

FSC® CONSUMER RECOGNITION STUDY

Global Report

June 2023



Research Introduction



FSC commissioned IPSOS, one of the largest market research companies in the world, to lead a global consumer research study to understand consumers attitudes towards forestry issues, how sustainability influences consumer purchase decisions, and awareness and perceptions of FSC.

In the research report, the following insights are included:



**Issues of
Concern**



**Consumer
Attitudes**



**FSC
Recognition**



Trust in FSC



BACKGROUND

One of the world's largest consumer surveys on the topic of forests, engaging 26,800 consumers across 33 markets



Methodology

- The survey was conducted online
- Fieldwork was conducted in October and November 2022.
- Samples were designed to be nationally representative as far as realistically possible using online panels.

Online research can only reach consumers who are online. For some countries this means that instead of following national representation we follow online representation resulting in a more urban, more educated, and/ or more affluent sample than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of these populations.



📍 Surveied markets

Argentina n=800	Australia n=800	Brazil n=800	Canada n=800	Chile n=800	China n=800	Colombia n=800	Czech Republic n=800	Denmark n=800	France n=800	Germany n=800
India n=800	Indonesia n=800	Italy n=800	Japan n=800	Kenya n=800	Lithuania n=800	Malaysia n=800	Mexico n=800	Norway n=800	Peru n=800	Poland n=800
Romania n=800	Slovakia n=800	South Africa n=800	South Korea n=800	Spain n=800	Sweden n=800	Thailand n=800	Turkey n=800	UAE n=800	UK n=800	USA* n=1,200

*West Coast, Rocky Mountains, Midwest, Northeast, Southwest, Southeast

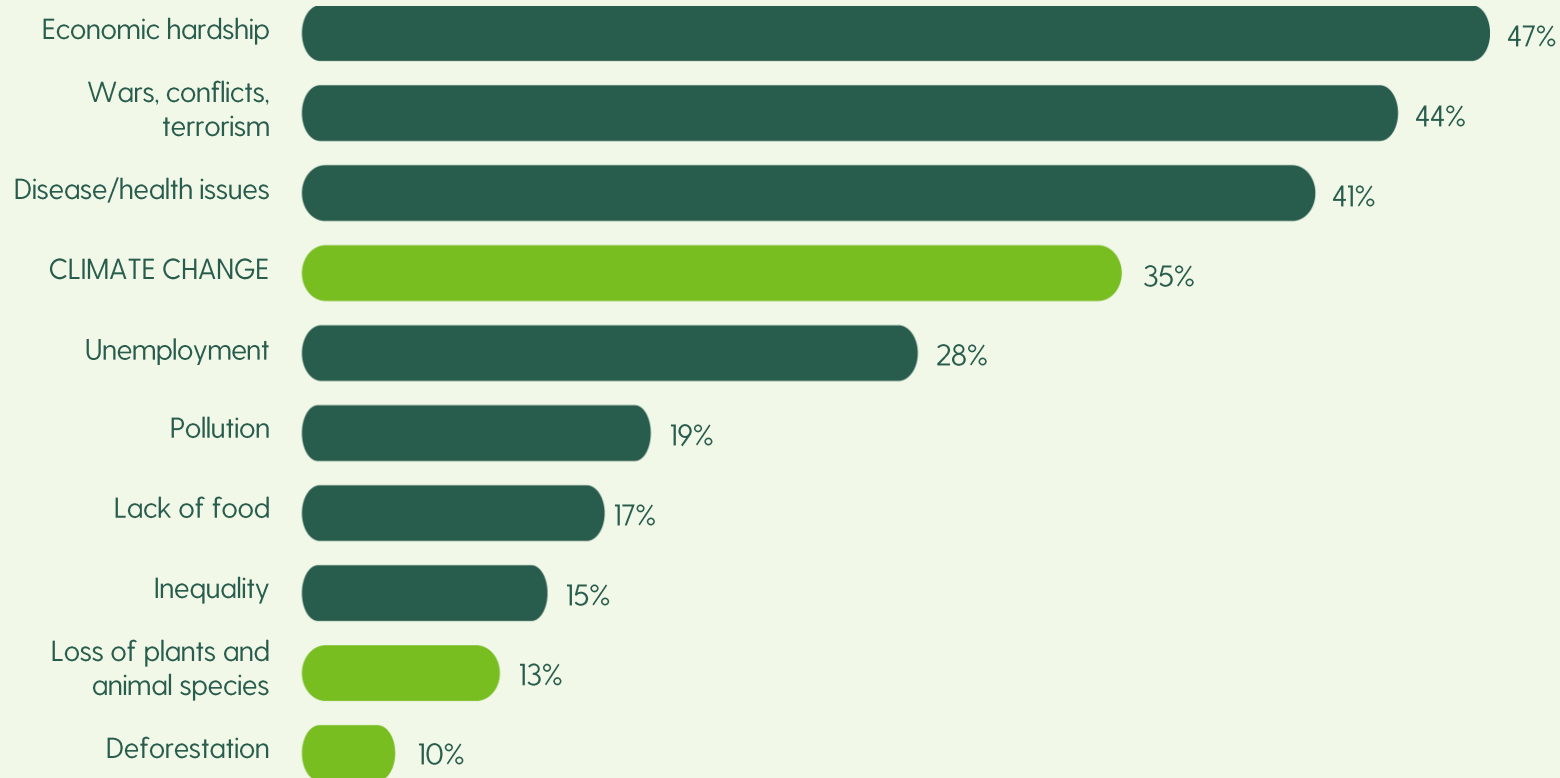


ISSUES OF CONCERN

Growing inflation and security concerns overshadow climate change and health as top consumer priorities

Economic and political instability can shift consumers' priorities, causing climate change to take a back seat.

Proportion of those who chose the respective topic as one of the top 3 most worrying issues



In previous research, climate change ranked second to health concerns in 2021, possibly viewed as more linked to the global pandemic. This year, while health concerns still rank highly, economic hardship and conflicts took top positions with climate change falling behind to 4th.

Q1. To start with, which of the following issues worry you the most? Please select up to three issues from the list. (10 issues)

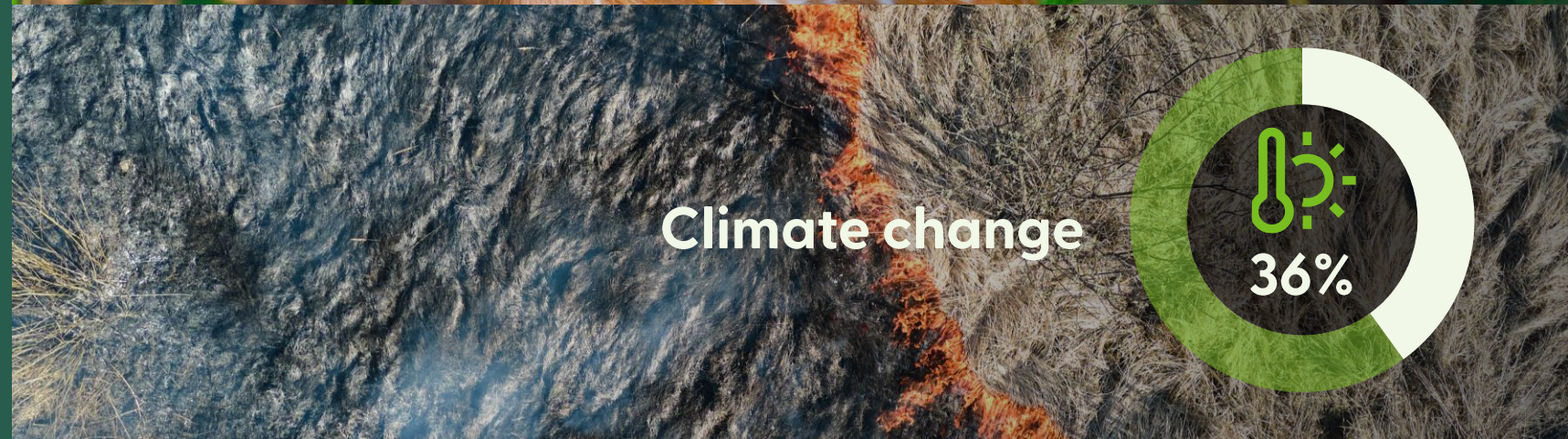
Base: Total global sample (n=26,800)

Note: Light green bars are the most relevant issues for FSC.

Top three forest issues driving concern



Biodiversity loss



Climate change



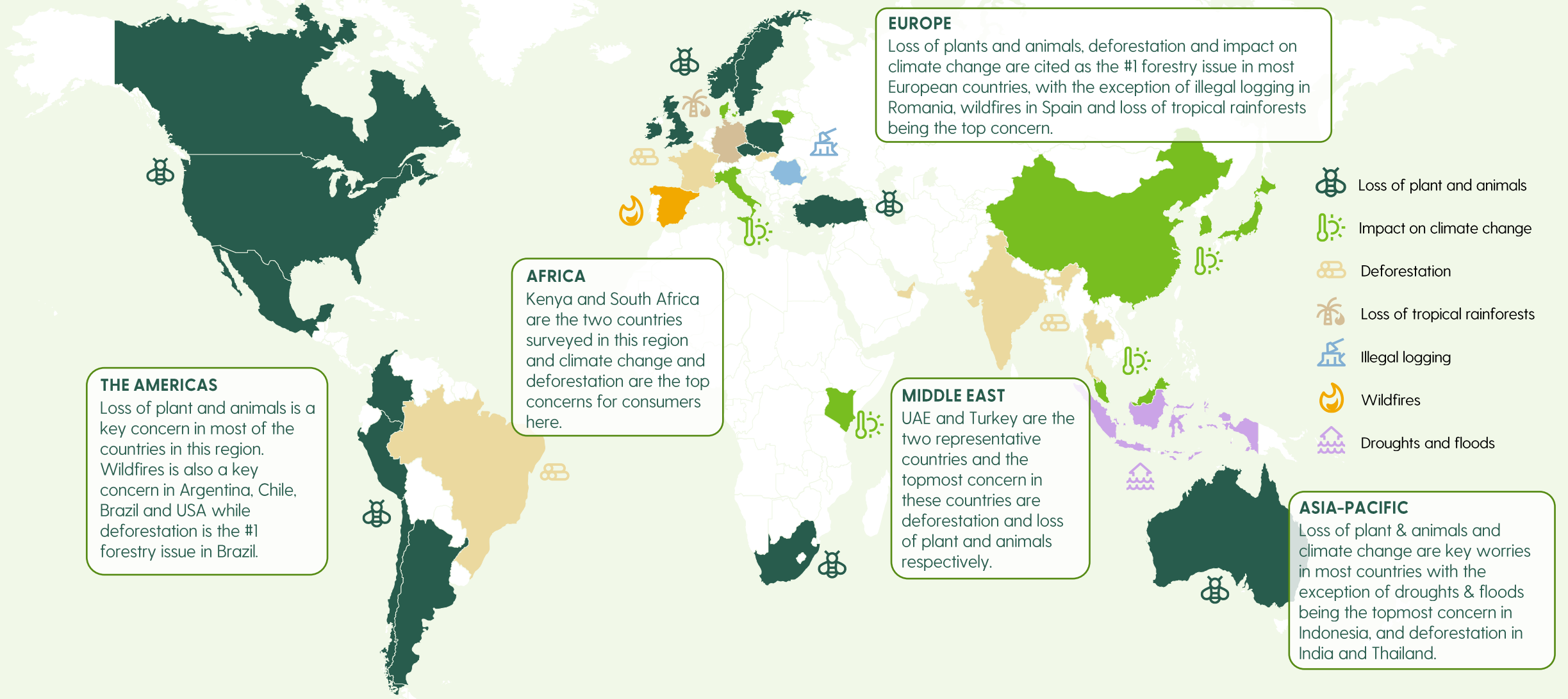
Deforestation



Q11. There are many different potential threats to the world's forests, the wildlife living there and the people who live and work there. Which of these potential issues worries you the most? Please select the three issues that concern you the most, in order of importance. (13 issues)

Base: Total global sample (n=26,800)

#1 forest concerns around the world



Q11. There are many different potential threats to the world's forests, the wildlife living there and the people who live and work there. Which of these potential issues worries you the most?

Please select the three issues that concern you the most, in order of importance. (13 issues)

Base: Total global sample (n=26,800)



CONSUMER ATTITUDES



Consumers are taking action to address forest issues through their product choices

CONSUMER EXPECTATIONS

66%

I expect companies to ensure that the wood/paper products and packaging they sell are not contributing to deforestation

64%

Information about sustainability on products should be certified by an independent organization

CONSUMER TAKING ACTION

71%

I prefer to choose products that do not damage plants and animals

63%

I try to buy products packaged with renewable materials such as paper instead of plastic

62%

I can help to protect the forests by purchasing products that have been certified by an independent organization



Q10. How well does each of the following statements describe your opinion?
Purchasing Intent: Percentage figures consist of the Top 3 on a 7-point scale:
1= Does not describe my opinion at all, 7= Describes my opinion very well)
Base: Total global sample (n=26,800)



FSC RECOGNITION



• La caoutchouc supérieure en polyuréthane absorbe l'humidité pour aider à offrir de l'adhérence pendant les semaines pluvieuses

• Le latex de caoutchouc naturel à l'approvisionnement durable et certifié par le FSC™ (Forest Stewardship Council)™, un organisme qui soutient la protection des écosystèmes forestiers et des gens, plantes et animaux qui y habitent

• Un additif antimicrobien aide à empêcher la formation de moisissure sur le tapis

• Dimensions : 80 cm x 180 cm, 5 mm

• Poids : 2,51 kg

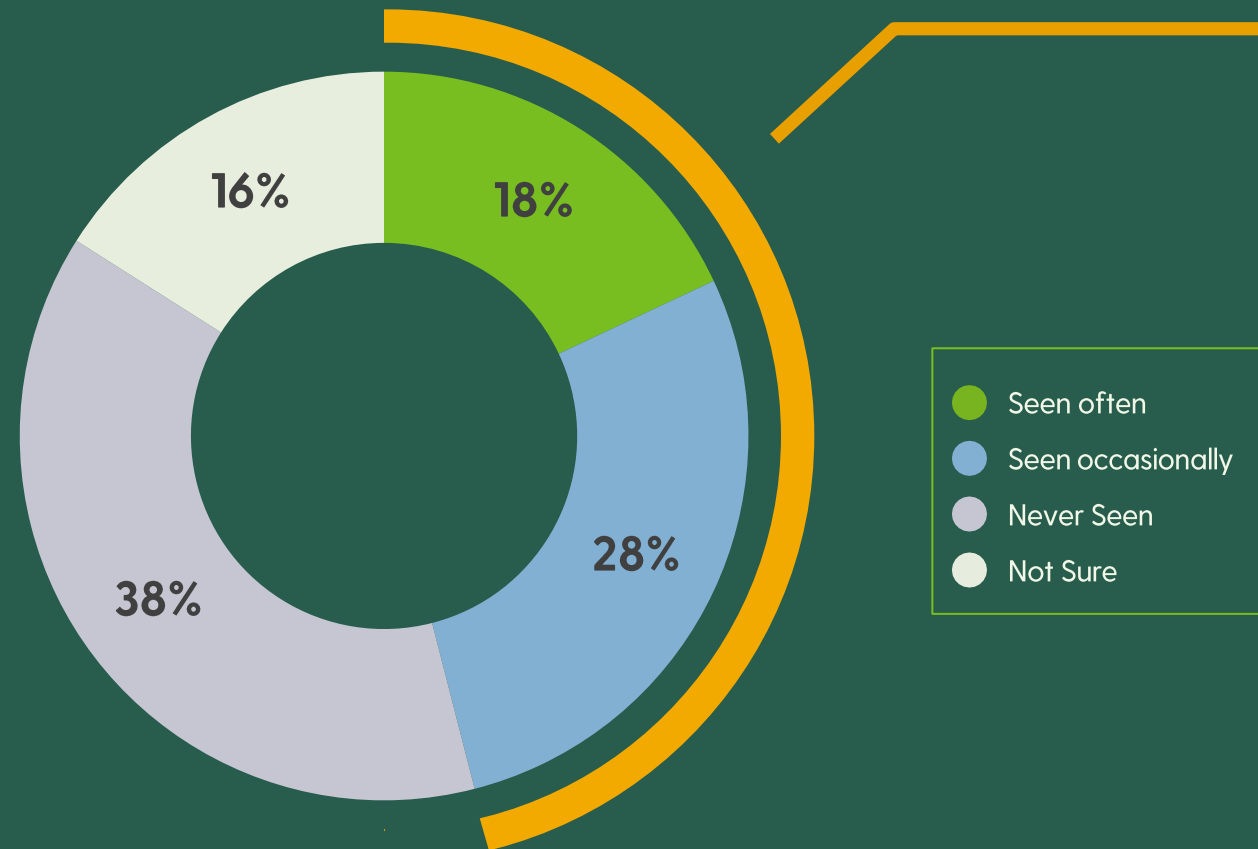
• La couleur peut changer au fil du temps. Après l'installation pratique, essuyez le tapis avec un chiffon humide et laissez sécher à l'air avant de le rouler et de le ranger à l'abri du soleil

• Ce tapis dégage une légère odeur qui s'estompera avec le temps (Conseil : dérouler le tapis et l'aérer avant le cours)

CONTENU DU LI-TEX
Il est conseillé aux personnes allergiques au caoutchouc ou au latex de ne pas entrer en contact avec ce produit car il contient du caoutchouc naturel et il peut contenir du latex

Produit et imprimé à Taiwan
Distribué en France
Fabriqué par Lullemon
Lullemon C-8, Canada V6J 1C7

FSC IS THE MOST RECOGNIZED FOREST CERTIFICATION SYSTEM*



46%

of global consumers recall seeing the FSC label.

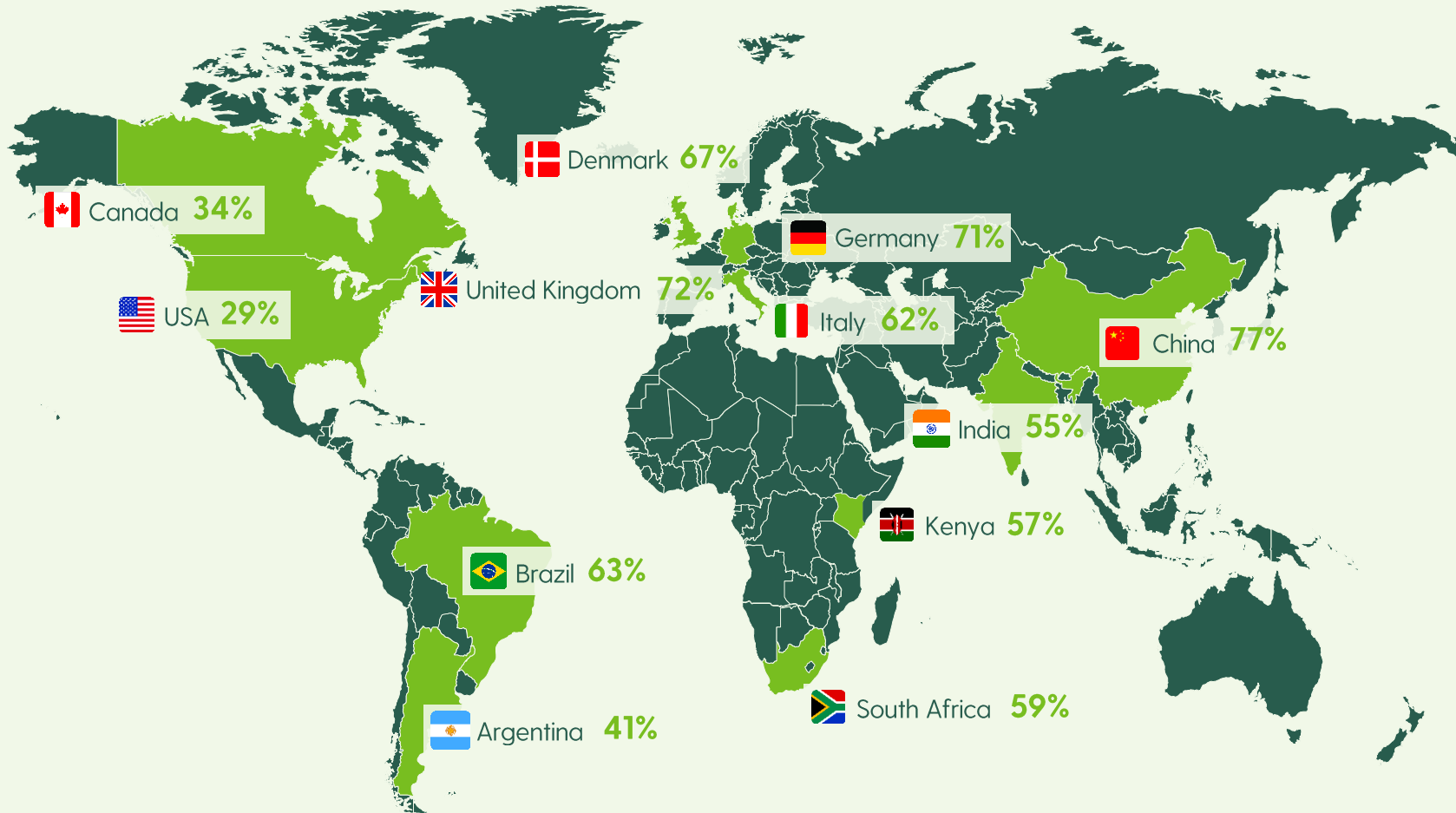
* **No other forest-certification tested came higher globally.**

The recognition of FSC is highest among young consumers aged 18-24 years, followed by 25-44-year-olds.

Across 33 countries globally, almost half of consumers recognize the FSC logo (46%)



FSC is especially well recognized in China, UK, Germany, Denmark, Brazil and Italy



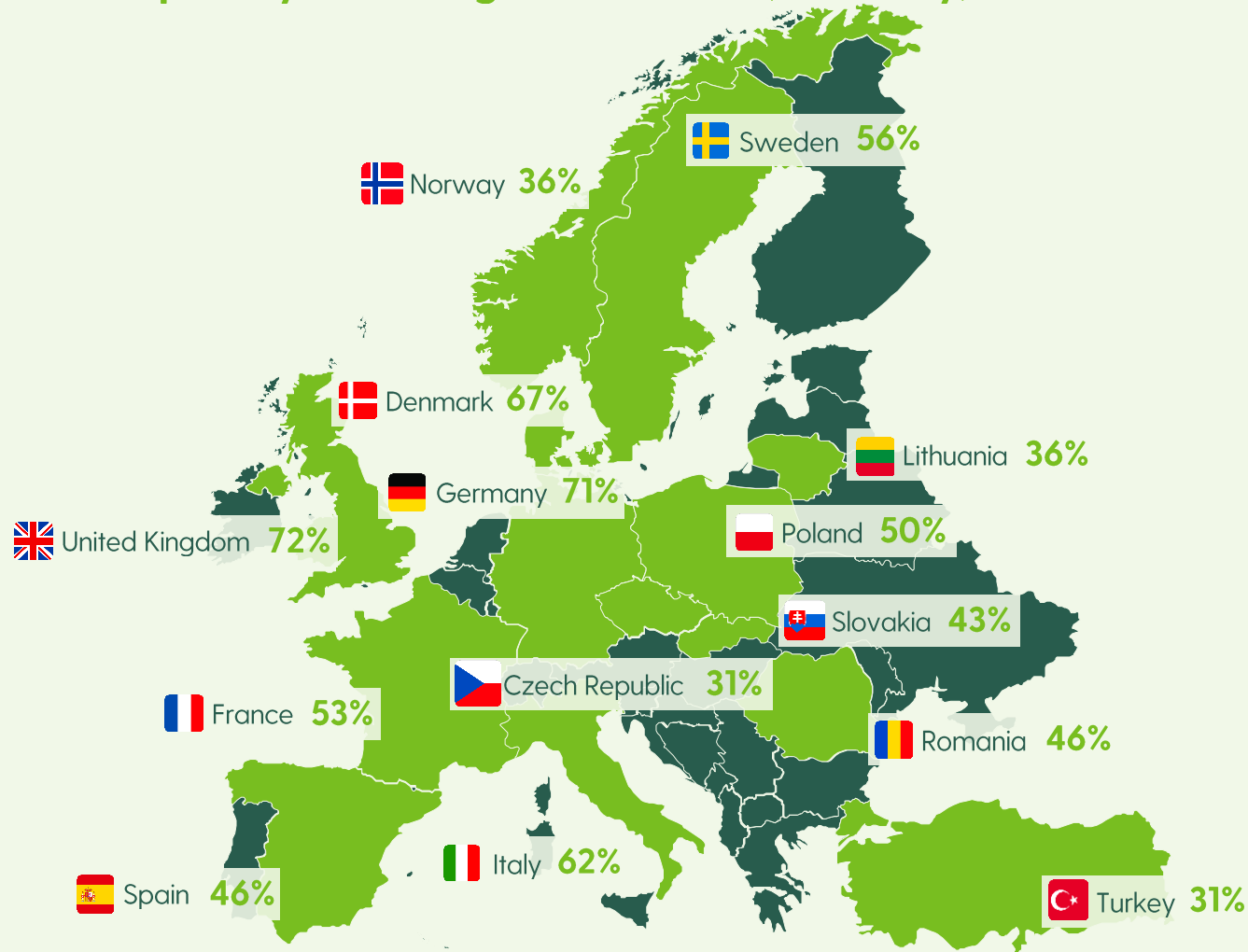
REGIONAL AVERAGES:

EUROPE	50%
ASIA-PACIFIC	43%
AFRICA	58%
LATIN AMERICA	42%
NORTH AMERICA	32%

Within Europe, 11,200 consumers were surveyed covering 14 countries



FSC is especially well recognized in the UK, Germany, Denmark and Italy

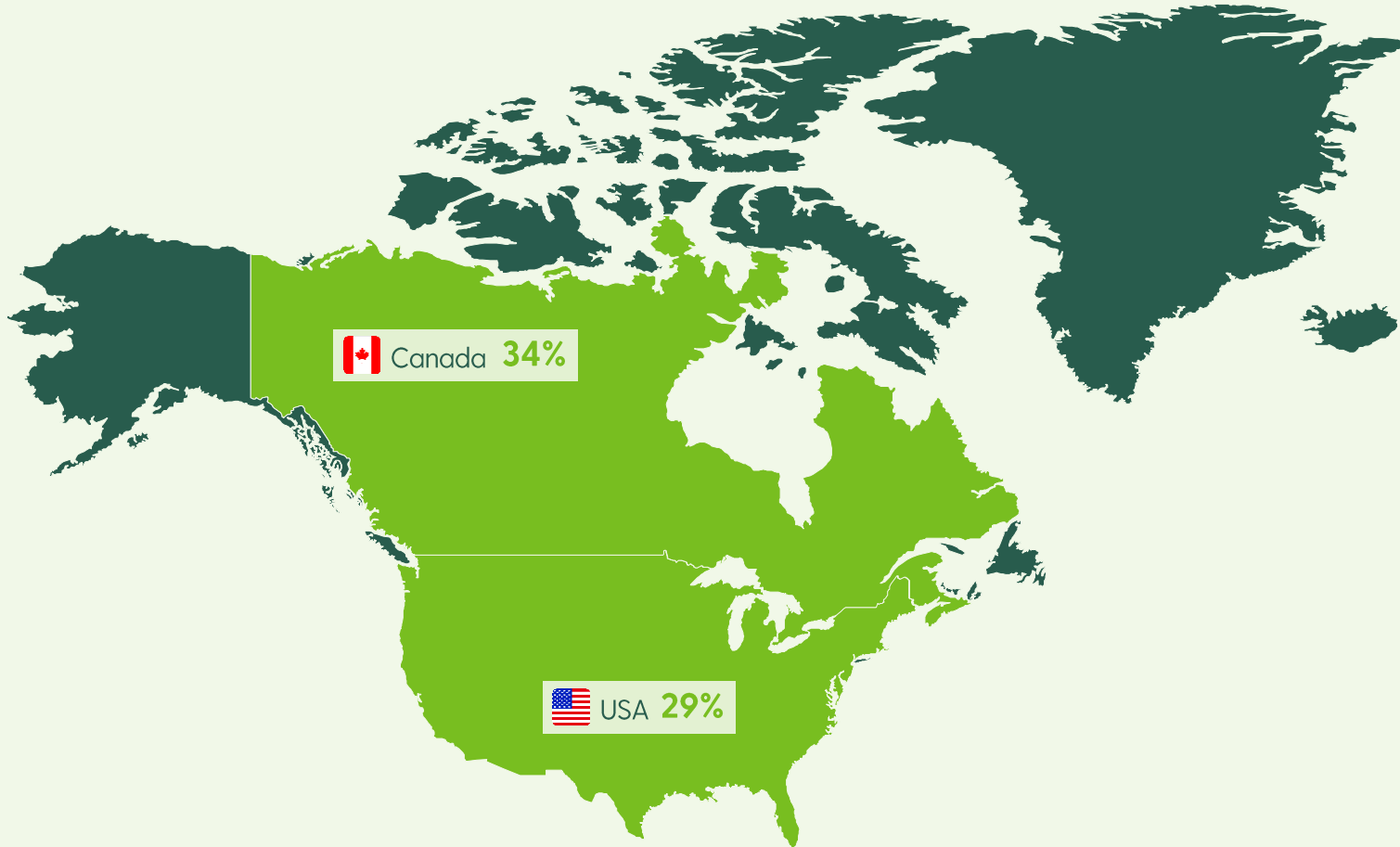


FSC AWARENESS

EUROPEAN AVERAGE **50%**

UNITED KINGDOM	72%	SPAIN	46%
GERMANY	71%	ROMANIA	46%
DENMARK	67%	SLOVAKIA	43%
ITALY	62%	NORWAY	36%
SWEDEN	56%	LITHUANIA	36%
FRANCE	53%	TURKEY	31%
POLAND	50%	CZECH REPUBLIC	31%

In North America, 2,000 consumers were surveyed covering the US and Canada



FSC AWARENESS

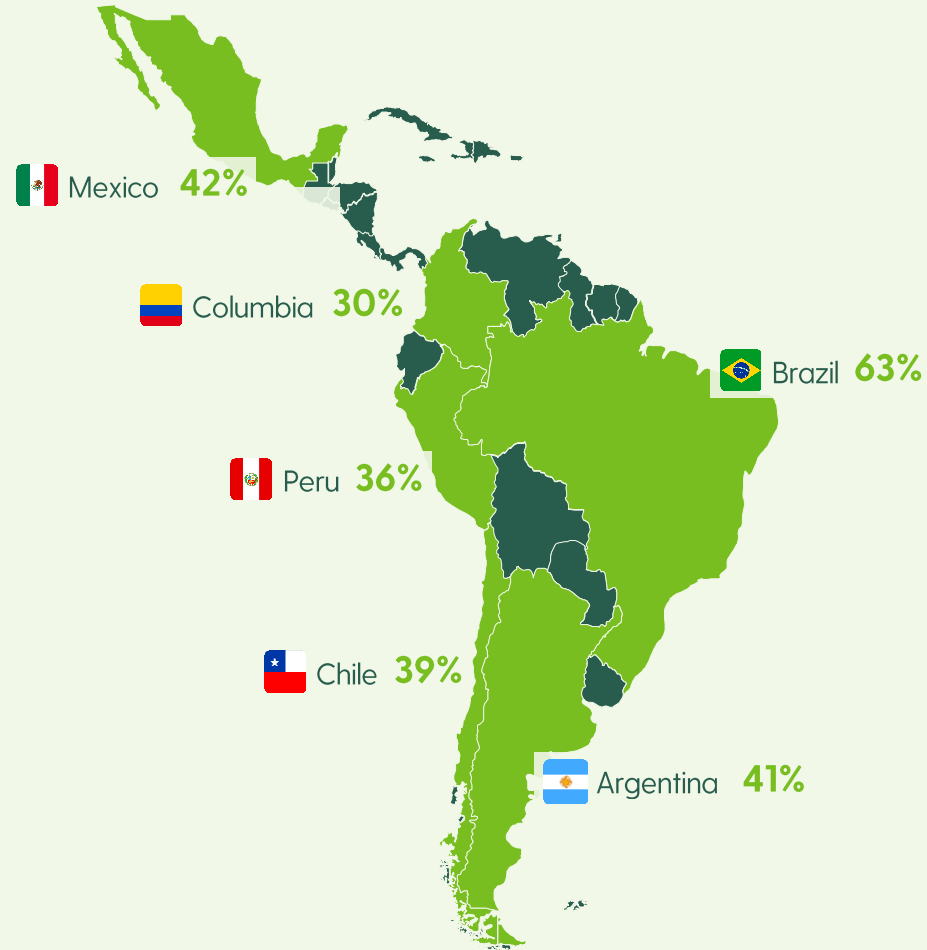
AVERAGE	32%
USA*	29%
CANADA	34%

*1,200 consumers were surveyed in the USA with a distribution of n=200 in each of the following regions: West Coast, Rocky Mountains, Midwest, Northeast, Southwest, Southeast

In Latin America, 4,800 consumers were surveyed covering 6 countries



FSC is especially well recognized in Brazil but has also good levels in Mexico and Argentina

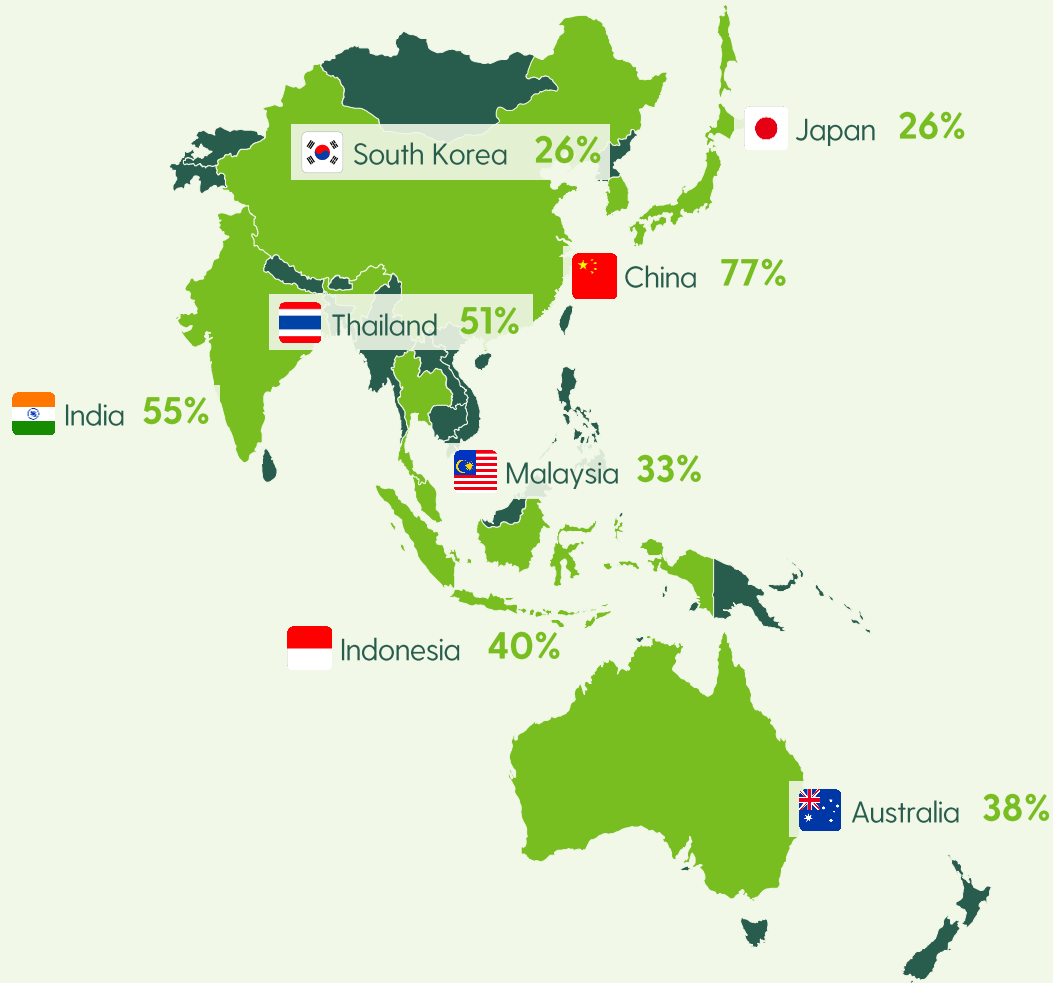


FSC AWARENESS

AVERAGE	42%
BRAZIL	63%
MEXICO	42%
ARGENTINA	41%
CHILE	39%
PERU	36%
COLUMBIA	30%

In Asia Pacific, 6,400 consumers were surveyed covering 8 countries

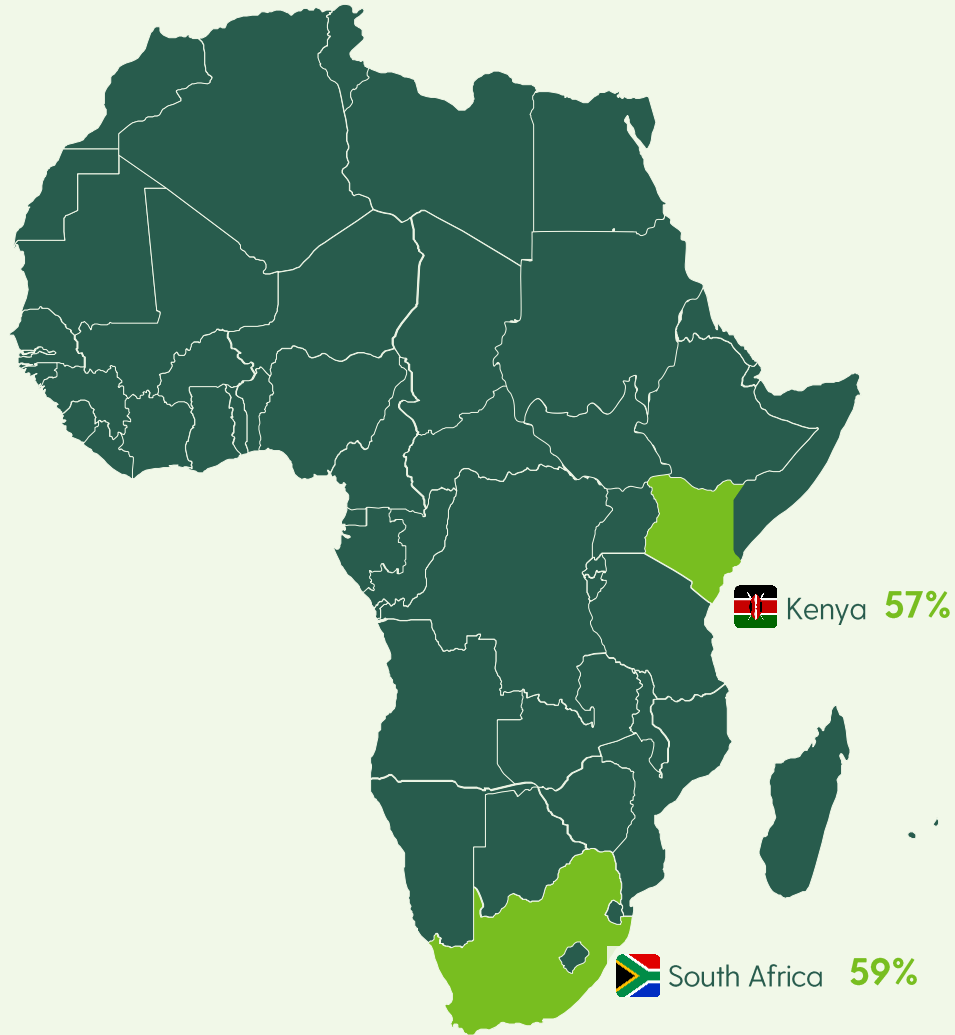
FSC is especially well recognized in the China and has also good levels in India and Thailand



FSC AWARENESS

AVERAGE	43%
CHINA	77%
INDIA	55%
THAILAND	51%
INDONESIA	40%
AUSTRALIA	38%
MALAYSIA	33%
SOUTH KOREA	26%
JAPAN	26%

In the African continent, 1,600 consumers were surveyed in Kenya and South Africa



FSC AWARENESS

AVERAGE	58%
KENYA	57%
SOUTH AFRICA	59%



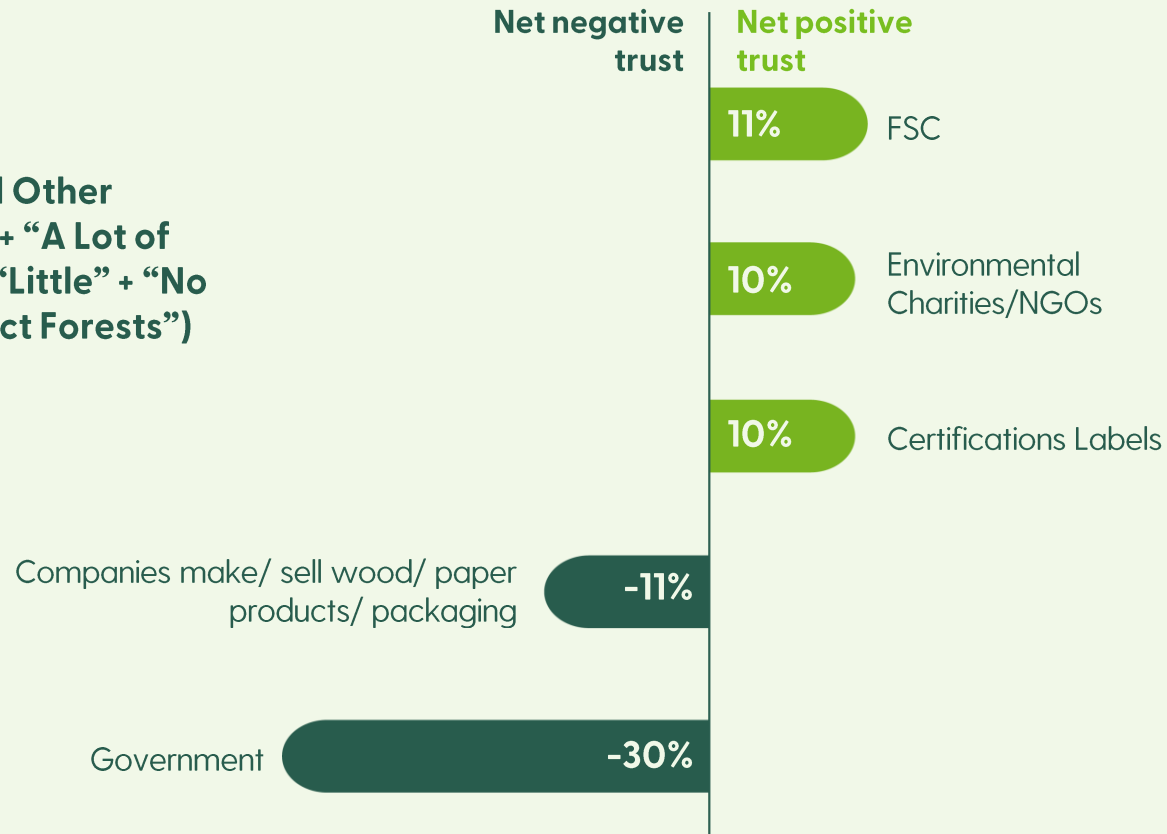
TRUST IN FSC

FSC is the most trusted to protect forests

When compared to other organizations, consumers have the highest confidence in FSC, which is significantly higher than their trust in businesses or governments.



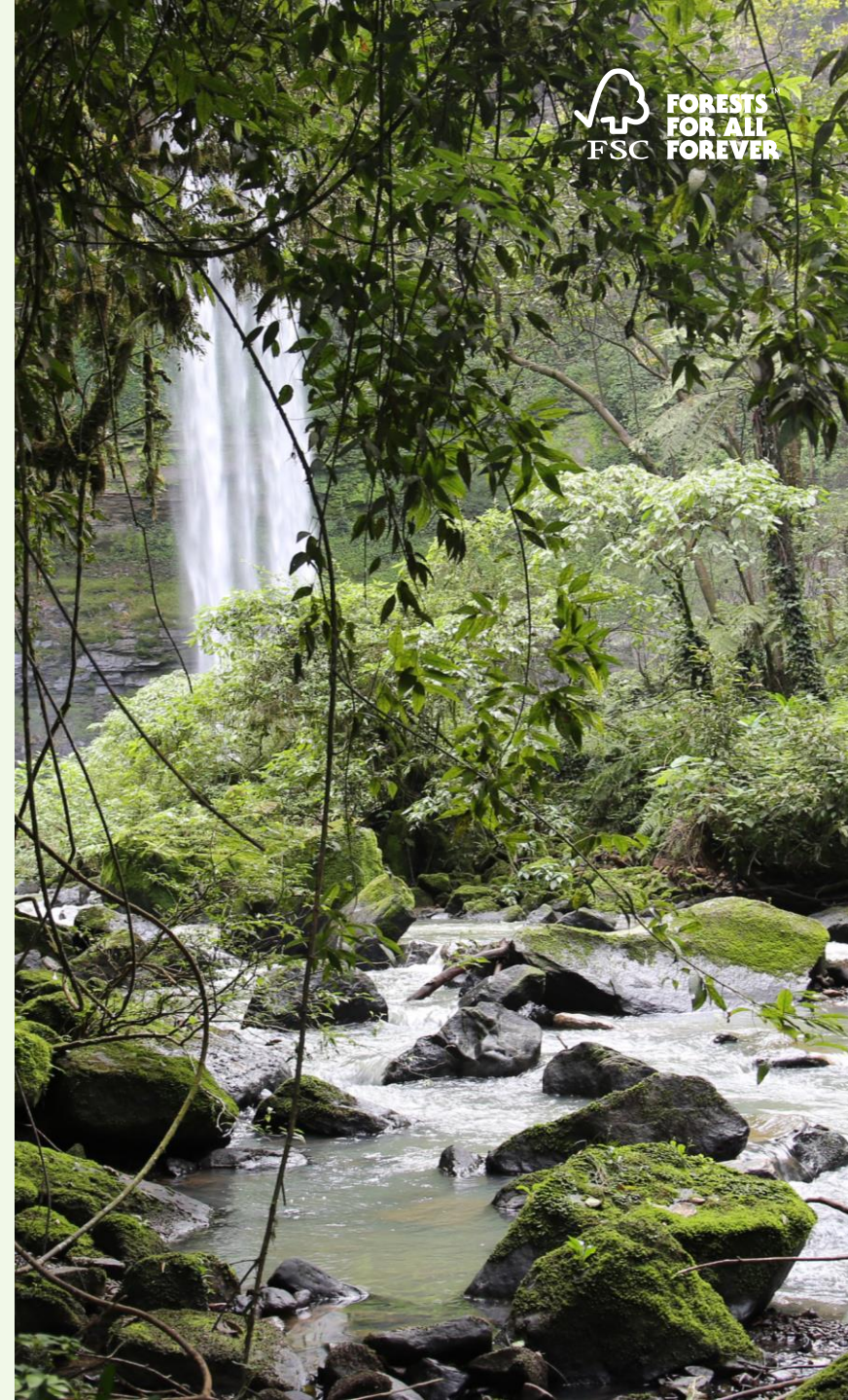
NET Trust in FSC and Other Actors (“Complete” + “A Lot of Confidence” Minus “Little” + “No Confidence to Protect Forests”)



Q8. How much confidence do you have in each of the following types of organizations to protect forests? (5-point scale)

Base: Total global sample (n=26,800)

Trust calculation: (4+5) minus (1+2); positive = greater than zero, negative = less than zero:



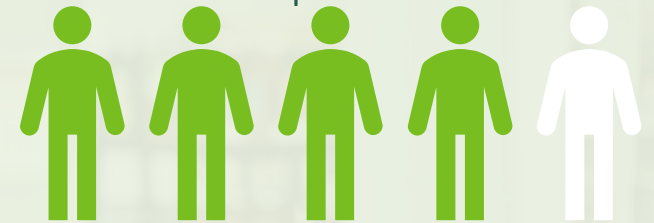
High levels of advocacy and purchase impact among those who know FSC



80%

of the consumers
who recognize
FSC trust a
brand carrying
the FSC logo.

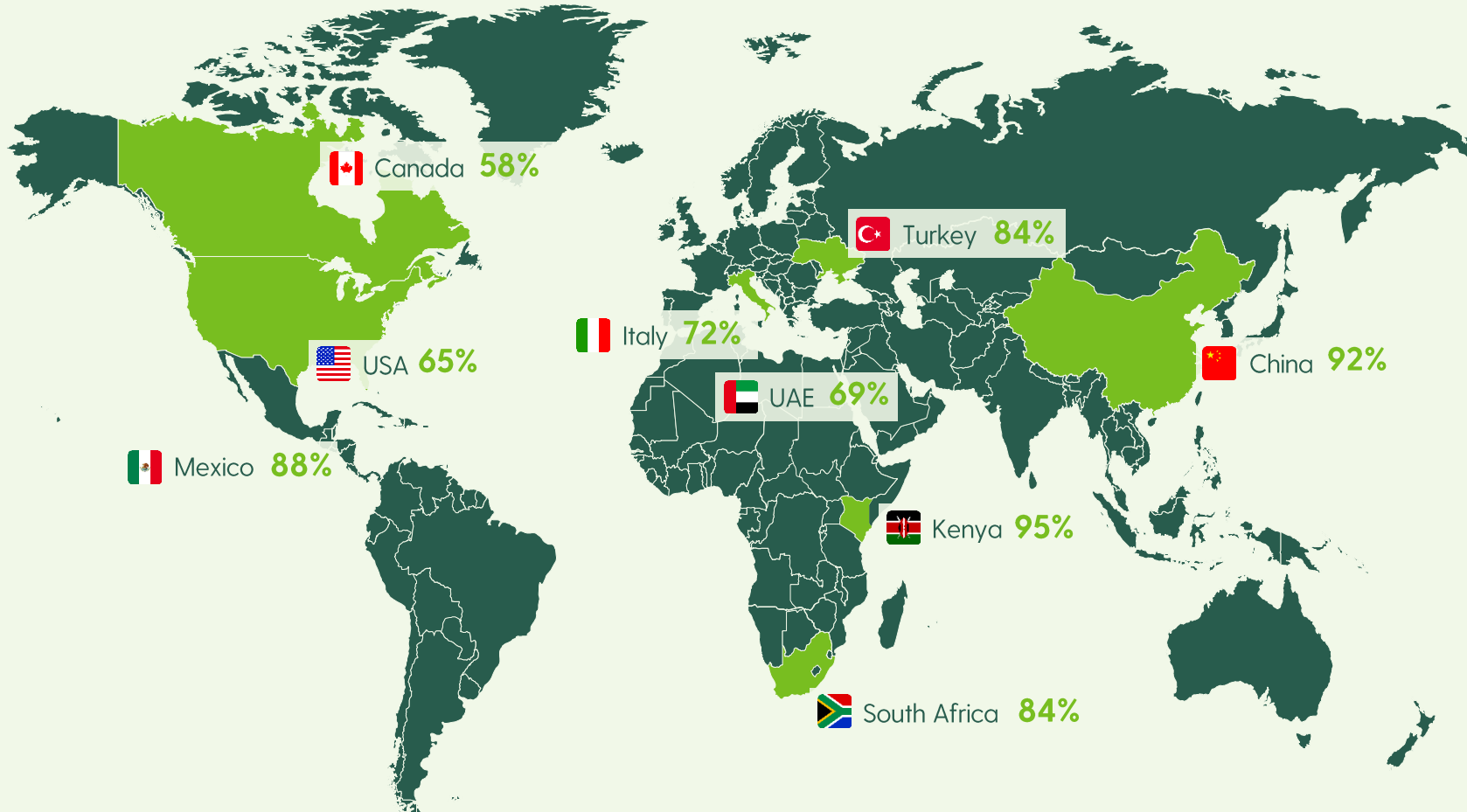
4 in 5 consumers who recognize
FSC are more likely to trust a
brand if FSC is present.



In the eyes of consumers, brands who associate with FSC have a clear advantage



8 in 10 consumers globally who recognize FSC say they are more likely to trust a brand if it offers FSC-certified products



REGIONAL AVERAGES:

EUROPE	63%
ASIA-PACIFIC	73%
AFRICA	90%
LATIN AMERICA	83%
NORTH AMERICA	61%

Influence of FSC on Brand Trust, (“Very positive influence” + “Positive influence”)

23 **Q9.** If you learned that a brand promotes FSC or offers FSC-certified products, what influence would it have on your trust in that brand? (5-point scale)
Base: Total global sample (n=26,800; Recognizer of FSC (seen often & seen occasionally, according to Q3) n=12,274

Consumers Demand Sustainability

Consumers globally worry about forest and wildlife loss and its contribution to climate change

- Climate change is one of the three most worrying topics in the world for more than a third of global consumers (35%), only surpassed by economic hardship, wars, conflicts and terrorism, and disease/ health issues.
- When it comes to forest issues, consumers are most worried about the loss of plant and animal species (36%), the impact on climate change from loss of forests (36%) and deforestation (34%)

Consumers show a considerable willingness to address forest issues through their product choices

- 71% of consumers claim they prefer to choose products that do not damage plants and animals
- 63% say they try to buy products packaged with renewable materials
- 59% claim they prefer to choose products that do not contribute to climate change

Independent sustainability certifications are regarded as important tools for change

- 64% expect information about sustainability to be certified by an independent organization
- 62% believe that they can help protect forests by purchasing products that have been certified by an independent organization

In this context, FSC is the clear leader as the most recognized forest certification worldwide

- Across 33 countries globally, almost half of consumers recognize the FSC logo (46%). FSC is especially well recognized in China, UK, Germany, Denmark, Brazil and Italy
- Over three quarters of consumers (77%) show moderate to high levels of confidence in FSC to protect forests. Compared to other types of organizations, consumers have the highest confidence in FSC, which is considerably higher than businesses* or governments

In the eyes of consumers, brands who associate with FSC have a clear advantage

- 62% of consumers who recognize FSC claim that they would choose FSC-certified products over non-certified equivalents. Additionally, nearly half (49%) claim they would pay more for FSC-certified products
- 80% of consumers who recognize FSC say they are more likely to trust a brand if it offered FSC-certified products



One of the world's largest consumer surveys about forests, **engaging 26,800 consumers across 33 markets**, has been conducted by **globally-renowned research agency IPSOS** on behalf of FSC.



IPSOS is your strong, globally positioned, competent partner, who has:

- expertise in coordinating such projects and knows where the methodological pitfalls lie
- access to high quality panels
- great experience in dealing with and evaluating country-specific results, and
- is highly competent in interpreting the data due to our global market research experience.

IPSOS is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people. “Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

www.ipsos.com



Healthy forests help life on Earth thrive. The Forest Stewardship Council® (FSC®) – a nonprofit organization that covers more than 150 million hectares of certified forests – provides the world’s most credible sustainable forestry solution, trusted by NGOs, consumers, and businesses to help protect healthy and resilient forests, for all, forever.

Equally governed by environmental, social, and economic perspectives, FSC helps forest managers, smallholders, and governments ensure thriving forest ecosystems and safeguard the livelihoods of forest communities. FSC’s forestry standards, linked to a strict chain of custody certification, are a proven solution to fight the climate and biodiversity crises. The FSC logo – found on millions of products worldwide – is the most recognized mark for responsible forestry.

Join our mission to protect the world's forests.

www.fsc.org

THANK YOU

