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A mainstream concern:

# FSC<sup>®</sup> Global Consumer Research Highlights





## Our goals

The FSC commissioned this research to better understand the global mainstream consumer.

As part of our research we asked some general questions, the answers from which we are sharing here.

- Profiles global mainstream consumers in terms of their green habits/values and purchasing habits
- Looks at loyalty to green brands
- Looks at influence of for profit brands on purchasing of FSC certified products
- Looks at barriers to green behavior



## GfK consumer segmentation

The Global Green Consumer Classification Scheme segment consumers by their green attitudes/behaviors via GfK's global Green Gauge® segmentation.

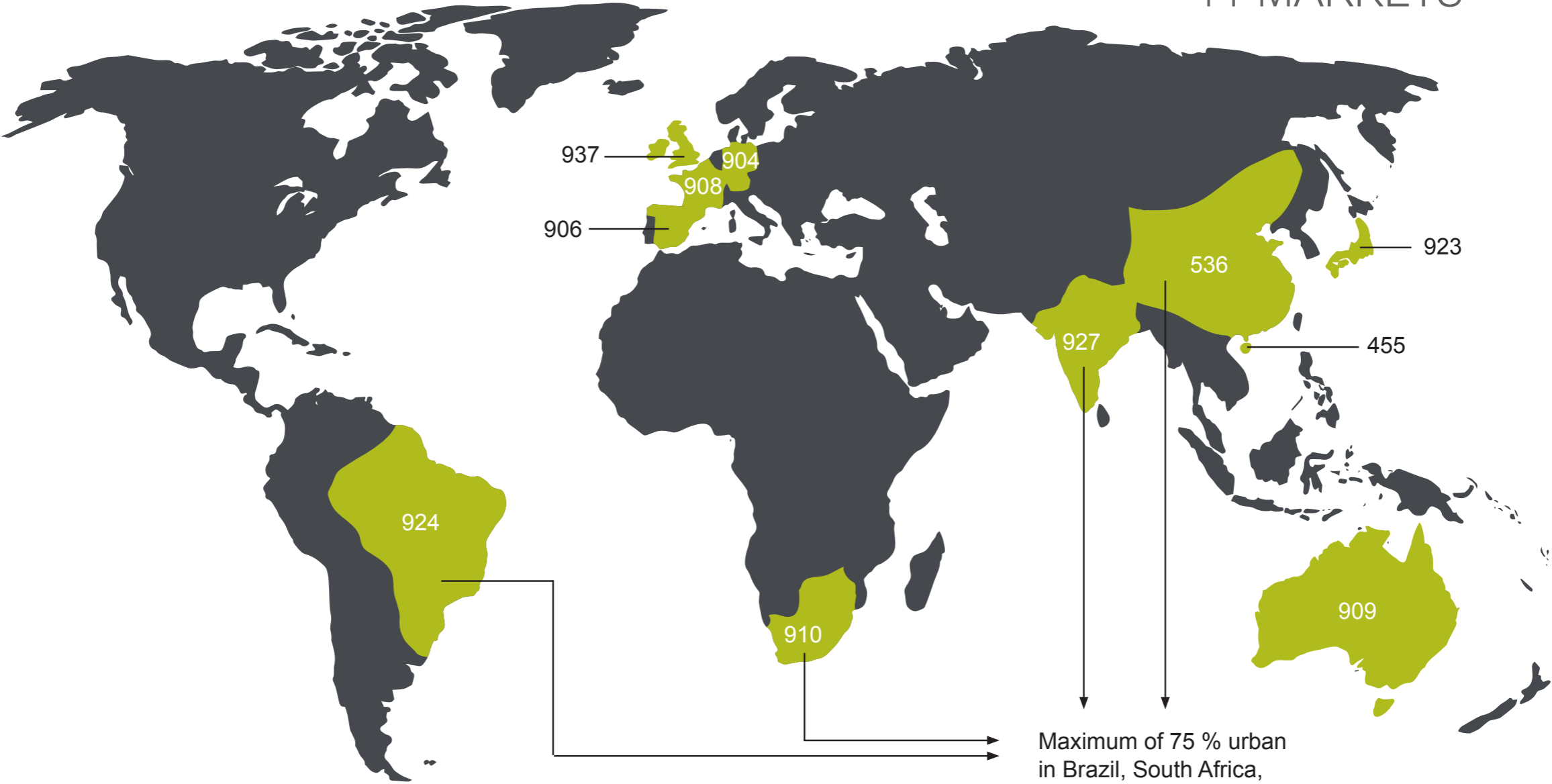
Green Gauge is calibrated to address cultural differences in the green category. It also provides diagnostics for nearly 20 green behaviors and attitudes.



# Study design:



11 MARKETS



Maximum of 75 % urban in Brazil, South Africa, India and China

9 000+ RESPONDENTS

Age:  
**21-64**



**35%**



**65%**

Minimum 100 women with kids at home

Data for this study were collected from September 12 - 19, 2013, via online interviews sourced from opt-in online panels, using an online consumer sample that excluded the Green Gauge Jaded segment and that met all quota and respondent qualification criteria for the study.



## THE SEVEN DIMENSIONS OF GREEN



The GfK Green Gauge Global Segmentation algorithm was used to classify participants in this research. This approach profiles people broadly on multiple dimensions of green attitudes and behaviors.



# Segment definitions: 5 green consumer segments



The greenest segment. This group shows the highest concern for the environment, and they put their money where their mouth is when it comes to green behavior.



Many of these people are located in markets where green has long been on the national agenda (mostly the developed world). As a result they show a high degree of concern for the environment, but some of their behaviors lack.

They do things that are expected of them like recycling and conserving energy/water, but many of the “harder” behaviours are still at or below global norms.



A group that exists almost exclusively in the developing world. They have the desire, but lack the means and know-how to be more green. Given the right tools, these people could climb the environmental ladder and become Green inDeeds.



“Green” to this group is a status symbol. The environment is only skin deep to them. They are less likely to have core green values, but they will participate if it means they can display their green badge of honor.

**JADED**

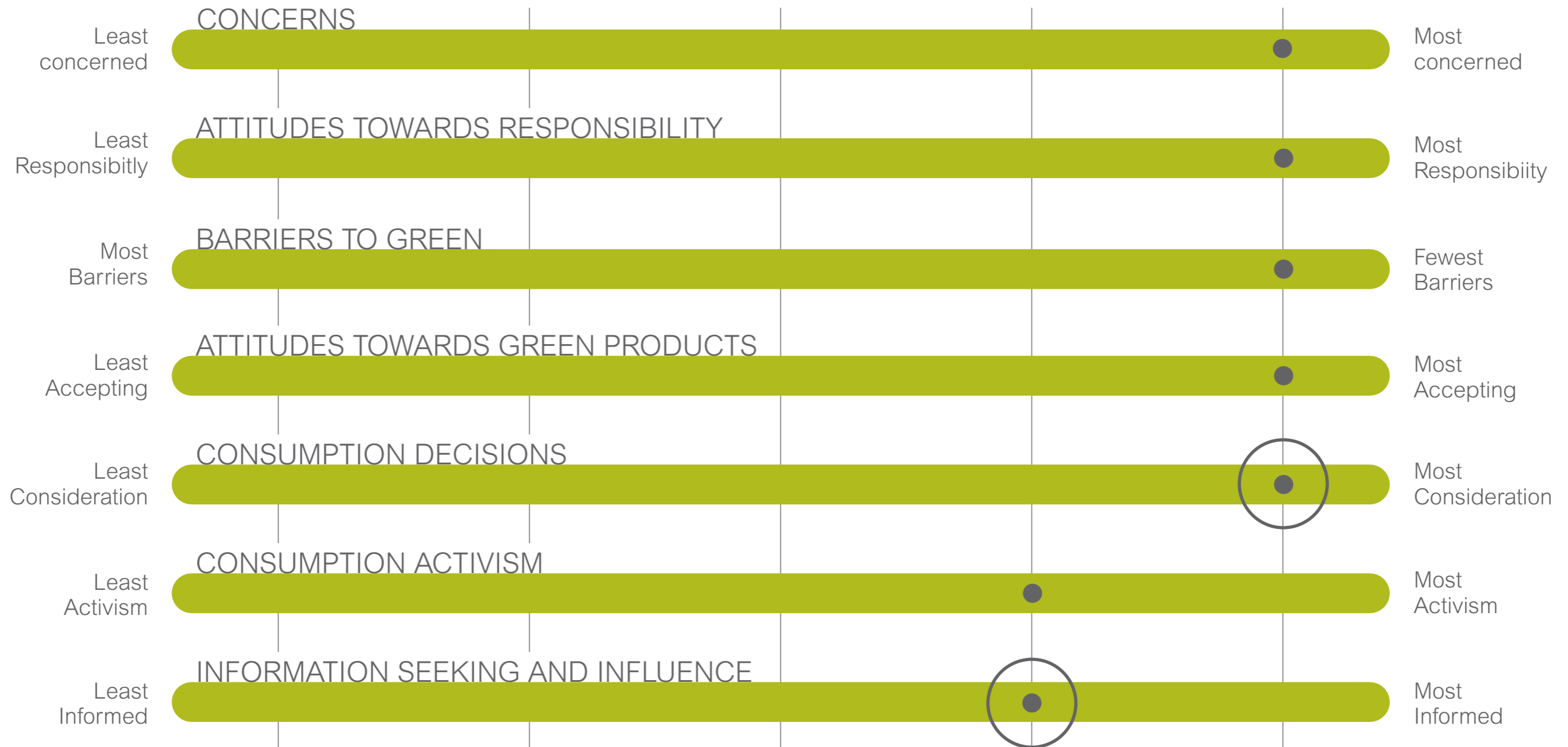
Screened Out

A cynical and skeptical group. This group claims to be knowledgeable about the environment but is less concerned about it and does not want issues to stand in the way of economic progress. Some may have rejected the “green movement”, and even be overly hostile towards it. The proportion of Jaded consumers in the markets being tested is between 4 to 45 percent, underscoring the importance of using a culturally-balanced segmentation scheme to classify customers when conducting global research.

In this survey Jaded consumers were screened out - as such our sample reflects consumers in each country who assign at least some importance to environmental issues.

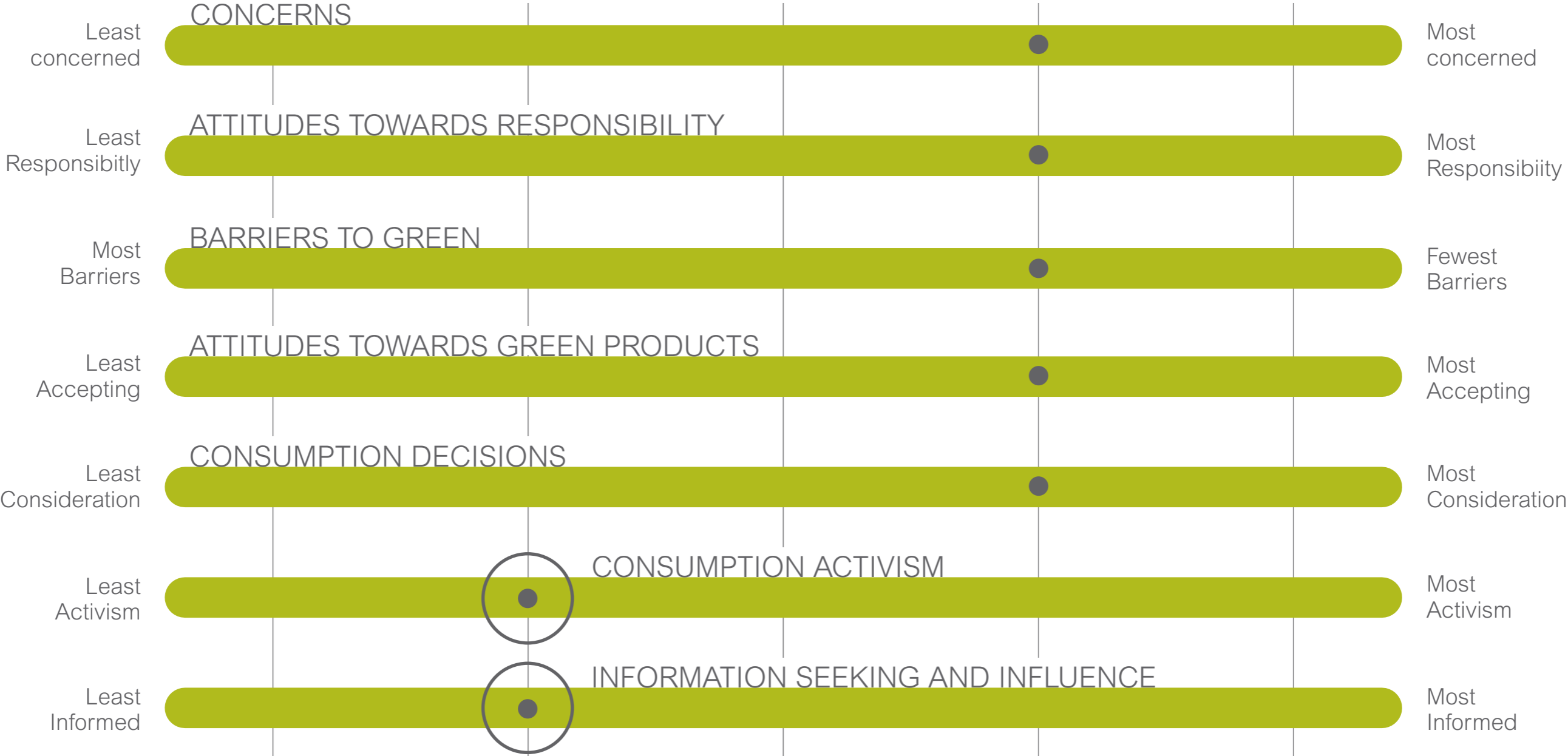


# Green inDeed on the seven dimensions of green



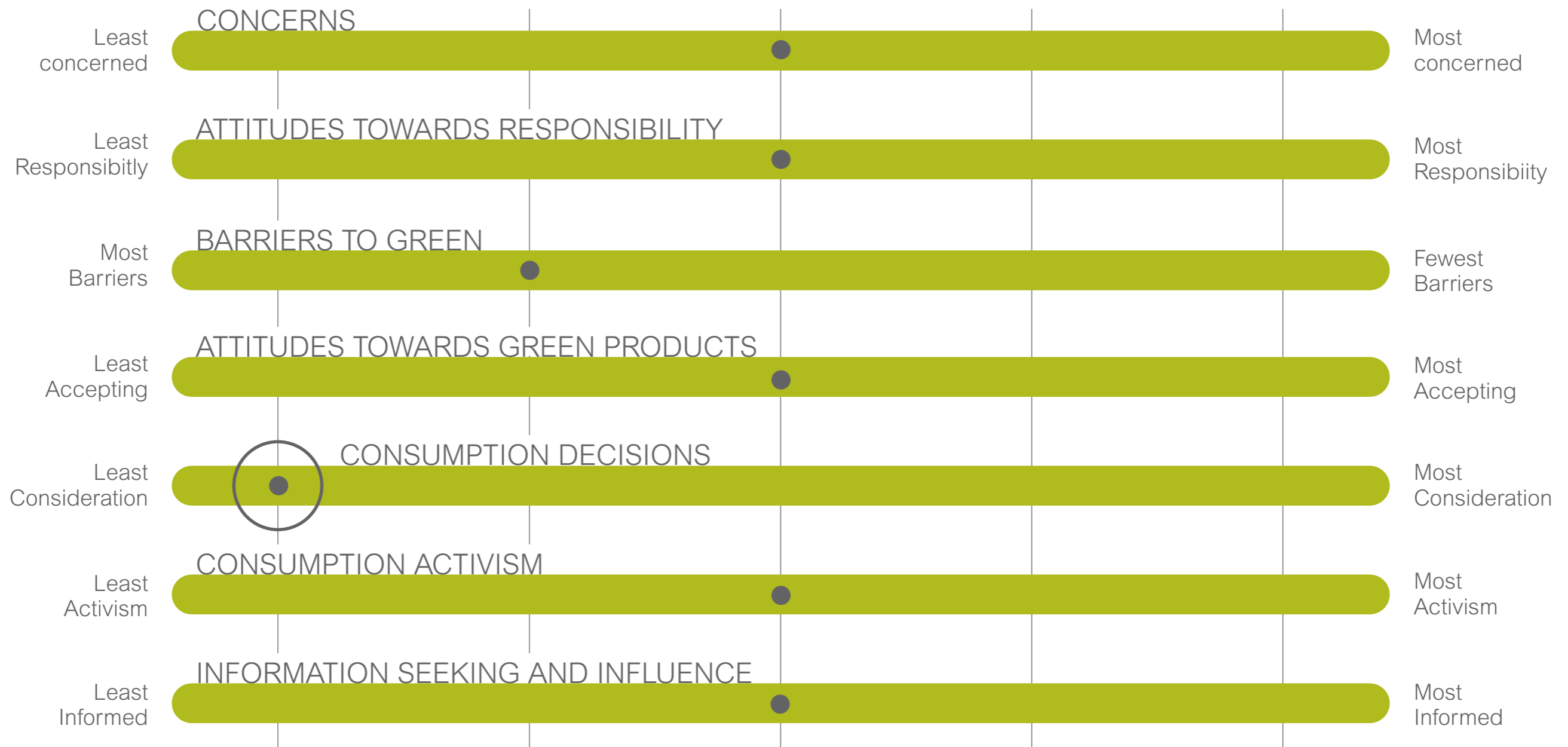


# Carbon Cultured on the seven dimensions of green

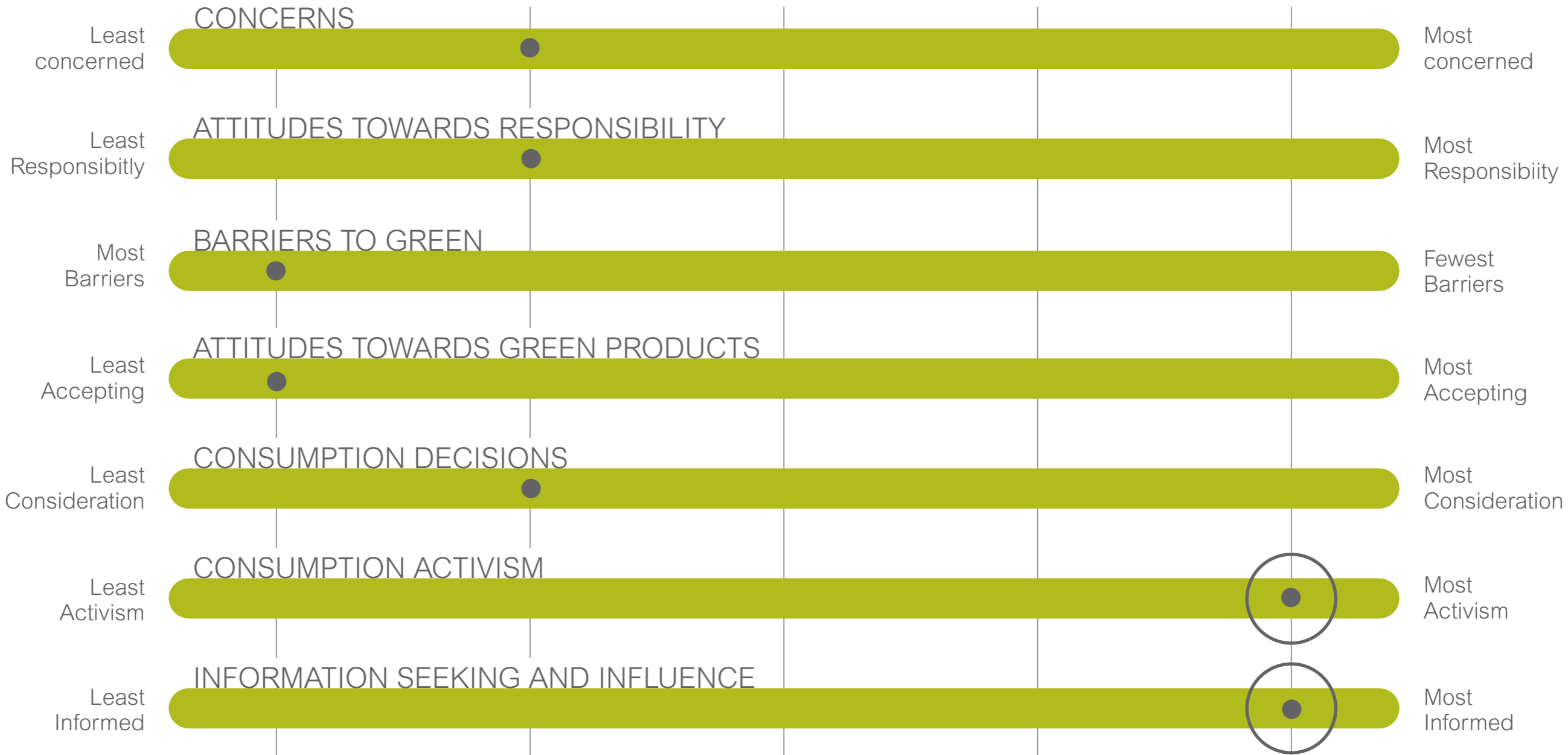




# Green in Need on the seven dimensions of green



# Glamour Green on the seven dimensions of green

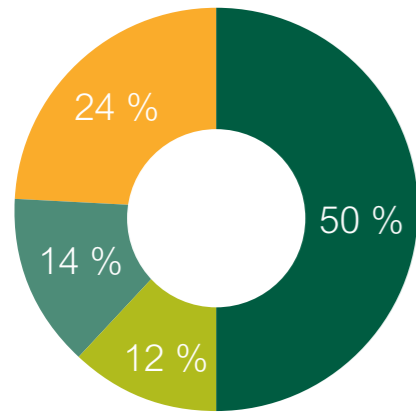




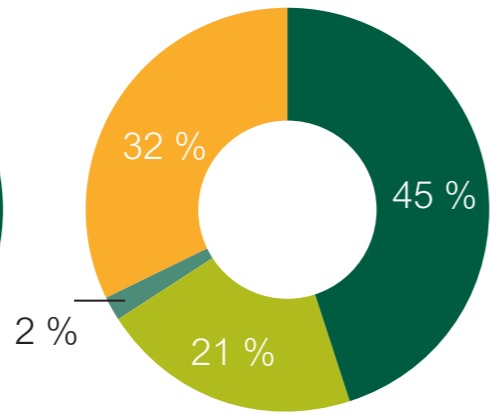
# FSC study: GfK Green Gauge segments by country



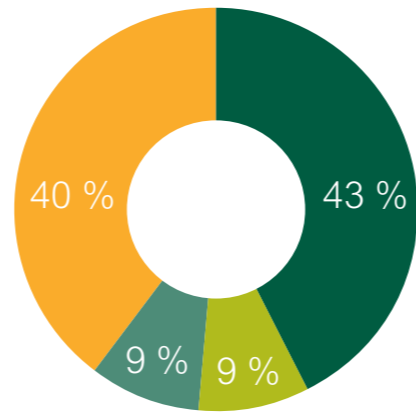
**Brazil** 



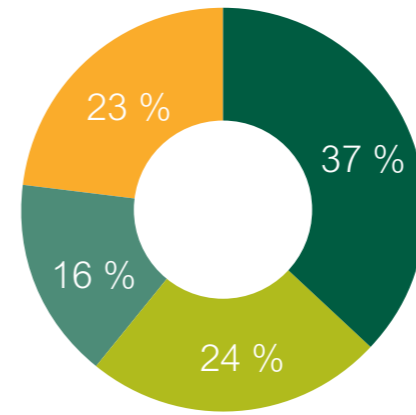
**Germany** 



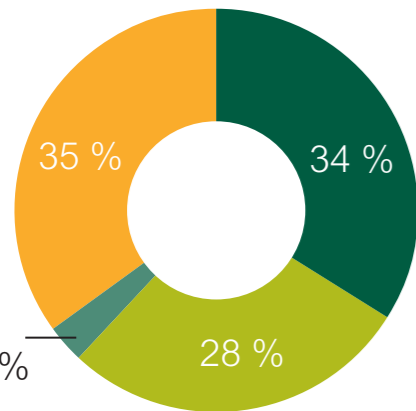
**China** 



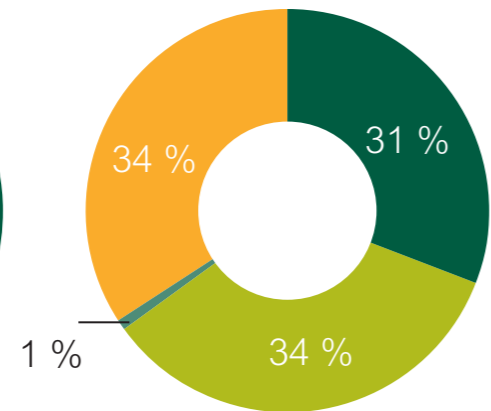
**South Africa** 



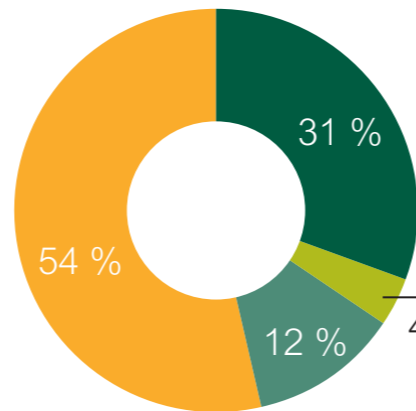
**Spain** 



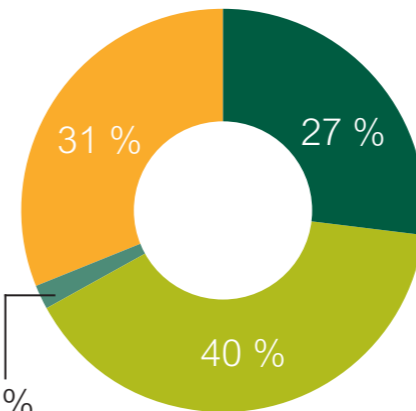
**Australia** 



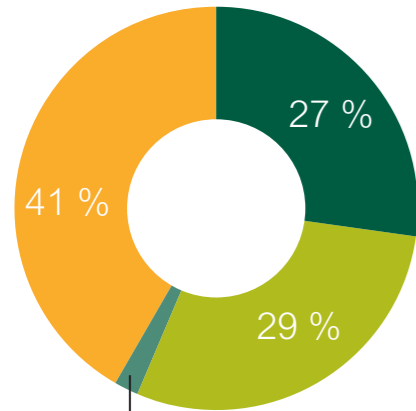
**India** 



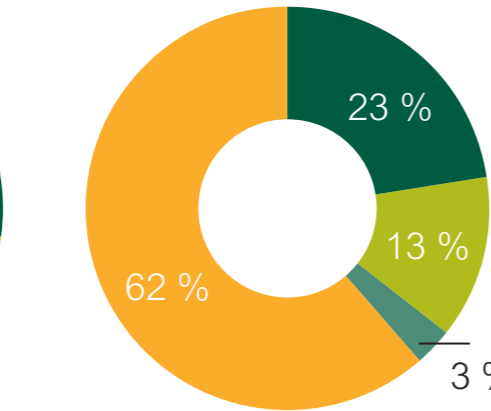
**UK** 



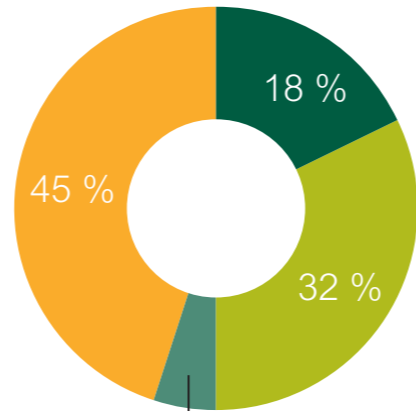
**France** 



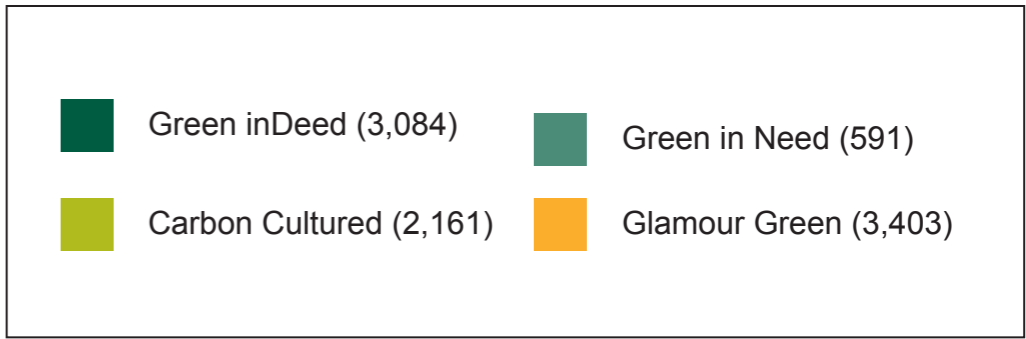
**Hong Kong** 



**Japan** 



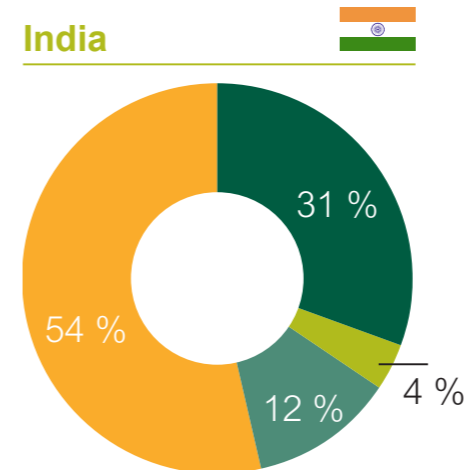
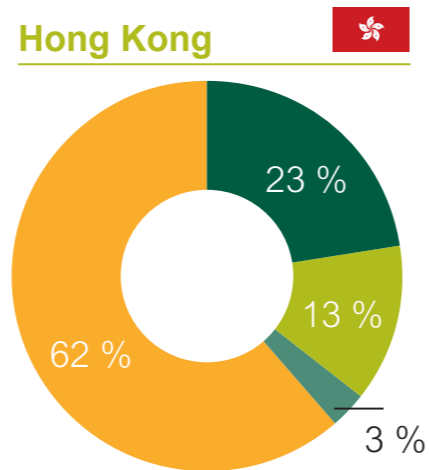
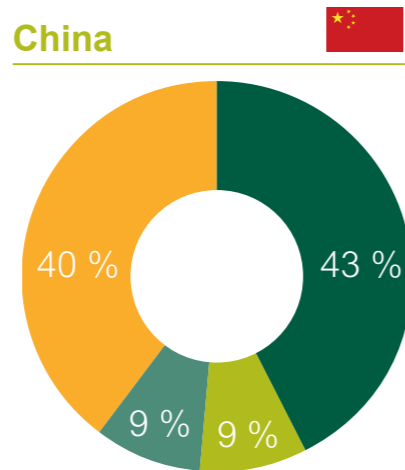
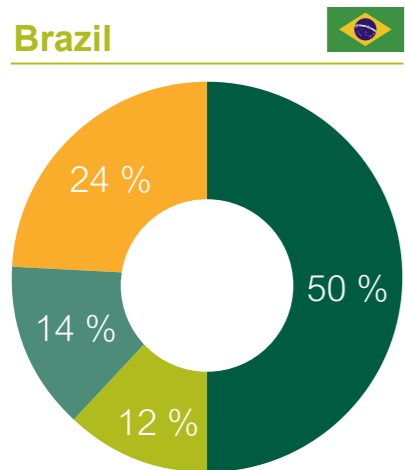
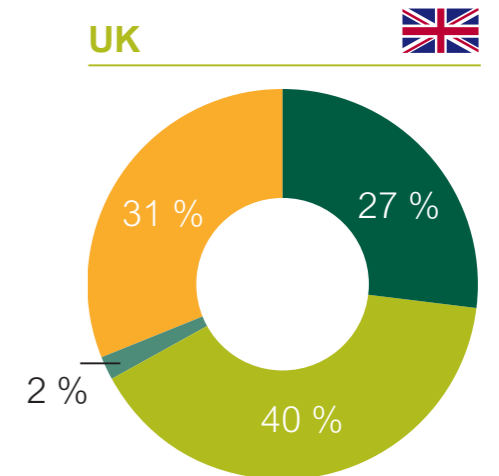
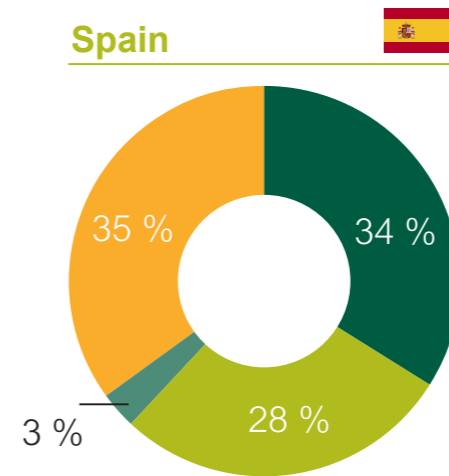
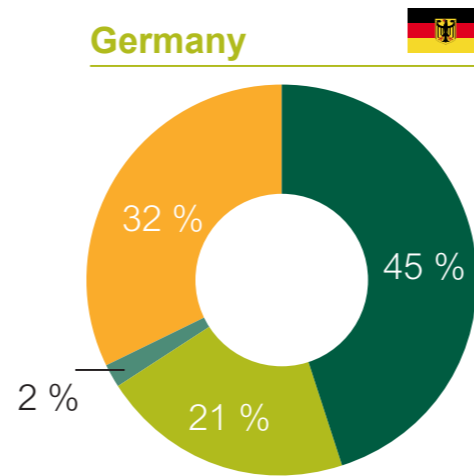
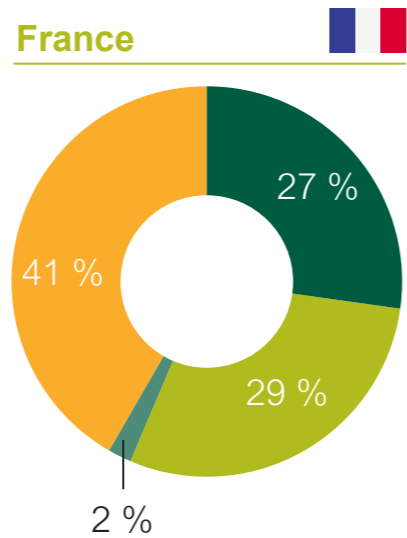
Very few countries have meaningful numbers of the Green in Need segments.



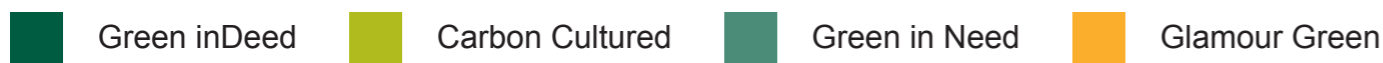
# FSC study: GfK Green Gauge segments by country



**Europe:**  
Closer balance between Green inDeed, Carbon Cultured, and Glamour Green.



**Developing countries:** Majority of respondents fall into Green inDeed and Glamour Green, thus exhibiting stronger green behaviors and attitudes whether genuinely committed or as a skin-deep badge of honor.







CONSUMERS ARE CONCERNED ABOUT THE ENVIRONMENT

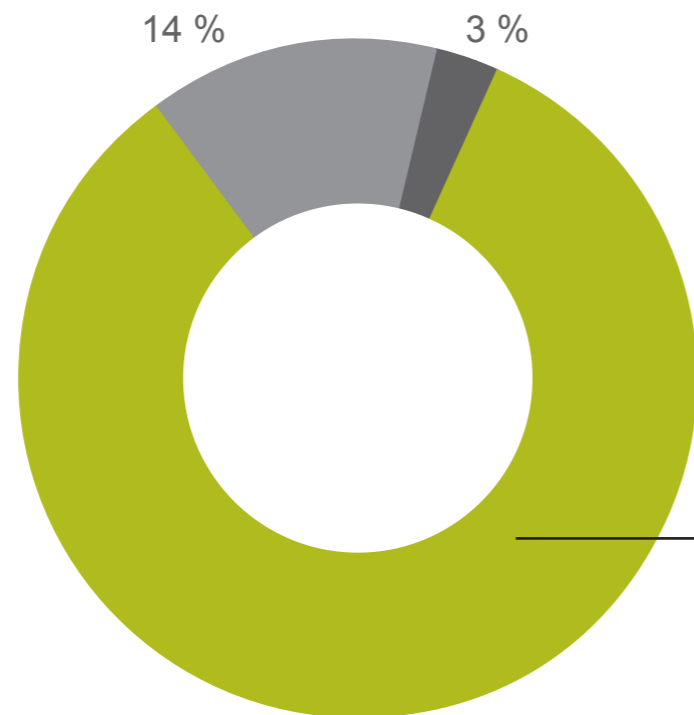


# Consumers are concerned: **Global level**



The majority of consumers around the world find both environmental pollution and global climate change/global warming a high concern.

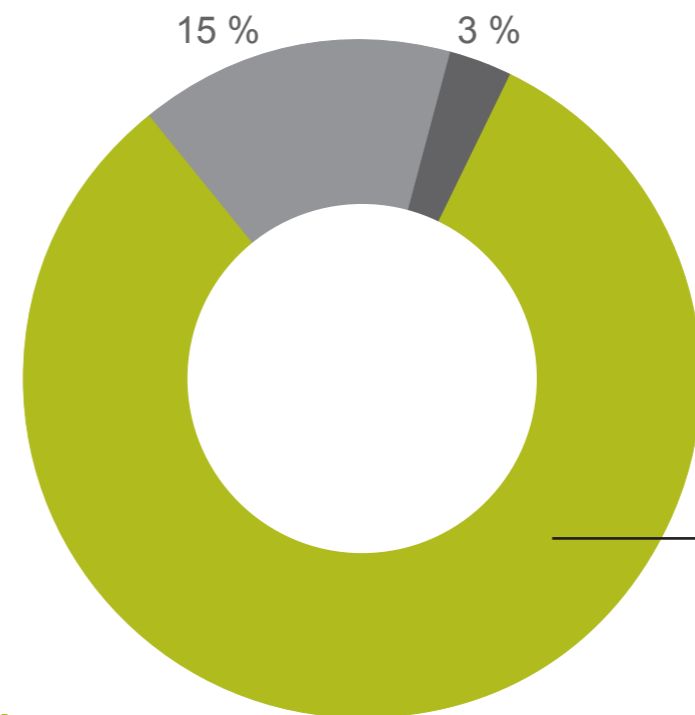
## ENVIRONMENTAL POLLUTION



**84%**

84 % find environmental pollution extremely or very serious

## GLOBAL CLIMATE CHANGE/ GLOBAL WARMING



**82%**

82 % find global climate change/global warming extremely or very serious

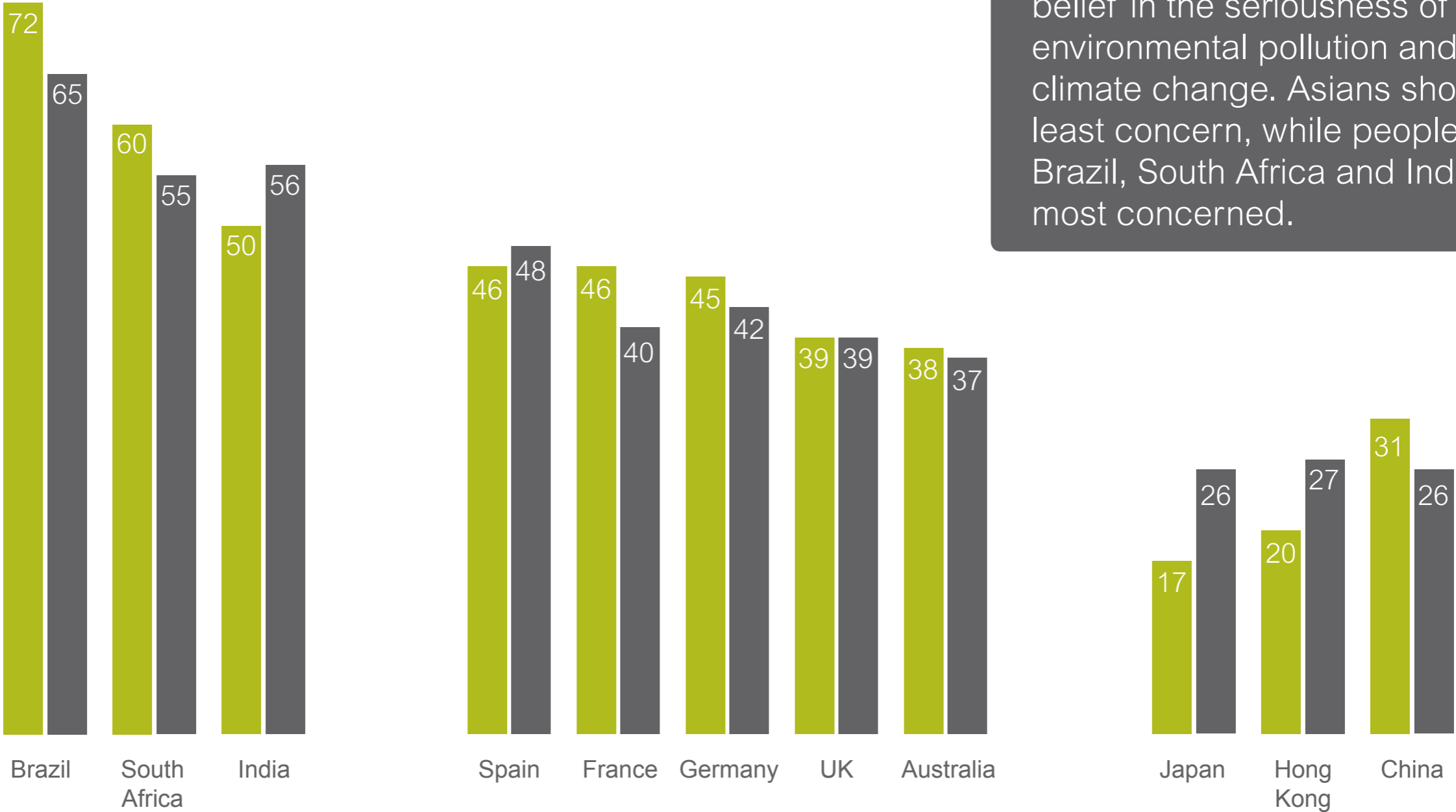
- Extremely or very serious
- Somewhat serious
- Not very or not at all serious



# Consumers are concerned: **Country level**



- Environmental pollution
- Global Climate Change/ Global Warming



Europeans set the average for belief in the seriousness of environmental pollution and climate change. Asians show the least concern, while people in Brazil, South Africa and India are most concerned.

**ABOVE AVERAGE CONCERN**

**AVERAGE CONCERN**

**BELOW AVERAGE CONCERN**

Numbers show % Extremely Serious Concern





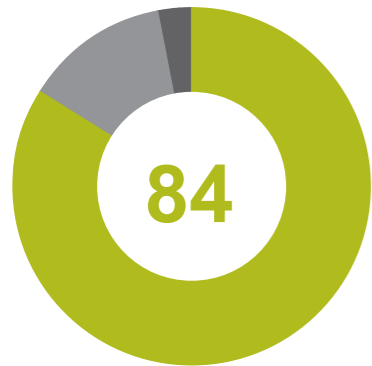
HOW DO CONSUMERS ACT UPON THIS CONCERN?



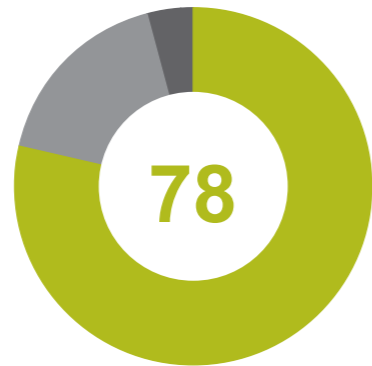
# Consumer actions: **Everyday life**



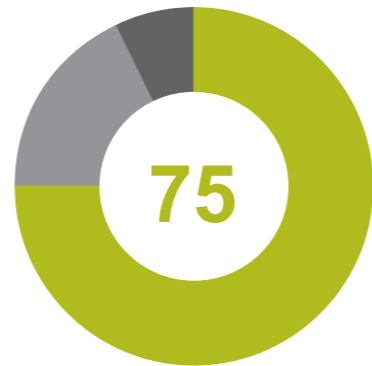
**Conserve energy** 



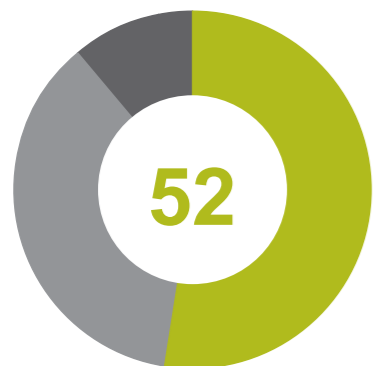
**Conserve water** 



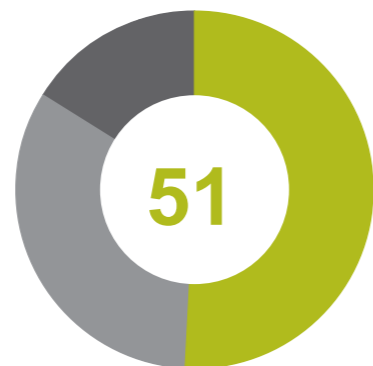
**Recycle** 



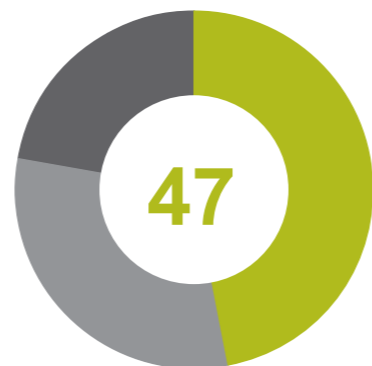
**Consider green when purchasing** 



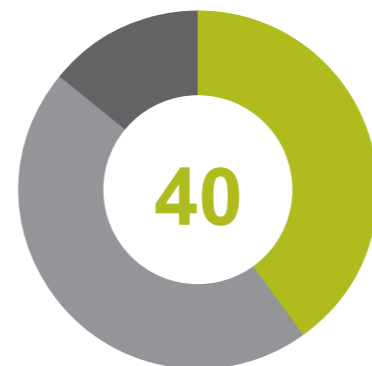
**Use green transportation** 



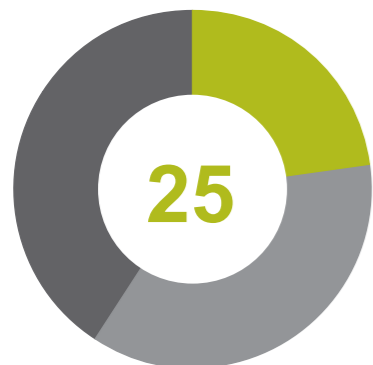
**Use greener home/car energy** 



**Talk about it** 



**Research co. practices** 



**Volunteer** 






**Contribute money** 



Consumers respond to their concerns about pollution and climate change by acting green. However, the motivation is highest if the green behavior is easily incorporated into their everyday life and routine.

Q: Please indicate how often you or someone in your household does it:

-  All or most of the time
-  Some of the time
-  Almost never or never

Numbers show % All or most of the time.

Base = Total (9,239)



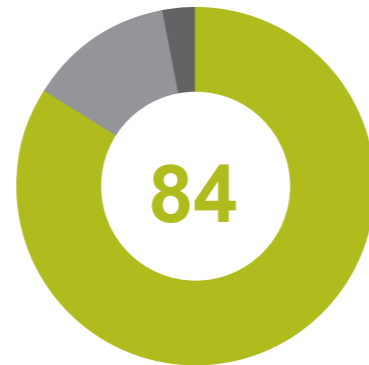
# Consumer actions: **Everyday life**



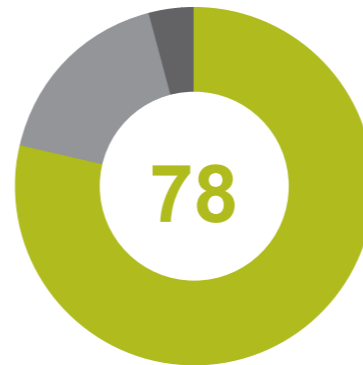
Green behavior is more likely if the consumer gains a direct benefit. Green actions are least likely when the consumer has to invest time and energy into the behaviour.

## TOP ACTIONS

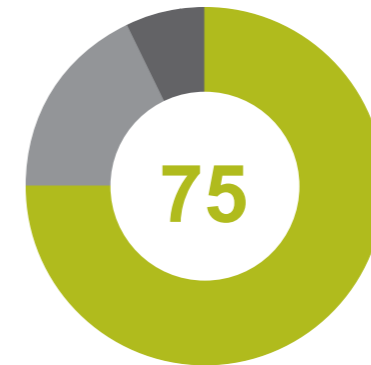
**Conserve energy** 



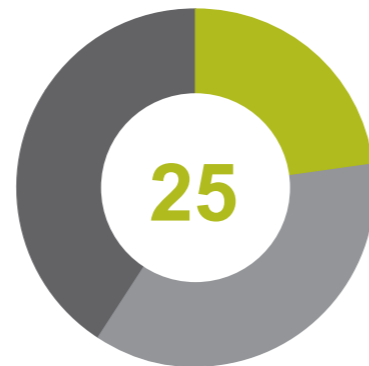
**Conserve water** 



**Recycle** 



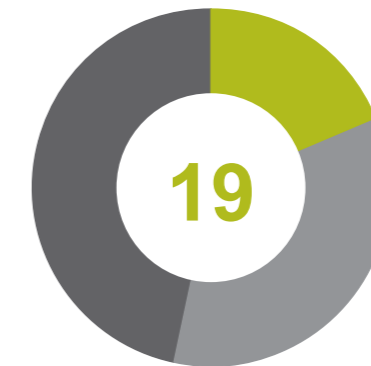
**Research co. practices** 



**Volunteer** 



**Contribute money** 



## BOTTOM ACTIONS

# Consumer actions: **Purchase behavior**



Globally, most consumers believe their purchases can make a difference and many intend to increase their eco-spending in the next year.



**76%**

The purchasing choices I make can make a difference to the environment.



**60%**

I plan to spend more on eco-friendly/green products in the next year.



**59%**

I am willing to pay more for eco-friendly/green products.

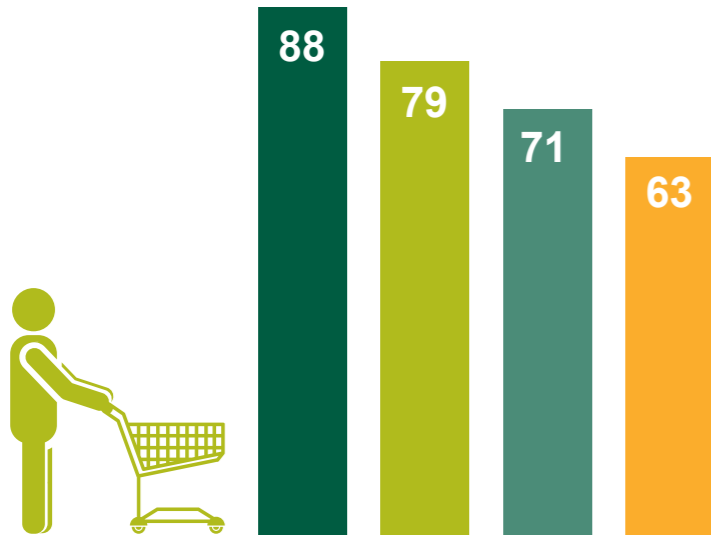


**53%**

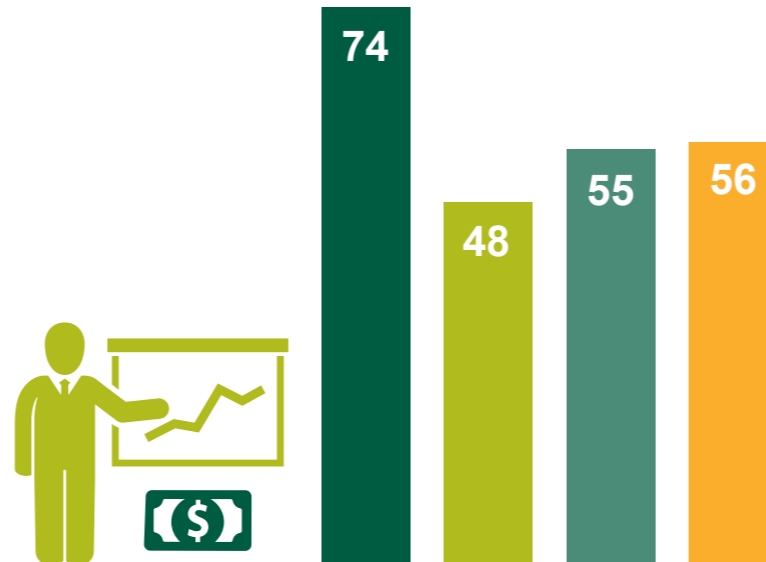
I am less likely to switch to brands when a product is eco-friendly/green than when a product is not.

Furthermore, the majority of consumers are willing to pay more for eco-friendly products and are less likely to switch brands, when the product is green.

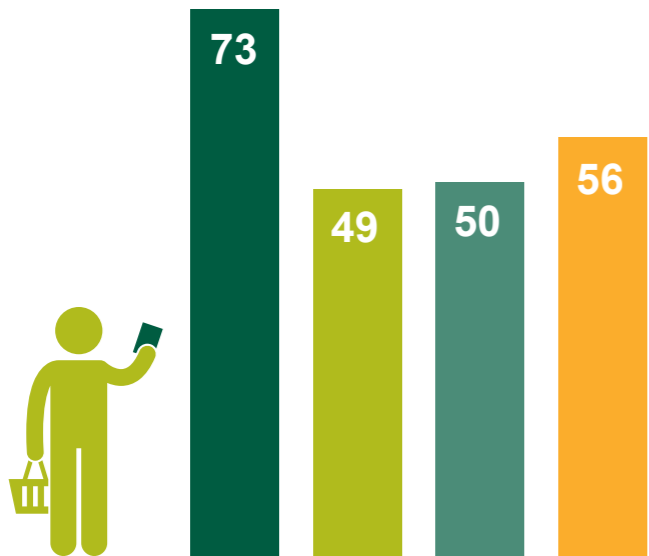
# Consumer actions: Purchase behavior



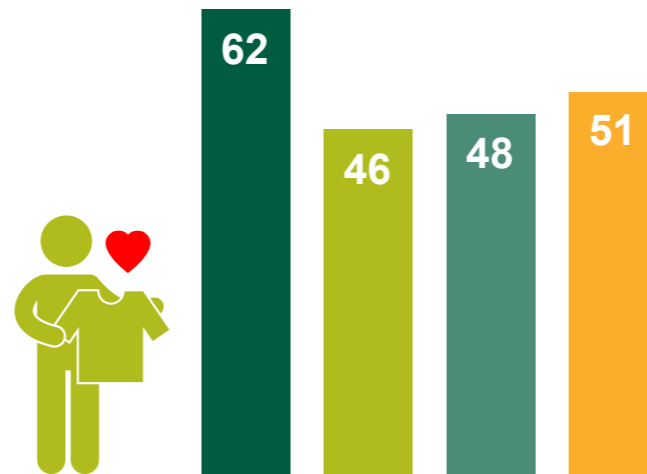
The purchasing choices I make can make a difference to the environment.



I plan to spend more on eco-friendly/green products in the next year.



I am willing to pay more for eco-friendly products.



I am less likely to switch brands when a product is eco-friendly/green than when a product is not.

Green inDeed consumers believe most in the impact of eco-conscious spending, are most willing to pay more for eco-friendly products, and plan to increase eco-spending in the next year.

Carbon Cultured consumers are least likely to spend more or increase spending on eco-friendly products.





WHO IS RESPONSIBLE FOR FIXING THE PROBLEM?



# Responsibility and barriers to being green



**80%** of consumers strongly or slightly agree that companies should be responsible for fixing the problem.



**55%**

Being green is too expensive.

**51%**

I don't know how to do more.

**42%**

The government should address the problem.

**29%**

Eco-friendly products don't work as well.

**28%**

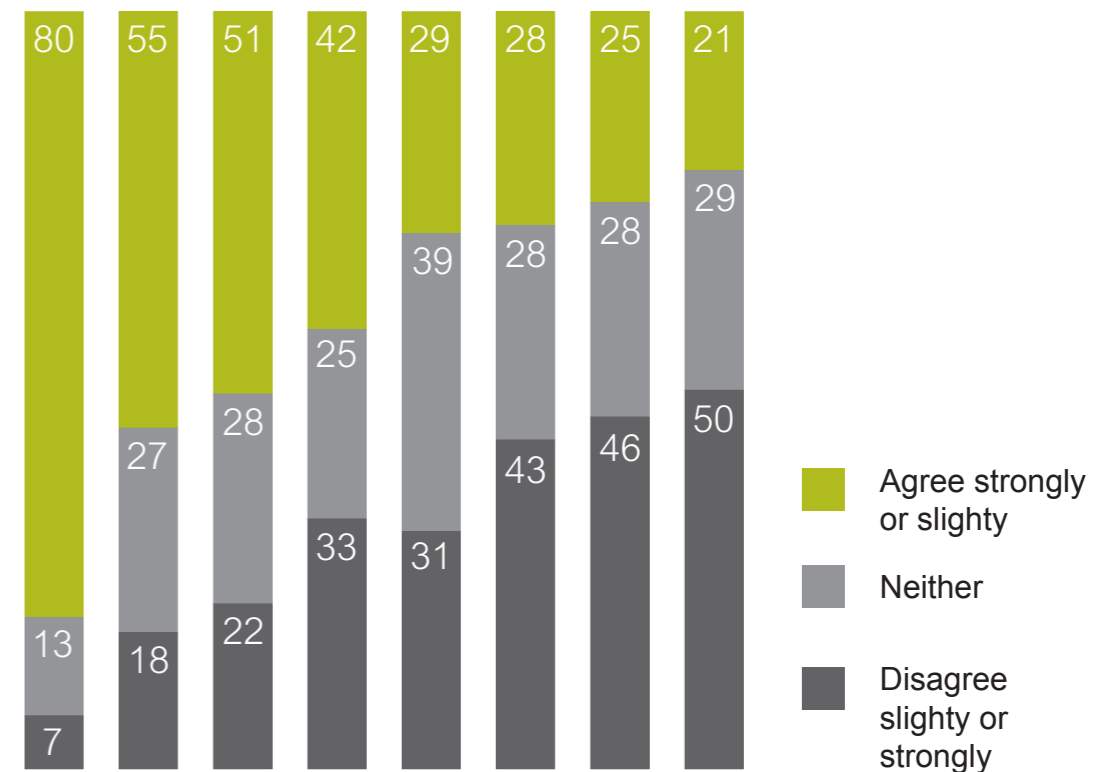
I am too busy.

**25%**

First comes economic security.

**21%**

Family rejects eco-friendly products.



Green numbers show % Strongly/Slightly Agree.

Q: How much do you agree or disagree with each of these statements regarding your lifestyle and attitudes toward the environment, please use a scale where "1" means "disagree strongly" and "5" means "agree strongly".  
Base = Total (9,239)



# Consumers trust varies



**50%** of consumers fully trust certification seals or labels on products packaging.

**20%** of consumers fully trust company advertising.



Certification seals are the most trusted source of information on a product's level of environmental and social responsibility.

**44%**

Awards and recognition by independent third party sources

**43%**

Friends, family or co-workers

**34%**

Consumer reviews, ratings, blogs or message boards

**34%**

CSR or sustainability reports

**32%**

Government information or reports

**31%**

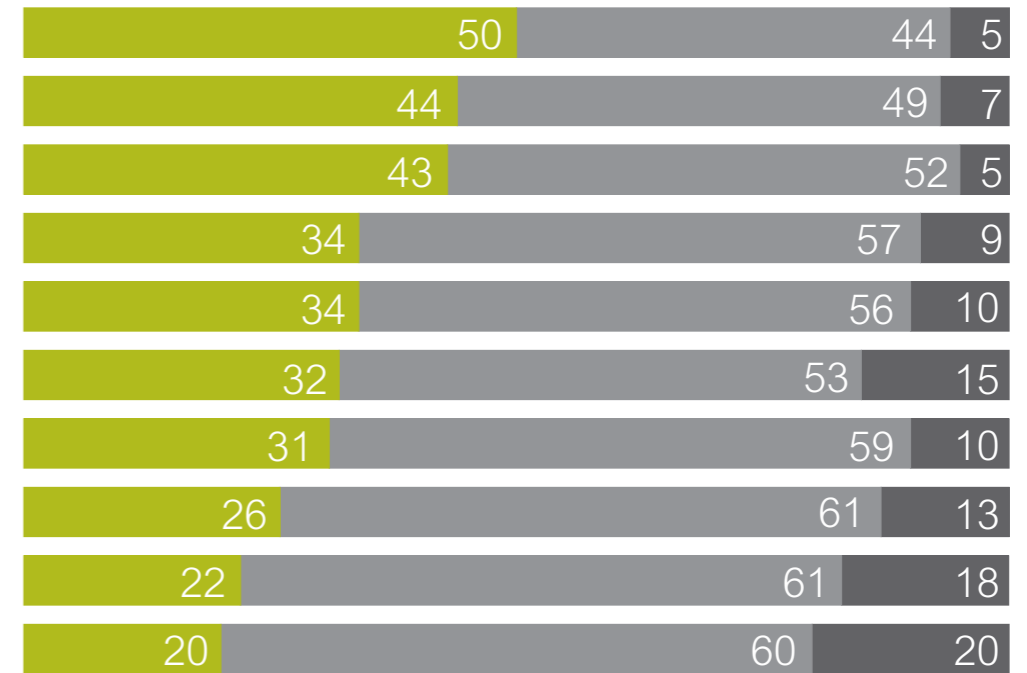
Statements made on product packaging

**26%**

Media reports

**22%**

Company website or a company's Facebook page



■ Fully trust
 ■ May or may not trust
 ■ DO NOT trust

Green numbers show % Fully Trust.

Q: How much do you trust each of the following sources to inform you about whether or not a product is environmentally friendly and socially responsible? ("I fully trust this source" to "I do not trust this source at all".  
Base = Total (9,239)

# Impact of ENGOs and for-profit brands on the FSC label



69%



would trust the FSC label more when endorsed by **non-profit organisation WWF**

65%



would trust the FSC label more when endorsed by **for-profit organisation HP**

Surprisingly, when it comes to building consumer trust for-profit brands show to be as influential as non-profit ENGOs.

63%



would trust the FSC label more when endorsed by **non-profit organisation Greenpeace**

64%



would trust the FSC label more when endorsed by **for-profit organisation Kleenex**

Respondents rated from a list of preselected options on a three point positive influence scale.

Numbers shown are in percentage.



# Summary

- 1** Consumers are highly concerned about environmental pollution and global warming/global climate change. And they want to do their part by purchasing 'green' products.
- 2** Consumers believe that companies are responsible for solving environmental challenges, but have high distrust for companies specific messaging on this topic.
- 3** Consumers trust is highest for certification seals or labels on product packaging, which tell them if the product is environmentally and socially responsible.
- 4** Consumers report that trusted and well-known brands can positively influence their green purchasing decisions.
- 5** The credibility of a certification seal together with the consumer equity of a trusted brand equals an influence that is greater than either group can exercise alone.
- 6** Telling the FSC story in conjunction with a trusted brand makes it easy for shoppers to be confident that the company is taking care of the environment.





Let's talk...

**If you would like to collaborate or discuss working with FSC to achieve your sustainability goals please contact:**

Marcelle Peuckert, Business Development Director

**[m.peuckert@fsc.org](mailto:m.peuckert@fsc.org)**

Carla Tavares, Marketing Manager

**[c.tavares@fsc.org](mailto:c.tavares@fsc.org)**



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# Forest Stewardship Council®

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FSC Global Development GmbH  
Charles de Gaulle Straße 5  
53113 Bonn, Germany

T +49 (0) 228 367 660  
F +49 (0) 228 367 66 30  
[www.fsc.org](http://www.fsc.org)

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