

Getting Our Labels Right

Key Findings From Quantitative Stage

B2B International

JN262-16, December 2016



Beyond Knowledge



A Little About The Target Audience

2,013

Consumer Views Heard

Country:



China
(613)



USA
(746)

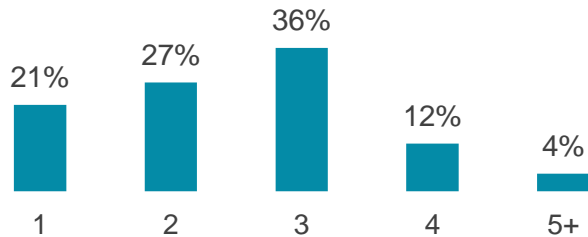


Germany
(654)

Gender:



Number Of Bedrooms:



Average Age:

44
Years

Home Location:

Location	%
In a city	54%
In the suburbs	18%
In a town	15%
In a village	8%
On its own in a rural area	4%
In a small group of houses	1%

Income:



~26,000\$



~54,000\$



~39,000\$

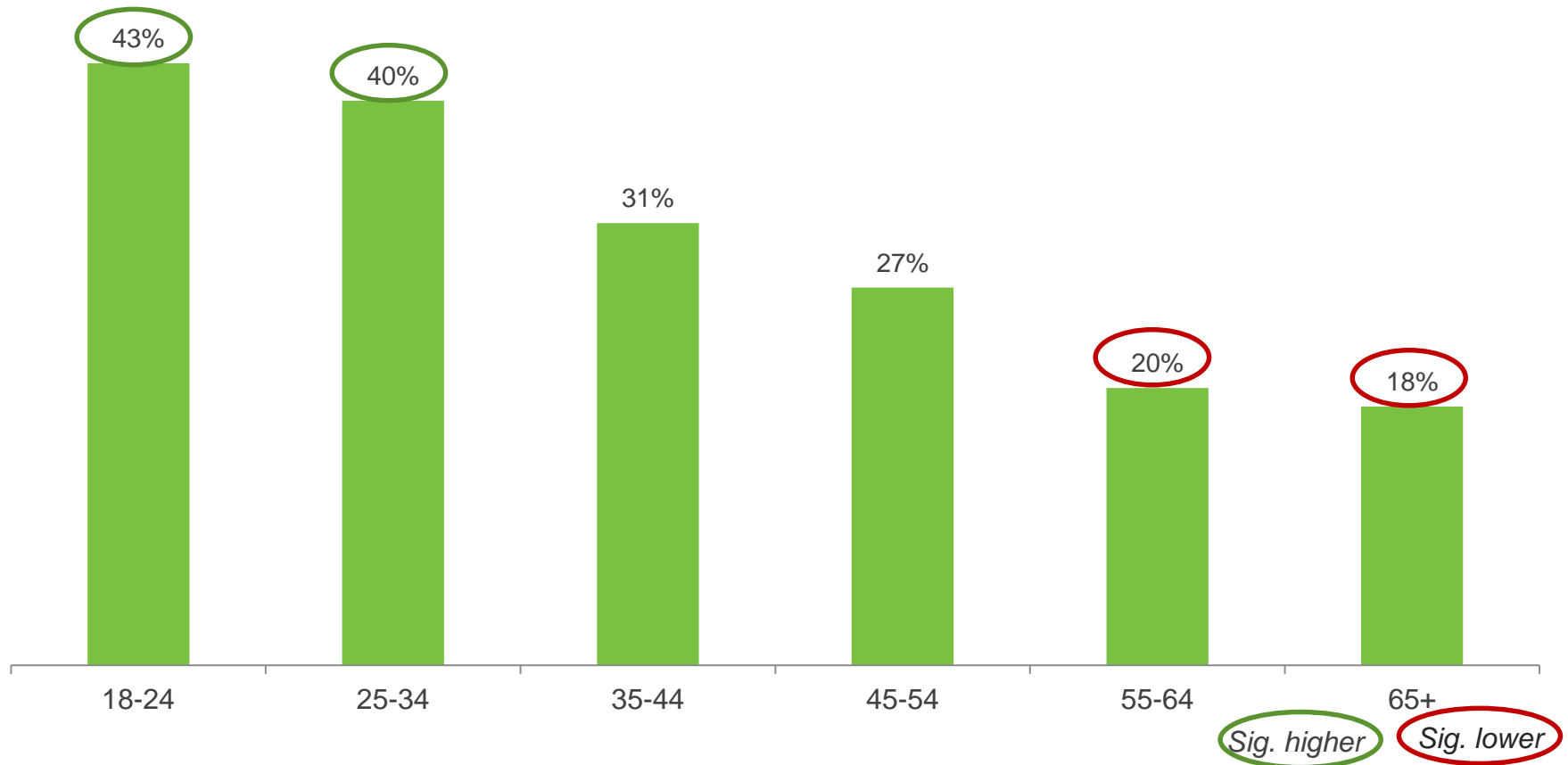
Awareness Of Labels Related To Sustainability

Beyond Knowledge

B2B
International

Younger Age Groups Are More Aware Of FSC

Younger age groups are more aware of FSC. In Germany, where awareness of FSC is already augmented, awareness of FSC amongst 18-34 year olds is 67%. There is no difference in levels of awareness across age groups.

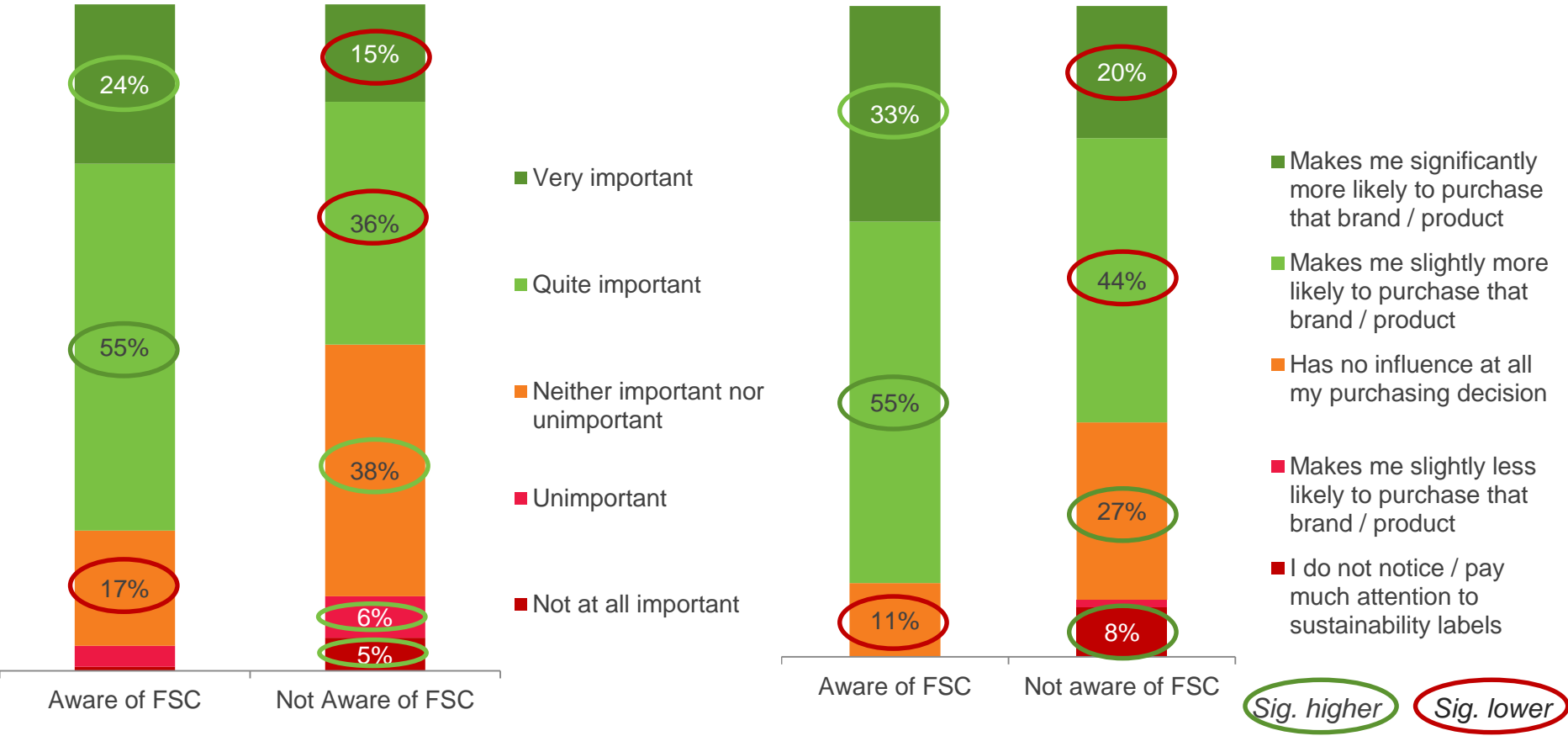


Base: 2,013
All respondents

Which of the following have you heard of or seen before today? Please select all of the logos you are aware of.

Those FSC Aware See Sustainability Labels As More Important & They Are More Likely To Influence Their Purchase Decisions

Three quarters of consumers aware of FSC see sustainability labels as important and 9/10 state that displaying them on a product would make them more likely to purchase it.



Base: Varies

How much attention do you pay to sustainability labels when purchasing a product, where 1 is no attention at all and 10 is a lot of attention. What influence does a product having a sustainability-label have on your purchasing decision?

Understanding & Views Of FSC & Its Labels

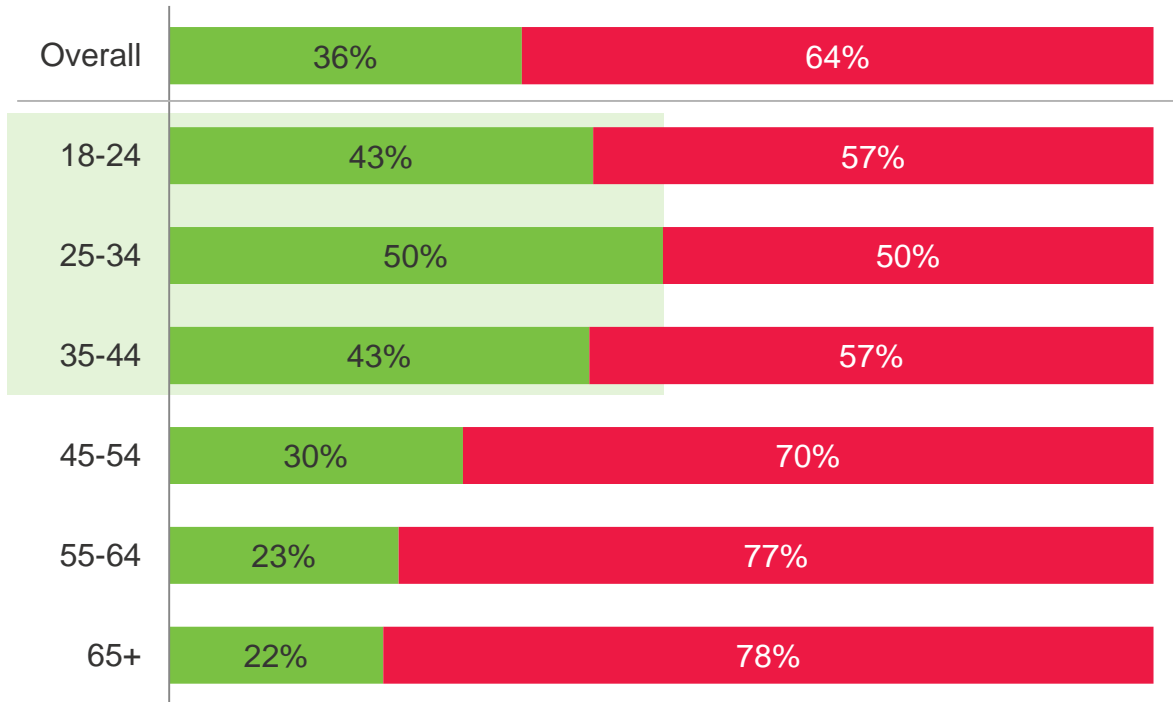
Beyond Knowledge

B2B
International

Up To A Third Of Respondents Know FSC Is A Certification & Labelling System Promoting Responsible Forest Management

Younger respondents in China and Germany were significantly more likely to state that they knew about FSC. A slightly different picture was seen in the USA where those aged between 25-34 were the age group most likely to have knowledge of FSC.

■ Yes ■ No



In the USA and Germany, males were more likely to state they knew the mission of FSC compared to females

With don't know/N/A removed

Base: 2,013
All Respondents

The Forest Stewardship Council (FSC) is a certification and labelling system promoting responsible forest management worldwide, did you know this before today?

In Germany & The US, Around 1 In 10 State They Are Aware Of The Three FSC Label Categories



100% - wood from FSC certified forests

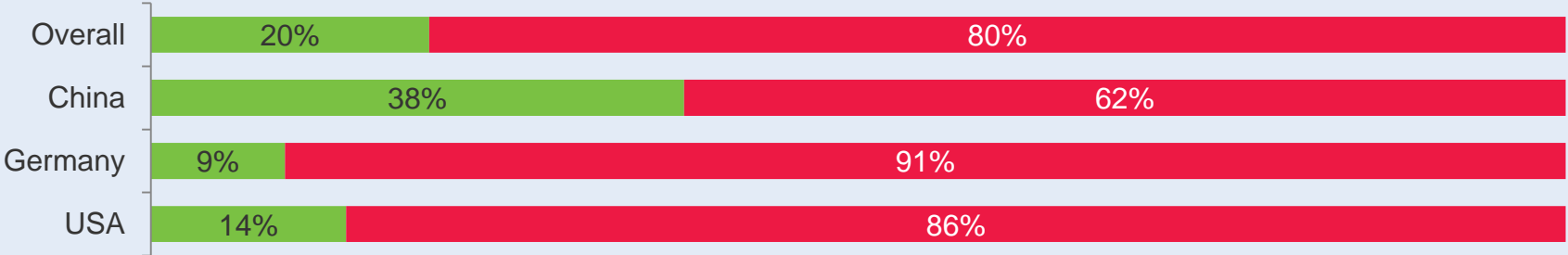


MIX – mixture of material from FSC certified forests, controlled wood and recycling



RECYCLED – material from recycled material only

Aware?



Base: 2,013
All Respondents

Labels come under three categories, which describe the origin of FSC-certified material. Did you know that there were three different FSC label categories that can be found on products?

The MIX Label Is The Least Clear Overall

At an overall level nearly three quarters of consumers stated that they believed that the 100% wood and Recycled labels were clear to understand. However, this was significantly lower for the MIX label.



74%



60%



73%

NOTE: Target range as indicated by research agency is 70-75%

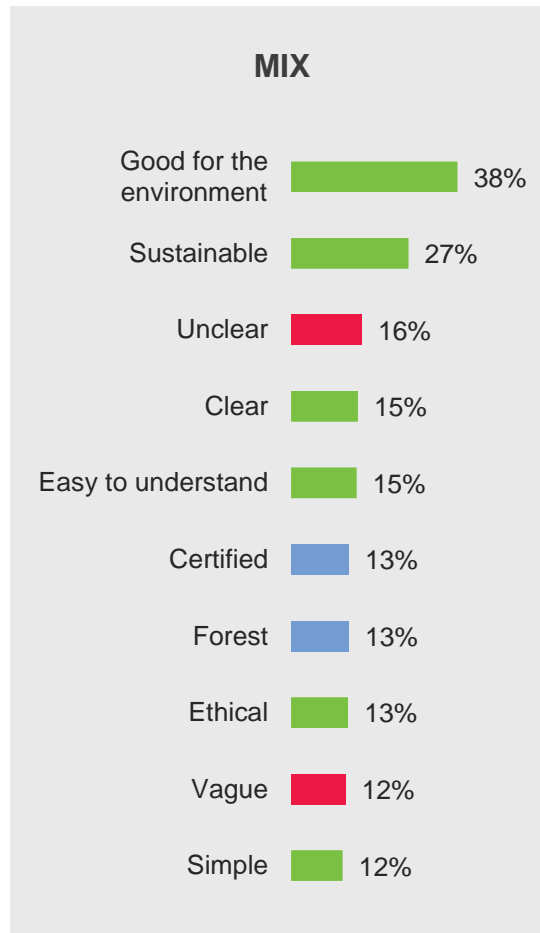
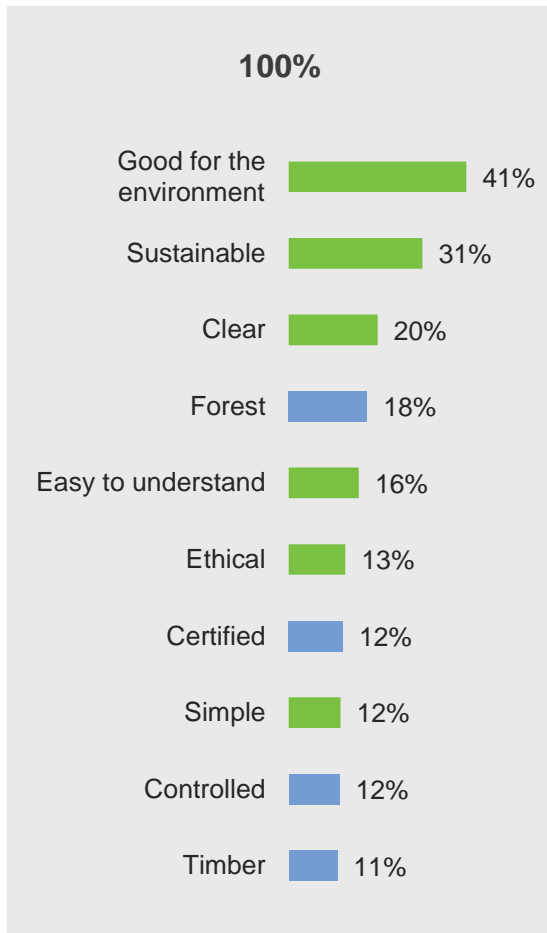
Base: 2,013
All Respondents

How clearly do you understand the meaning behind each of these labels?

B2B International

Labels Generally Described In A Positive Manner

All labels were seen to be good for the environment and sustainable, however, the MIX label was more often associated with being unclear and vague compared to other labels.

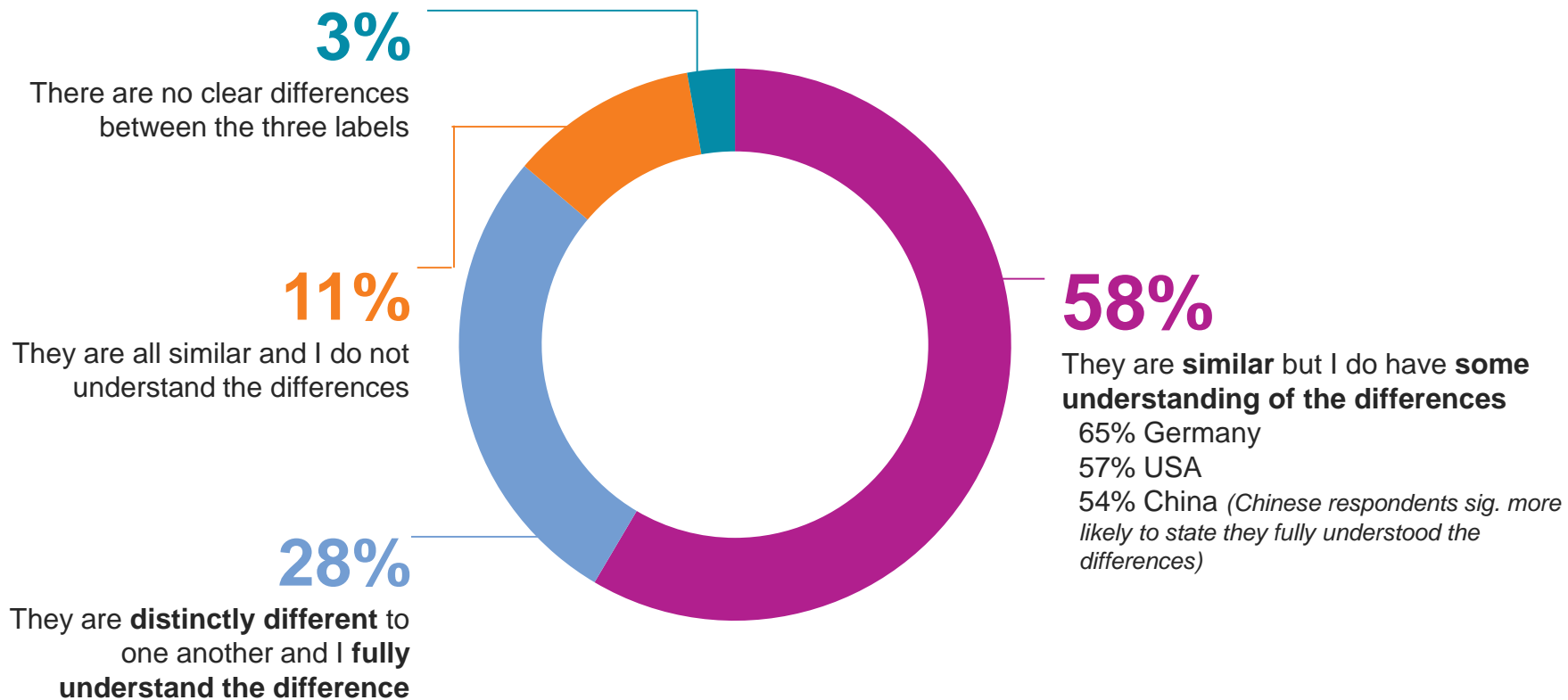


Base: 2,013
All Respondents

Which of the below would you use to describe each label? Please select up to three words or labels which indicated your view.

Labels Seen To Be Similar But Respondents Have Some Understanding Of The Differences

Those who had less familiarity of sustainability labels and FSC were more likely to state that they did not fully understand the labelling system. There was little difference by age or gender.



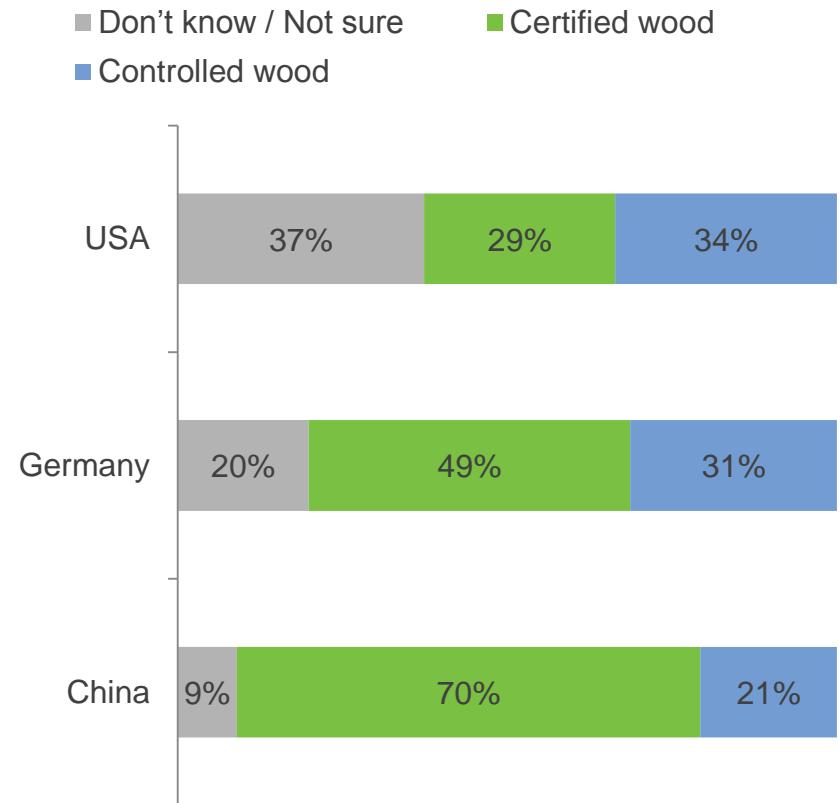
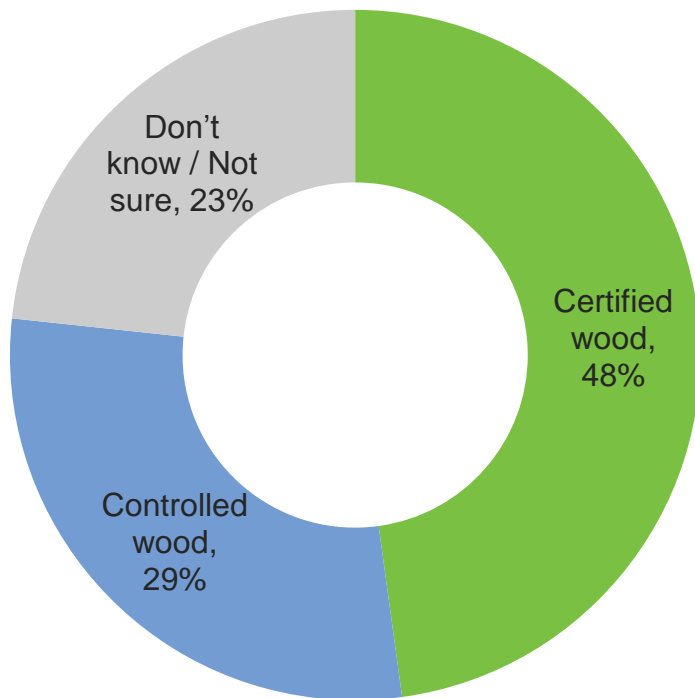
Base: 2,013
All Respondents

How differentiated are each of the three labels?

Views On The MIX Label

'Certified Wood' Seen To Indicate More Diligent Supply Chain

Respondents in the USA were least clear about which phrase indicated the most diligent supply chain. No clear differences by age were seen. 58% of those aware of FSC stated Certified wood, compared to 44% of those unaware.



Base: 2,013
All Respondents

In your opinion, which of these phrases indicates a more diligent supply chain?

When MIX Label Is Explained, Fewer Respondents State The Meaning Is Clear

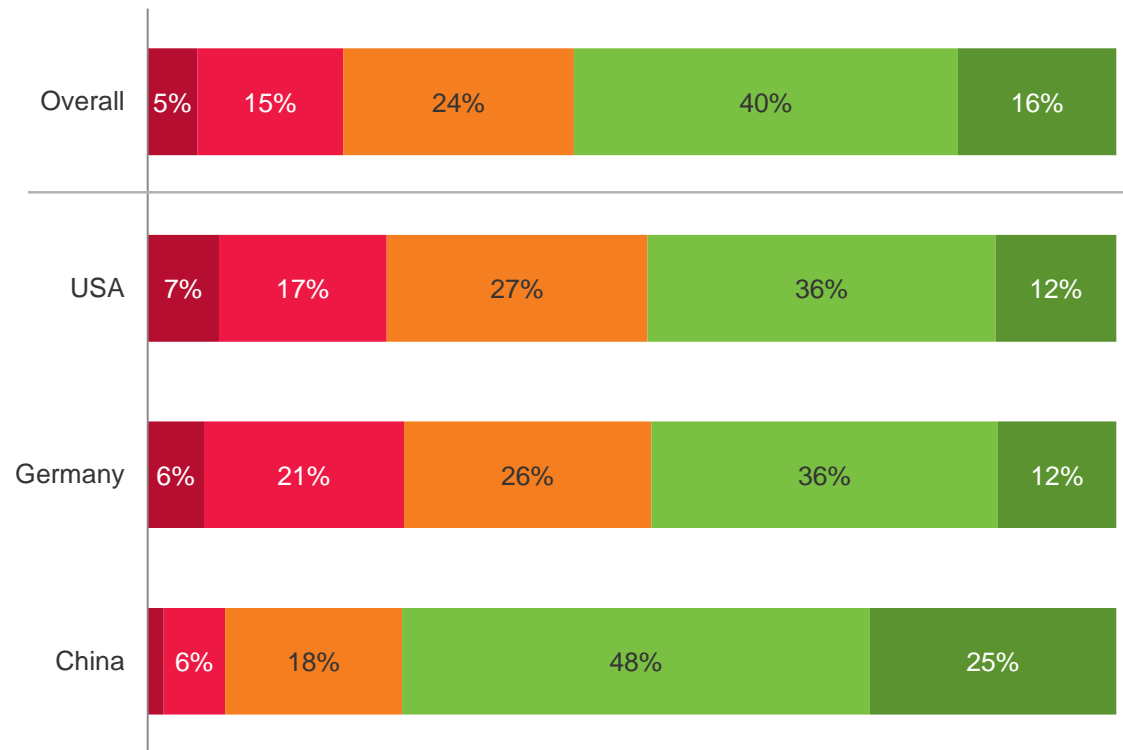
Males were significantly more likely than females to state that they felt that the meaning of the MIX label was clear. 65% of those previously aware of FSC stated the label was clear compared to 52% of those unaware.



MIX labels are used when the timber or fibre in the product or mixture of some / all of the following:

- a) Timber or fibre from an FSC certified well-managed forest
- b) Reclaimed timber or fibre
- c) Timber or fibre from controlled sources that have been checked against minimum criteria

■ Not at all clear ■ Unclear ■ Neither / nor ■ Clear ■ Extremely clear



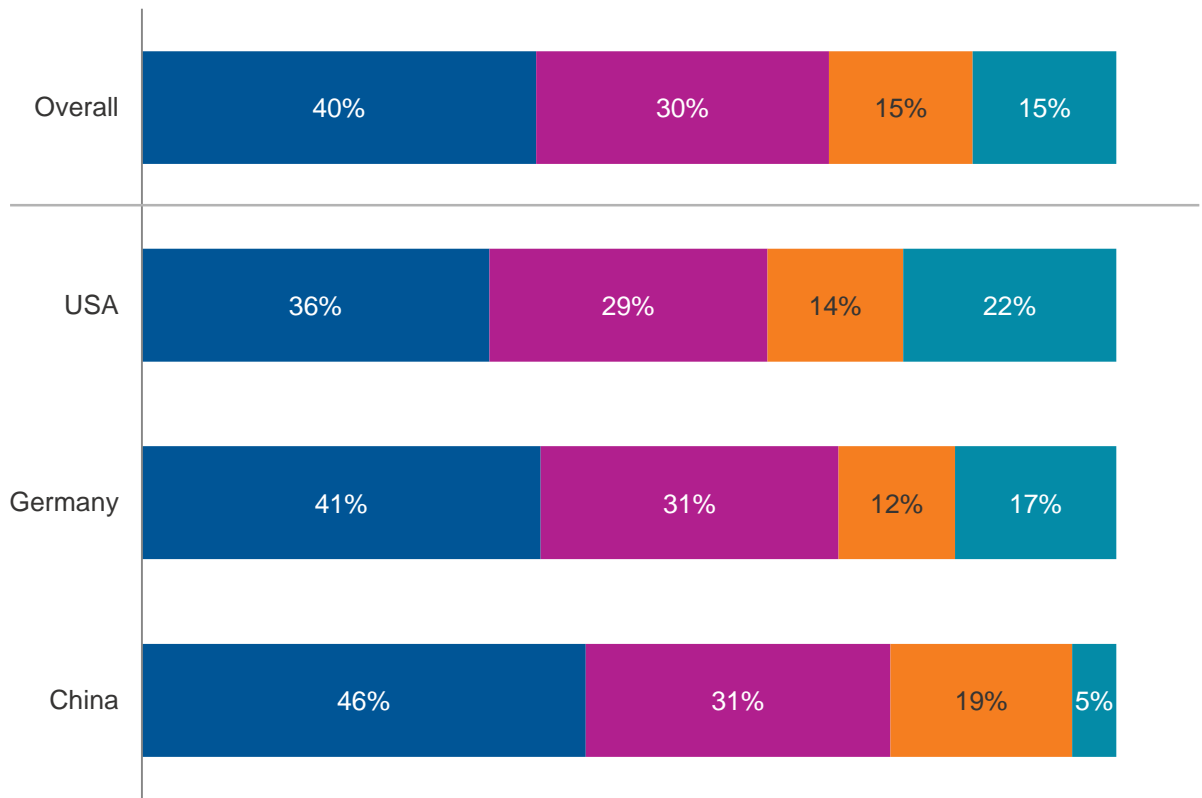
Base: 2,013
All Respondents

How well does the current MIX label convey this?

Less Than Half Believe That It Is Important To Communicate Manufacturing Process In The Label

- It would be important to see this clearly in the label
- The current label provides enough information
- This makes no difference to me
- As long as this information is available on the website that is enough

During the manufacturing of some MIX labelled products, the materials are mixed together and it is not always possible to state how much certified material an individual product contains. At a manufacturing level it is checked that sufficient amounts of certified materials are being used.
























With don't know/N/A removed

Base: 2,013
All Respondents

Is this important to see in the label when shopping for forest based products?

All Age Groups Prefer Text, ‘Wood- Responsible Use Of Forest Resources’

Whilst second and third choices vary across groups, this label remains most popular.

MIX Text Options	18-24	25-34	35-44	45-54	55-64	65+
Wood – supporting responsible forestry	3 rd 	=2 nd 	3 rd 	=3 rd 	4 th	3 rd 
Wood from responsible sources	2 nd 	=2 nd 	=2 nd 	=3 rd 	3 rd 	4 th
Wood – responsible use of forest resources	1 st 	1 st 	1 st 	1 st 	1 st 	1 st 
Wood - from certified or controlled sources	4 th	3 rd 	=2 nd 	2 nd 	2 nd 	2 nd 

Base: 2,013
All Respondents

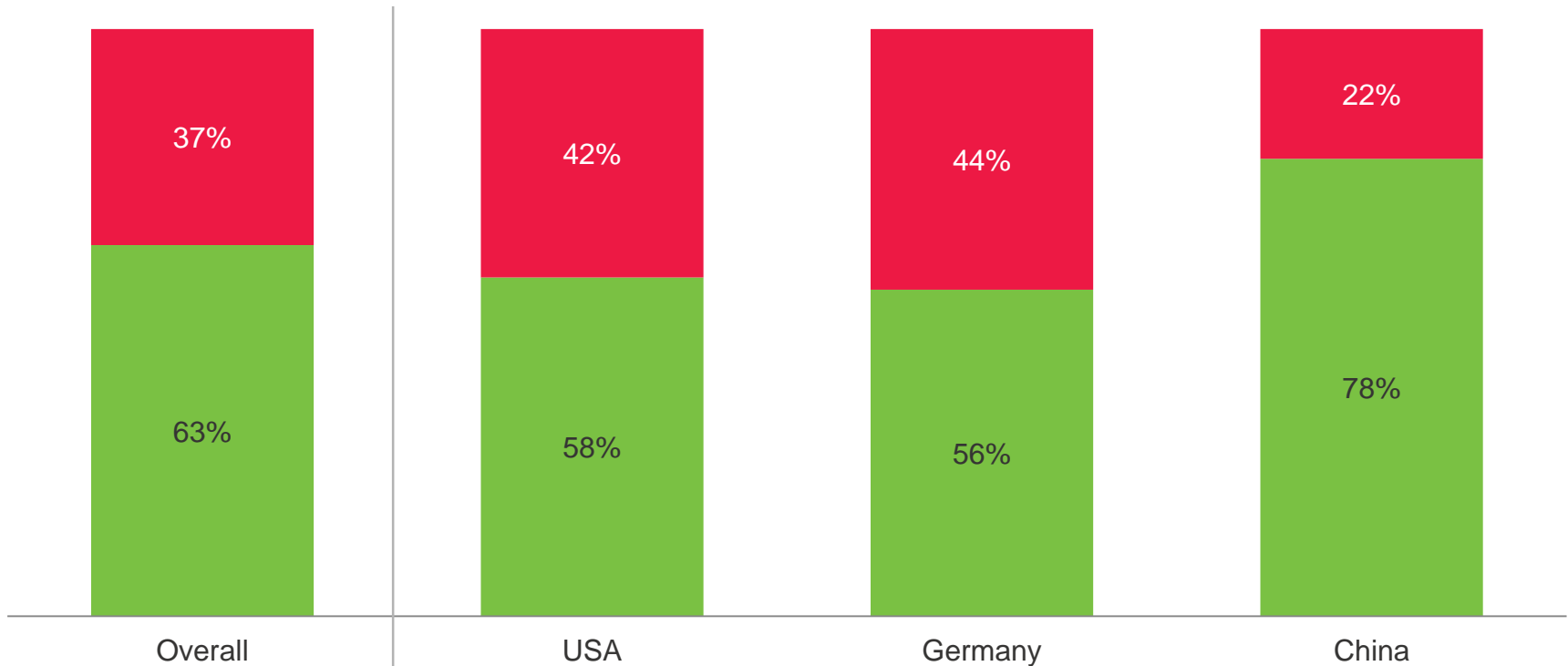
Please rank the text below in order of your preference of how you would like to receive the information about the meaning of the label.



Over Half Believe A Change In Wording Would Make It Simpler To Understand

Younger respondents were significantly more likely to state that a change in the text would make the label easier to understand. Those previously aware of FSC would be more likely to state a wording change would be simpler to understand (71% of those aware compared to 59% unaware).

■ Yes, it would be simpler to understand ■ No, it would make no difference to me



With don't know/N/A removed

Base: 1,416
All Respondents

Would changing the text on the MIX label (wood from responsible sources) into your number one choice improve your understanding?

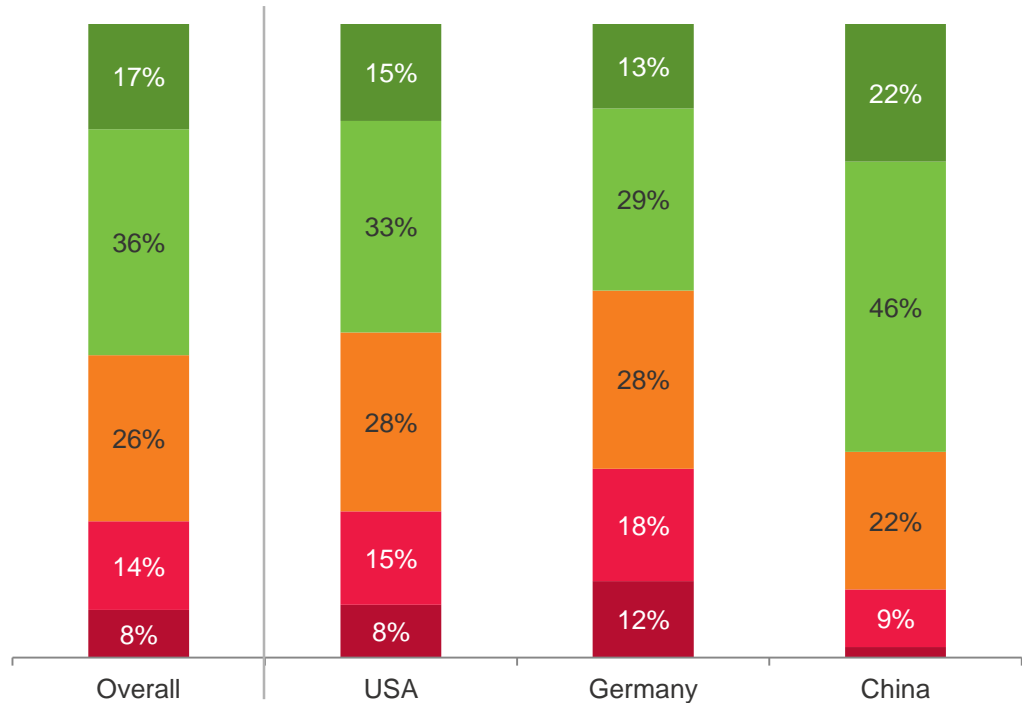
Views On The Wider Range Of Labels

Half State That Mini Labels Would Provide Enough Information In Most Cases

This was particularly strong amongst the younger age group – 20% of those aged under 35 stated that mini labels would always be enough information. Mini labels are particularly popular in China compared to other geographies.



- Yes this would always be enough information
- In most cases this would be enough information
- Sometimes this would be enough information
- This would rarely be enough information
- This would never be enough information

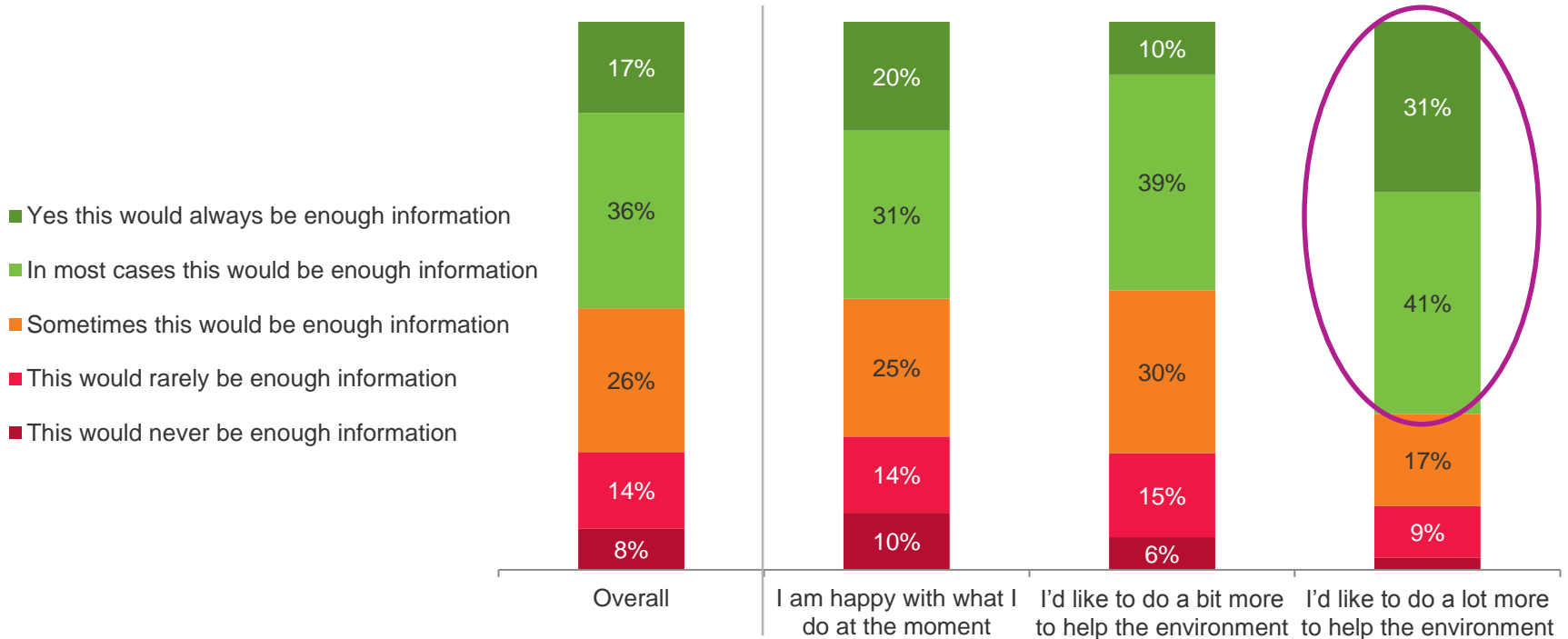


Base: 2,013
All Respondents

FSC labels are also available as 'mini' labels with reduced information. Is there enough information on these labels to help you with purchase decisions?

Mini Labels Preferred By Those Looking To Do More For The Environment

Those who are actively looking to do more for the environment were significantly more likely to state that mini labels would be enough information.

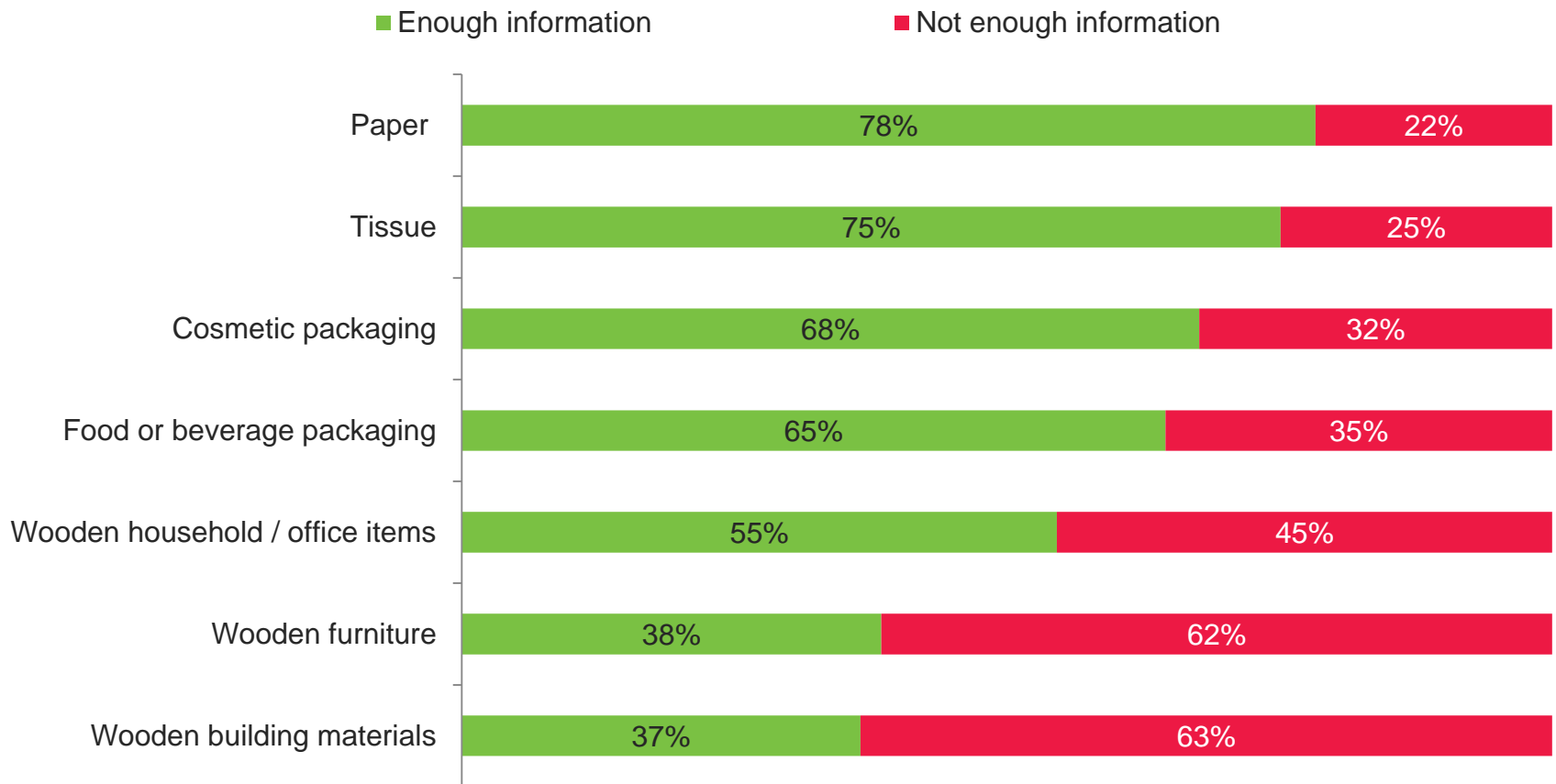


Base: 2,013
All Respondents

FSC labels are also available as 'mini' labels with reduced information. Is there enough information on these labels to help you with purchase decisions?

Mini Labels Generally Seen To Show Enough Information On Fast Moving Consumer Goods

Across all countries a similar trend was seen, generally it is acceptable to have mini labels on all products except wooden furniture or wooden building materials when spend is typically more.



Base: 2,013
All Respondents

On what types of products would a mini label be enough information / not be enough information?

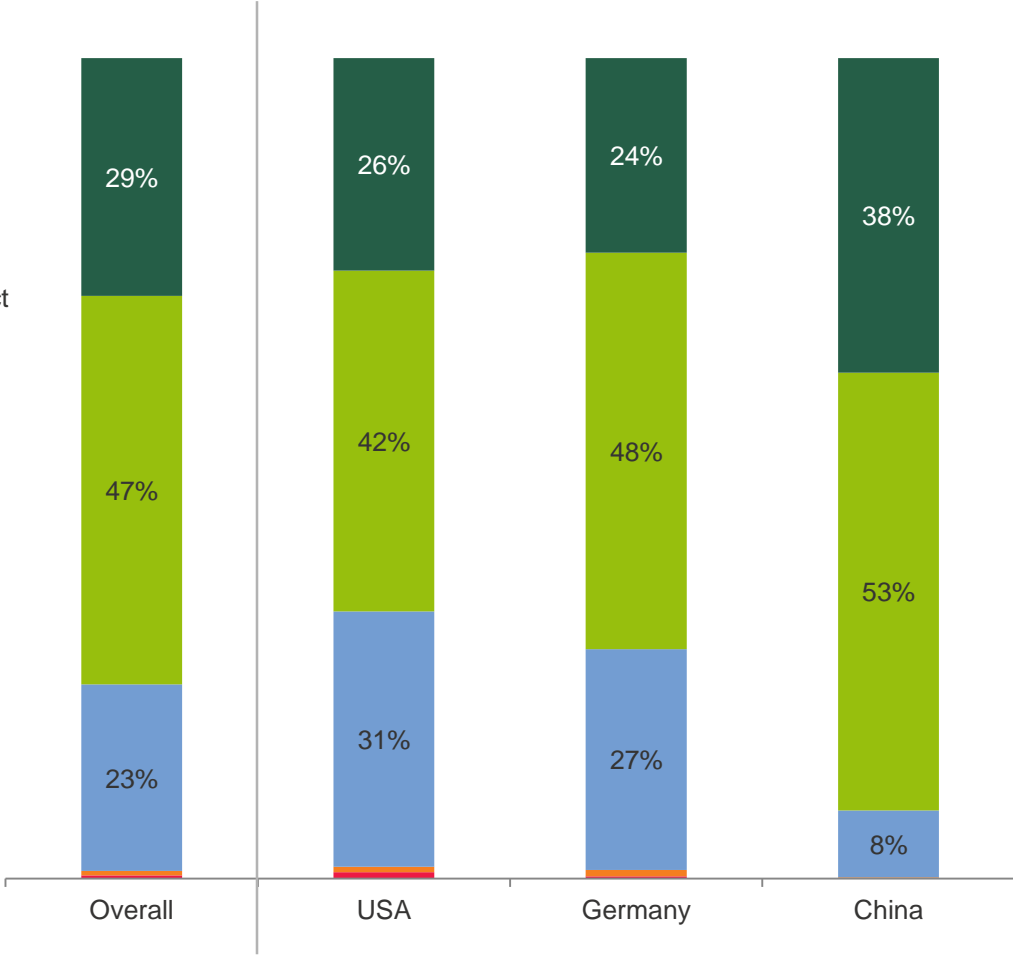
Into The Future

Beyond Knowledge

B2B
International

3 In 4 More Likely To Purchase A Product With FSC Label After Taking Part In The Research

- I would be significantly more likely to purchase the product
- I would be slightly more likely to purchase the product
- The label would have no impact on my decision
- I would be slightly less likely to purchase the product
- I would be significantly less likely to purchase the product



Base: 2,013
All Respondents

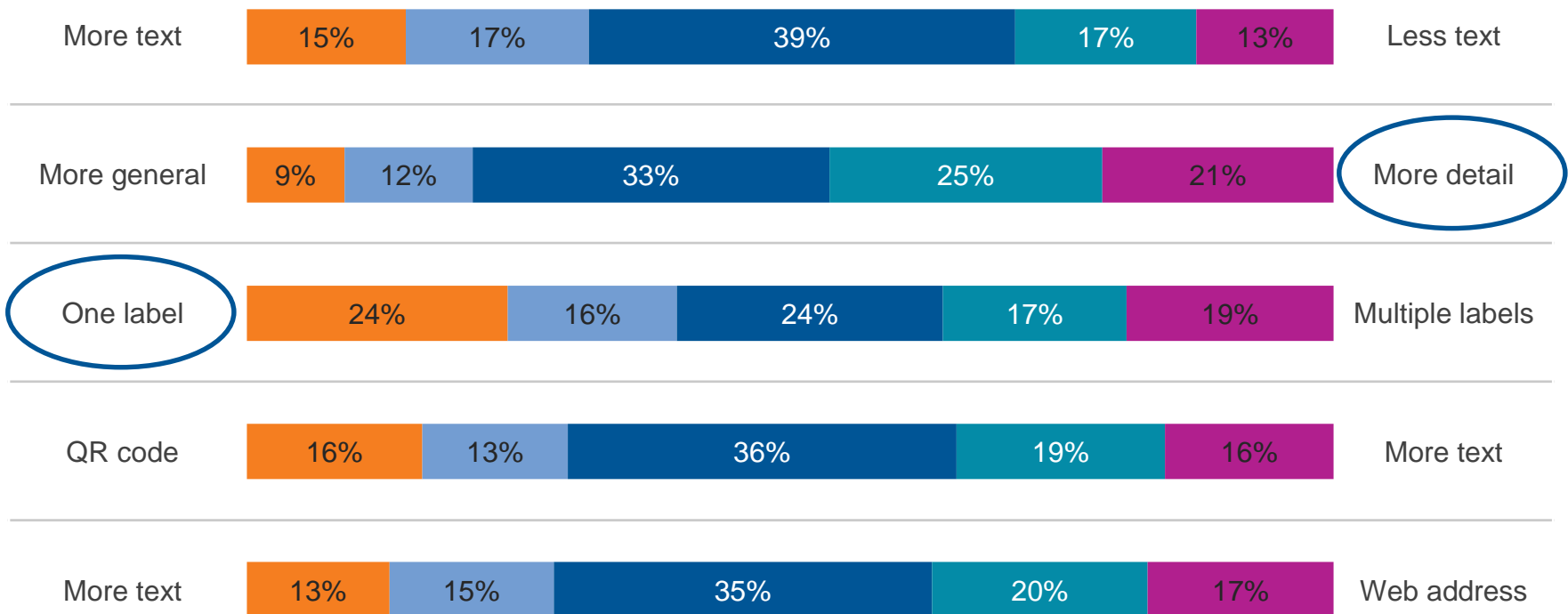
After learning about FSC labels today, how likely are you to purchase a product with an FSC logo on it in the future?



Divided Opinions When It Comes To The Label Of The Future

On an aggregated level there was little agreement on the best way forward for the label – in China Less text and the web address options were most preferred options. In other geographies, no clear differences were seen.

1 2 Neither/nor 4 5

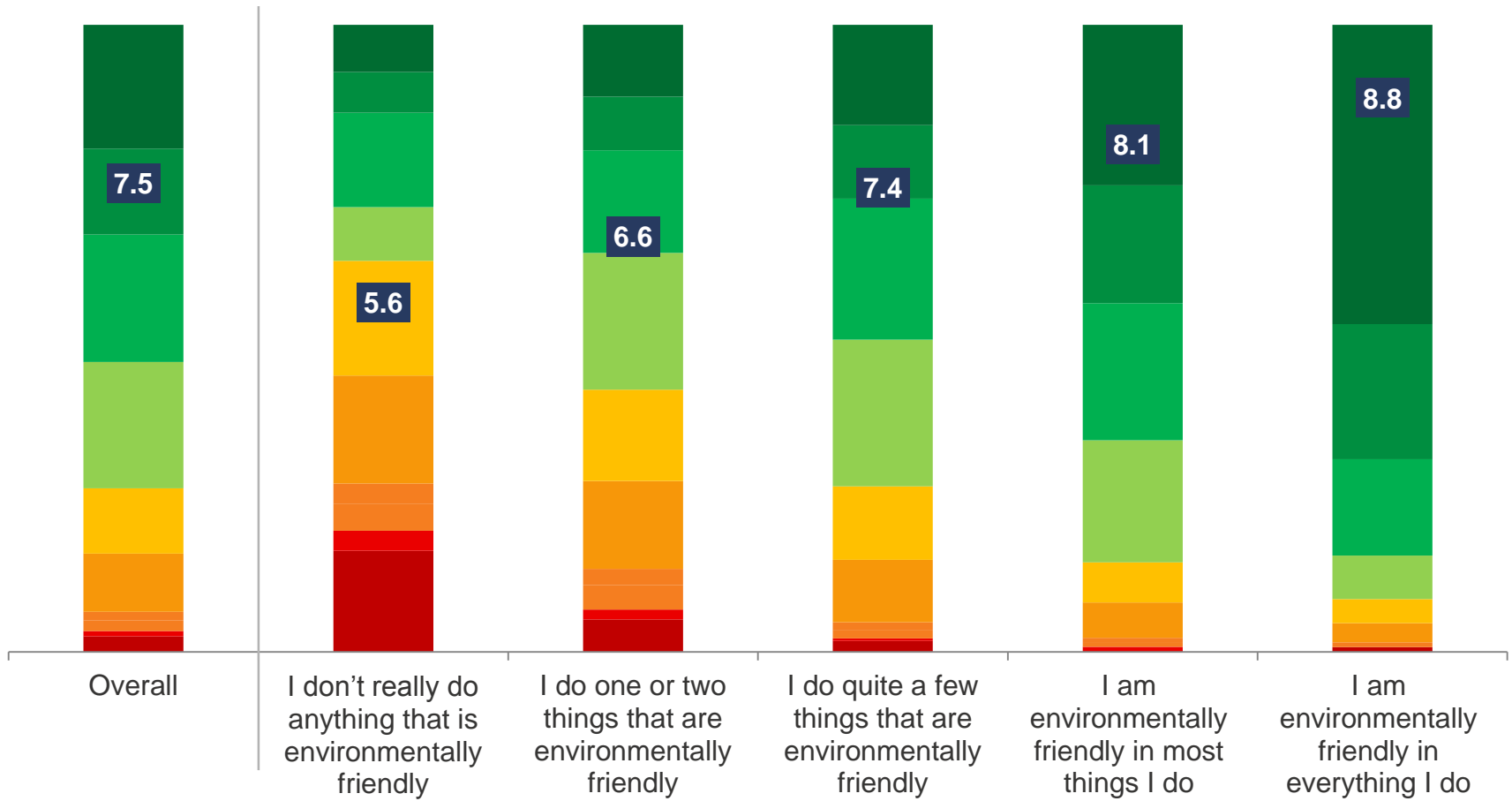


Base: 2,013
All Respondents

Thinking about improving the FSC labels for the future, which of the following changes would you like to make?

Those Who See Themselves As Environmentally Friendly Believe It Is Important For FSC To Build Awareness

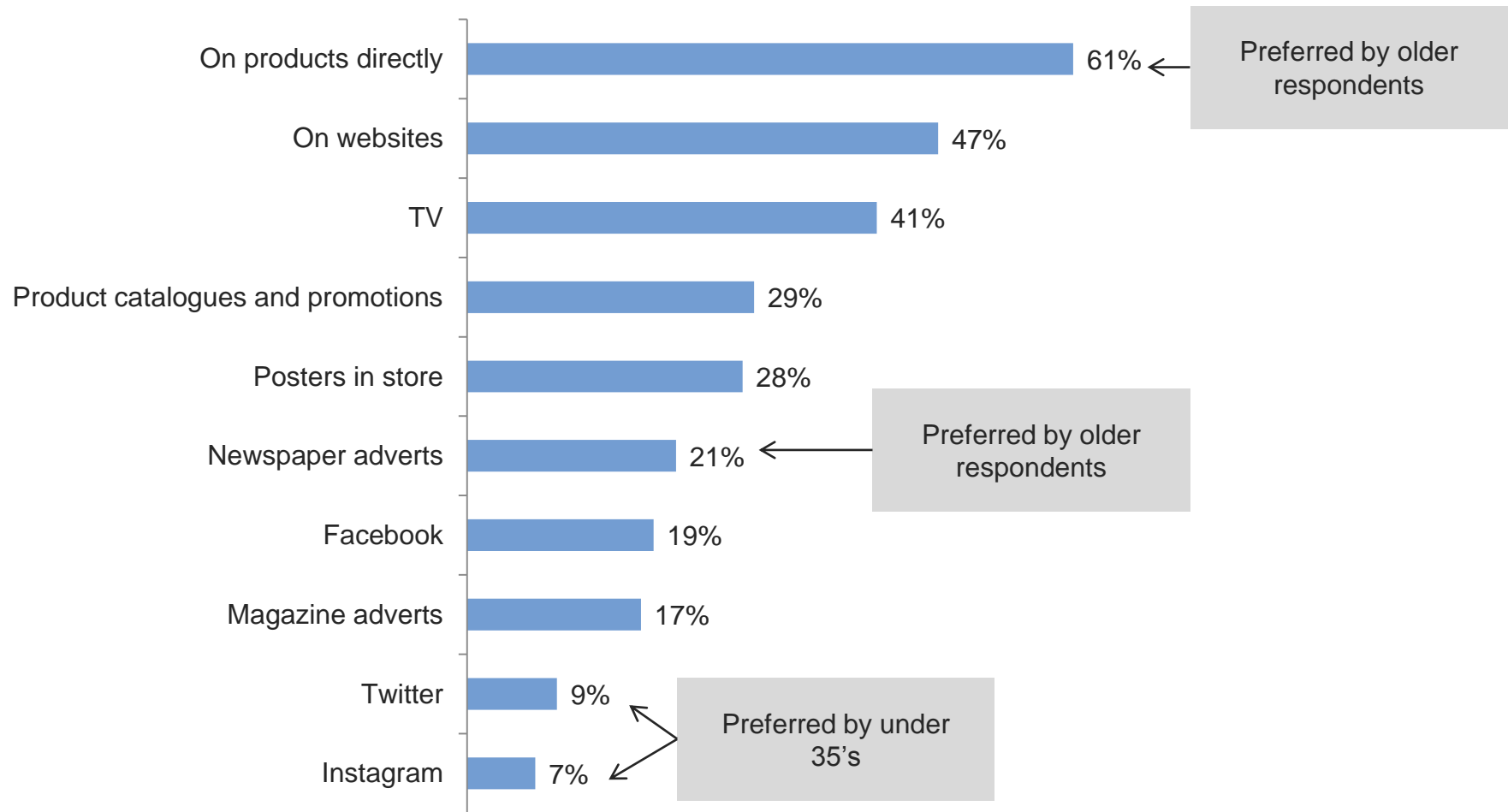
■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 ■ Mean score



Base: 2,013
All Respondents

How important is it for FSC to build awareness of its labelling system amongst people such as you, where 1 is not at all important and 10 is extremely important.

Building FSC's Awareness: Directly On The Products & On Websites Will Be Most Effective



Base: 2,013
All Respondents

How would you like to be told about FSC and the meaning of the labels? Please select all that apply to you.

Conclusions & Recommendations

What The Research Has Told Us – Related To The Objectives

- Consumers have a **poor understanding of the differences between each of the FSC labels**, the majority were not aware that there was more than one variation of the label
- However, when the labels are explained to consumers, the general **consensus that the labels are reasonably clear**
- Changing the MIX wording would improve understanding, the preferred choice was **'Wood – responsible use of forest resources'**
- Consumers are not **typically looking for lots of information when looking at the FSC label.**
- However **additional information online would be useful** for those who have a particular interest in knowing more.

MANCHESTER LONDON NEW YORK CHICAGO DÜSSELDORF SINGAPORE BEIJING SHANGHAI

B2B International

Bramhall House, 14 Ack Lane East,
Bramhall, Stockport, Manchester SK7 2BY

Tel: +44 (0)161 440 6000

Fax: +44 (0)161 440 6006

E-mail: info@b2binternational.com

Website: www.b2binternational.com

Beyond Knowledge

