



AIAC Event in Tuscany
16 May 2019

"A consumer perspective on the environment and sustainable forestry"
By: Mikael Selling, CEO, Opticom Group

A long track record within global forestry.

We offer global research, consulting and communication services.

Our mission is to help our customers improve their results by transforming **data** and **knowledge** into strategic **advice** and efficient communication.

We are a **truly global** company covering over 30 nationalities active on four continents in more than 100 countries.





Consumers around the globe get more **environmentally conscious**, their concerns are rapidly **growing**, and we are all aware of that. Most of us wants to do the **right** thing, but sustainability is a **complex** matter.

SCA wanted to know what **consumers** around the world think.

What are their **perceptions** on how we manage our forests and our resources?

What do they **know** about fiber-based products and environmental certifications?

Do they even **perceive** fiber-based products as renewable and recycable?

So they asked **Opticom International Research & Consulting** to find out!

Consumer scope

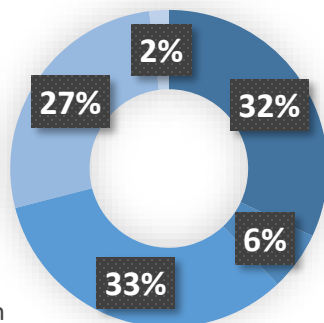
- **Overall purpose:**
 - To investigate consumer attitude towards the environment and forest industry including:
 - Attitudes towards eco-friendliness and influences on their purchasing behaviour
 - Awareness and perception of sustainability terms and the impact of different materials
 - Knowledge about the impact of the forest industry
 - Attitudes, awareness and importance of certifications
- **How and with whom:**
 - 1560 web surveys with consumers in the UK, Germany, France, Sweden, Spain and the US (New York state only)
 - Distribution spread across demographic age groups and gender per country
- **When:**
 - January 2019
 - Up-dated in May 2019 with survey among consumers in China



Demographics

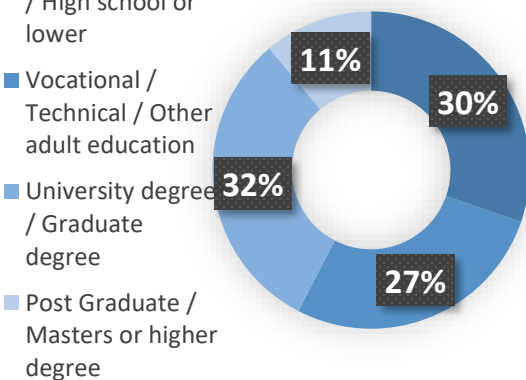
■ Single

Household



■ Secondary school / High school or lower

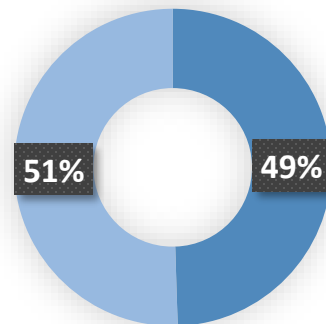
Education



Gender

■ Male

■ Female

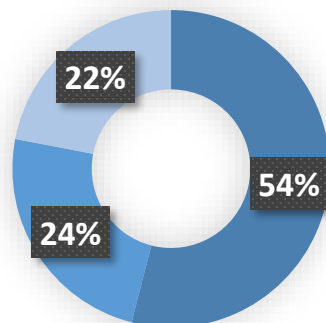


Residence

■ Urban

■ Suburban

■ Rural



Age

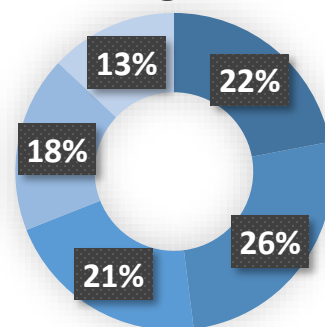
■ 18-30 years

■ 31-40 years

■ 41-50 years

■ 51-60 years

■ 61 years and older



(253 resp.)



(250 resp.)



(259 resp.)



(262 resp.)



(262 resp.)



(256 resp.)

NY state only



Key findings and main results



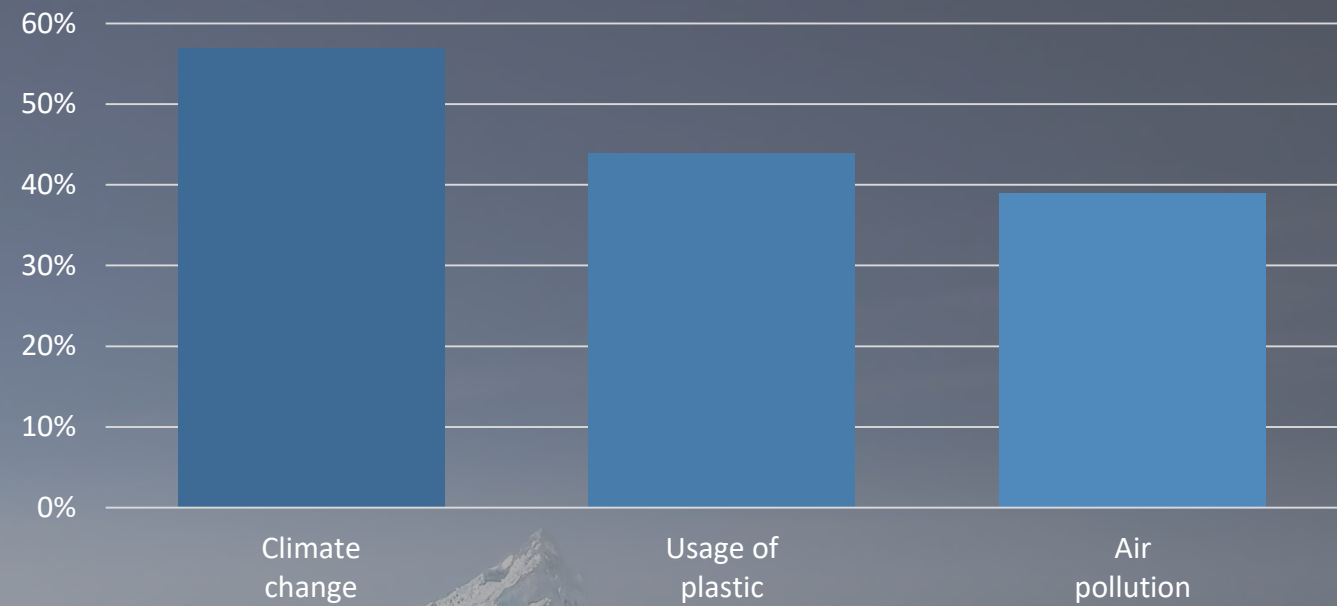
43% of consumers consider environmental impact of own behaviour

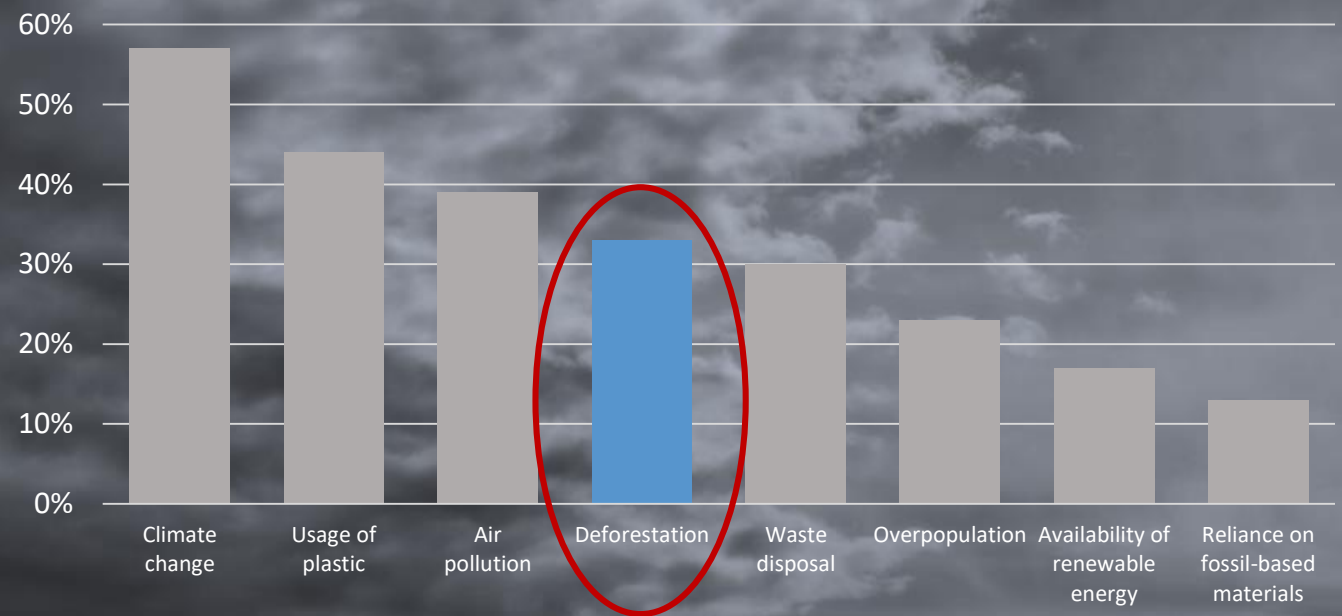
35% take into account their environmental responsibility when making purchases

But only **22%** actually refuse to purchase items or services that are not environmentally sustainable


Over the past 12 months **66%** of consumers say that their concern for environmental issues has increased

Climate change and **Usage of plastic** are topics that cause the most concern





Deforestation still high on top of mind for consumers



72% of respondents feel that plastic has a negative impact on the environment – only 16% for paper packaging!

54% have refrained from purchasing a product or service that was not environmentally friendly at some point

And of those who have refrained, 70% of those times were due to **plastic packaging**

Compared to 7% refrained from paper-based packaging!



35% of respondents do not think that paper / packaging is a "renewable" material

29% of respondents think that wood is a "fossil-based" material

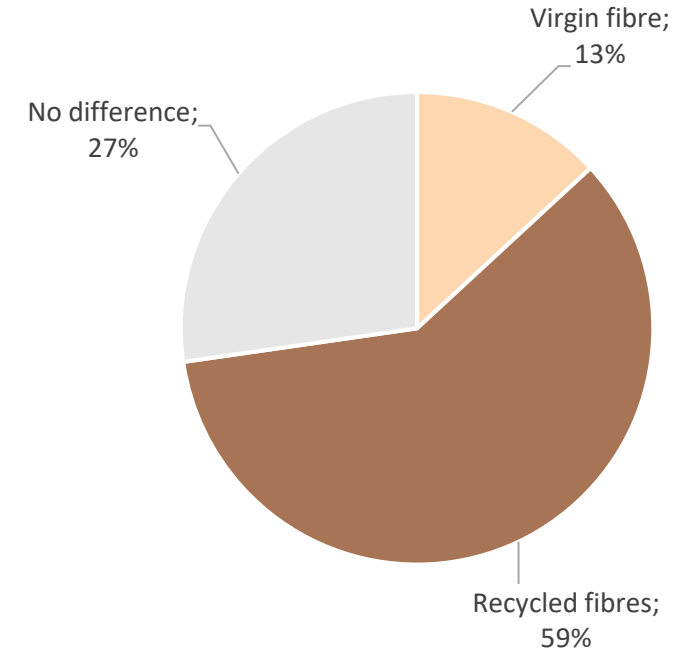
72% of respondents think that plastic is a "recyclable" material



55% of respondents would like to see renewable fiber-based materials such as cardboard and paper replace materials such as plastics and metals

27% were familiar with the term "virgin fiber"

42% were familiar with the term "recycled fiber"



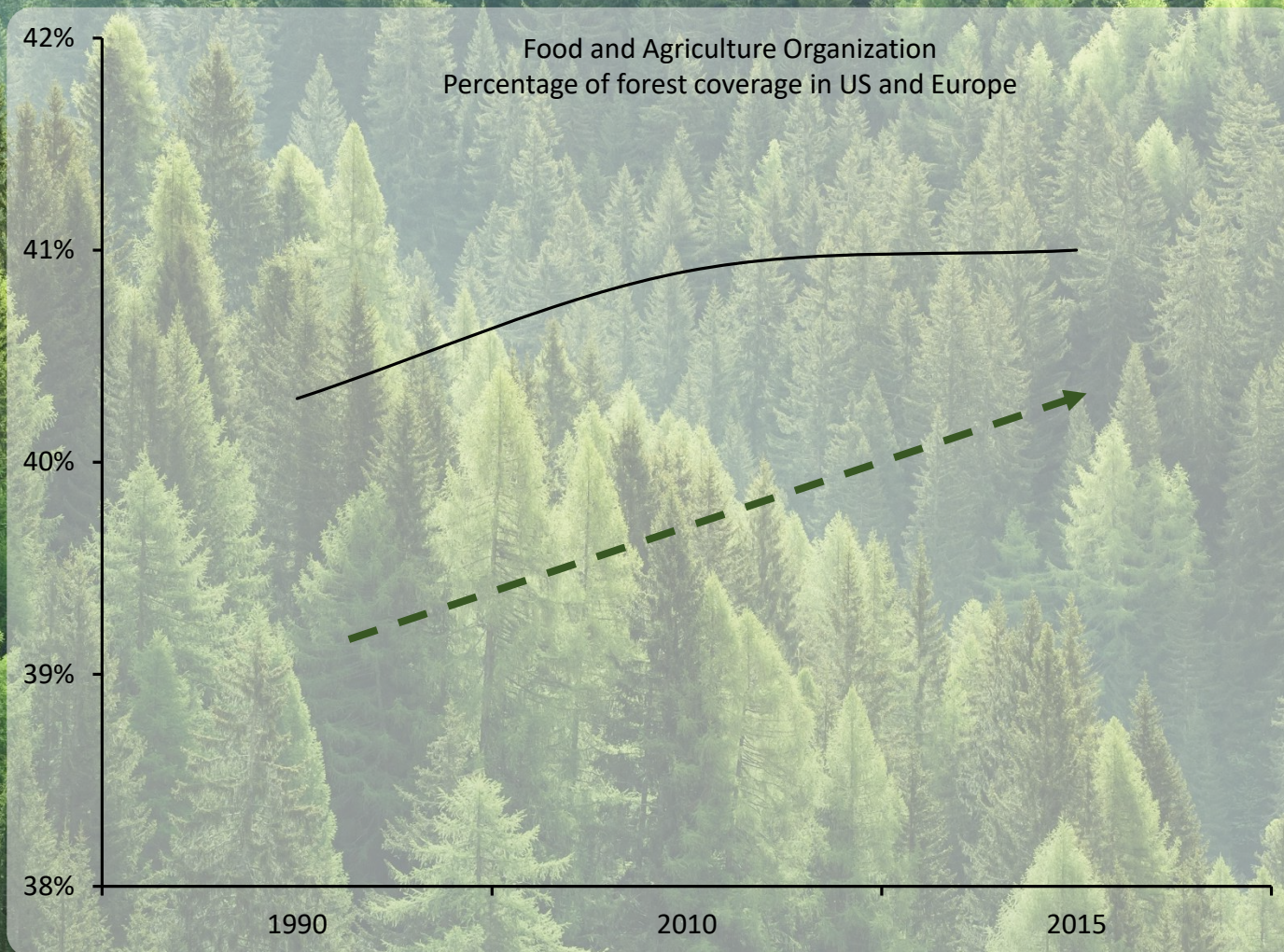
59% thought that "Recycled fibers" were more environmentally friendly / sustainable than "Virgin fibre"

Only **31%** of respondents think that the European forest industry operates in a sustainable and responsible way

A **further third** were unable to answer the question at all

49% believe that forests cover less than 20% of Europe

66% thought European forests are currently at their lowest levels in 20 years



Europe & NA
Source: FAO, UN, 2017

42% say that we can rely on recycling existing paper products without the need to harvest more trees

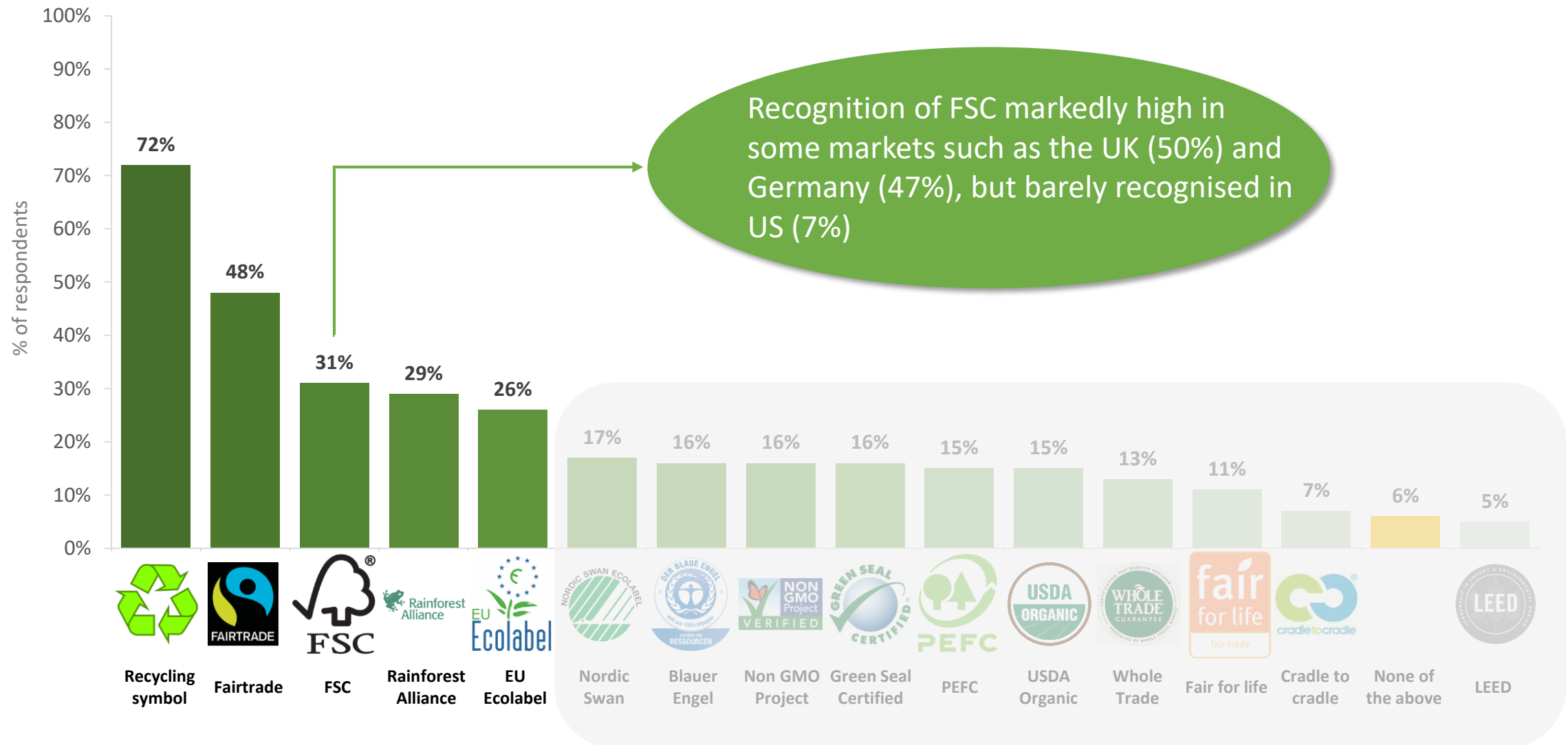
It is believed by **more than a third** of respondents that the forest and paper industry is having a **positive** impact on current atmospheric levels of CO₂



More than 80% of consumers claim that certifications influence their decision making when purchasing products produced from paper or trees



Certification recognition



Demographic differences

Homogeneous opinions across the spectrum?

Not quite!

Youth
(18-30)

Their environmental concern has **increased** most among the age groups

Impact

More young people have refrained from making purchases that were **not** environmentally friendly

However....



Fewer young adults believe that paper / packaging is "renewable"



77% think that forest levels in Europe are at their lowest level in 20 years



And they are the least concerned group regarding usage of plastic





What about China? Those who believe that Chinese consumers are less environmentally concerned than we in the west need to rethink!

- **51%** of consumers consider environmental impact of own behaviour
- **39%** take into account their environmental responsibility when making purchases
- **81%** of consumers in China have refrained from purchasing a product that was not environmentally friendly
- Interesting to note is that consumers have a very positive perception on how the forest industry operates in China ... but as many 68% believe that the forest industry is having a negative impact on CO2 levels



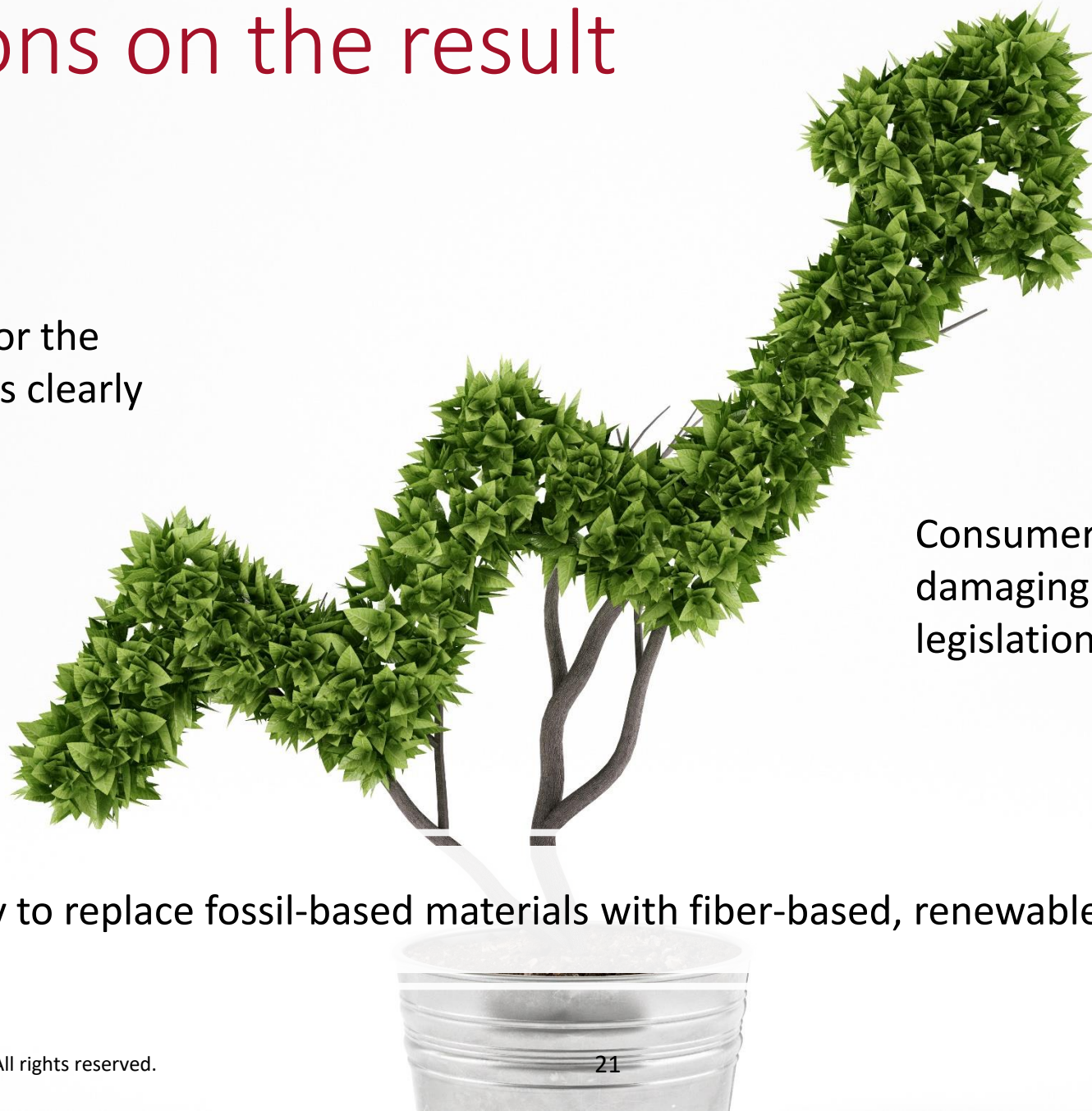
Conclusions

Reflections on the result

The concern for the environment is clearly growing

Consumers know plastics are damaging to the environment, and legislation for change is developing

A great opportunity to replace fossil-based materials with fiber-based, renewable and sustainable solutions



But our industry is facing a big challenge

60% of consumers consider our forests a scarce and decreasing resource

Many don't see fiber-based materials as renewable

Most consumers don't think that our forests are managed sustainably

There's still a strong need to communicate our sustainability story better



Together we need to **combine** our communication efforts that forests in Europe are in fact in a **healthy** state. Forest coverage is continuing to **grow**, particularly in Sweden where we have **twice** as much forest as we had a century ago, and our flourishing forests are having a **positive** impact on the environment.



Our **combined** efforts to curate the forest in a smarter way will make for a **greener** and more **sustainable** world for everyone, and this in turn needs to be **communicated along the value chain!**



Knowledge explains.
Communication changes.