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2021 Global Consumer Research Reveals Escalating Concerns about Climate Change and Threats to Forest Biodiversity

Among consumers, environmental concerns are becoming more important than ever and sustainability now rivals conventional factors such as price and brand as influencers of consumer shopping choices.

(21 October 2021) - Consumers want to make sustainability-focused purchasing decisions and trusted third party certification labels play an increasingly important role, new research reveals.

According to research conducted by GlobeScan for the Forest Stewardship Council (FSC) with 12,000 participants across 15 countries¹, consumers list climate change as their second most important global worry. When compared against the previous 2017 study¹, this concern is significantly higher². Understandably, disease/health issues³ ranked first in the research, although the comparable level of concern about climate change sends a stark message in terms of urgency to act. For forests specifically, the research found increasing concerns about the loss of plant and animal species and the impact of deforestation on climate change (see figures 1-2 for more information).

Businesses and Brands are Expected to Engage in Sustainability Issues

Consumers' sustainability concerns also appear to increasingly influence their shopping choices, with more than 80 per cent of shoppers saying they expect companies to ensure their wood and paper products do not contribute to deforestation.

Additionally, the survey found that 86 per cent of consumers try to avoid products that damage biodiversity and about seven in ten want to choose products that do not contribute to climate change. As such, consumers pay attention to these factors when choosing wood-

¹ Consumers were surveyed in Canada, Chile, Colombia, China, Germany, India, Italy, Mexico, Poland, South Africa, South Korea, Sweden, Turkey, UK and USA.

² Tracking based on 8 out of the 15 countries base=6,413 (2017) base=6,400 (2021). Tracking countries were Canada, China, Germany, India, Italy, South Africa, UK and USA.

³ Climate change also poses a threat to human health, according to the World Health Organisation, Intergovernmental Panel on Climate Change, and Co-operation on Health and Biodiversity (Source: <https://www.who.int/news-room/fact-sheets/detail/climate-change-and-health>, <https://www.un.org/en/chronicle/article/health-effects-global-warming-developing-countries-are-most-vulnerable> and <https://www.cbd.int/doc/health/cohab-policy-brief3-en.pdf>)

based products and packaging and expect companies to ensure their products do not harm the environment.

When asked about influences on their purchases of wooden products, protecting animals and plants and sourcing from sustainably managed forests were among consumers' biggest motivators - nearly on par with product quality; while for paper or card products, these motivators were even higher than product quality (see figure 3 for more information). Consumers' belief in their own potential impact is also growing.

Consumers Value Independent Certification to Support Sustainable Choices

Independent certification also influences product choice among shoppers, with nearly eight in ten consumers believing sustainability product information should be certified by an independent organization. These results show that the need for trusted eco-labels has never been greater. There is a steep upward trend in people's interest in companies' social and environmental impact; therefore, the opportunity for ecolabels is growing, highlighting the value that brands can gain from partnering with trusted certification systems.

"Consumer insights are crucial to help FSC focus on the priorities" says Jeremy Harrison, Chief Markets Officer at FSC. "These findings inspire confidence that consumers appreciate the vital role forests play in tackling major sustainable development challenges and that consumers recognize and trust FSC as part of the solution".

The FSC label is a powerful tool to help consumers make more sustainable shopping choices. Consumers purchasing FSC-certified products trust that FSC is effective in protecting forests with seven in ten shoppers feeling motivated to buy a product when they see the FSC label. In turn, brands and retailers support sustainable shopping choices by sourcing responsibly sourced timber and wooden products from FSC-certified forests.

The research shows that FSC's visibility and trust is rising globally⁴, reflecting a strong trend towards conscious consumerism. Fifty-four per cent of consumers express high levels of trust in FSC's role to protect forests above all other actors – including governments and companies. Boosted by a positive context for ecolabels, the role of businesses and brands to inspire consumers about the value of sustainable forest management has never been more important.

Sustainable forest management as a nature-based solution

What can we – as businesses and consumers – do? We can step up in terms of responsible forestry, consumption and production. Responsible forest management plays a vital role in the fight against climate change (mitigation and adaptation) and biodiversity loss, both of which are inextricably linked and must be addressed together.

"Sustainable forest management of both natural and planted forests is essential to achieving sustainable development. It is a means to reduce poverty, reduce deforestation, halt the loss of forest biodiversity, and reduce land and resource degradation, and contribute to climate change mitigation."

(Intergovernmental Panel on Climate Change (IPCC))

⁴ Tracking based on 8 out of the 15 countries base=6,413 (2017) base=6,400 (2021). Tracking countries were Canada, China, Germany, India, Italy, South Africa, UK and USA.

Increasingly, consumers are influencing the kind of products being made available through their sustainably-focused purchasing decisions. This presents a huge opportunity for businesses to make responsibly-sourced, sustainably-made products available to consumers. We are already seeing an increasing number of leading corporations around the world transitioning to deforestation-free supply chains.

FSC provides such an opportunity to both businesses and consumers, through its system credibility of an unbroken chain of certified organisations along the supply chain and labelling. In this regard, the survey results show that FSC is the most recognised forest-certification scheme, and most trusted (ahead of other actors) in protecting forests.

How is this linked to the 12th Malaysia Plan?

It is worth noting that the work of FSC contributes to 14 of the total 17 United Nations Sustainable Development Goals, including Goal 12 (Responsible Consumption and Production), Goal 13 (Climate Action) and Goal 15 (Life on Land, specifically, sustainable forest management (Target 15.2)), all of which are part of both the 11th and 12th Malaysia Plans, to varying degrees. Our forests absorbed c. 78% of our nation's CO_{2e} emissions in 2016⁵. Advancing sustainable forest management through the FSC certification scheme can potentially increase the carbon sequestration rate of our forests.

About the Forest Stewardship Council® (FSC®)

FSC is a non-profit organization that provides a proven sustainable forest management solution. Currently, over 220 million hectares of forest worldwide is certified according to FSC standards, with close to 9 million hectares of FSC-certified forests in the Asia Pacific Region. It is widely regarded as the most rigorous forest certification system among NGOs, consumers, and businesses alike to tackle today's deforestation, climate, and biodiversity challenges. The FSC forest management standard is based on ten core principles designed to address a broad range of environmental, social and economic factors. FSC's "check tree" label is found on millions of forest-based products and verifies that they are sustainably sourced, from forest to consumer. www.fsc.org.

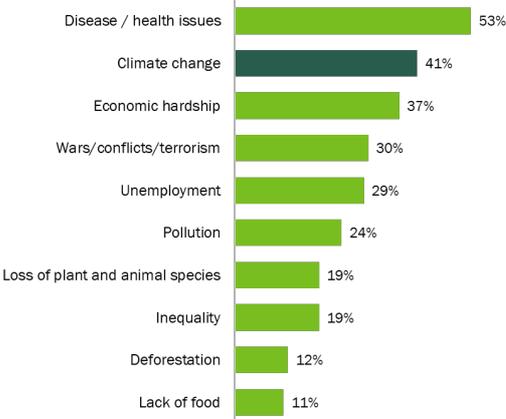
About GlobeScan

GlobeScan is an international insights and advisory consultancy working at the intersection of brand purpose, sustainability, and trust.

We partner with leading businesses, NGOs, and governmental organizations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable world. Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Mumbai, Paris, San Francisco, São Paulo and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation. Learn more at www.GlobeScan.com.

⁵ <https://www.mof.gov.my/en/news/speech/virtual-conference-on-road-to-glasgow-and-kunming-ministerial-address>

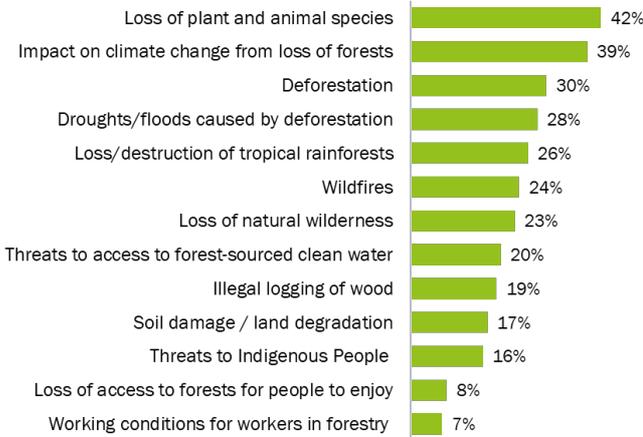
Figure 1: Most Concerning Global Issues *Select in Top Three, Global, 2021*



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)

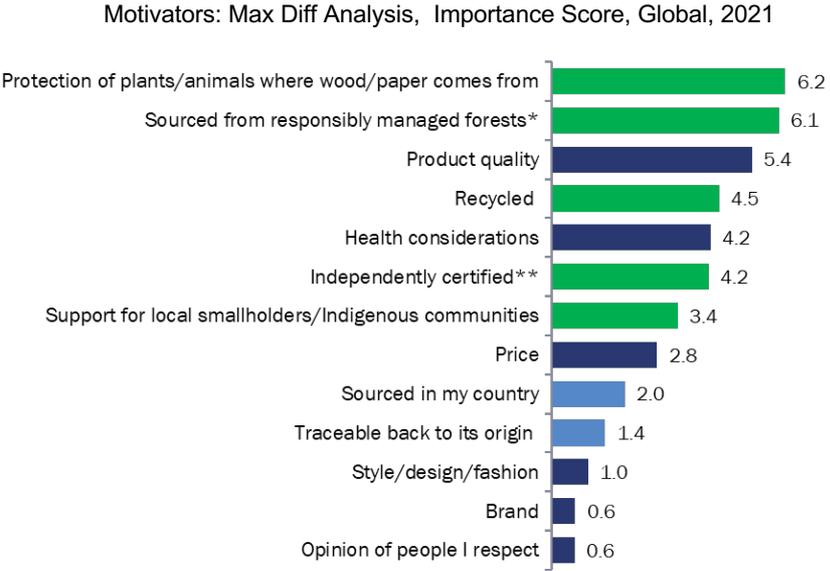
Figure 2: Most Concerning Forestry Issues

Rank in Top Three, Global, 2021



Q8. Which of these potential issues worries you the most?
 Base: Total global sample (n=12,000)

Figure 3: Purchase drivers for paper or card



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)