

# FSC CONSUMER INSIGHTS 2021 GLOBAL REPORT

NOVEMBER 2021



# RESEARCH INTRODUCTION

FSC commissioned GlobeScan, a top global insights and advisory consultancy, 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:



**BACKGROUND**



**ISSUES OF CONCERN**



**ATTITUDES AND BEHAVIOURS**



**DRIVERS OF PURCHASE**



**FSC RECOGNITION**



**TRUST IN FSC**

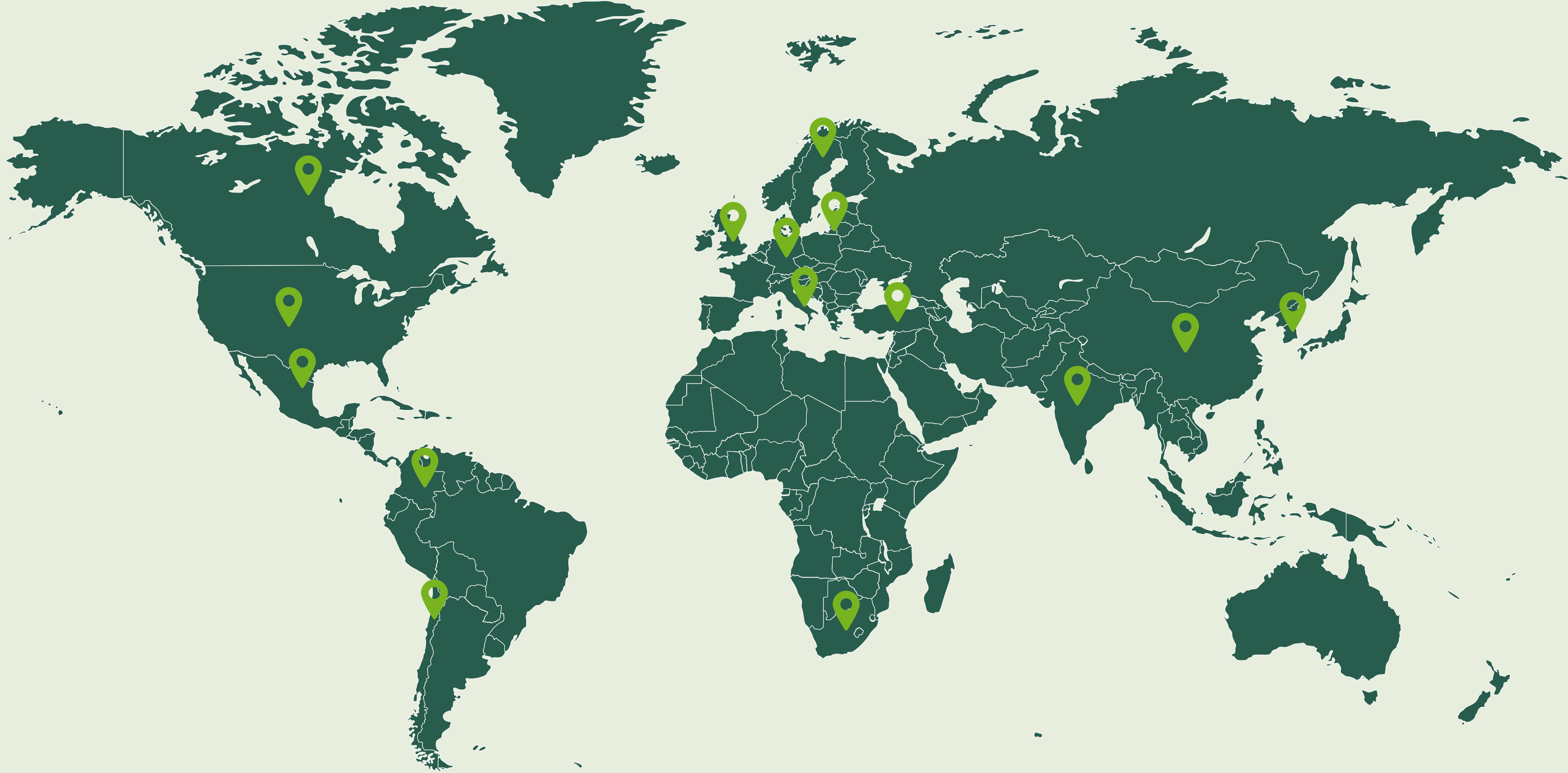


**BACKGROUND**

# METHODOLOGY

- Online consumer research panels
- Fieldwork - July 2021.
- The total global sample size = 12,000 (800 x 15 countries)
- Samples = nationally representative as far as possible
- Samples in China, India, Colombia, Chile, Mexico, South Africa, and Turkey are skewed towards more educated and urban consumers

*Notes on reporting:* All figures in this report are given in percentages, unless otherwise stated. In charts, due to rounding of decimal places displayed, figures may not always add up to exactly 100%.



<b>Canada</b>	<b>Chile</b>	<b>Colombia</b>	<b>China</b>	<b>Germany</b>	<b>India</b>	<b>Italy</b>	<b>Mexico</b>
n=800	n=800	n=800	n=800	n=800	n=800	n=800	n=800
<b>Poland</b>	<b>South Africa</b>	<b>South Korea</b>	<b>Sweden</b>	<b>Turkey</b>	<b>UK</b>	<b>USA</b>	<b>Global Sample</b>
n=800	n=800	n=800	n=800	n=800	n=800	n=800	n=12,000

# MARKET SELECTION

- An equivalent study with the same methodology was carried out by GlobeScan for FSC in 2017
- The sample of markets in the 2017 study was not entirely the same; therefore, trend data are only available for 8 'tracking' markets
- The relevant analyses are highlighted in this report with the icons shown opposite



## 15 COUNTRY GLOBAL AVERAGE 2021

- |          |              |
|----------|--------------|
| Canada   | Poland       |
| Chile    | South Africa |
| Colombia | South Korea  |
| China    | Sweden       |
| Germany  | Turkey       |
| India    | UK           |
| Italy    | USA          |
| Mexico   |              |



## 8 TRACKING MARKETS ONLY 2017 VS 2021

- |              |
|--------------|
| Canada       |
| China        |
| Germany      |
| India        |
| Italy        |
| South Africa |
| UK           |
| USA          |

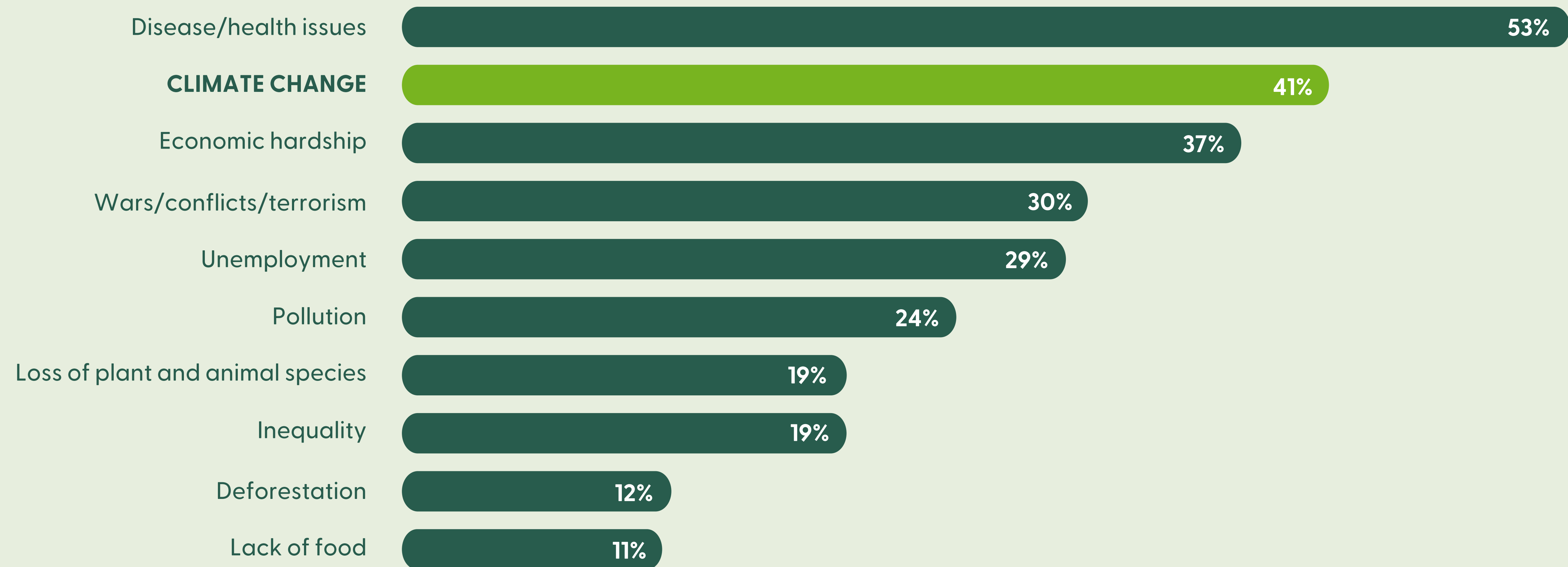


# ISSUES OF CONCERN



# CLIMATE CHANGE IS AMONG THE MOST WORRYING ISSUES, AFTER DISEASE/HEALTH

Most Concerning Global Issues, Select in Top Three, Global, 2021

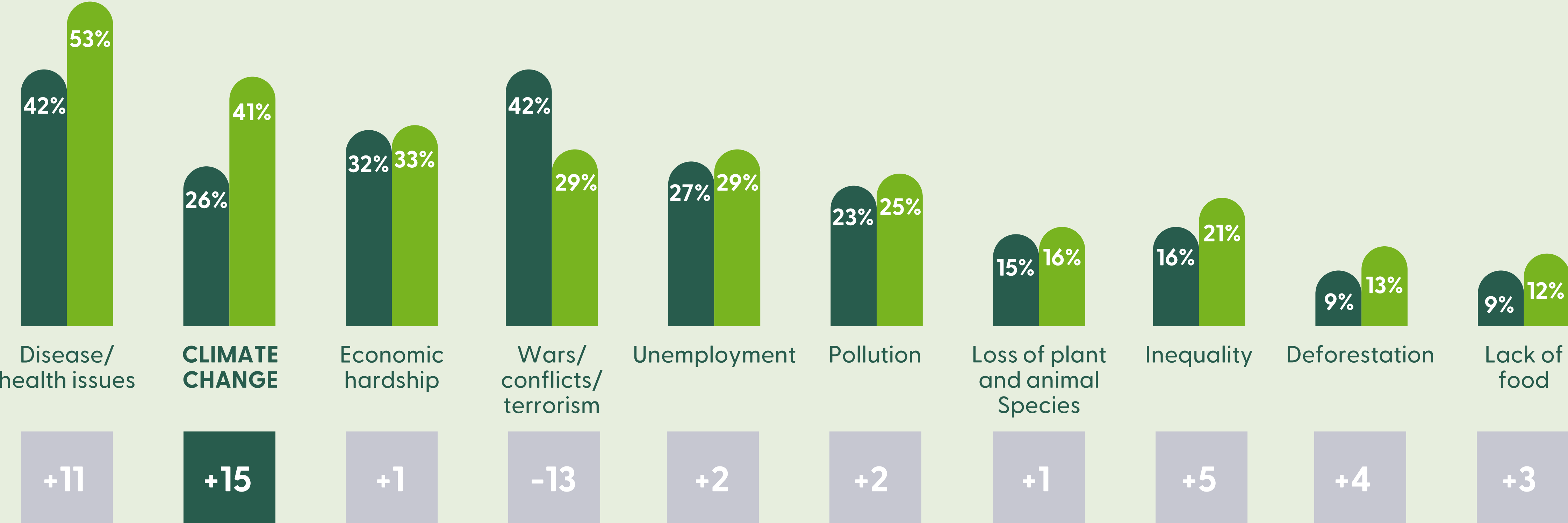


Q1. To start with, which of the following issues worry you the most? Please select up to three issues from the list  
Base: Total global sample (n=12,000)



# BIG UPLIFT IN WORRY AROUND CLIMATE CHANGE SINCE 2017

Most Concerning Global Issues, Total Mentions, Eight Tracking Markets Only, 2017 vs 2021



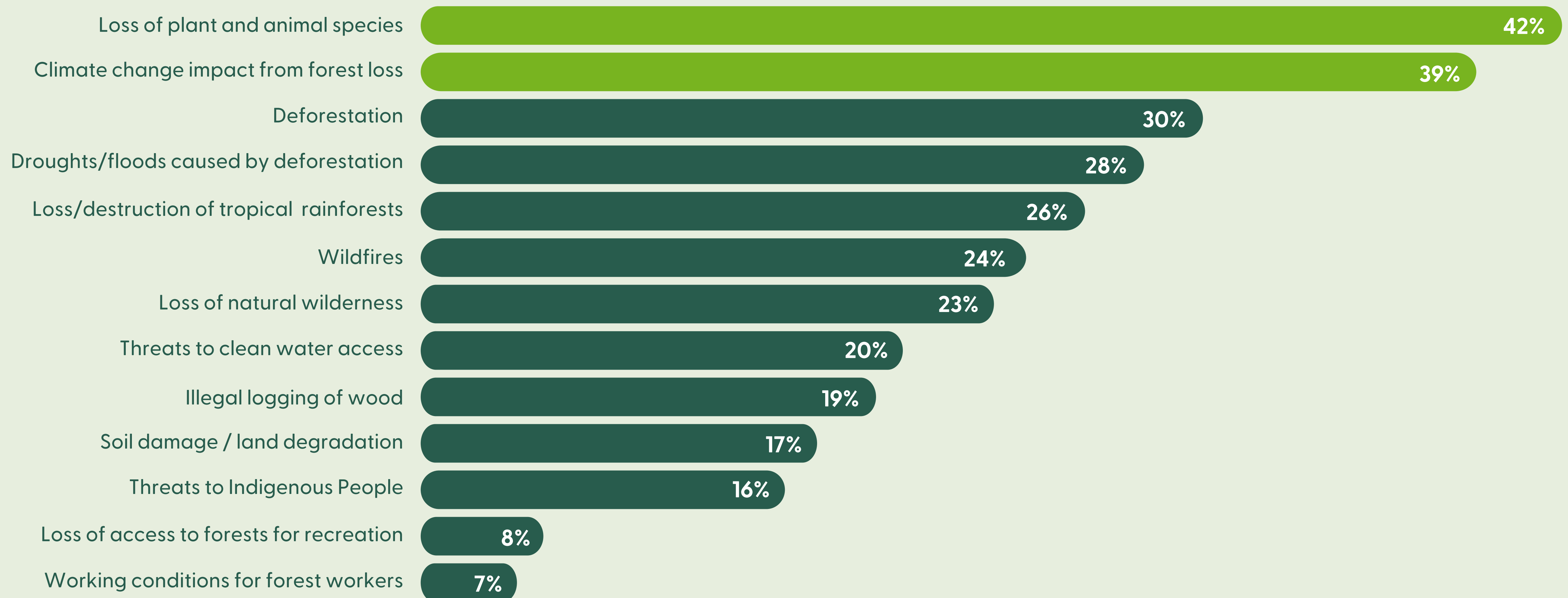
Q1. To start with, which of the following issues worry you the most?  
Base: Total tracking markets sample (2021 n=6,400; 2017 n=6,413)



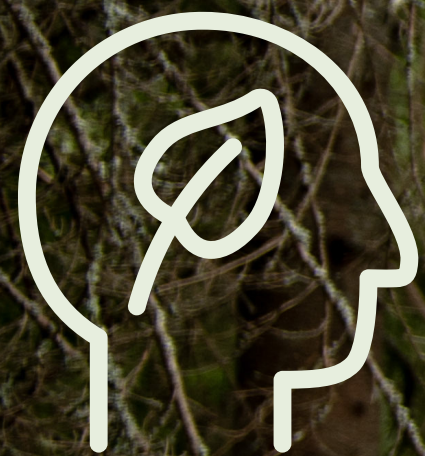


# WITHIN FOREST ISSUES, BIODIVERSITY AND CLIMATE IMPACT ARE TOP CONCERNS

## Most Concerning Forestry Issues, Rank in Top Three, Global, 2021



Q8. 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?  
Base: Total global sample (n=12,000)



# ATTITUDES AND BEHAVIOURS





# STRONG SUPPORT FOR SUSTAINABLE FORESTRY

Especially protecting biodiversity, avoiding deforestation and choosing an alternative to plastic

## Attitudes toward Sustainable Forestry Products, Agreement (5+6+7 on a 7-pt Scale), Global, 2021



Q6. How well does each of the following statements describe your opinions?  
Please use a scale from 1–7 where 1 means "Does not describe my opinion at all" and 7 means "Describes my opinion very well."  
Base: Total global sample (n=12,000)

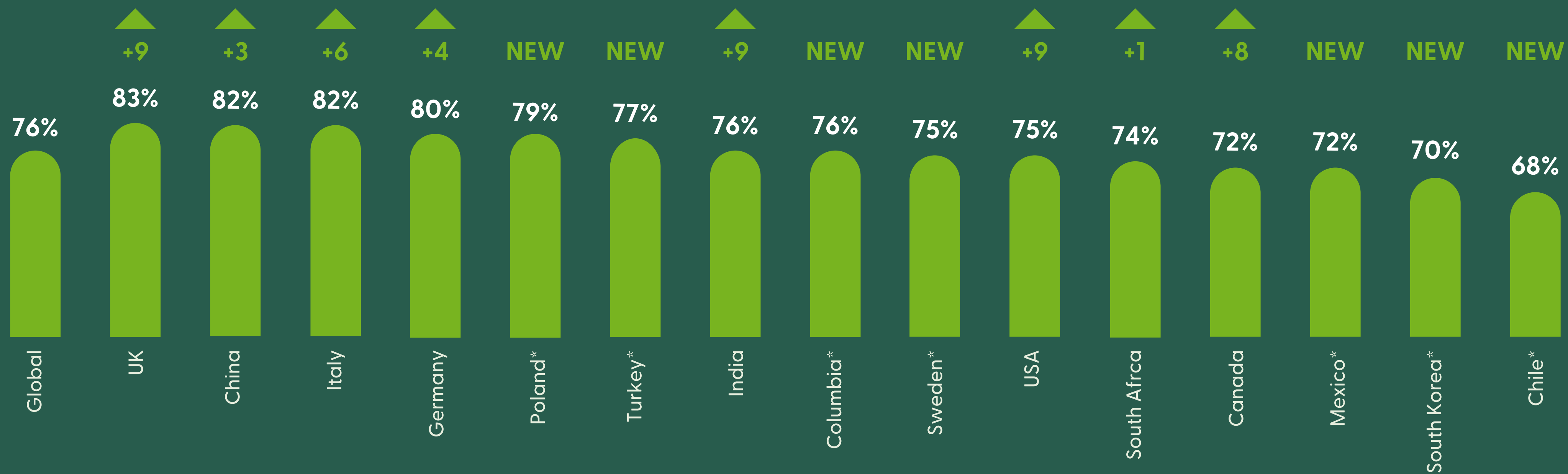


# DEMAND FOR INDEPENDENT CERTIFICATION IS HIGH ACROSS ALL MARKETS

And has grown in most tracking markets, most notably UK, India, USA and Canada

Agreement “Information about sustainability on products should be certified by an independent organization,”  
(5+6+7 on 7-pt Scale), by Market, 2021

Change since 2017 shown for tracking markets



Q6. How well does each of the following statements describe your opinions?  
Please use a scale from 1–7 where 1 means "Does not describe my opinion at all" and 7 means "Describes my opinion very well."  
Base: Total global sample (n=12,000) \* New markets, were not covered in 2017



# DRIVERS OF PURCHASE

# MOTIVATORS OF PURCHASE:

## MaxDiff. Analysis

The next pages summarise the findings of a research approach used to determine what motivates consumers when purchasing:

1. Wooden products such as wooden furniture (e.g., tables, chairs, cabinets, shelving etc.), toys, flooring, or home improvement materials / DIY materials
2. Paper or card such as books and stationery

We asked consumers which attributes were most and least important when purchasing each kind of product. The attributes tested included a range of conventional purchase drivers (e.g., standard drivers of price, quality, etc.) and sustainability-focused purchase drivers.

The responses were used to calculate the most and least important motivators of wood and paper/card products purchase using a maximum differentiation methodology. Importance scores have been calculated for each attribute, indicating the relative importance of each attribute on a scale between one and ten (with ten being the highest potential score).

The survey sample was split so that half of respondents in each market were asked for wooden products and the other half for paper/card.

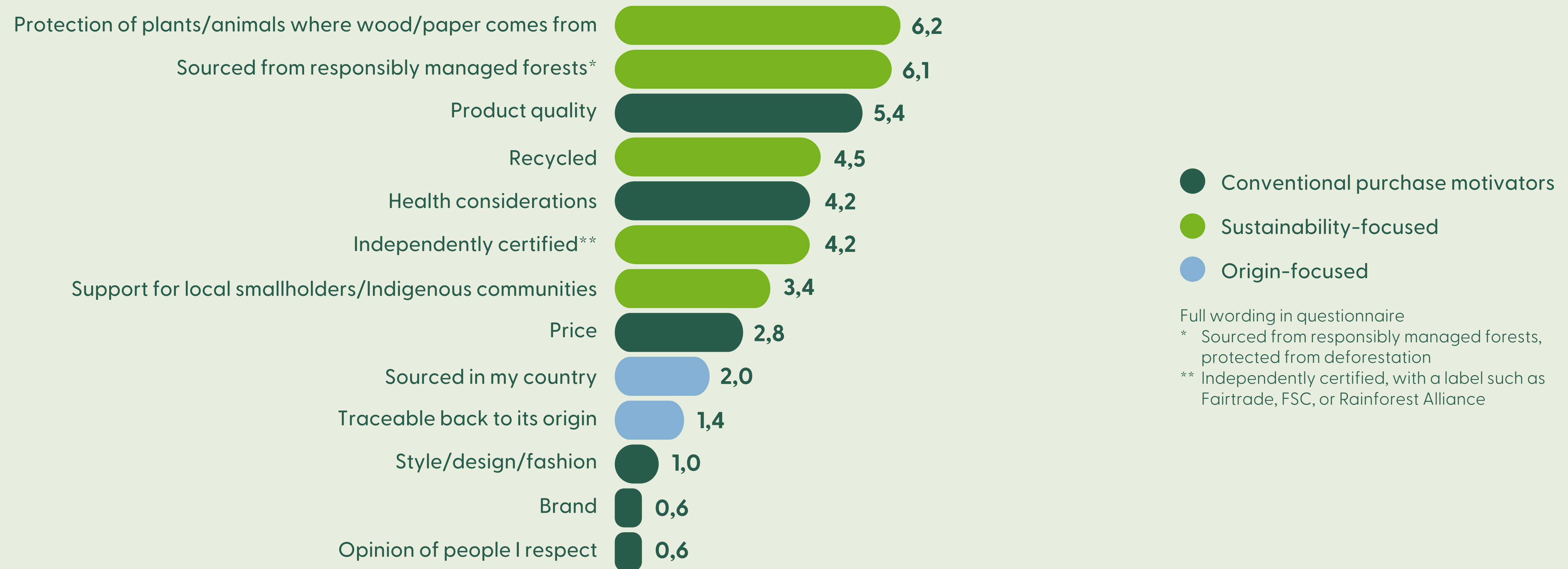
<b>Conventional purchase motivators</b>	Brand
	Health considerations
	Opinion of people I respect
	Price
	Product quality
	Style, design, fashion
<b>Sustainability-focused motivators</b>	Independently certified
	Protection of plants and animals where wood/paper comes from
	Recycled
	Sourced from responsibly managed forests, protected from deforestation
	Support for local smallholders and Indigenous communities
<b>Origin-focused motivators</b>	Sourced in my country
	Traceable back to its origin



# THE TOP TWO MOTIVATORS FOR PAPER/CARD ARE SUSTAINABILITY-RELATED

Biodiversity and responsible forestry come ahead of quality and of being recycled

Motivators: Max Diff Analysis, Importance Score, Paper or Card, Global, 2021



Q5b. Think about the products that you purchase that are made from paper or card, such as books, and stationery. Which of the following considerations are the most important and which are the least important to your decision to purchase these items?

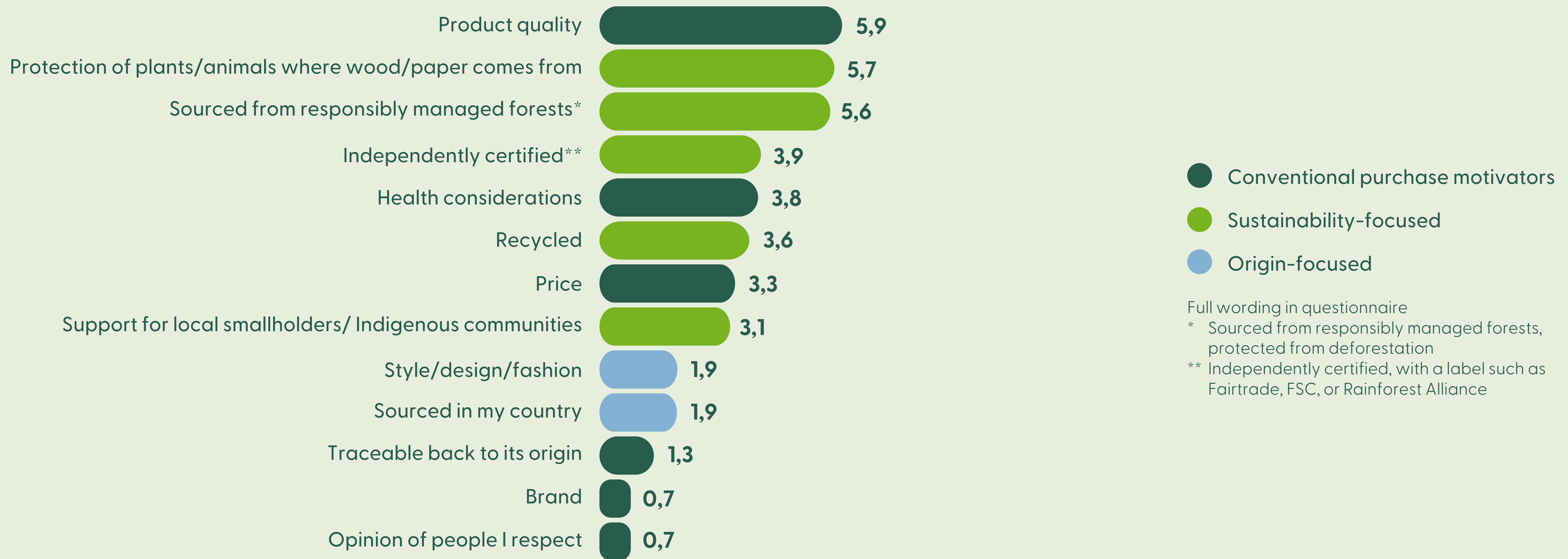
Base: Half of global sample (n=6,002)



# BIODIVERSITY AND RESPONSIBLE FORESTRY ARE JUST BELOW QUALITY AS MOTIVATORS FOR WOODEN PRODUCTS

Independently certified is also a strong secondary motivator of purchase.

Motivators: Max Diff Analysis, Importance Score, Wooden Products, Global, 2021



Q5a. about wooden products that you purchase, such as wooden furniture (e.g., tables, chairs, cabinets, shelving etc.), toys, flooring, or home improvement materials. Which of the following considerations are the most important and which are the least important to your decision to purchase these items?

Base: Half of global sample (n=5,998)

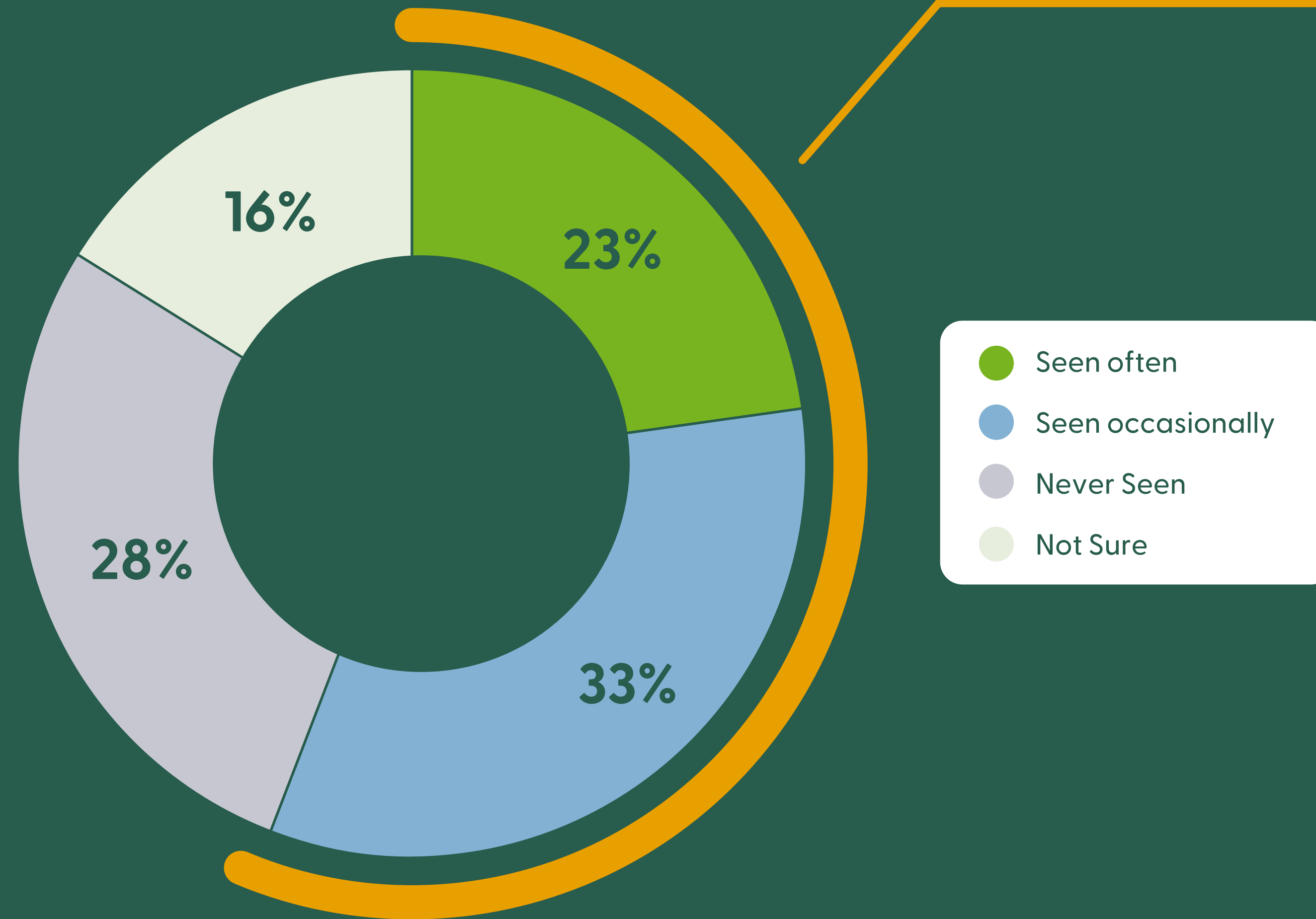




# FSC RECOGNITION



# FSC IS THE MOST RECOGNIZED FOREST-CERTIFICATION SCHEME



**56%**

**of global consumers recall seeing the FSC label.**

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



# TRUST IN FSC





# FSC IS THE MOST TRUSTED TO PROTECT FORESTS, ABOVE ALL ACTORS

Trust in companies/brands is fairly low. Net trust in FSC is six points ahead of certifications generally



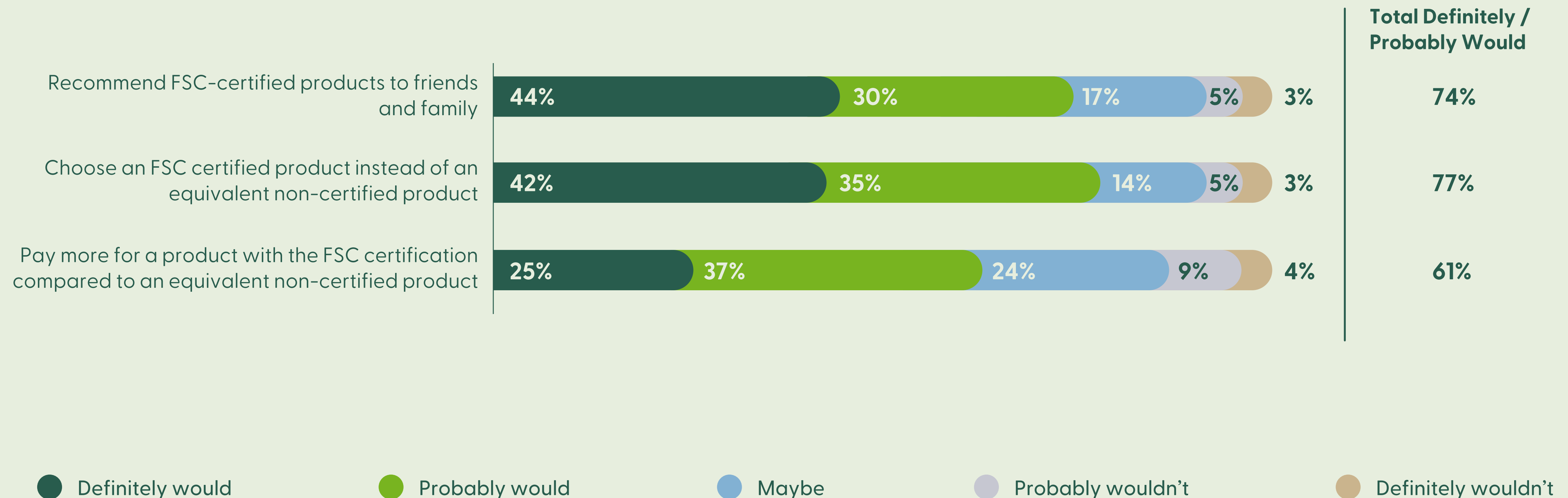
Q12. How much confidence do you have in each of the following types of organizations to protect forests?  
Base: Total global sample (n=12,000)



# HIGH LEVELS OF ADVOCACY AND PURCHASE IMPACT AMONG THOSE WHO KNOW FSC

Over six in ten say they would probably pay more for an FSC labelled product

Support for FSC, Global, 2021



Q13. Based on your knowledge of FSC, how likely are you to do the following?  
Base: Seen FSC (n=6,827)

# KEY TAKEAWAYS

## Consumers are increasingly concerned about sustainability issues – climate change and biodiversity loss

- Consumers list climate change as their second most important worry. Understandably, disease/health issues ranked first in the research
- The topmost concern among forest issues for consumers is the impact of deforestation on climate and biodiversity

## These issues are strongly associated with forests, and are key drivers of purchase for forest products – forests are a key connection point for consumers with sustainability

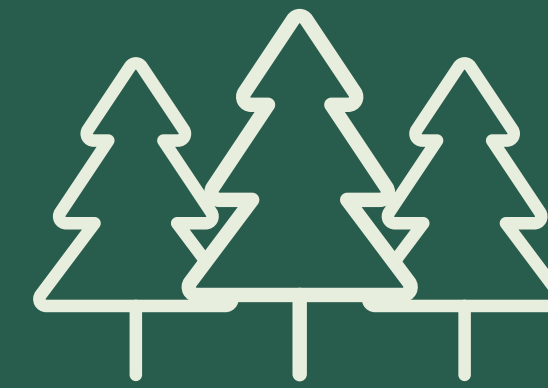
- Consumers now regard climate change and biodiversity loss as the top 2 drivers of purchase for paper-based products—even above quality and price
- More than half of global consumers recall seeing the FSC logo and 69% of shoppers say the FSC label motivates them to buy a product

## Consumers believe strongly in the importance of certification and this belief is increasing

- Over 76% believe sustainability information on products should be certified by an independent organization
- Compared against the 2017 report, this figure rose in all tracked markets – growing most notably in Canada, India, Italy, UK and USA

## Within this context, FSC is the clear leader in terms of recognition and trust for forest product certification

- FSC is the most recognized forest certification label globally with 56% of consumers recalling seeing the FSC logo
- 54% of consumers expressing high levels of trust in FSC's role to protect forests. It is also most trusted to protect forests above all actors, including other certifications, NGOs, governments, and companies/brands



**FSC is the world's most recognized and trusted forest-certification scheme to protect the world's forests**



GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose.

Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto, and is a participant of the UN Global Compact and a Certified B Corporation.

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Forests sustain life on earth and must be protected. That's why the Forest Stewardship Council™ (FSC®) – a non-profit membership organization that covers over 200 million hectares of certified forests – exists to provide a sustainable forest management solution that is trusted by NGOs, consumers and businesses alike to protect healthy and resilient forests, for all, forever.

As the most recognized, trusted and rigorous forest certification system, FSC's "check tree" label – found on millions of products worldwide – verifies sustainable sourcing from forest to consumer. FSC's responsible forestry standard, linked to a strict chain of custody certification, is a proven solution to tackle today's climate and biodiversity challenges. This means choosing FSC helps protect the future of forests and the communities who depend on them.

Join our mission to protect the world's forests.

[www.fsc.org](http://www.fsc.org)



# THANK YOU

For any questions about this research, please contact  
[marketing@fsc.org](mailto:marketing@fsc.org).

