

GLOBESCAN

evidence and ideas applied

The Case for FSC

International Insights from GlobeScan

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GlobeScan

Some of our recent certification and broader sustainability clients:

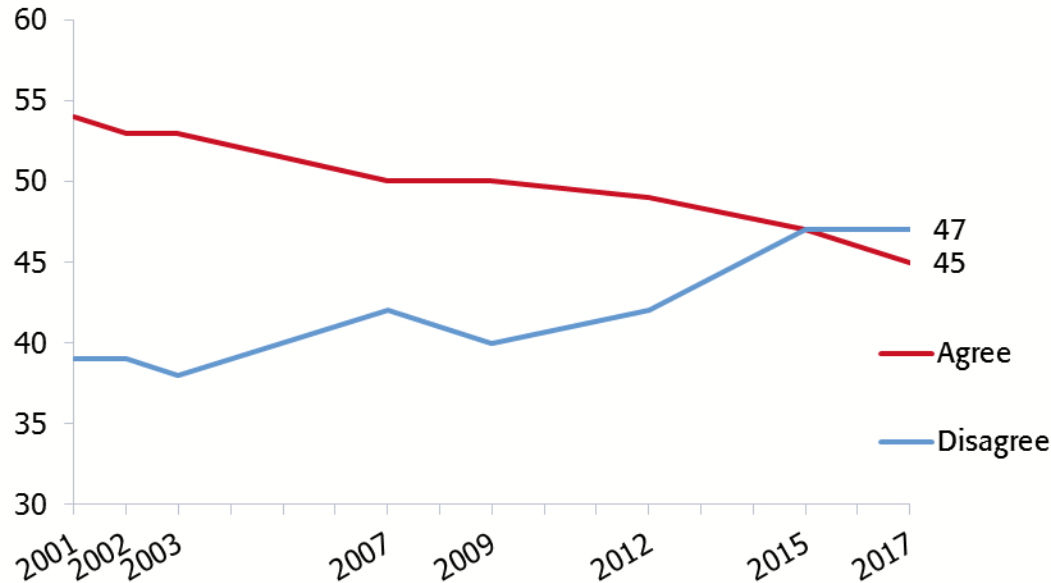


The Opportunity

A declining sense of hope means we need a vision



Our Children and Grandchildren Will Have a Higher Quality of Life than We Do Today
Agree vs Disagree,* Average of 15 Countries,** 2001-2017



*"Strongly agree" and "Somewhat agree" vs. "Strongly disagree" and "Somewhat disagree"

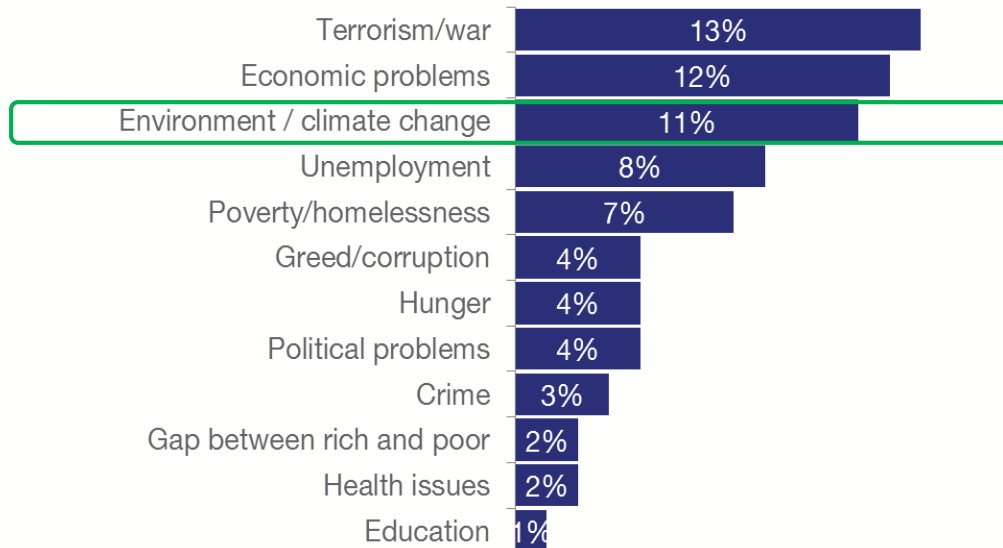
**Includes Australia, Canada, Chile, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.

Q. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree - Our children and grandchildren will have a higher quality of life than we do today.



Consumers see environmental issues as some of the most important challenges facing the world

Most Important Problem Facing World, Unprompted, 2016

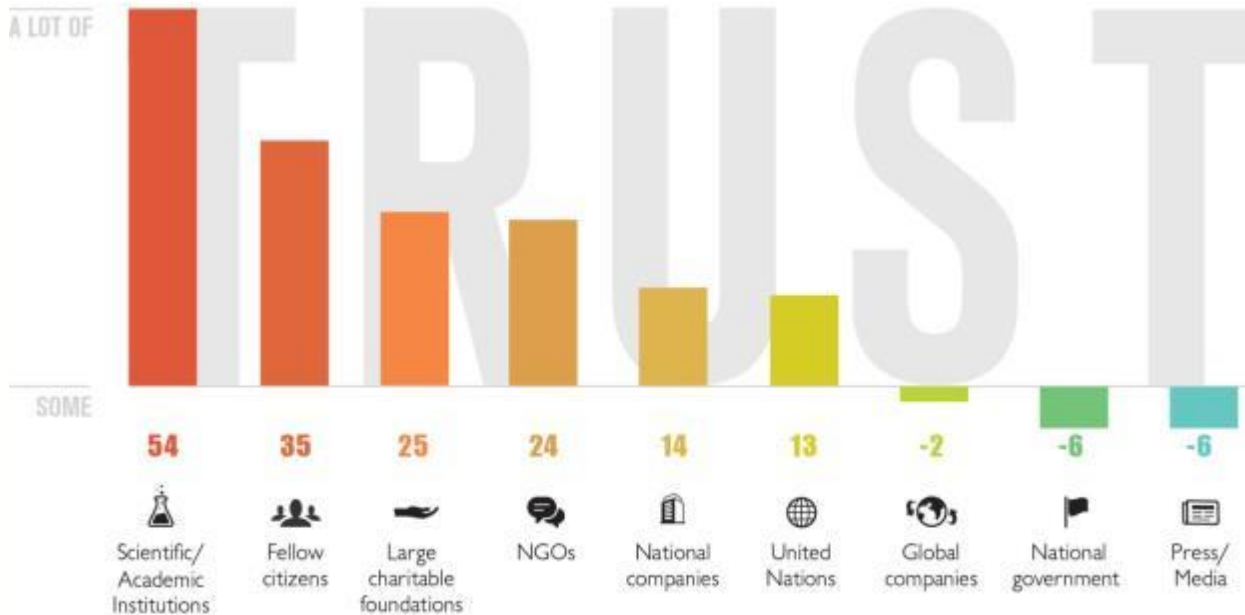


Includes Canada, Chile, China, Germany, Ghana, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Korea, Spain, Turkey, UK, and USA

Q. What do you think is the most important problem facing the world today?

A deficit of trust

Net Trust* in Institutions
Average of 20 Countries,** 2017



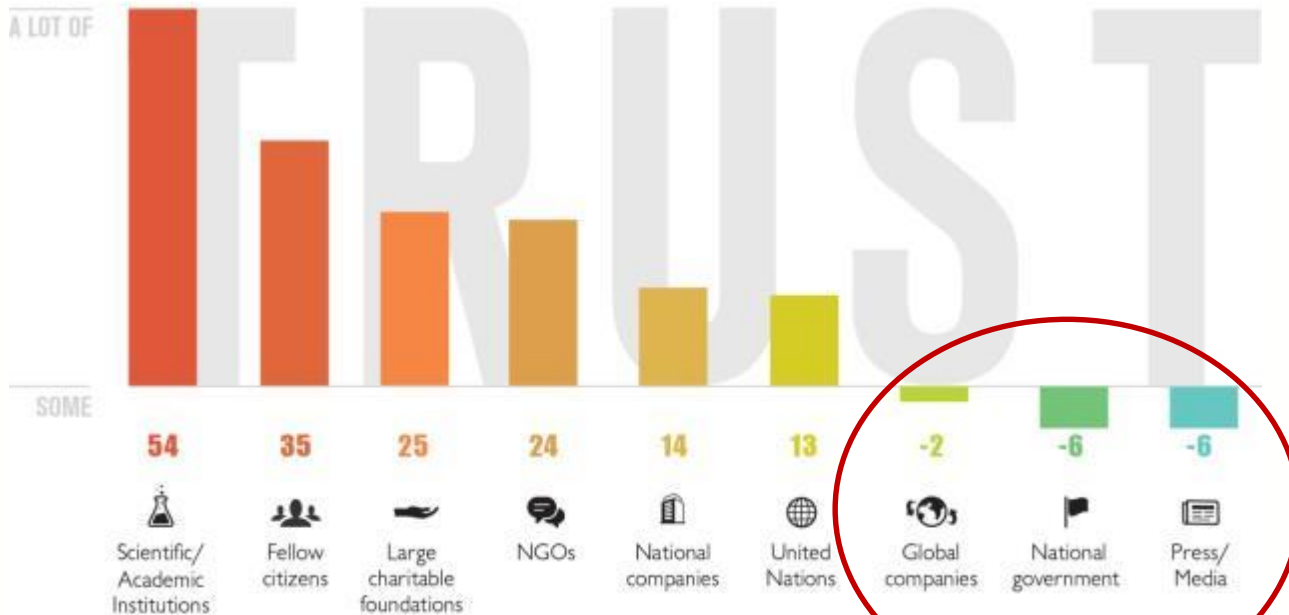
*"A lot of trust" and "Some trust" minus "Not much trust" a "No trust at all"

**Includes Australia, Brazil, Canada, Chile, France, Germany, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Africa, Spain, Turkey, UK, and USA

Q. Please tell me how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

A deficit of trust

Net Trust* in Institutions
Average of 20 Countries,** 2017



*"A lot of trust" and "Some trust" minus "Not much trust" a "No trust at all"

**Includes Australia, Brazil, Canada, Chile, France, Germany, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Africa, Spain, Turkey, UK, and USA

Q. Please tell me how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

Wide gap between supply and demand for purposeful companies

45%

of people globally

able

to name company
with a strong purpose



65%

want to

support

companies with a
strong purpose



-20%

Percentage point gap

between the desire to
support purposeful
companies and the
ability to do so

Q. Some companies and brands are thinking about their overall purpose. That is, how they can make a positive difference in society through their products, services and operations in a way that enables them to be financially successful. Can you think of a company or brand that comes to mind as having a strong purpose in this way?

**Lack of optimism +
Demand for purposeful business
= Consumers crave a positive
vision of a sustainable future**

The Market for FSC

Methodology & Country Coverage



- Online survey, using reputable national consumer research panels to recruit respondents in 13 countries.
- Total sample size $n=10,435$; samples designed to be as nationally representative as possible



What motivates people when they purchase wood and paper products?

Sustainable forest management is part of the value equation

Drivers of forest-product purchase, relative importance scores based on MaxDiff analysis, global averages, 2017



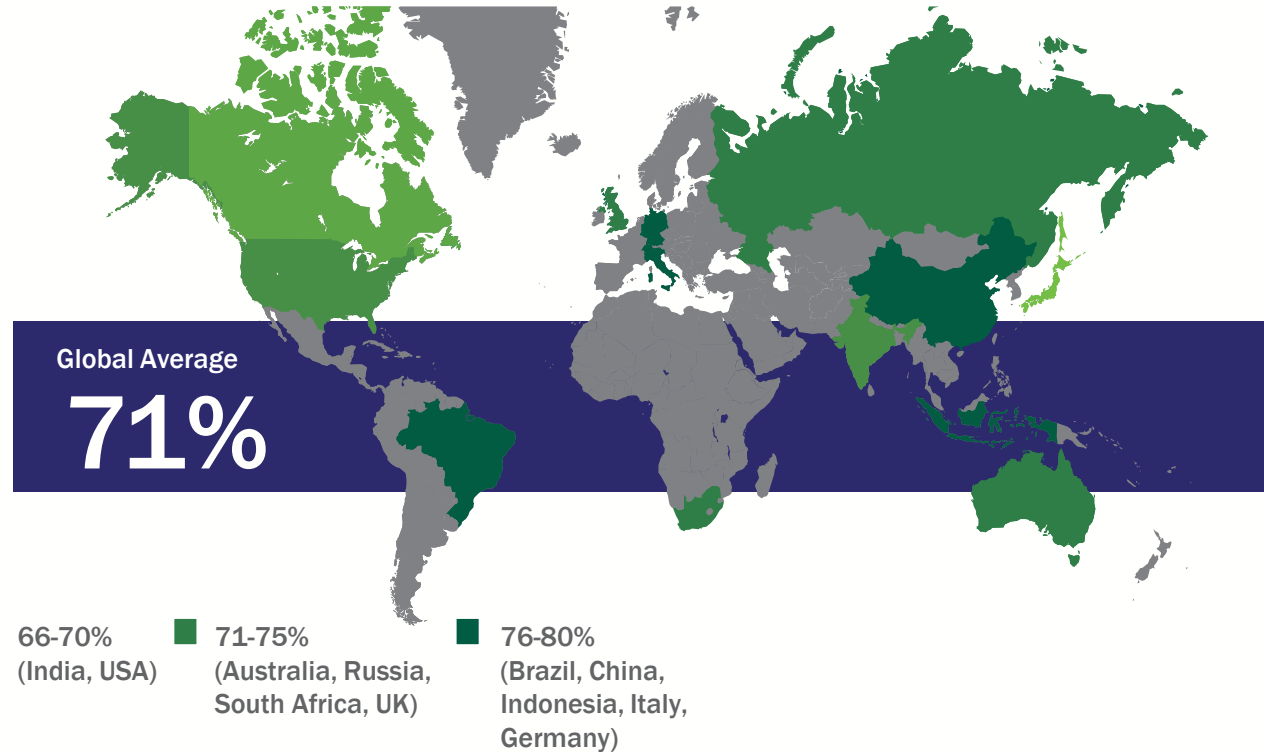
Q6. Thinking about these wood, paper and forest-based products that you purchase, which of the following considerations are the most important and which are the least important to your decision to purchase? MaxDiff exercise

Consumers value independent certification



Seven in ten consumers feel that **sustainability claims should be independently certified.**

Certifications are **key to overcoming gaps in trust and transparency.**



Percentage of Consumers



50%

(Japan)



61-65%

(Canada)



66-70%

(India, USA)



71-75%

(Australia, Russia, South Africa, UK)



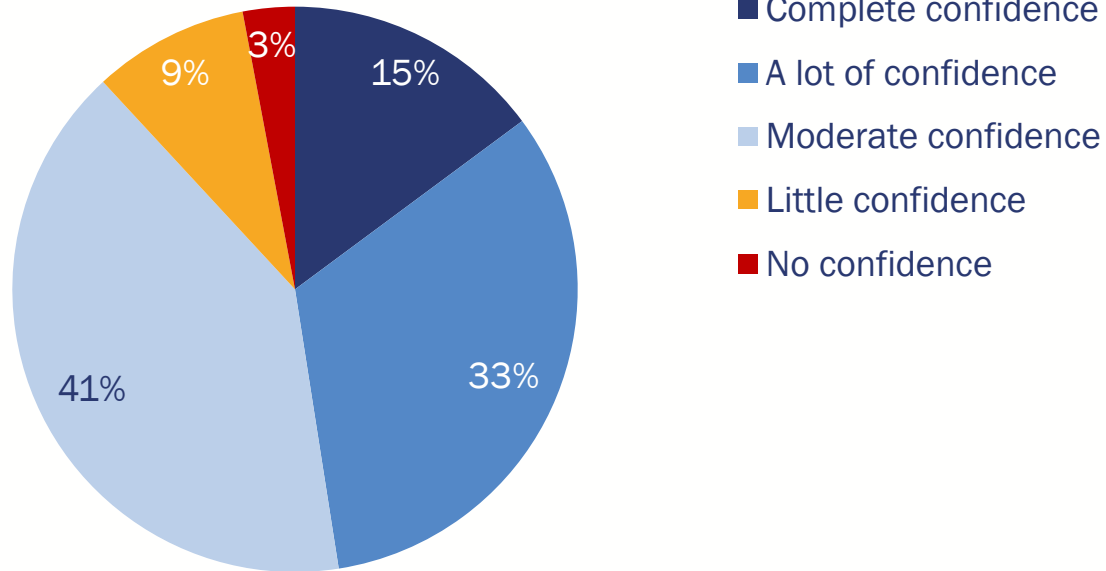
76-80%

(Brazil, China, Indonesia, Italy, Germany)

Trust tends toward FSC's favour



Confidence in FSC to protect forests, global averages, 2017



Q11. How much confidence do you have in each of the following types of organisations to make improvements towards protecting forests?

Takeaways

- **Positive vision is needed**
- **Trust requires partnership**
- **Responsible forestry is in demand**



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Offering a suite of specialist research and advisory services, GlobeScan partners with clients to meet strategic objectives across reputation, sustainability and purpose.

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