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
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.

Surveyed markets

<table>
<thead>
<tr>
<th>Country</th>
<th>Argentina</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>Chile</th>
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*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

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Economic hardship</td>
<td>47%</td>
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<td>Wars, conflicts, terrorism</td>
<td>44%</td>
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<tr>
<td>Disease/health issues</td>
<td>41%</td>
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<td>CLIMATE CHANGE</td>
<td>35%</td>
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<td>Unemployment</td>
<td>28%</td>
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<td>Pollution</td>
<td>19%</td>
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<td>Lack of food</td>
<td>17%</td>
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<td>Inequality</td>
<td>15%</td>
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<tr>
<td>Loss of plants and animal species</td>
<td>13%</td>
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<tr>
<td>Deforestation</td>
<td>10%</td>
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</table>

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

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

**The Americas**
Loss of plant and animals is a key concern in most of the countries in this region. Wildfires is also a key concern in Argentina, Chile, Brazil and USA while deforestation is the #1 forestry issue in Brazil.

**Africa**
Kenya and South Africa are the two countries surveyed in this region and climate change and deforestation are the top concerns for consumers here.

**Europe**
Loss of plants and animals, deforestation and impact on climate change are cited as the #1 forestry issue in most European countries, with the exception of illegal logging in Romania, wildfires in Spain and loss of tropical rainforests being the top concern.

**Middle East**
UAE and Turkey are the two representative countries and the topmost concern in these countries are deforestation and loss of plant and animals respectively.

**Asia-Pacific**
Loss of plant & animals and climate change are key worries in most countries with the exception of droughts & floods being the topmost concern in Indonesia, and deforestation in India and Thailand.

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)
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
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.

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample (n=26,800)
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%

Q3. Have you ever seen the following logos or labels? (4-point scale)

**Base:** Total global sample n=26,800
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%
GERMANY 71%
DENMARK 67%
ITALY 62%
SWEDEN 56%
FRANCE 53%
POLAND 50%
SPAIN 46%
ROMANIA 46%
SLOVAKIA 43%
NORWAY 36%
LITHUANIA 36%
TURKEY 31%
CZECH REPUBLIC 31%

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n=26,800: 14 countries surveyed in Europe, n=800 per market totaling to 11,200 consumers)
In North America, 2,000 consumers were surveyed covering the US and Canada

FSC AWARENESS

AVERAGE 32%
USA* 29%
CANADA 34%

*1200 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

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n=26,800; 2 countries surveyed in North America, totaling to 2,000 consumers
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

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n=26,800. 6 countries surveyed in Latin America, n=800 per market totaling to 4,800 consumers
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>43%</td>
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<tr>
<td>China</td>
<td>77%</td>
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<td>India</td>
<td>55%</td>
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<td>Thailand</td>
<td>51%</td>
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<td>Indonesia</td>
<td>40%</td>
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<td>Australia</td>
<td>38%</td>
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<td>Malaysia</td>
<td>33%</td>
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<td>South Korea</td>
<td>26%</td>
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<td>Japan</td>
<td>26%</td>
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</tbody>
</table>

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n=26,800; 8 countries surveyed in Asia Pacific, n=800 per market totaling to 6,400 consumers
In the African continent, 1,600 consumers were surveyed in Kenya and South Africa

FSC AWARENESS

AVERAGE 58%
KENYA 57%
SOUTH AFRICA 59%

Q3: Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n=26,800. 2 countries surveyed in Africa, n=800 per market totaling to 1,600 consumers)
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.

<table>
<thead>
<tr>
<th>NET Trust in FSC and Other Actors (“Complete” + “A Lot of Confidence” Minus “Little” + “No Confidence to Protect Forests”)</th>
<th>Net positive trust</th>
<th>Net negative trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSC</td>
<td>11%</td>
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<tr>
<td>Environmental Charities/NGOs</td>
<td>10%</td>
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<tr>
<td>Certifications Labels</td>
<td>10%</td>
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<tr>
<td>Companies make/ sell wood/ paper products/ packaging</td>
<td>-11%</td>
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<tr>
<td>Government</td>
<td>-30%</td>
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</table>

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

Q6. Based on your knowledge of FSC, how likely are you to do the following?

**Base:** Total global sample; all who have seen the FSC logo very often or occasionally; n=12,274

- **60%**
  - Recommend FSC-certified products to friends and family

- **62%**
  - Choose an FSC certified product instead of an equivalent non-certified product

- **49%**
  - Willing to pay more for FSC-certified products than non-certified equivalents
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.

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
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")

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.

* Businesses only includes companies that make/sell wood/paper products and packaging
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