

# IPSOS CONSUMER RESEARCH FOR FSC 2022

COUNTRY REPORT JAPAN

IPSOS Project 22-026181-01



# CONTENTS



Topic	Page
<b>1</b> Executive Summary	4
<b>2</b> Methodology	5-6
<b>3</b> Context	7-8
<b>4</b> Awareness of FSC	9
<b>5</b> FSC KPIs	10
<b>6</b> FSC Associations	11-12
<b>7</b> Brand Trust Influence	13
<b>8</b> Appendix: Full Wording	14-15



# Contact Us



For more information, contact:

**Tobias Michael**

Senior Director

Tobias.Michael@ipsos.com

**Manuela Schrödel**

Associate Manager

Manuela.Schroedel@ipsos.com

**Swantje Lilje**

Senior Research Executive

Swantje.Lilje@ipsos.com

www.ipsos.com

Game Changers

FSC may not use IPSOS' name, trademarks or logos in the public domain or towards third parties, including, without limitation, in advertising, marketing or promotional materials, press releases or press conferences (collectively, the "Public Domain") without IPSOS' prior written consent.

In addition, FSC shall not publish the Deliverables in the Public Domain without the prior written consent of IPSOS. IPSOS will grant consent to publication on a case-by-case basis if the intended publication complies with the requirements of Self Regulatory Rules, in particular if it does not distort the results, and if, in addition, no disadvantages for FSC or for IPSOS are apparent.

Project: 22-026181-01

ISO 20252 – Market Research



ISO 27001-Information Security



ISO 9001 – Quality Management



# Executive Summary



## Consumer Context

### Concerns and Attitudes

Economic hardship is the #1 worry in Japan and wars, conflicts, and terrorism are #2. Disease and health issues come third; climate change follows on rank 4. The other global issues are seen as comparatively less alarming in Japan.

On forestry issues specifically, the impact on climate change from loss of forests is deemed the most important issue. With droughts & floods caused by deforestation, and deforestation more generally, which is most often on rank 1 of concerns, they make up the top three.

### Purchasing Intent

Nearly half of Japanese consumers prefer to choose products that do not harm plants and animals. Two out of five prefer to choose products that do not contribute to climate change. Nearly as many expect companies to ensure that the wood/paper products and packaging they sell are not contributing to deforestation.

## FSC & Comparators

### Awareness and Understanding

When asked an open-ended question to recall a certification seen on paper/ wooden products, 1 percent of consumers in Japan spontaneously mention FSC.

Regarding prompted awareness, the by far best-known eco-label is EcoMark Japan. FSC comes third, after Japanese Agricultural Organic Standard.

Every seventh Japanese sees the FSC label on products at least several times a month.

Slightly more than a third of Japanese consumers have a good understanding of what the FSC label stands for. Among the Recognizers of FSC, more than half have a good understanding.

### FSC KPIs

EcoMark Japan is by far the most motivating eco-label. FSC comes fourth. Nearly one out of five consumers in Japan is motivated to purchase an FSC labelled product.

A third of the Japanese who have seen the FSC label say they would (definitely or probably) choose an FSC-certified product instead of an equivalent non-certified product.

### Building Trust

The influence on the trust in a brand if it promoted FSC or offered FSC-certified products is claimed to be very positive or positive by more than half of Japanese consumers. Amongst the Recognizers of FSC, it is seven out of ten.



## Methodology

The IPSOS Global Consumer Research for FSC survey was conducted online using IPSOS' own and partner research panels to recruit respondents in 33 countries. Fieldwork was conducted in October and November 2022.

The total sample size for each of the 33 markets, including Japan, is n=800 (except for US with n=1,200; 6 regions\* with n=200 each), and the total sample size across the 33 markets is n=26,800.

Samples were designed to be nationally representative as far as realistically possible using online panels. Online research can only reach consumers who are online. For some countries this means that instead of following national representation we follow online representation resulting in a more urban, more educated, and/ or more affluent sample than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of these populations.

\*West Coast, Rocky Mountains, Midwest, Northeast, Southwest, Southeast

# Methodology – Net Recommendation Score (NRS)



## Methodology – How we measure the Net Recommendation Score (NRS)

The Net Recommendation Score in the FSC Consumer Insights Study is based on the answer to a single question, using a scale from one to five plus the option “not sure”:

*“When you think of FSC, how likely are you to do the following? Recommend FSC-certified products to friends and family”*

1. Definitely wouldn't	2. Probably wouldn't	3. Maybe	4. Probably would	5. Definitely would	99. Not sure
Detractors		Passives		Recommender	Passives

$$\text{NRS} = \frac{\% \text{ of Recommenders}}{(5.)} - \frac{\% \text{ of Detractors}}{(1.-2.)}$$

Subtracting the percentage of Detractors from the percentage of Recommenders yields the Net Recommendation Score. The Score can range from -100 (if every respondent is a Detractor) to +100 (if every respondent is a Recommender).

Remark: This question was asked to respondents who have seen the FSC logo often or occasionally.

# Context: Importance of Issues

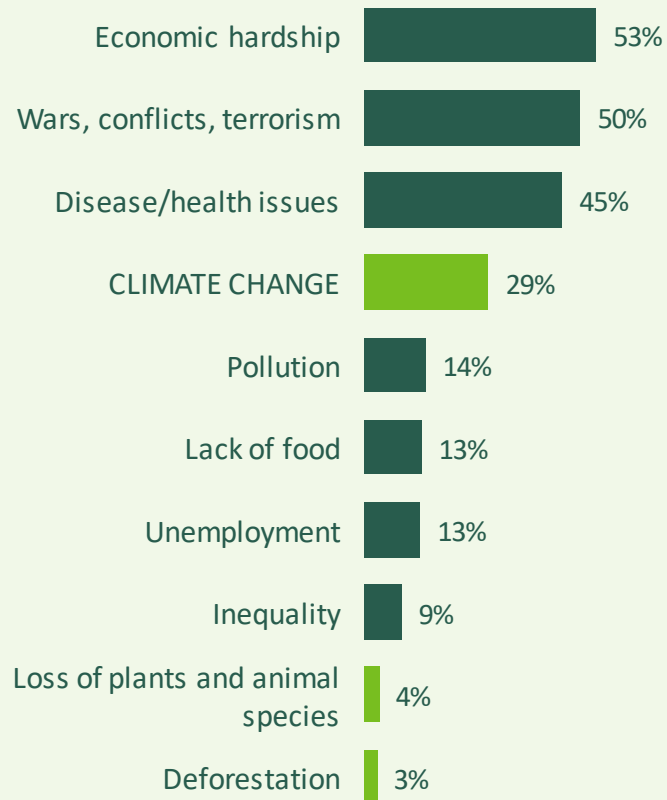


Economic hardship is the #1 worry in Japan and wars, conflicts, and terrorism are #2. Disease and health issues come third. The top forestry issue for Japanese consumers is the impact on climate change from loss of forests.

## Important Global Issues



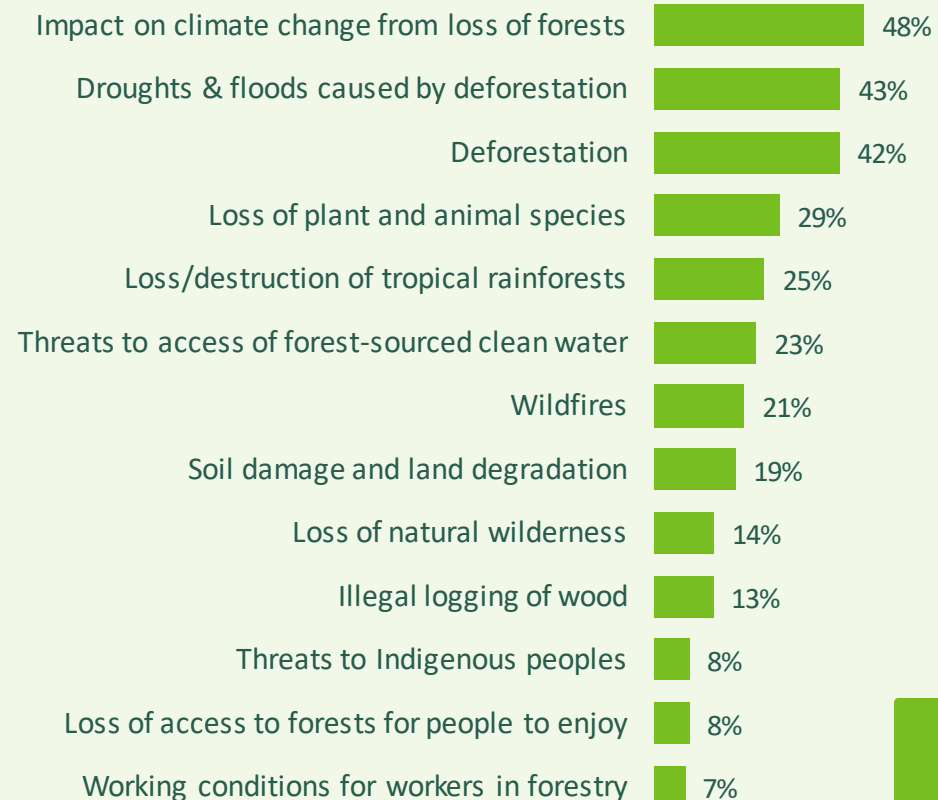
Proportion selecting each issue in top 3 most worrying issues



## Important Forestry Issues



Proportion selecting each issue in top 3 most worrying issues



Most often on rank 1:  
Deforestation

Q1. To start with, which of the following issues worry you the most?  
Note: light green bars are the most relevant issues for FSC

Q11. Which of these potential issues worries you the most?

# Context: Intentions



Nearly half of Japanese consumers prefer to choose products that do not harm plants and animals; 2 out of 5 products that do not contribute to climate change.

## Purchasing Intent

Describes opinion, Top 3 on a 7-pt scale



Q10. How well does each of the following statements describe your opinion?



# Awareness of FSC



The unprompted awareness of FSC is at 1%. Prompted, the by far best-known eco-label is EcoMark Japan. FSC comes third, after Japanese Agricultural Organic Standard.

## Unprompted Awareness

Open-ended responses

**1%** recall FSC top-of-mind this year

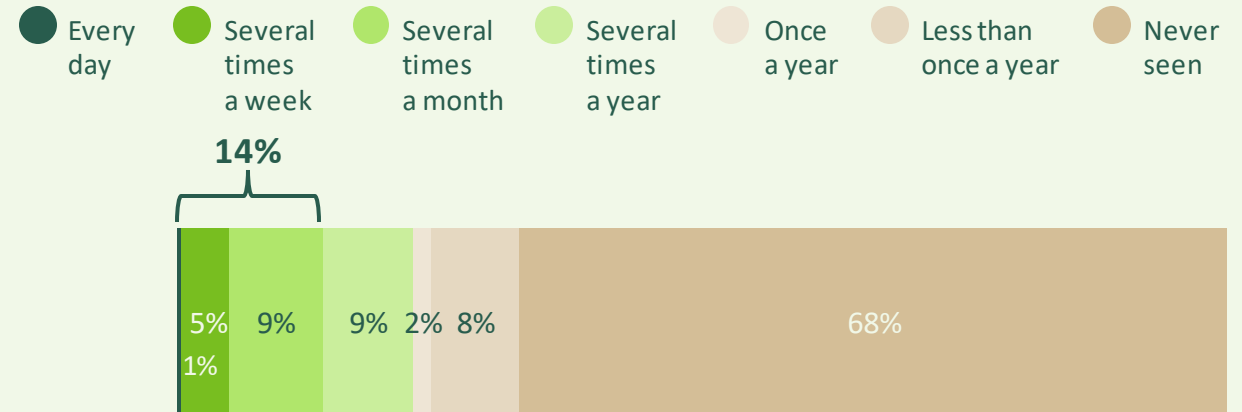
Q2. Please name or describe any logos or labels like this that you have seen on wood or paper products/packaging.

## Prompted Awareness



Q3. Have you ever seen the following logos or labels?

## Frequency of contact with FSC



Q7. How often do you see the FSC label on products?

# FSC KPIs



EcoMark Japan is by far the most motivating eco-label. FSC comes fourth. Nearly one out of five Japanese consumers is motivated to purchase an FSC labelled product.

## Motivation to Purchase

Top 3 on a 7-pt scale



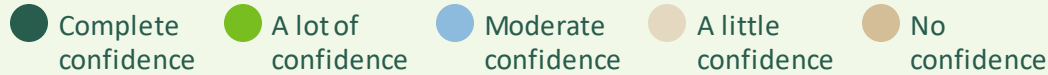
**NRS\***

**-33**

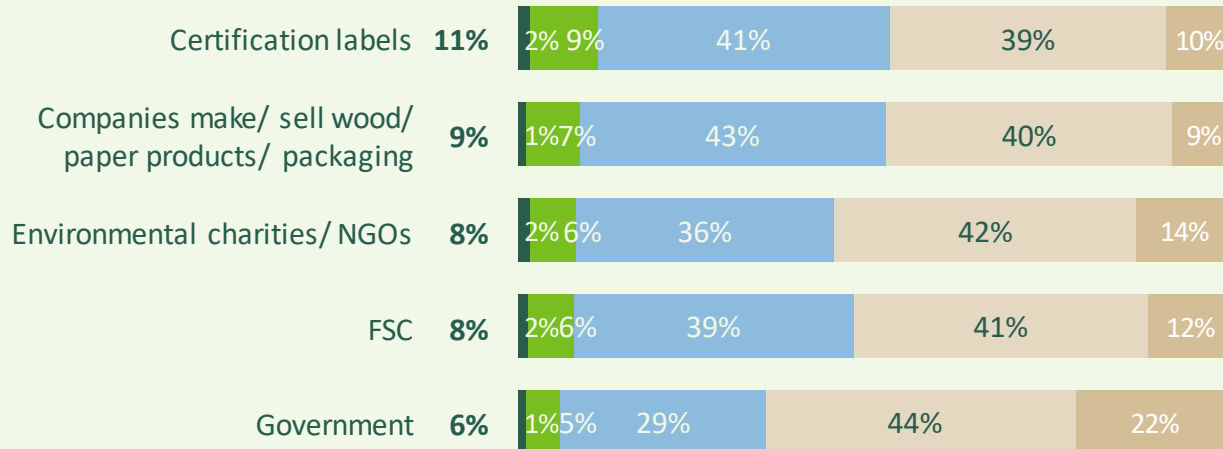
\*Description on slide 6

Q4. Imagine you saw the following labels on a product. To what extent would each label motivate you to purchase that product?

## Trust in FSC

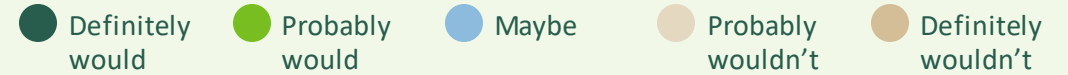


Top 2 Boxes

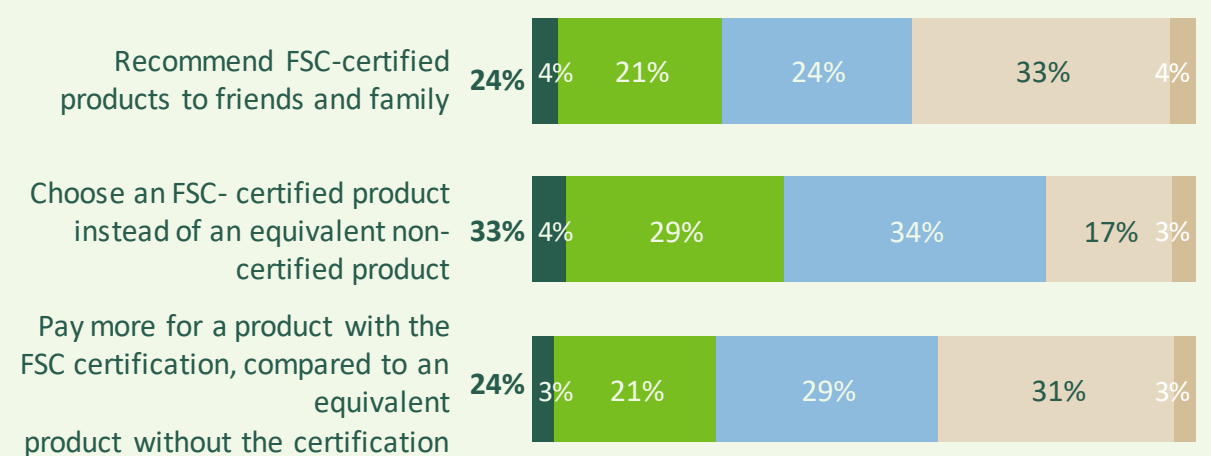


Q8. How much confidence do you have in each of the following types of organizations to protect forests?

## Advocacy and Purchase Behaviour



Top 2 Boxes



Q6. When you think of FSC, how likely are you to do the following?  
Base: All who have seen the FSC logo very often or occasionally, n=204



# FSC Associations



Slightly more than a third of Japanese consumers have a good understanding about what the FSC label stands for. Among the Recognizers of FSC, more than half have a good understanding.

## Association with FSC Label

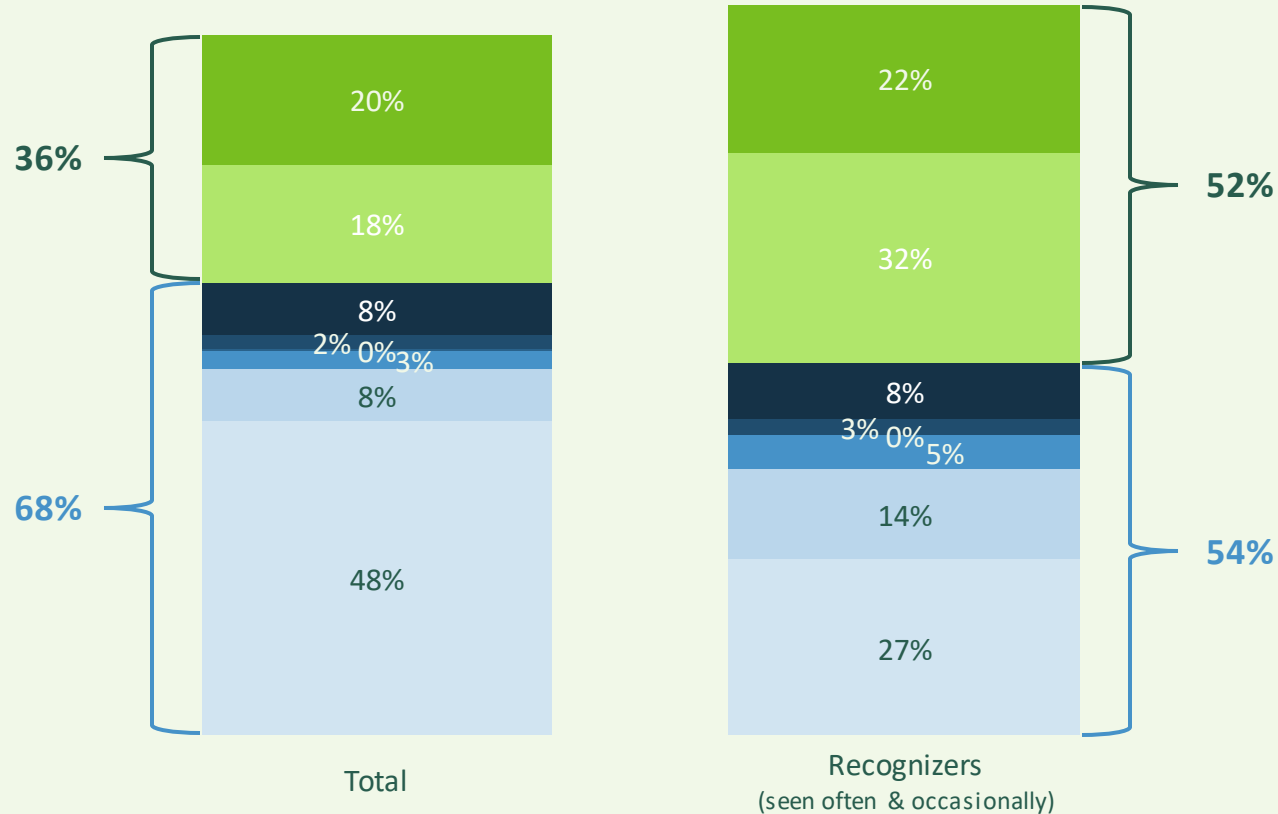
Open-ended responses

### Good understanding

- Forest Stewardship Council (written fully)
- Sustainable forestry (preserving/protecting/replenishing forests)
- General environmentally friendly/green answer
- Forest safety

### Limited/ no understanding

- Trees/ forests/ wood (no sustainability mention)
- Recycled/ recyclable
- Organic/ natural
- Product uses no/ less trees
- Other incorrect response
- Don't know/ means nothing



Q5. Imagine you saw this image while shopping. What does it mean to you?

Note: Each respondent usually gives more than one answer to an open question. This is the reason why the answers do not add up to 100 per cent.

Base: Total Sample, n=800; Recognizers of FSC (seen often & seen occasionally, according to Q3), n=204

## Association with FSC Label – Quotes “good understanding”

Open-ended responses

*„I think it's a product that should be supported because it's proof that the forest is being protected while climate change is becoming a major social issue.“*

*„I think it is a mark to protect nature (trees), etc. If you buy a product with this mark, you have contributed to the natural environment .... I think it will be like that.“*

**Good understanding**

*„It means that we use wood that we have permission to cut down, so you can use it with peace of mind.“*

*„I think it is a mark to protect nature (trees), etc. If you buy a product with this mark, you will feel like you have contributed to the natural environment .... I think it will be something like.“*

*„Products from companies that focus on forest protection activities to prevent desertification. You should choose products with this mark as much as possible.“*

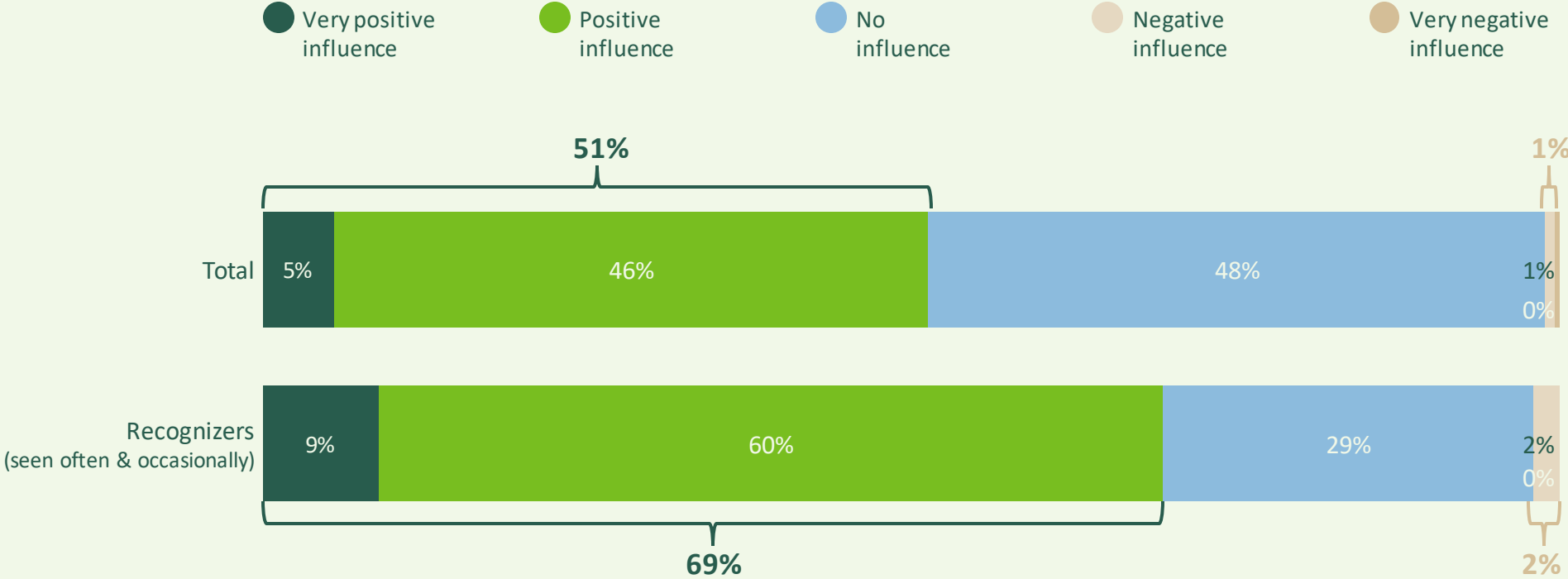
Q5. Imagine you saw this image while shopping. What does it mean to you?

# Brand Trust Influence



The influence on the trust in a brand if it promoted FSC or offered FSC-certified products is claimed to be very positive or positive by more than half of Japanese consumers. Amongst the Recognizers of FSC, it is 7 out of 10.

## Brand Trust Influence from FSC



Q9. FSC (Forest Stewardship Council) certifies a number of brands. If you learned that a brand promoted FSC or offered FSC-certified products, what influence would it have on your trust in that brand?  
 Base: Total Sample, n=800; Recognizers of FSC (seen often & seen occasionally, according to Q3), n=204

# Appendix: Full Wording



Xxxxx

xxxxx

Purchasing Intent (Q10)	Full wording
Care about where the wood source in products/packaging	When choosing products made of wood or paper, I care about where the wood comes from
Sustainability info on products should be certified by an independent org	Information about sustainability on products should be certified by an independent organization
Willing to pay more for a product from smallholder forest owners/producers	I am willing to pay more for a product if it comes from smallholder forest owners and producers
Expect companies to ensure no contribution to deforestation	I expect companies to ensure that the wood/paper products and packaging they sell are not contributing to deforestation
Willing to purchase tropical wood if responsibly sourced	I am willing to purchase tropical wood furniture/materials if it comes from a responsible source
Can protect forests by buying products certified by an independent org	I can help to protect the forests by purchasing products that have been certified by an independent organization
Try to buy products packaged with renewable materials e.g. paper	I try to buy products packaged with renewable materials such as paper instead of plastic
Prefer to choose products that don't contribute to climate change	I prefer to choose products that don't contribute to climate change
Prefer to choose products that don't harm plants and animals	I prefer to choose products that do not harm plants and animals

# Appendix: Full Wording



Important Forestry Issues (Q11)	Full wording
Impact on climate change from loss of forests	The impact on climate change from loss of forests
Loss of plant and animal species	Loss of plant and animal species
Illegal logging of wood	Illegal logging of wood
Loss of natural wilderness	Loss of natural wilderness
Soil damage and land degradation	Soil damage and land degradation
Deforestation	Deforestation
Wildfires	Wildfires
Droughts & floods caused by deforestation	Droughts and floods caused by disruption to forests
Threats to access of forest-sourced clean water	Threats to access to clean water that comes from forests
Threats to Indigenous peoples	Threats to Indigenous peoples who live in forests around the world
Loss/destruction of tropical rainforests	Loss/destruction of tropical rainforests
Loss of access to forests for people to enjoy	Loss of access to forests for people to enjoy
Working conditions for workers in forestry	Working conditions for workers in the forestry industry



IPSOS is your strong, globally positioned, competent partner, who has:  
expertise in coordinating such projects and knows where the methodological pitfalls lie  
access to high quality panels  
great experience in dealing with and evaluating country-specific results, and  
is highly competent in interpreting the data due to our global market research experience.

IPSOS is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people. “Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

[www.ipsos.com](http://www.ipsos.com)





# Thank you



Forest Stewardship Council®

**FSC® Global Development**



Adenauerallee 134, 53113 Bonn, Germany

T +49 (0) 228 367 66-0

F +49 (0) 228 367 66-65

FSC Global Development © All rights reserved

FSC® F000100

[www.fsc.org](http://www.fsc.org)