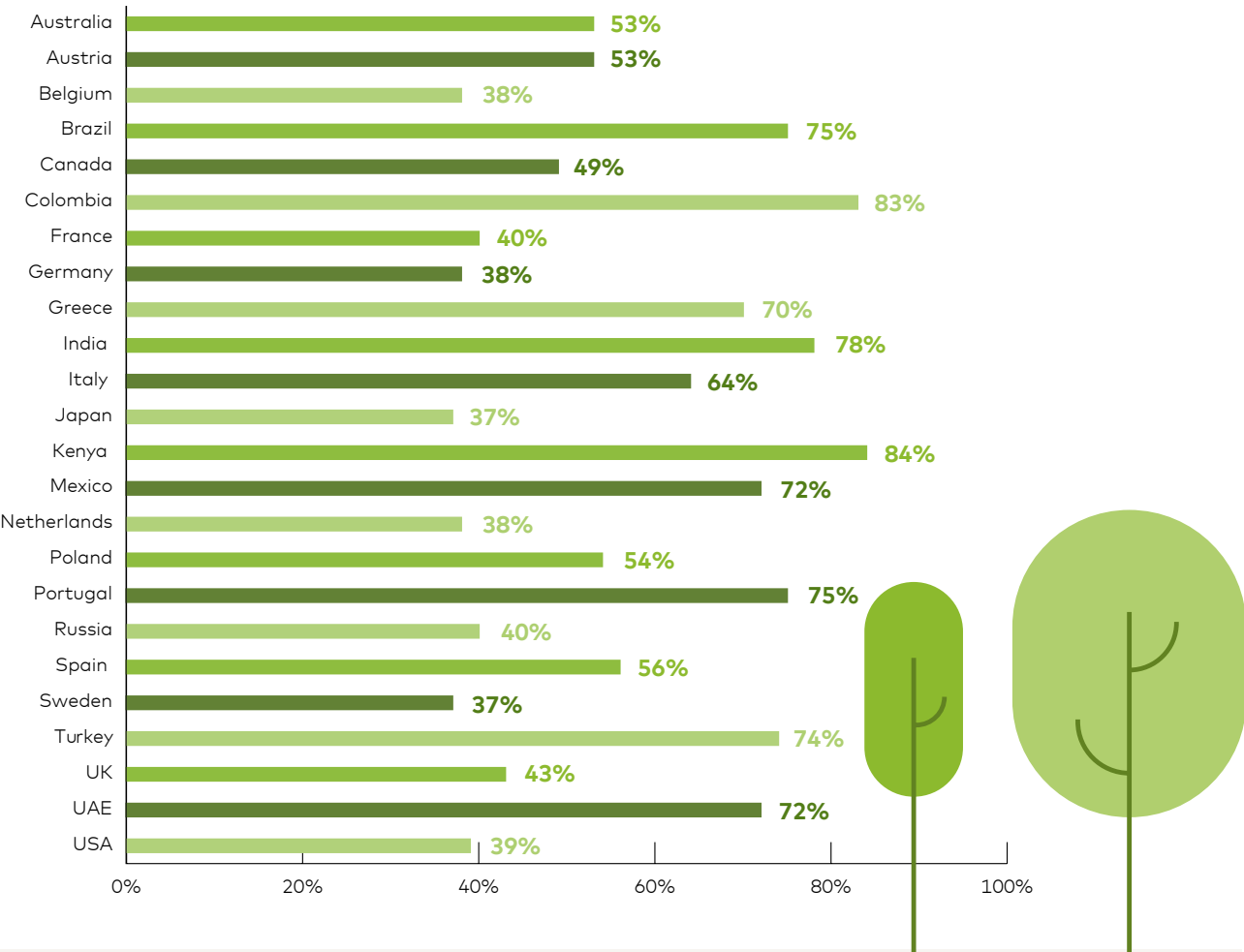
Figure 21:



The top three most environmentally conscious countries were Kenya (94%), Turkey (86%) and Brazil (85%) (21)

Globally consumers feel it has become a lot more important to reduce their carbon footprint with over half (54%) feeling it is now more important to reduce their impact on the environment

Figure 22:



In Kenya (84%) of those surveyed stated it is now more important than before that they reduce their carbon footprint followed by Columbia (83%) and India (78%). (22)

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Consumers wish to enjoy life to the fullest post-pandemic



Enjoying life to the fullest is one of the top three effects of COVID-19, with more than a third (35%) globally placing more importance on enjoying life

In Belgium half the nation (50%) stated this as an effect of the pandemic, followed by 43% of Greece and 2 in 5 Brits (40%) also wanting to make this change towards a happier lifestyle.

Consumers want to take more time to appreciate nature, particularly women (41%) versus men (32%). In Greece, Portugal and Brazil over half (56%) are more likely to take time out of their day to appreciate their environment. (8)

The pandemic has demonstrated that

consumers don't need to commute long distances, with almost 2 in 5 of those aged 55+ revealing this in comparison to 26% of Gen Z. In the UAE and Russia 2 out of 5 (40%) felt the pandemic had shown that they don't need to unnecessarily travel long distance for work with over a third (35%) of those in Australia who have changed their attitude towards the environment and sustainability saying they will be looking to reduce travel where possible.



The pandemic has fostered better local community connections

The pandemic has helped people to feel more connected to their local community with nearly 2 in 5 of the 55+ age group feeling more connected than they did pre COVID-19 (39%).

In Kenya 45% fostered better local community connections followed by 43% in Canada and Portugal .

A quarter (25%) of respondents within the Gen Z age group felt more connected to their local community because of the pandemic, increasing to 2 in 5 with those aged 55+.

Across Europe consumers are giving more importance to supporting

local businesses, with an average of 23% actively wanting to buy more products produced locally to them, when prompted on their top three behaviours they will change following the pandemic. **Those living in Austria (37%), Canada (33%) and Australia (31%) placed the most emphasis on locally sourced products with 1 in 3 wanting to buy more products produced locally.** Globally those aged 55 and above (27%) were twice as likely to buy products produced locally to them than Gen Z (15%) with an equal gender split of men (20%) and women (23%).



34% of respondents who feel these issues are more important stated that the pandemic has helped people to feel more connected to their local community and would therefore like to shop locally more

Figure 23:



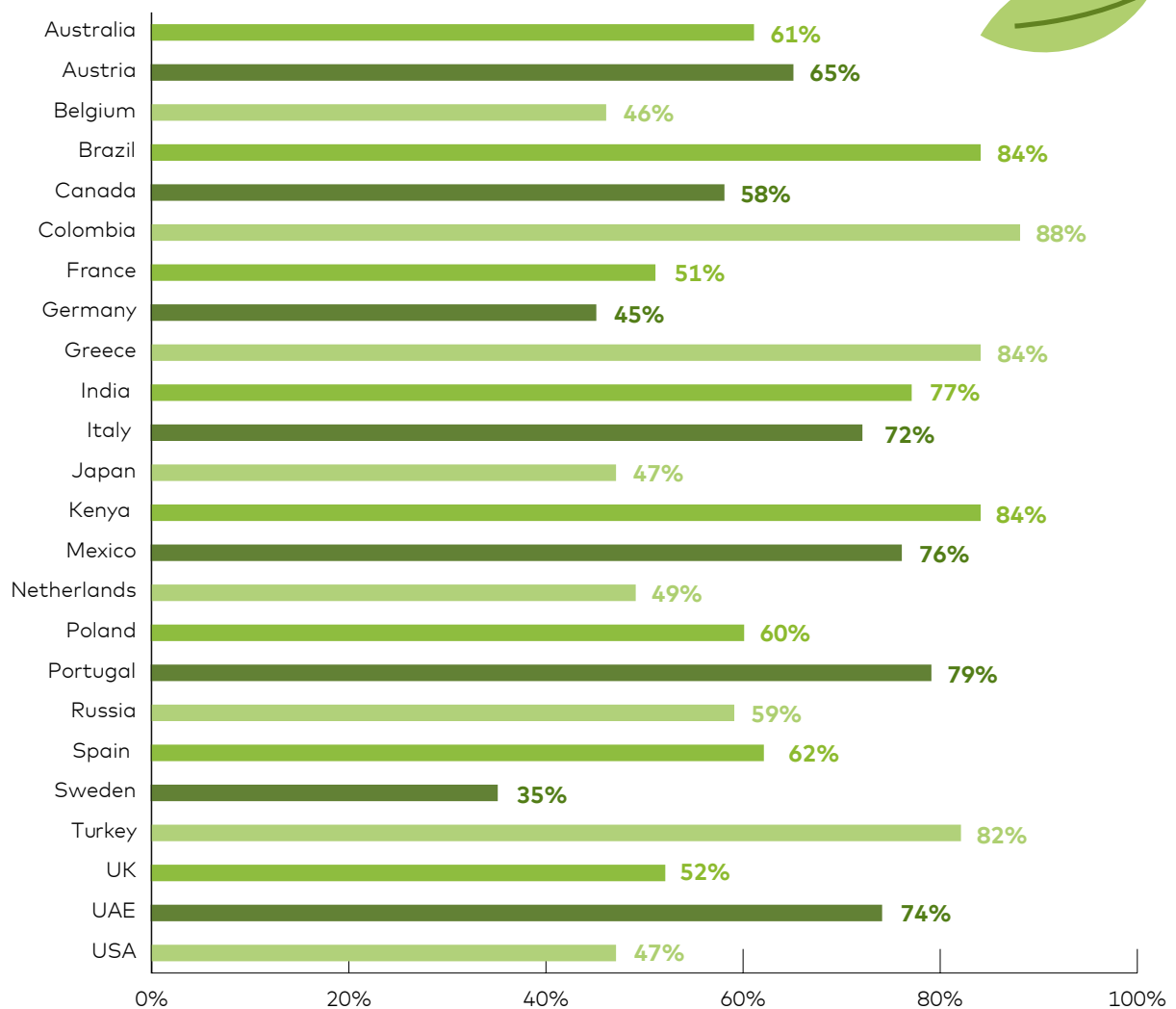
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Consumers are now more conscious of a company's eco credentials and want them to act more ethically



Companies and brands are now expected to act with greater purpose

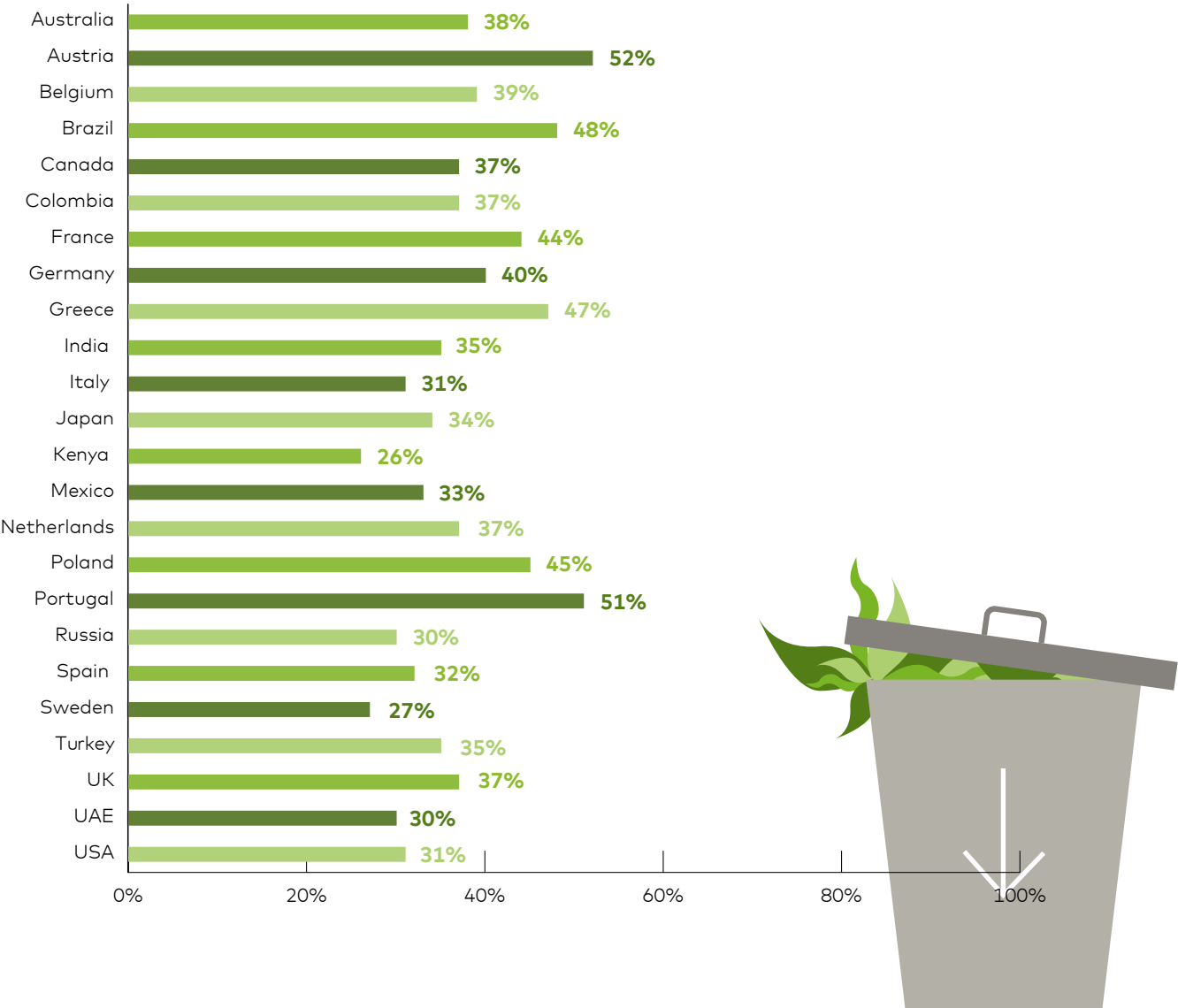
Figure 24:



Consumers are now more conscious of a company's eco credentials and want them to act more ethically. This is across several areas including waste management, plastic pollution and the health and wellbeing of their employees, with 62% across the globe deeming this a lot more important than at the start of the pandemic.

When considering the three key issues, 37% of consumers expect companies to focus on waste reduction (i.e., food waste and reducing water and energy consumption)

Figure 25:

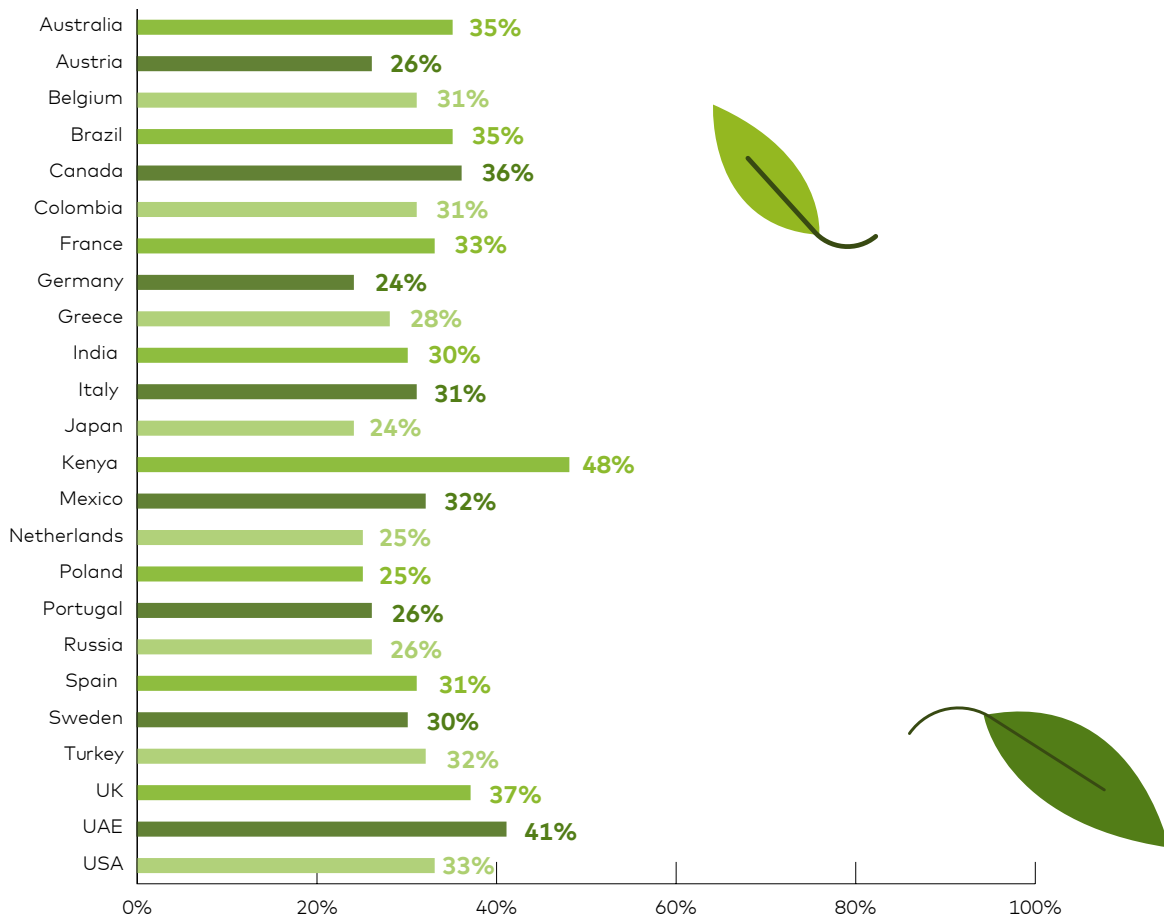


Consumers expect companies to focus on waste reduction (i.e. food waste and reducing water and energy consumption), with 2 in 5 of the 55+ age group stating this as a key issue that companies should address. (25)

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On average 31% across the globe revealed that companies should be more conscious of their employees' health and wellbeing when dealing with their top three issues besides coronavirus

Figure 26:

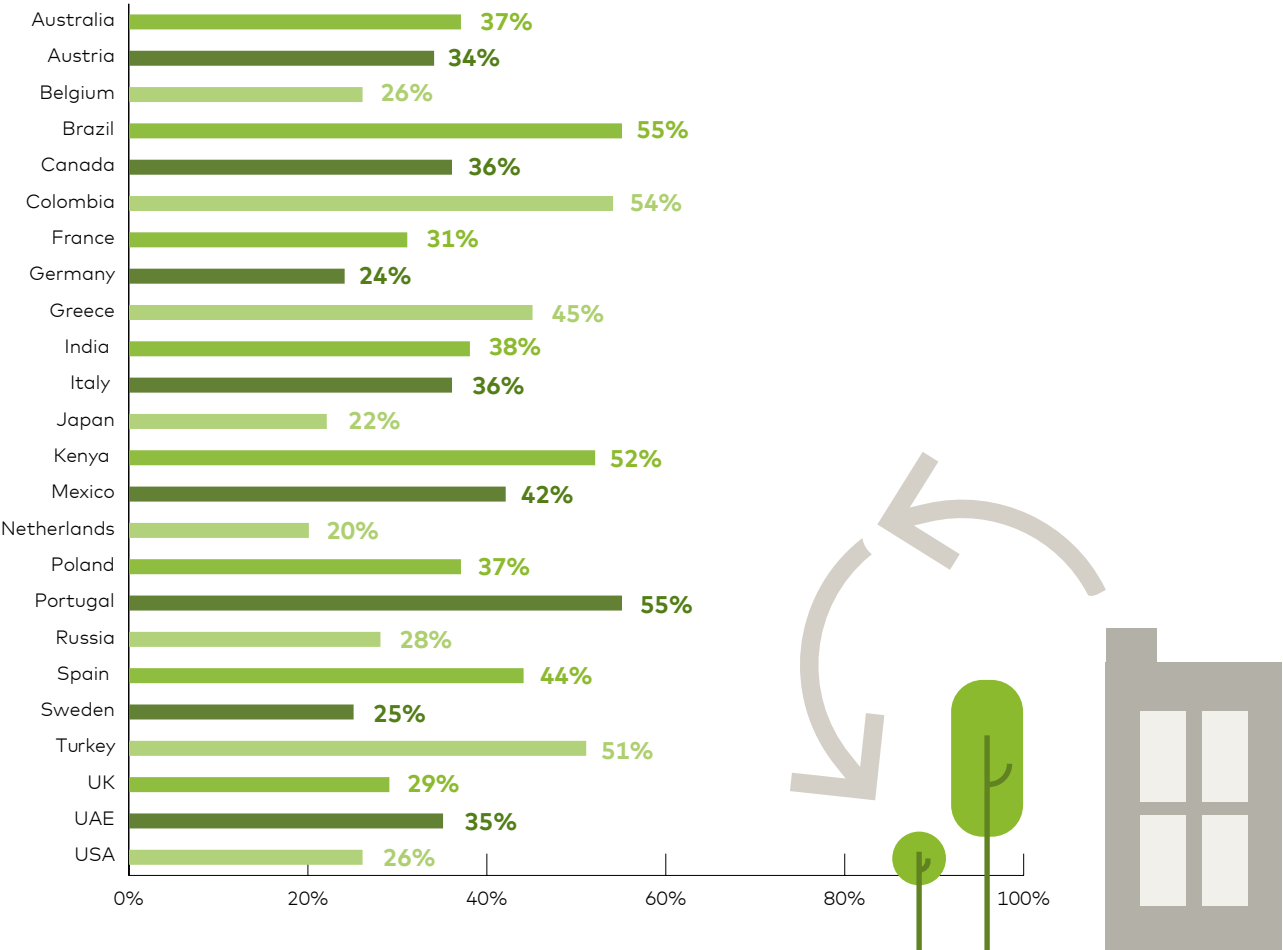


Reducing plastic waste was another highly listed issue, demonstrated in the 55+ age group where 43% felt that companies should tackle this issue versus Gen Z at 29%. In the UK, 44% of those surveyed believed that brands should focus on tackling the overuse of plastics in packaging.

Consumers want workforces to be healthy and happy. Consumers wanting companies and brands to focus on their employees' health and wellbeing as a priority came into the top three focal points with an average of 31% across the globe revealing that companies should be more conscious of their employees (26).

Consumers now have increased expectations of companies to act with greater purpose and placing increased value (35%) on brands that act in a responsible, transparent and honest way

Figure 27:



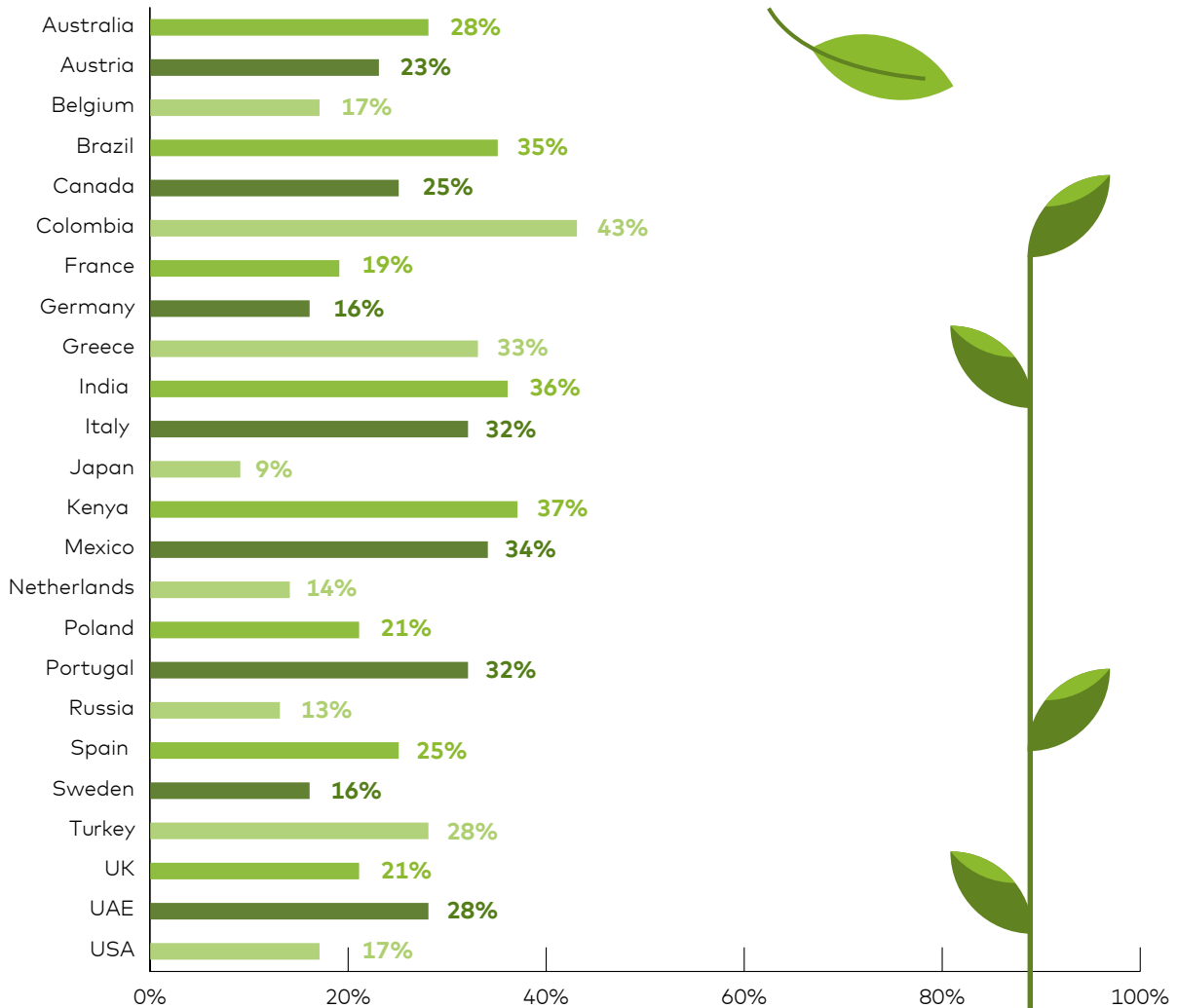
But consumers are likely to stop using a brand that hasn't adopted sustainable values.

Consumers now have increased expectations of companies to act with greater purpose and placing increased value (35% globally) (27) on brands that make ethical choices, with India (36%), Greece (33%) and Brazil (35%) being the top countries likely to boycott a brand with no sustainability plans for the future (28).

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24% of consumers are likely to stop shopping from brands with no sustainability plans for the future

Figure 28:



Priceless Planet Coalition

With growing consumer passion for the environment, Mastercard continues to develop products and programs that help people contribute to the future of the planet.

In 2020, Mastercard launched the Priceless Planet Coalition and committed to restoring 100 million trees in five years, uniting the efforts of merchants, banks, cities and consumers to take action and fight climate change.

The Priceless Planet Coalition aims to reinforce a restoration model that's not only focused on planting trees, but on re-growing forests in geographies with the greatest need and most potential for a positive climate, community and biodiversity impact. Guided by the expertise of forest restoration partners, Conservation International and World Resources Institute, and our Advisory Committee, the Coalition has employed rigorous science-based best practices to identify three restoration locations for the coming year in Kenya, Brazil and Australia. Beyond these initial projects, the project portfolio will be expanded to include other locations that meet established criteria.

PricelessPlanet.org
#pricelessplanet

