The Case for FSC
International Insights from GlobeScan

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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

- Terrorism/war: 13%
- Economic problems: 12%
- Environment / climate change: 11%
- Unemployment: 8%
- Poverty/homelessness: 7%
- Greed/corruption: 4%
- Hunger: 4%
- Political problems: 4%
- Crime: 3%
- Gap between rich and poor: 2%
- Health issues: 2%
- Education: 1%

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

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

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

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Conventional drivers</th>
<th>Environmental/social sustainability</th>
<th>Origin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product quality</td>
<td>5.94</td>
<td></td>
<td></td>
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<tr>
<td>Responsibly managed forests</td>
<td>4.93</td>
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<td></td>
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<tr>
<td>Health considerations</td>
<td>4.70</td>
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<tr>
<td>Protection of birds/animals</td>
<td>4.41</td>
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<tr>
<td>Price</td>
<td>4.07</td>
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<tr>
<td>Independently certified</td>
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<tr>
<td>Recycled</td>
<td>3.48</td>
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<td>Smallholder and indigenous support</td>
<td>2.78</td>
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<td>Sourced in my country</td>
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<tr>
<td>Style/design/fashion</td>
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<tr>
<td>Traceable to origin</td>
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<tr>
<td>Opinion of people I respect</td>
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<td></td>
<td></td>
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<tr>
<td>Brand</td>
<td>0.86</td>
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</tbody>
</table>

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.

Q. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements:

- Information about sustainability on products should be certified by an independent organisation
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
GlobeScan is a strategy and insights consultancy, focused on helping our clients to build long-term trust with their stakeholders.

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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