The attitude of European consumers towards forests and forestry

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An analysis of study results concerning European attitudes towards forestry, and an evaluation of the potential role of certification in selling products to this audience.

The FAIR survey

· Type of survey: representative surveys in each country

· Countries surveyed:

FAIR-project: Germany, France, Italy, United Kingdom
Additional foods: Austria (BMUJF, BMLF Austria)

· Survey method: personal interviews face-to-face; in-home

· Sample design: multistage stratified clustered random sampling or similar standard procedures as in nationwide representative opinion surveys

· Sample size:

FAIR total: n=5500
(n = 1 000 persons >14 years of age per country; Germany: n = 2 400)
Austria: n =1000

· Field dates: December 1996 to January 1997

· Fieldwork institute: GfK Europe GfK-Eurobus©

· Total European Union population covered: approximately 70 percent

In-depth results of the consumer survey, together with results from business-to-business market surveys conducted in the United Kingdom, Germany and Finland are published in: Rametsteiner *et al.* (1998), http://www.efi.fi/.

Concern about the environment first gained broad attention in the United States in the early 1960s with the New Conservation Movement. Since the 1970s, awareness of environmental topics has increased across Europe as well, starting in Germany, the Netherlands and Sweden. Most international studies conducted to assess the degree of environmental concerns among Europeans over the past decades show that:

- the majority of Europeans (about 80 percent) are concerned about environmental issues;

- differences among European countries regarding the perceived urgency of environmental issues have gradually almost disappeared over the years 1986 to 1992;

- the degree of the perceived urgency of environmental problems peaked around 1992 (unemployment and recession are now perceived to be the most pressing issues in most European countries).

The level of environmental concern expressed by Europeans parallels that of people in many other regions, including Asia, Africa and Latin America. Today, people throughout the world show concern about environmental problems (Dunlap *et al., 1993;* Environics/MORI, 1998).

EUROPEANS' CONCERN ABOUT FORESTS

A number of recent surveys have shown that the dominating environmental concerns in Europe relate to air and water pollution, including greenhouse gases and ozone layer destruction. Forest-related issues, some of which are connected with air and water pollution, usually follow. The main concerns that people express about forests are: forest dieback, deforestation in tropical regions and loss of biodiversity. A majority of people also worry about the issue of waste, especially nuclear waste.

A consumer survey was conducted in 1996-97 in Germany, France, Italy and the United Kingdom (the main consumer markets for wood and wood products in Europe) to investigate the attitudes and opinions of Europeans towards forests and forestry in their countries and in other regions of the world. The survey also studied public attitudes towards wood and likely consumption behaviour regarding certified forest products (see Box).

The results of the FAIR survey show that the majority of the population in each of the countries surveyed assesses the situation of forests negatively. On average, more than 50 percent of the people in Germany, France, Italy and the United Kingdom think that the forest area in their home countries is decreasing (although this is not, in fact, true). Likewise, the majority of people think species diversity in their forests is decreasing and that the health of their forests is declining (see Figure 1 for combined country results).

FIGURE 1 - Attitudes of Europeans (in Germany, France, Italy and the United Kingdom) towards the situation of their forests

Consequently, the majority of people (58 percent) express dissatisfaction with the situation of forests in their home countries (see Figure 2). Only about one-quarter of the citizens of the countries surveyed regard domestic forests as being in a satisfactory condition. The data show that, in general, more dissatisfaction results from the impression of declining forest health than from decreasing forest area or species diversity. People from countries with high forest cover, such as Austria, Finland and Sweden, usually evaluate forests in their country to be in relatively better condition.

FIGURE 2 - The satisfaction of Europeans (in Germany, France, Italy and the United Kingdom) with the situation of their forests (percentages)

Very negative attitudes are expressed regarding the situation of forests in tropical countries. Two-thirds of the population in the four European Union (EU) countries included in the FAIR study are not content with the state of tropical forests, and 41 percent state that they are "not at all content" (see Figure 2). More than 70 percent of those surveyed believe the area of tropical forest to be in decline, the number of animal and plant species to be decreasing and forest health in general to be deteriorating. Europeans are thus concerned about forests, both in their home countries and in tropical countries, and see the situation as especially disturbing in the tropics.

EUROPEANS PARTLY BLAME INDUSTRIAL FORESTRY FOR THE BAD SITUATION OF FORESTS

In the case of domestic forests, people who are not content with the situation of forests (a majority of almost 60 percent) think that the major factors and responsibilities for unsatisfactory forest conditions lie outside the forestry sector. They name industrial pollution and traffic or construction activity as the main causes of the situation. Each of these three factors is seen to be responsible by about 75 to 80 percent of the population. Industrial forestry is seen as the fourth most responsible factor. Agriculture, tourism and natural events follow.

Regarding the situation of forests in tropical countries, the majority of EU citizens clearly think that the main cause for concern is industrial forestry. About 80 percent of respondents state that industrial forestry is responsible for the situation of tropical forests, while 50 percent think that poor forestry practices are very much responsible (see Figure 3).

FIGURE 3 - Perceived responsibility of Industrial forestry for the bad situation of tropical forests

Probably as a consequence of their opinion about the situation of forests, people in Europe express clear preferences for the protection and conservation of forests and biodiversity over utilization. However, people in the FAIR survey also indicated clearly that they find ensuring wood supply important. This is in line with other studies conducted in individual countries in Europe.

The FAIR survey, and other studies, shows that the general public in Europe has a fairly positive overall impression of industrial forestry in Scandinavian countries. More than half of the respondents in the major EU countries think that forest management in Scandinavia is very or quite sustainable.[1] Forestry in other countries, such as those of central Europe and North America, rank second and third. The sustainability of forest management in the respective home countries of the respondents is usually not seen to be excellent. The sustainability of forestry in eastern Europe and in tropical countries is seen as much more negative than in the other regions (see Figure 4).

> [1] The definition of sustainable forest management used in the survey was: "The forest is being carefully managed and less wood is cut than regrows."

FIGURE 4 - The perceived degree of sustainabillty of forest management in different regions

WOOD IS SEEN AS A VERY ENVIRONMENTALLY FRIENDLY MATERIAL

When consumers in the four main European markets were asked about the relative environmental friendliness of raw materials, the majority of the respondents regarded two of the materials presented as environmentally friendly: domestic wood and glass. Tropical wood is seen as environmentally friendly and environmentally harmful by equal shares of the EU population (see Figure 5). The image of tropical wood is considerably worse in Germany and Austria than in the United Kingdom, Italy or France.

FIGURE 5 - The perceived environmental friendliness of raw materials

When asked to assess the environmental friendliness of different phases in the "life cycle" of a wood product, people rate forestry and the harvesting of timber as more environmentally friendly phases of the life of a product than the production or the disposal of furniture or paper. The positive image of wood thus seems to lead by a "halo effect" back to the forests.

The study also found that consumers' evaluation of the environmental friendliness of domestically produced wood is influenced by their satisfaction with the condition of forests in their home countries and how sustainable they perceive forest management to be. The correlation between these aspects is low, but statistically significant. This might to a certain extent be attributed to the fact that the state of the forest is not primarily seen to be a result of bad forestry practices but the consequence of pollution.

DO THESE ATTITUDES EFFECT WHAT EUROPEANS PURCHASE?

To what extent do attitudes towards forests and wood effect consumers' decisions about what to purchase? This question is quite difficult to answer. First, environmentally oriented purchasing behaviour can take several forms. Consumers can purchase "green" goods, they can shift from previously bought items to green goods, reduce their consumption or totally renounce purchases of certain goods. Second, environmentally friendly consumer behaviour is dependent on a variety of combined factors.

Most studies find that, for the majority of products, environmental aspects are not regarded as being of key importance to consumers in purchasing decisions. The FAIR survey showed that the environmental friendliness of a wood product is less of a determining factor in purchasing decisions than are several other product features. Product attributes such as quality, durability, design, material or sales price rank higher in importance than naturalness or compatibility with the environment (see Figure 6).

FIGURE 6 - Attention paid to different product features in purchasing decisions: furniture (percentages)

WOULD CERTIFICATION MAKE A DIFFERENCE?

Certification would seem to have good potential as a marketing tool in the given situation. People regard forests as being in bad shape and forestry as partly responsible for this. Nevertheless, they regard wood to be an environmentally friendly material.

At least in theory, a number of the reasons given above for consumers' refraining from purchasing green goods could be addressed by certification/ecolabelling, which could be applied in situations where consumers are insecure about how to evaluate the environmental friendliness of a product or where they find the information provided untrustworthy, regard their own actions as being irrelevant, doubt the genuineness of the product, etc.

The potential strength of certificates lies in their function as guarantees, conveying credible information. A certificate, however, is only worthwhile if consumers understand the information it provides. The FAIR survey has shown that consumers in Europe are, in general, not aware of the sustainability concept and only a minority (about 20 percent) have ever heard of the key information delivered, namely "sustainable forest management" (SFM).

A second precondition that must hold is that potential buyers regard the information delivered as being relevant. Having been provided with brief information on what sustainable forest management is about (see footnote on p. 43 - in a true market situation this information would need to be communicated either by written information material or through sales personnel), about 20 percent of consumers said that the origin of timber from sustainable sources is very important to them when purchasing furniture, fixtures such as doors, windows or parquet or paper products (see Figure 7). A third important prerequisite is the consumer's trust in the source of the information.

FIGURE 7 - Stated importance attached to the origin of timber from sustainably managed forests

Regarding the credibility of various sources of sustainable forest management labels, people find the following to be credible (the percentage of respondents finding the source credible is given in brackets):

- environmental pressure groups (about 80 percent);
- national forestry and timber industry associations (about 60 percent);
- the competent national ministry and the EU administration (about 45 percent);
- the manufacturer of a product (about 30 percent);
- the competent ministry of a tropical country (about 25 percent).

Several surveys asking more specifically about information sources for forest-related issues also show that foresters are generally regarded as very credible information sources. Politicians are only rarely regarded as a credible information source (Demoskop, 1997).

Existing survey and market data on markets for certified forest products (CFPs) indicate that the size of the current European market for these products vanes considerably from country to country. The majority of the demand comes from companies (resellers) that have committed themselves to buying certified timber products. End consumers have not, up to now, created any significant market pressure on their own. Most of the companies are located at the consumer end of supply chains. The total market demand of these companies, loosely organized in cooperation with the World Wide Fund for Nature (WWF) into WWF buyers' groups, was estimated to be around 9 million m^3 in 1997. Other estimates about actual and potential demand for CFPs in Europe range from 2 million m^3 to an optimistic 15 million m^3 in 1998. This is only a fraction of the apparent consumption of sawnwood and wood-based panels in Europe, which amounted to 131.8 million m^3 and the consumption of paper and paperboard, at 73.1 million tonnes in 1995 (UN/ECE-FAO, 1996).

Among the WWF buyers' groups, the largest share of demand comes from the United Kingdom, the Netherlands, Belgium, Germany, Austria and Switzerland. Both the United Kingdom and the Netherlands are importers of wood and wood products with relatively little domestic supply and significant exposure to tropical timber. As people see tropical forests to be far more threatened than domestic or other forests, certificates of the sustainable origin of tropical timber are likely to be considered useful marketing tools in these markets. Good market conditions for certified tropical timber can also be expected in German-speaking countries because, as has already been pointed out, the image of tropical wood is much worse in Germany and Austria than in Italy or France.

As regards product groups, it can be observed that the most promising markets today concern do-it-yourself products and paper as well as smaller niche-market items. When asked in the FAIR survey, about 60 percent of the respondents in the European main markets indicated a willingness to pay a price premium for certified forest products. The amount varied between 42 percent in the United Kingdom and 66 percent in Germany. The average acceptable price increase identified by those who stated they would be willing to pay more ranged between 9.6 percent in Austria and 5.6 percent in France.

CONCLUSIONS

Based on the FAIR survey which covered the four main consumer countries forwood and wood products in the EU, Europeans have a variable image of the situation of forests in Europe and a decidedly negative impression of the situation of forests in the rest of the world. However, to date, it is not certain what impact this impression has, or could have, on purchasing decisions regarding wood products. Consumers tend to regard wood and wood products as both attractive and environmentally friendly.

Certification would appear to have significant potential as a marketing tool in Europe, especially for tropical timber. However, many more actions, both in actual forest conservation and protection efforts and in communication are necessary to restore confidence about the situation of forests in European consumers.

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