

EU Legislation Opinion Poll

Measuring opinions on
proposed EU legislation for
deforestation-linked products

Prepared for the Meridian Institute

September 2022



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Project: 3977

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Background

- On 17 November 2021, the EU published a legislative proposal for a regulation on deforestation-free products. The regulation is meant to set mandatory due diligence rules for operators which place specific commodities on the EU markets that are associated with deforestation and forest degradation – soy, beef, palm oil, wood, cocoa, and coffee and some derived products, such as leather, chocolate, and furniture.
- This regulation will provide a guarantee to EU citizens that the products they consume on the EU market do not contribute to global deforestation and forest degradation. This would also mean a reduction of at least 31.9 million metric tons of carbon emissions to the atmosphere every year due to EU consumption and production of the relevant commodities, which could be translated into economic savings of at least € 3.2 billion annually.
- Before placing these products on the EU market or exporting them from the EU, the proposed regulation would require operators and large traders to carry out comprehensive, effective, and continuous due diligence to prove that their products are not linked to deforestation or forest degradation, disclose information about their supply chains, and report on their measures to avoid deforestation. The legislative proposal is currently going through the ordinary legislative procedure and must be formally adopted by both the European Parliament and the Council of the European Union.
- This survey follows another omnibus survey conducted by YouGov in May – June 2022 to understand consumer attitudes toward the EU Deforestation Free Law in Denmark, France, Germany, Italy, and Spain.


Methodology

A ten-minute online survey conducted with 9,000 consumers across nine countries

- The survey was conducted between 10 July 2022 and 28 July 2022 using established online research panels.
- Nationally representative samples (online) of $n=1,000$ mainstream consumers per country.
- Quotas were set by age, region, gender, and education. The final sample is weighted to reflect the general population as per the latest available census data.
- Within the survey, some questions were focused on specific sectors, products, and ingredients impacting deforestation. To prevent fatigue, the sample was split so that each respondent was only asked about half of the product categories/sectors.

Notes on reporting:

- All figures in this report are given in percentages, unless otherwise stated. In charts, due to rounding of decimal places displayed, figures may not always add up to exactly 100%.
- Country-level characteristics can influence response styles such as acquiescence and extreme response styles. Hence, it is advised to also look at the results within each country and patterns in the rankings, rather than only comparing countries.

Country	Sample size ($n=$)
 Austria	$n=1,000$
 Czech Republic	$n=1,000$
 France	$n=1,000$
 Italy	$n=1,000$
 Portugal	$n=1,000$
 Germany	$n=1,000$
 Spain	$n=1,000$
 Sweden	$n=1,000$
 The Netherlands	$n=1,000$

Executive Summary



Key Take-aways

- Deforestation is the biggest environmental issue of concern across most EU countries, with eight in ten Europeans saying they are worried about the destruction and degradation of the world's forests.
- There's an important expectation – perception gap to fill: Europeans expect large companies to be the most responsible actor in protecting forests but believe that businesses are currently performing the worst in preventing deforestation.
- A strong majority of Europeans think businesses should not be selling products which are harmful to the world's forests, yet they find it difficult to distinguish deforestation-free products when shopping. They therefore believe that it is the government's role to ban the products that have a negative impact on forests.
- As a result, Europeans strongly support a deforestation-free law that would require companies in the EU to stop selling products that destroy the world's forests (they do so at a much higher rate than they support other EU regulations generally). They see it as the way to stop companies sourcing from deforested land, to preserve species diversity, and to reduce GHG emissions.
- In the meantime, nearly three in four Europeans (73%) say they are ready to act against businesses that make or sell products which drive deforestation - by stop buying from them altogether (37%), or by reducing how much they buy from them (36%). A smaller part of this group (15%) would go as far working to convince others they know to stop buying from them as well.



Because of the public's perception that large companies are failing in their responsibility to prevent deforestation, there is a strong appetite for regulation. For businesses, consumer trust and loyalty is also at stake. **Businesses have more to gain by supporting this new regulation than opposing it.**

Executive Summary (I)

- **The destruction and degradation of the world's forests is the number one concern for the public among all environmental issues surveyed.**
 - Eight in ten Europeans are concerned about deforestation. Women, people with high incomes, and people who live in cities are the most concerned about the destruction and degradation of the world's forests.
 - **Europeans primarily trust scientists** for providing information about deforestation, followed by documentaries and charities/NGOs. Other sources of information receive low levels of trust with business leaders at the bottom.
 - Europeans score very high on the following attitudes: supporting businesses not selling products which are harmful to the world's forests, finding it difficult to distinguish deforestation-free products in store, and believing that it is the government's role to ban the products with negative impact on forests.
- **The public considers the institutions most responsible for protecting forests to be performing the worst. They think large companies are the lowest performing actor when it comes to preventing deforestation.**
 - Nearly half of Europeans think that large companies are the most responsible for protecting the world's forests, particularly people with high incomes and those who live in rural areas. However, large companies are seen as performing the most poorly when it comes to preventing deforestation.
 - Together with international bodies like the UN, national governments, and the EU, large companies need to fill a perception – expectation gap on deforestation, hence an opportunity to work together to support the new EU regulation.

Executive Summary (II)

- **A vast majority of Europeans are willing to take action and move away from businesses which they believe contribute to deforestation.**
 - **More than seven in ten Europeans are ready to move away from businesses** if they find out that a brand or a retailer sells or manufactures products/ingredients which contribute to deforestation, either by buying less or by no longer buying their products. A small minority (13%) is even ready to convince people they know to stop buying from these businesses.
 - The risk of losing customers because the brand or retailer contributes to deforestation is especially high in Spain and Italy, where nearly half would fully stop buying products from these companies.
- **Europeans strongly support a Deforestation-free Law, and at a much higher rate than they support EU regulations generally.**
 - **Eighty-one percent of Europeans support a Deforestation-free Law.** This strong support is observed across all surveyed countries, voters of all the main political parties in Europe, and all age groups (with even stronger support among those 45+).
 - **Europeans also claim to strongly support strengthening parts of the Deforestation-free Law under debate:** Over eight in ten believe that it should require financial institutions to stop investing in companies that destroy the world's forests, require companies to stop selling products that violate the land rights of Indigenous peoples, and require companies to stop selling products that destroy other critical ecosystems and products that degrade the world's forests.
 - **Their main reasons for supporting a Deforestation-free Law are to stop companies sourcing from deforested land,** to protect biodiversity, and to reduce greenhouse gas emissions.

Executive Summary (III)

- **The segmentation aims to visualize the difference in consumers' potential response to the Deforestation-free Law and the risk businesses could face if they do not proactively support this piece of legislation.**
 - The segments are defined by specific attitudes and behaviours:
 - **Engaged Influencers** want to **convince people to stop buying** brands/products, or from retailers, contributing to deforestation. Although they expect large companies to be the most responsible actor to protect forests, they also believe that they (as individuals) have a role to play by putting pressure on them.
 - **Individual Boycotters** are willing to fully stop buying brands / from retailers contributing to deforestation. This segment has the **widest perception – expectation gap** on the responsibility of large companies and holds large companies as responsible for changing their practices vs them changing their behavior.
 - **The Consumption Reducers** are willing to reduce their consumption of products with negative impact on forests to some extent. However, this attitude constantly conflicts with purchase decisions driven by price and quality.
 - **Non-engaged Law Supporters** support of the Deforestation-free Law passively, with no immediate impact on their consumption / choice of products. Their purchase decisions are mostly driven by price and quality.
 - **Law Opposers** generally **don't trust governments or claims made by companies** and believe that NGOs only care about deforestation to make money. They oppose the Deforestation-free Law. This segment is defined by a relatively low income and their purchase/retailers' decisions are mostly driven by low price.
 - **The Engaged Influencers and the Individual Boycotters** are the **most prominent segments across the EU countries** surveyed. Four in ten Europeans belong to these two segments.

Global Issues and Concerns about Deforestation



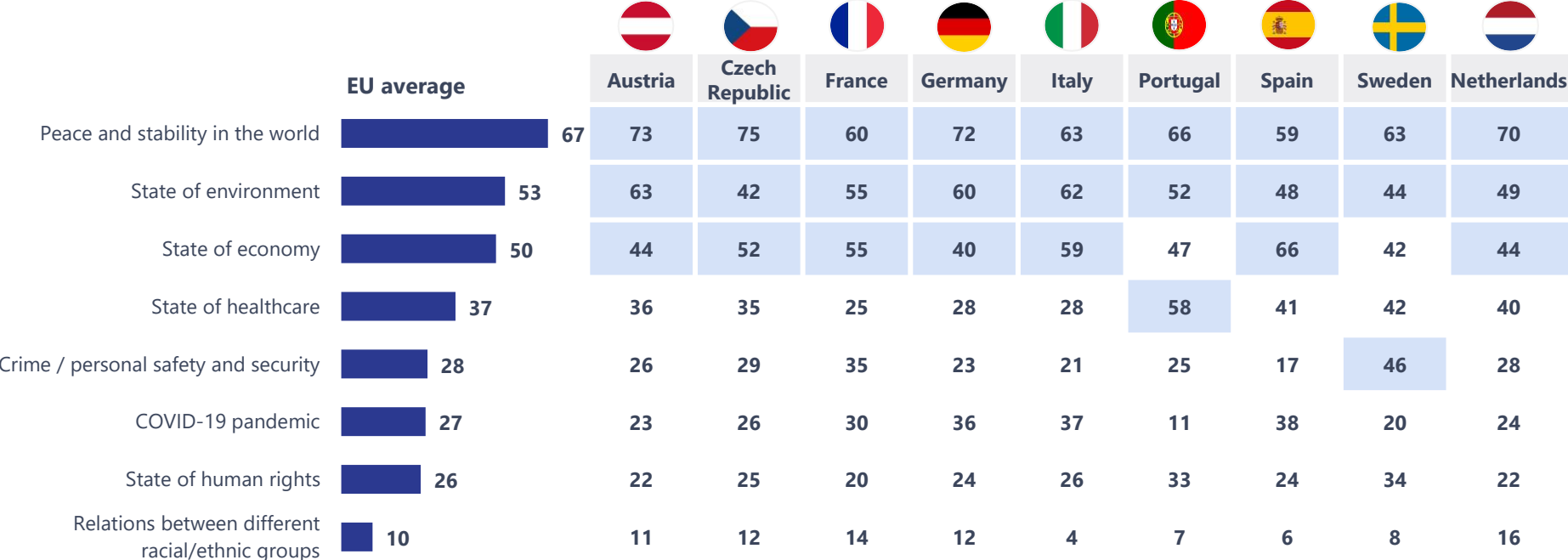
In a Nutshell...

The public thinks that the state of the environment is the second most serious global issue, after peace and stability.

Deforestation is the biggest environmental issue of concern.

Across the EU, the public believes that the state of the environment is the second most serious global issue, following peace and stability in the world

Most serious global issues, Rank 1–3, %, EU average and by country, 2022

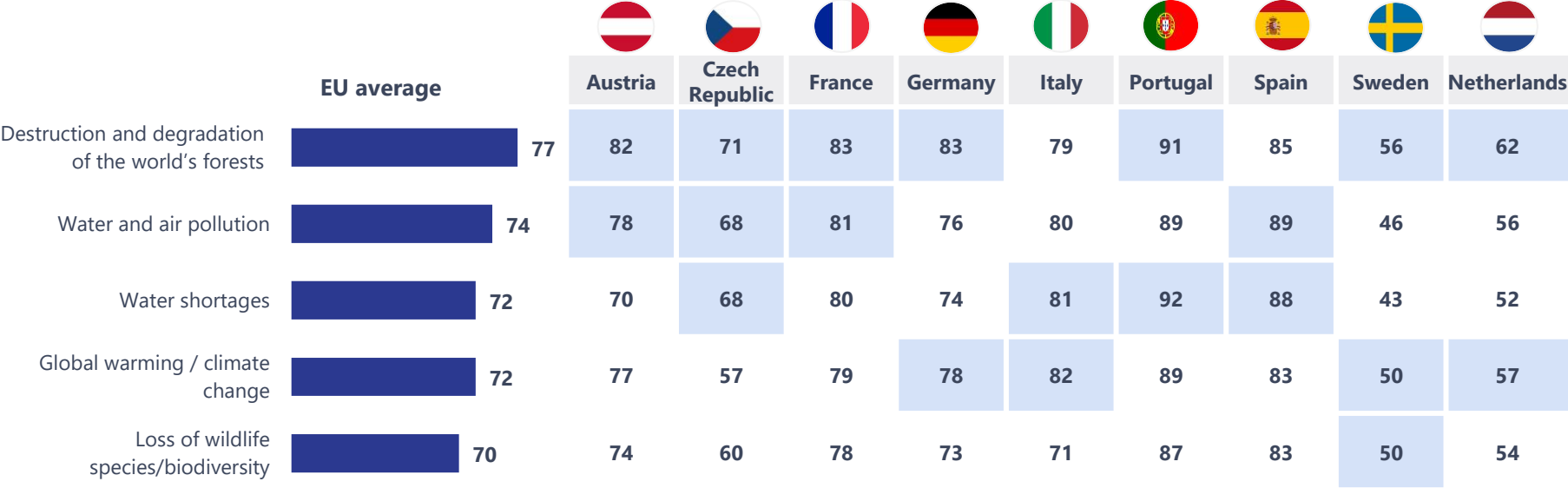


Top 3 by country

13 Q1. Which of the following global issues do you believe are the most serious today? (Total n=9,000; n=1,000 in each country)

Deforestation - destruction and degradation of the world's forests – is seen as the biggest environmental issue across most EU countries

Concern about environmental issues, scores 4+5 on a 5-point scale, "Moderately concerned" + "Extremely concerned", %, EU average and by country, 2022



 Top 2 by country

14 Q2. Now, thinking about the state of the environment globally, please indicate how personally concerned, if at all, you are about each of the following issues. (Total n=9,000; n=1,000 in each country)

Women, people with high incomes, and people who live in cities are the most concerned about the destruction and degradation of the world's forests

Concern about environmental issues, scores 4+5 on a 5-point scale, "Moderately concerned" + "Extremely concerned", %, EU average, 2022

EU average

Significant differences by demographics

Destruction and degradation of the world's forests



Those who live in **city areas (79%)** and **women (79%)** are the most concerned.



Older age groups of 55+ (81%) and people with **high incomes (81%)** are more concerned.

Water and air pollution



There is higher concern among **women (76%)** vs men (71%).



The **Baby Boomer generation (76%)** and people with **high income (77%)** are the most concerned.

Water shortages



There is higher concern among **women (75%)** vs men (69%).



People in the **oldest age group of 65+ (76%)** are more concerned than other age groups.

Global warming / climate change



Those who live in **city areas (75%)** and **women (75%)** are the most concerned.



There are higher concerns among **Baby Boomers (75%)** vs other generations.

Loss of wildlife species / biodiversity



Boomers (74%) are more concerned than other generations.



There are higher concerns among **parents with one child (73%)** vs parents without children.

Europeans are strongly in favor of banning products which are harmful to the world's forests. They find it difficult to distinguish deforestation-free products in store, and believe that it is the government's role to ban products that have a negative impact on forests

General attitudes, %, EU average, 2022

■ Describes my opinion very well ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ Does not describe my opinion at all ■ Don't know / Prefer not to say Total 5+6+7



Q11. How well does each of the following statements describe your opinion? Please use a scale from 1 to 7, where 1 means "Does not describe my opinion at all" and 7 means "Describes my opinion very well." (Total n=9,000)

Europeans are strongly in favor of banning products which are harmful to the world's forests. They find it difficult to distinguish deforestation-free products in store, and believe that it is the government's role to ban products that have a negative impact on forests

General attitudes, %, EU average, 2022

■ Describes my opinion very well ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ Does not describe my opinion at all ■ Don't know / Prefer not to say Total 5+6+7



17 Q11. How well does each of the following statements describe your opinion? Please use a scale from 1 to 7, where 1 means "Does not describe my opinion at all" and 7 means "Describes my opinion very well." (Total n=9,000)

Expectations and Impressions of Actors on Deforestation



In a Nutshell...

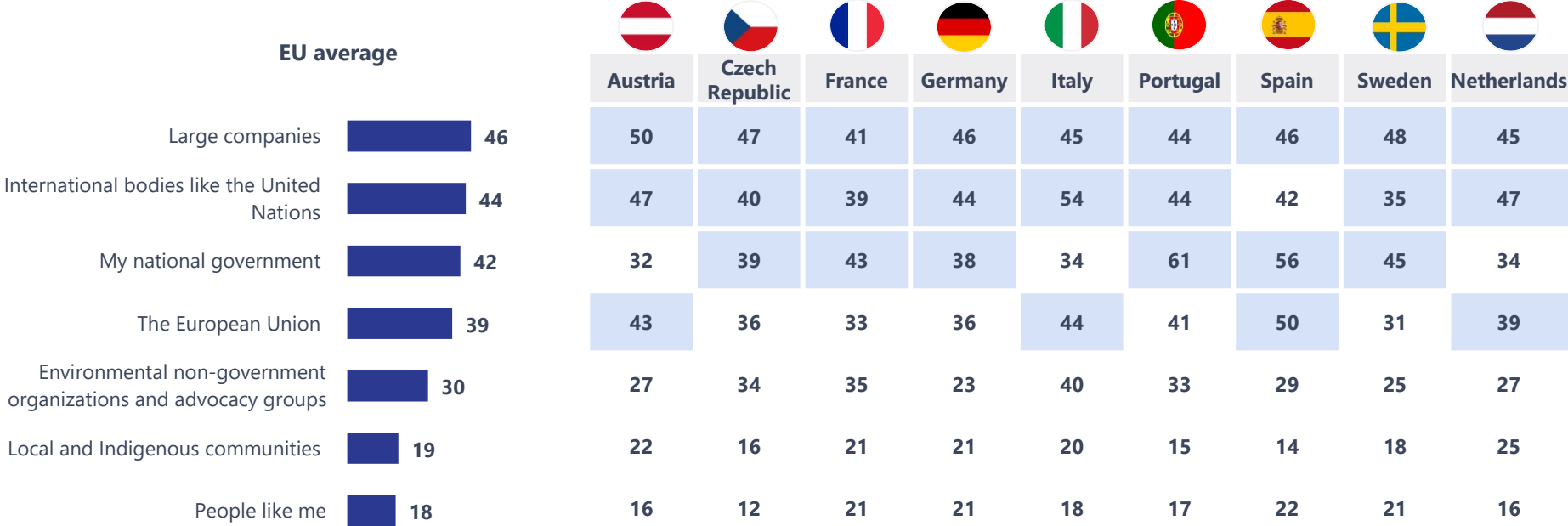
Large companies are seen as the most responsible actor for protecting forests.

However, the public thinks that they are performing the worst.

Together with international bodies like the UN, national governments, and the EU, large companies need to fill a perception – expectation gap on deforestation.

Large companies are seen as the number one actor expected to protect the world's forests, followed by international bodies like the UN, national governments, and the EU

Actors most responsible for protecting the world's forests, %, EU average and by country, 2022

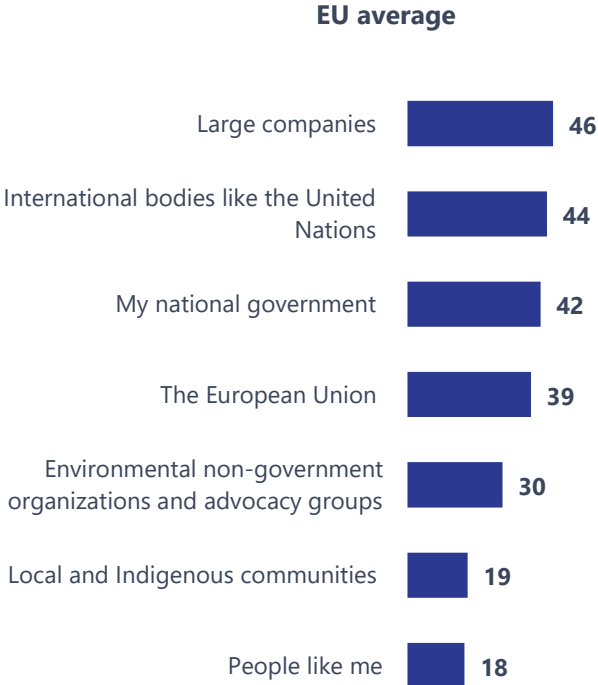


 Top 3 by country

20 Q4. There are many actors that could be held responsible for preventing deforestation. Which actors do you believe should have the most responsibility for protecting the world's forests? (Total n=9,000; n=1,000 in each country)

People with high incomes and those who live in rural areas strongly believe that large companies are responsible for protecting the world's forests

Actors most responsible for protecting the world's forests, %, EU average and by country, 2022



Significant differences by demographics



People with high incomes (48%) and those who **live in rural areas (51%)** are significantly more likely to believe that large companies have the most responsibility for protecting the world's forests.



Men (46%) and **people aged 55+ (50%)** are significantly more likely than women or other age groups to believe that international bodies have the most responsibility.



People who live in cities (44%) are significantly more likely to believe that their national governments have the most responsibility compared to those who live in rural areas (39%).



Millennials are more likely than other generations to believe that **the EU (46%)** has the most responsibility for protecting the world's forests.



Women (33%) and **people aged 55+ (35%)** are most likely to believe that environmental NGOs and advocacy groups have the most responsibility.



Those aged 55+ mostly believe that **local and Indigenous communities (26%)** have the most responsibility.

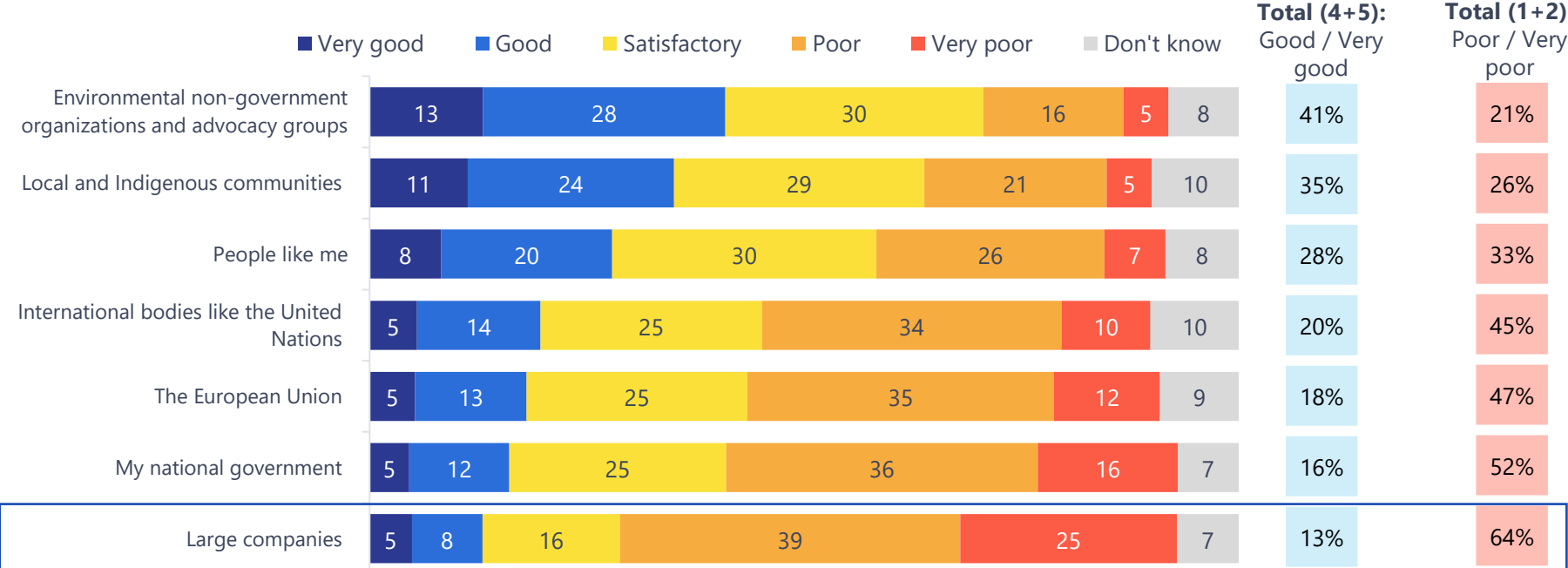


Gen-Z (22%) is slightly more likely than other generations to think that it is **their responsibility** to protect the world's forests.

21 Q4. There are many actors that could be held responsible for preventing deforestation. Which actors do you believe should have the most responsibility for protecting the world's forests? (Total n=9,000)

But large companies are also perceived to be doing the worst job in preventing deforestation; the EU and national governments are also viewed negatively

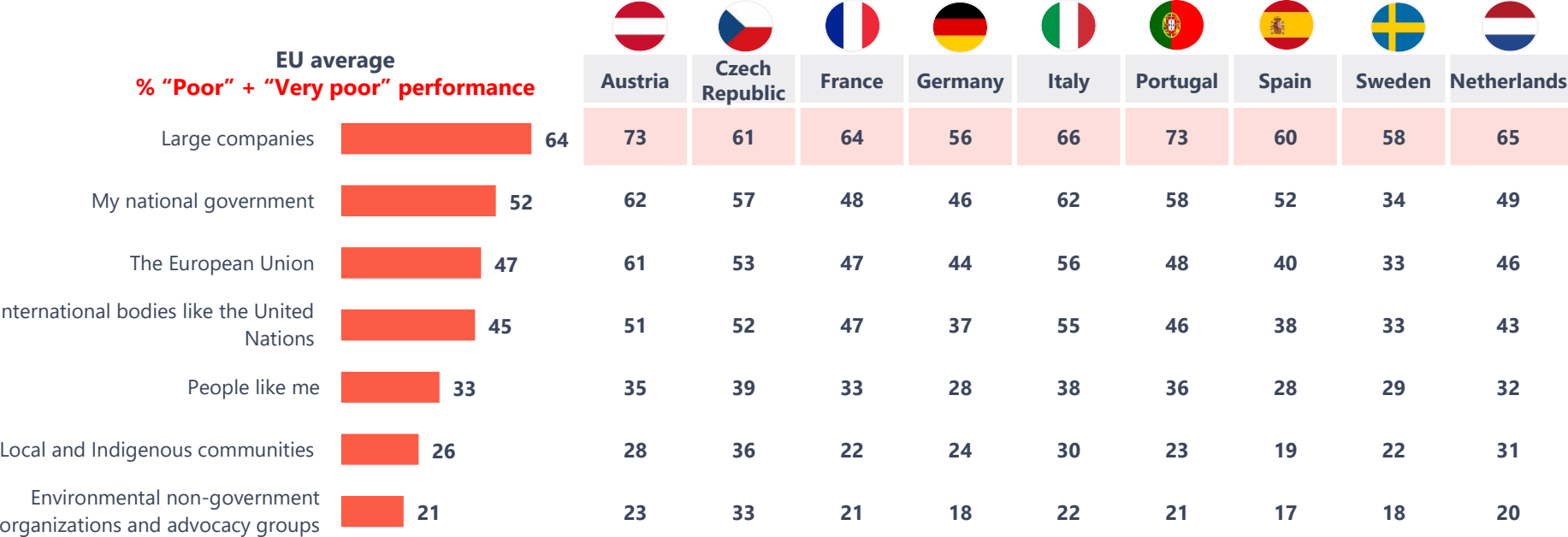
Performance of actors on forest protection, %, EU average, 2022



22 Q5. Now, we would like to get your impression of how well these actors are doing in protecting the world's forests / preventing deforestation today. (Total n=9,000)

Large companies are almost always viewed as being the worst performing actor

Performance of actors on forest protection, Ranked by "Poor" + "Very poor" performance, 1+2 on a 5-point scale, %, EU average and by country, 2022



Top 1 worst performing by country

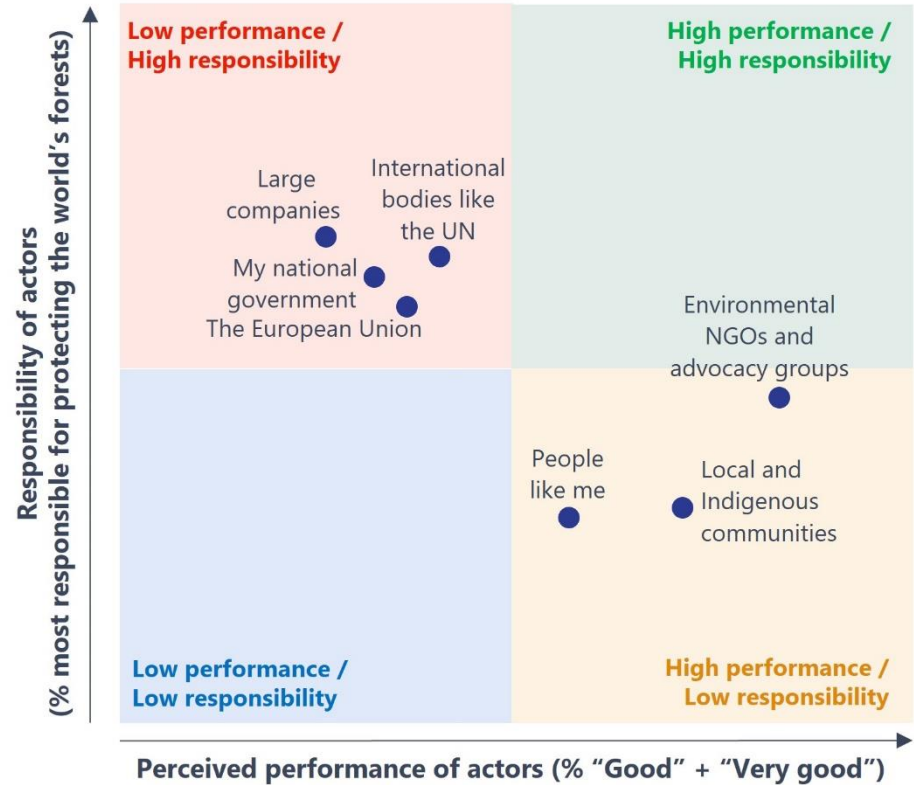
23 Q5. Now, we would like to get your impression of how well these actors are doing in protecting the world's forests / preventing deforestation today. (Total n=9,000; n=1,000 in each country)

Actors perceived as being most responsible for protecting forests are also the ones that the public believes are performing poorly on preventing deforestation

Responsibility vs Perceived Performance of actors on forest protection, %, EU average, 2022

Key learnings

- The public thinks that large companies have the most responsibility when it comes to protecting the world's forests, but also thinks that they themselves are the ones doing the least.
- A similar perception gap is recorded for international bodies like the UN, national governments, and the EU – hence an opportunity to work together to create and support a bold regulation protecting the world's forests.
- Europeans think that environmental NGOs and advocacy groups are performing the best in terms of protecting the world's forests, but do not believe that they are the most responsible for doing so.
- No actor is seen as a high performer / highly responsible.



Q4. There are many actors that could be held responsible for preventing deforestation. Which actors do you believe should have the most responsibility for protecting the world's forests? Q5. Now, we would like to get your impression of how well these actors are doing in protecting the world's forests / preventing deforestation today. (Total n=9,000)

Considerations toward Businesses and their Impact on Deforestation



In a Nutshell...

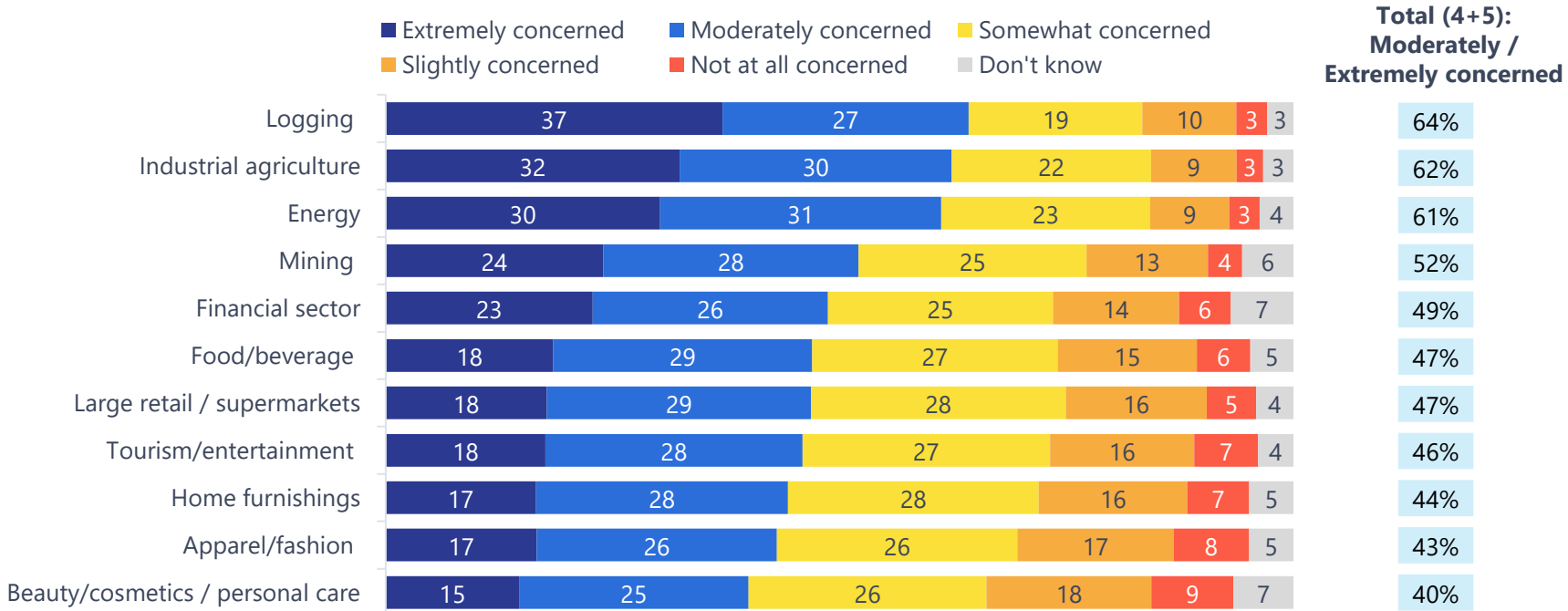
Europeans think it is very important that brands and retailers ensure that products/ingredients do not cause deforestation.

Logging, industrial agriculture, and energy are the sectors perceived to have the greatest impact on deforestation. Furniture, palm oil, soy animal feed, and meat are the products seen to contribute the most to deforestation.

Contribution to deforestation leads to lower purchase intent or to losing customers for good.

Logging, industrial agriculture, and the energy sector are perceived as having the biggest negative impact on deforestation

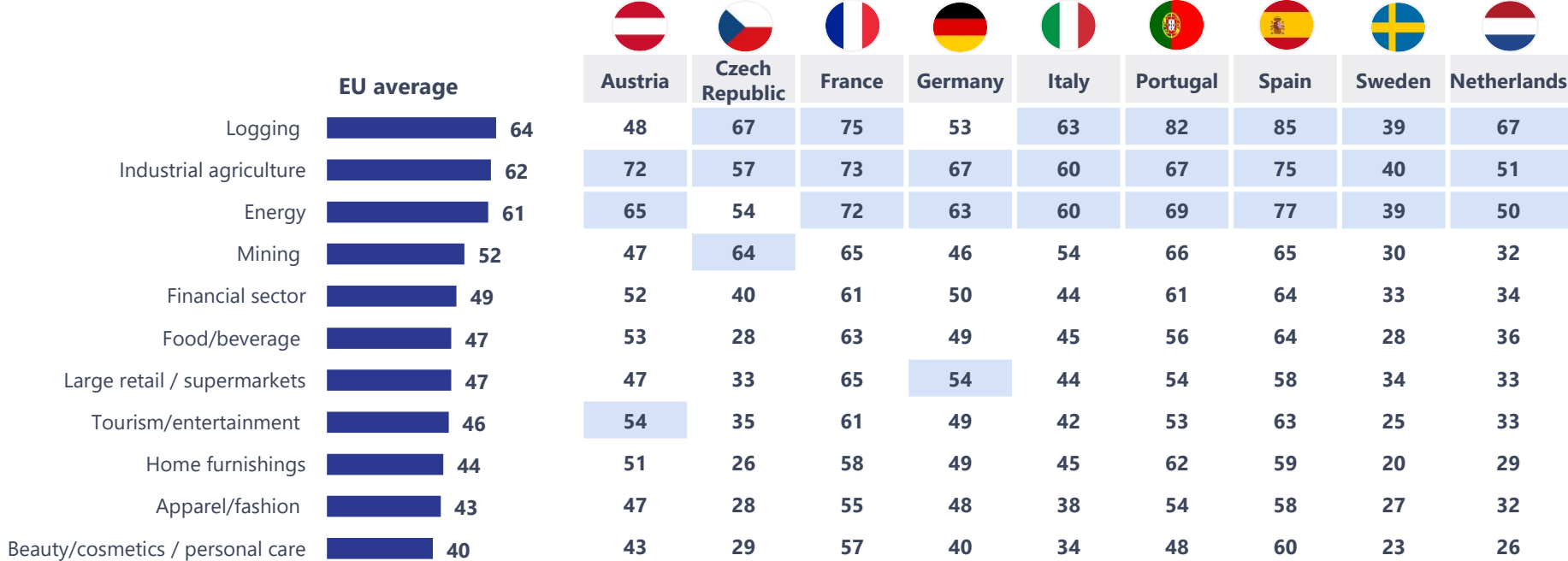
Concern about impact of sectors/industries on deforestation, %, EU average, 2022



Q6. For each of the following sectors/industries, how concerned, if at all, are you about the negative impact they might have on deforestation? That is to say, how concerned are you about these sectors/industries contributing to the cutting down and removal of the world's forests? (Total: n varies between n=4,870 and n=4,937 by sector due to random assignment of sectors)

Concern about industrial agriculture in particular is unanimous across all of the European markets surveyed; large retailers in Germany are also pointed out

Concern about impact of sectors/industries on deforestation, 4+5 on a 5-point scale, "Moderately" + "Very concerned", %, EU average and by country, 2022

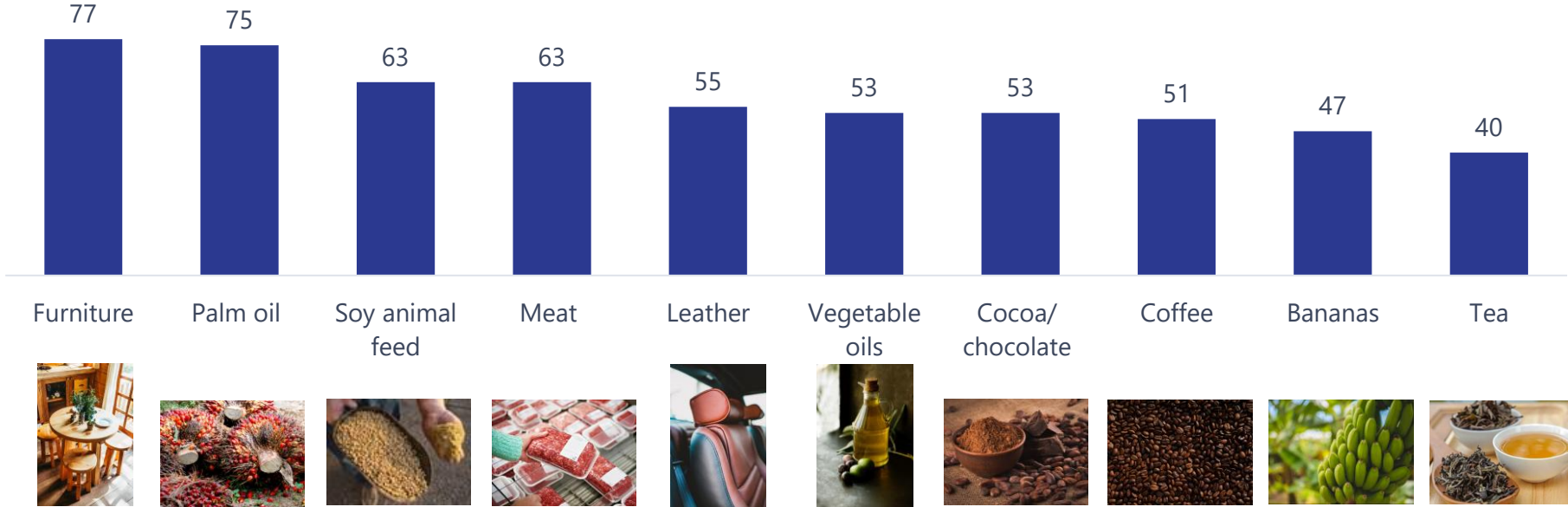


Top 3 by country

Q6. For each of the following sectors/industries, how concerned, if at all, are you about the negative impact they might have on deforestation? That is to say, how concerned are you about these sectors/industries contributing to the cutting down and removal of the world's forests? (Total: n varies between n=4,870 and n=4,937 by sector due to random assignment of sectors)

For a large majority of Europeans, the manufacturing of furniture and palm oil are the biggest drivers of deforestation, followed by soy animal feed and meat (which are in line with the products the EU lawmakers agree on).

Perceived impact of products/ingredients on deforestation, 4+5+6 on a 6-point scale, "To a moderate extent" + "To a large extent" + "To a very large extent", %, EU average, 2022

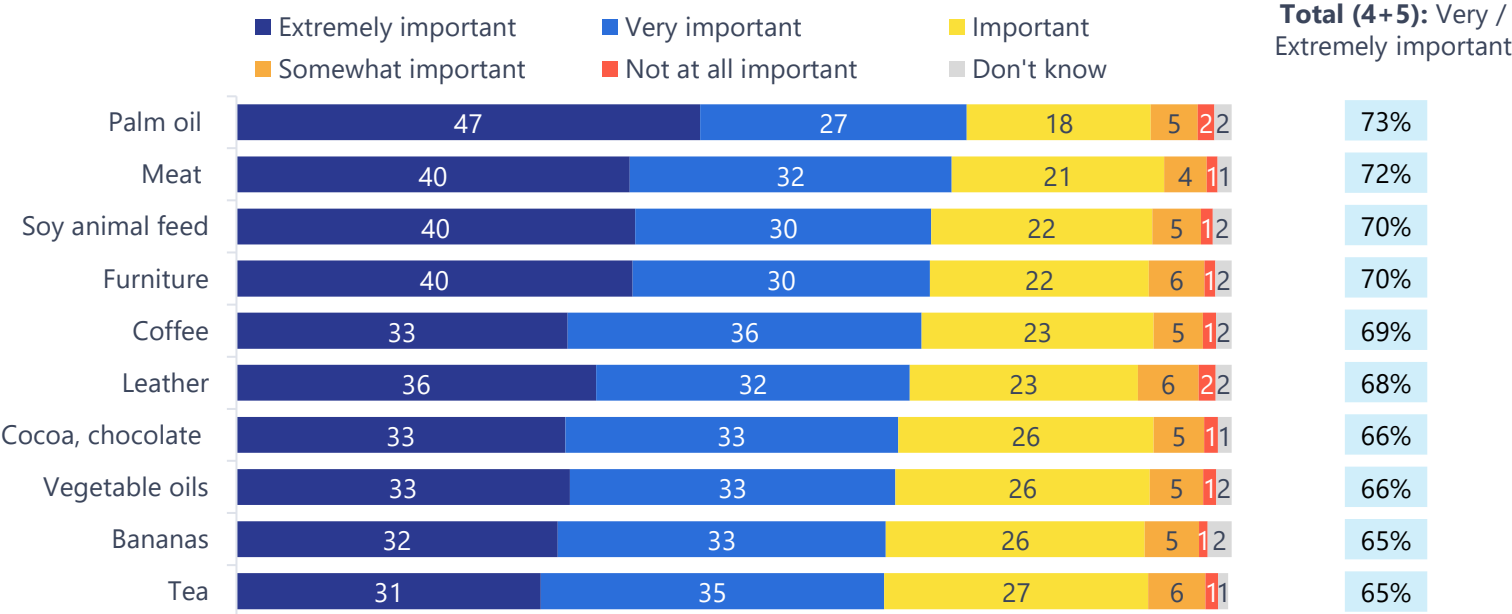


Note: To ensure a better differentiation of the products and give the respondents several points of comparison when rating the impact on deforestation, some ingredients were purposely added to the list, although they do not have a direct impact on deforestation (e.g., vegetable oils, tea, bananas)

Q7. Now, to what extent is the production or manufacturing of the following products/ingredients contributing to deforestation, in your view? (Total: n varies between n=4,448 and n=4,526 by product/ingredient due to random assignment of products/ingredients)

On average, nearly seven in ten Europeans think it is important that brands and retailers ensure that all products/ingredients do not cause deforestation

Importance of ensuring products/ingredients do not cause deforestation, %, EU average, 2022

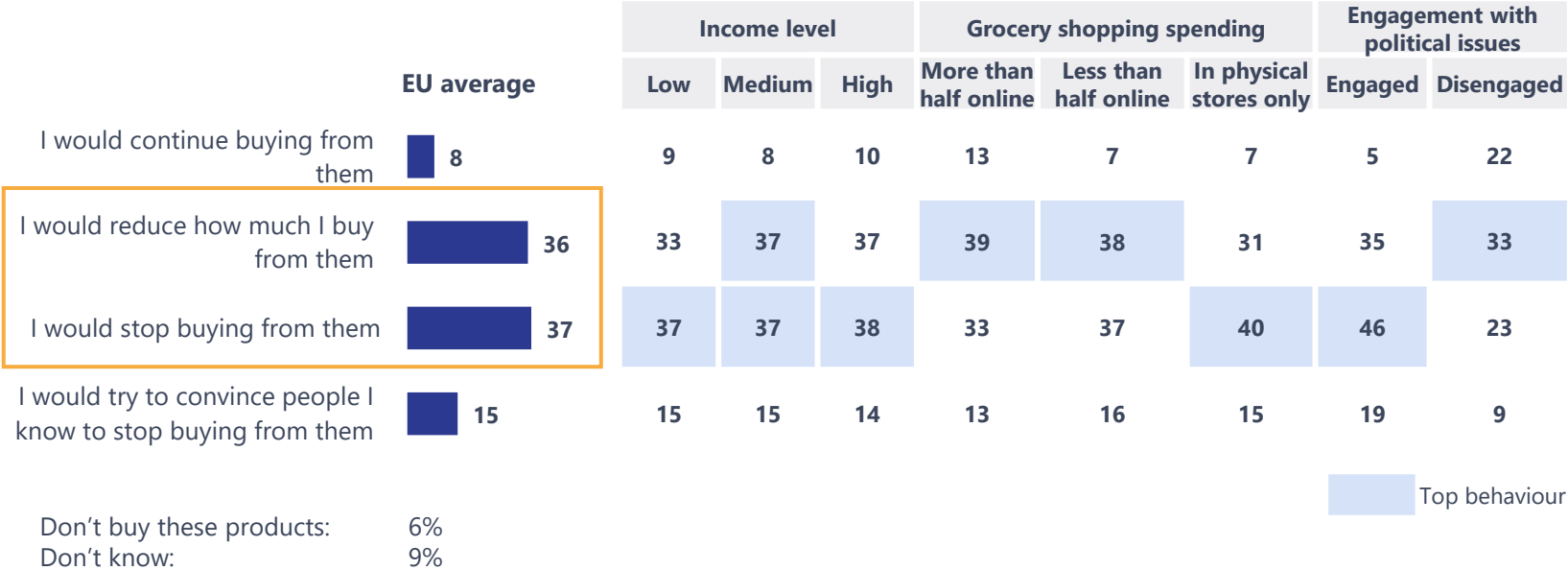


Note: To ensure a better differentiation of the products and give the respondents several points of comparison when rating the impact on deforestation, some ingredients were purposely added to the list, although they do not have a direct impact on deforestation (e.g., vegetable oils, tea, bananas)

Q8. How important is it for you that brands and retailers ensure that these same products/ingredients are produced in a way that does not cause deforestation (i.e., products/ingredients that are deforestation-free)? (Total: n varies between n=1,832 and n=3,472 by product/ingredient)

Contribution to deforestation leads to lower purchase intent or losing customers, regardless of their income level or political involvement

Consumer behaviour toward products contributing to deforestation, %, EU average, by consumer profile, 2022

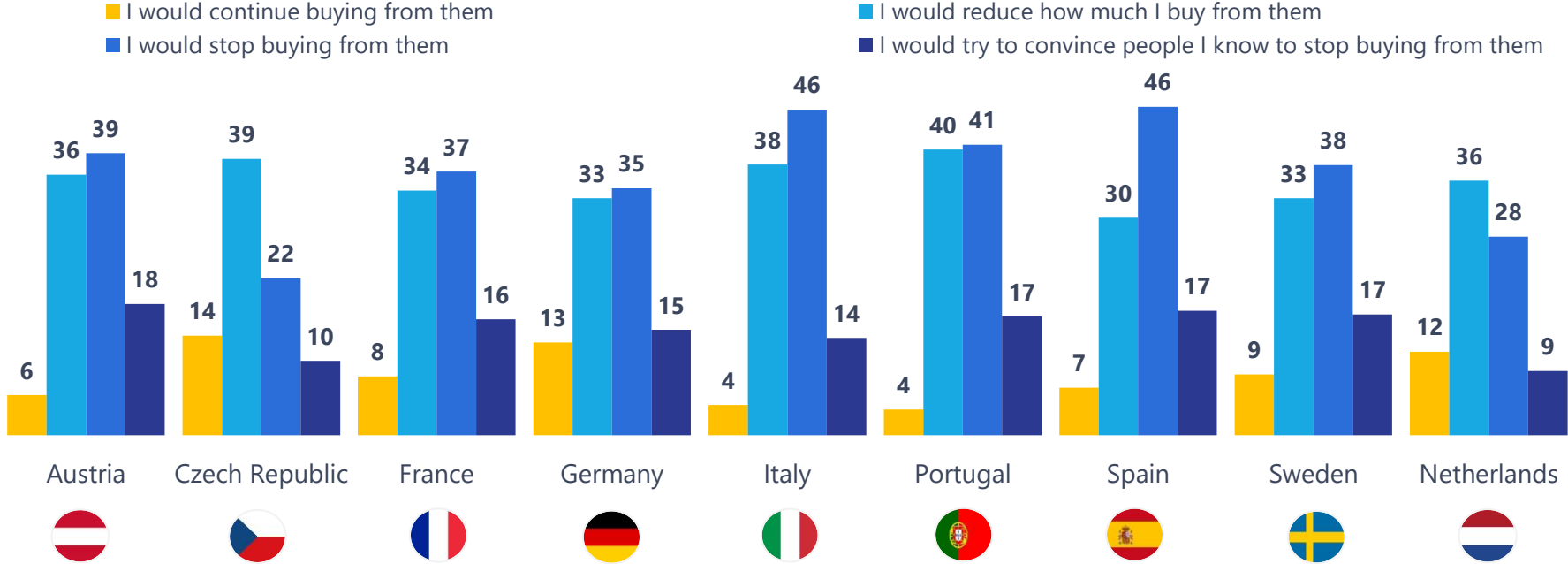


Q9. If you were to find out that your preferred brand or retailer contributes to deforestation in producing the products/ ingredients we have invited you to rate earlier, what would you do? (Total n=9,000)

Note: Q9 is a single choice question, except for the answer 'Would try to convince people I know to stop buying', which could be selected with another code as it is not mutually exclusive.

The risk of losing customers because of the brand's or retailer's contribution to deforestation is especially high in Spain, Italy, and Portugal – and strong across the EU

Consumer behaviour toward products contributing to deforestation, %, by country, 2022



Q9. If you were to find out that your preferred brand or retailer contributes to deforestation in producing the products/ ingredients we have invited you to rate earlier, what would you do? (Total n=9,000; n=1,000 in each country)

Attitudes toward new EU Regulation on Deforestation- free Products



In a Nutshell...

Europeans strongly support a Deforestation-free Law (at a higher rate than they support EU regulations in general).

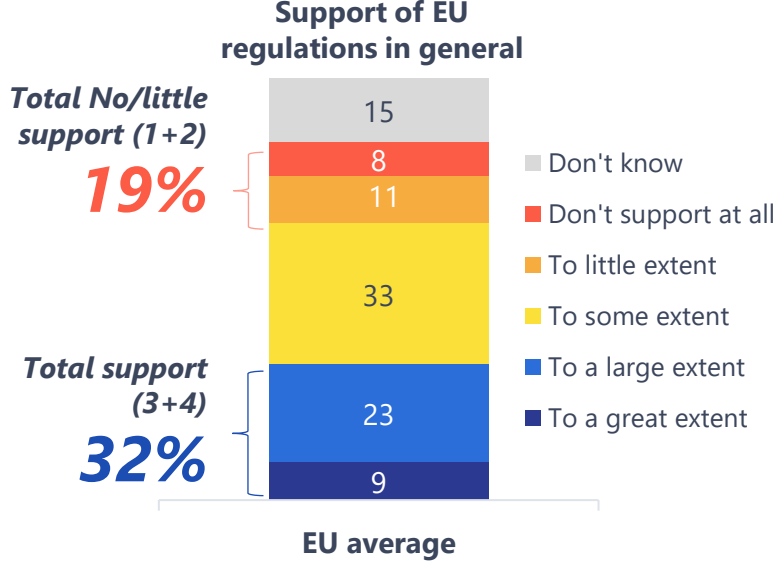
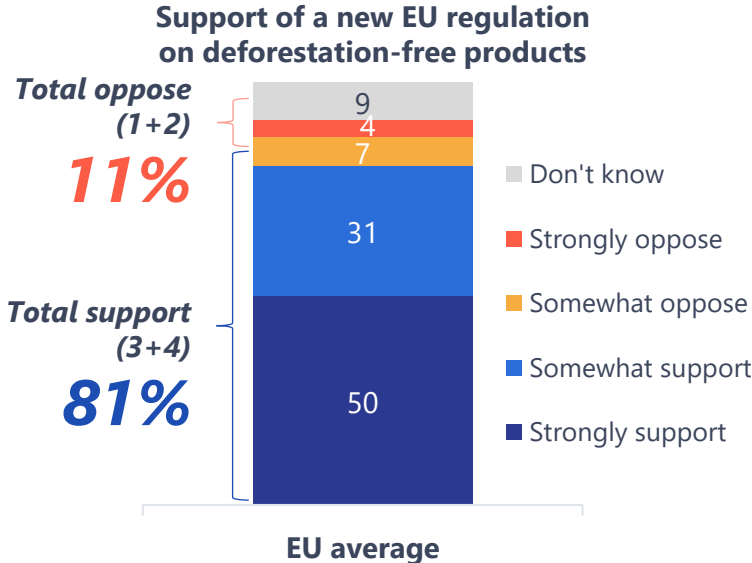
Support is high across all age groups, and is almost universal among those aged 45+ (that is, a key consumers & voters group).

The public's main reasons to support a Deforestation-free Law are to stop companies sourcing from deforested land, to preserve species diversity, and to reduce GHG emissions.

Europeans widely support a Deforestation-free Law (and to a much higher degree than other EU legislations are supported). Support for this law provides strong political capital

Level of support of a new EU regulation on deforestation-free products, %, EU average, 2022

Note: Each respondent saw the following introduction before answering this question:
 The European Commission has proposed a new law to halt deforestation and minimize the European Union’s impact on forests worldwide.
 The proposed law will require companies that sell commodities linked to deforestation and forest degradation – such as soy, palm oil and beef products – to ensure they don’t contribute to the destruction of the world’s forests / are ‘deforestation-free’ before placing them on the European market or exporting them from the EU.



Q14. Do you support or oppose a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world’s forests? D7. Thinking about EU legislations/regulations generally, to what extent would you say that you usually support them? (Total n=9,000)

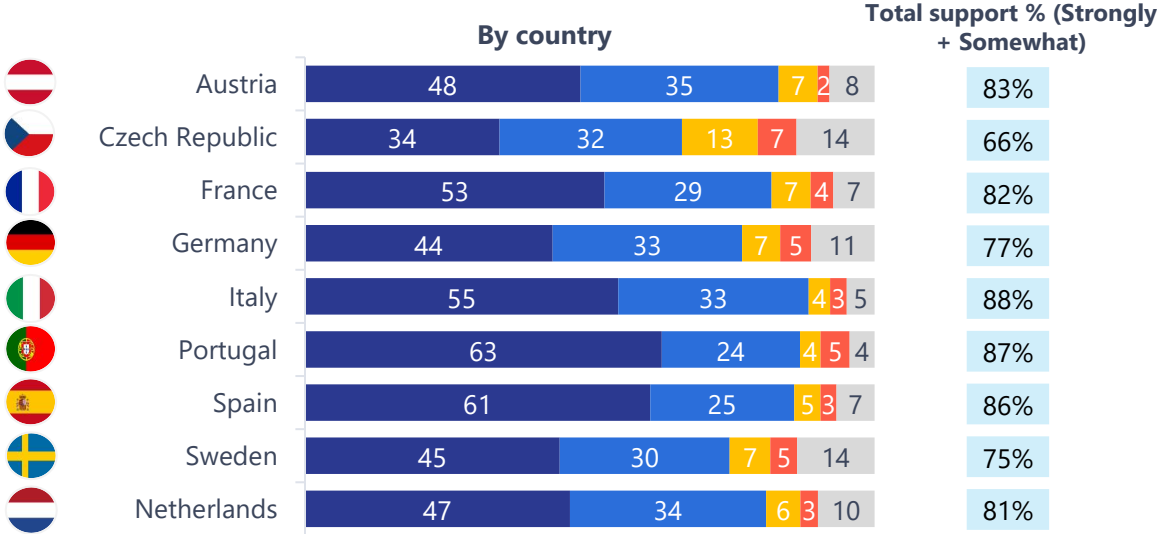
Europeans widely support a Deforestation-free Law across all the surveyed countries

Level of support of a new EU regulation on deforestation-free products, %, EU average, 2022

Note: Each respondent saw the following introduction before answering this question:

The European Commission has proposed a new law to halt deforestation and minimize the European Union’s impact on forests worldwide.

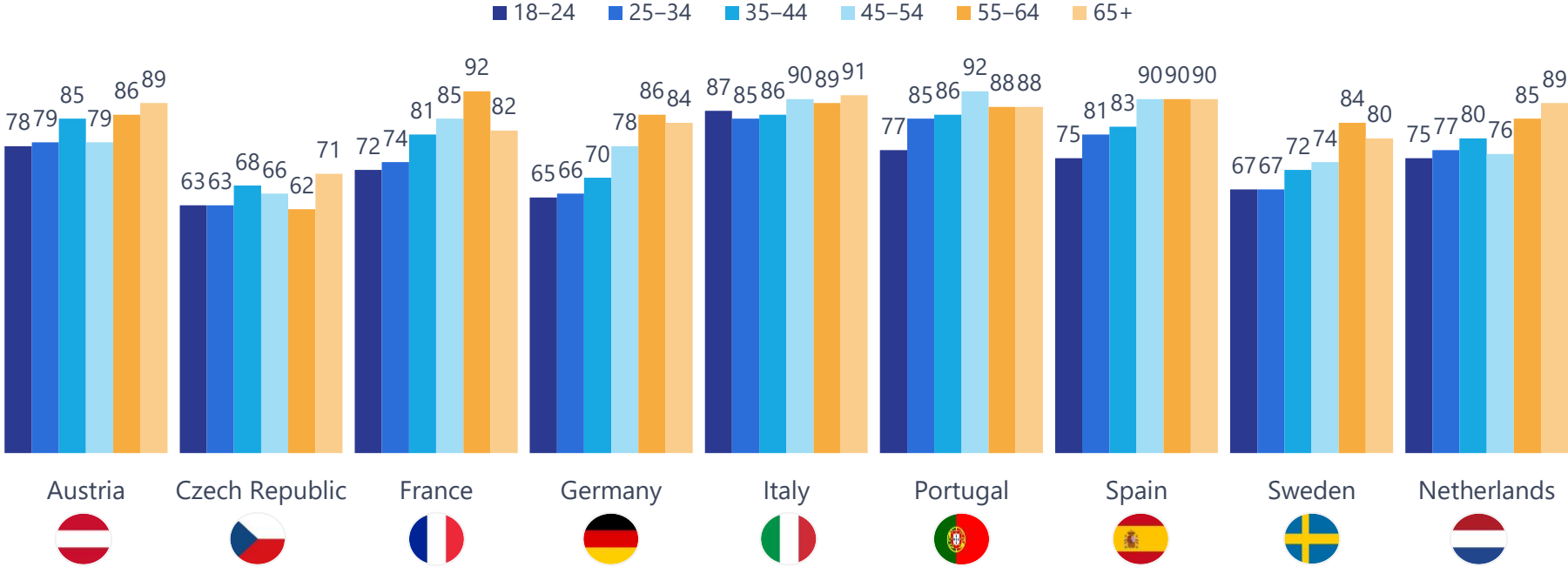
The proposed law will require companies that sell commodities linked to deforestation and forest degradation – such as soy, palm oil and beef products – to ensure they don’t contribute to the destruction of the world’s forests / are ‘deforestation-free’ before placing them on the European market or exporting them from the EU.



36 Q14. Do you support or oppose a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world’s forests? (Total n=9,000; n=1,000 in each country)

Support is high across all age groups, and is slightly higher among those aged 45+

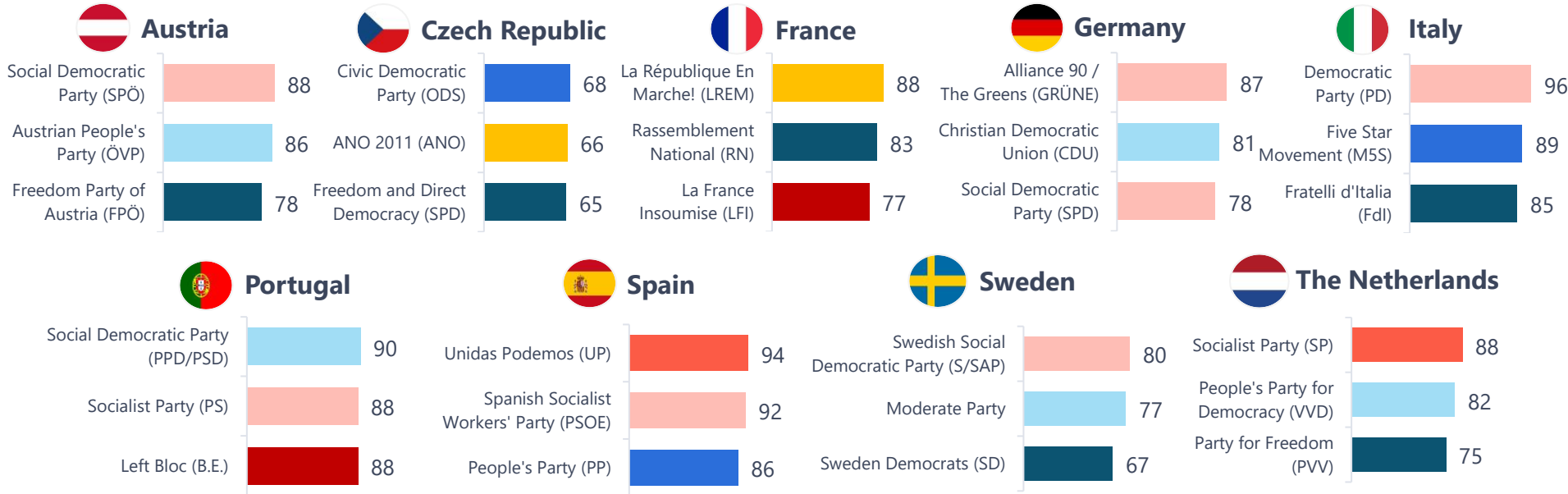
Support for a Deforestation-free Law, 3+4 (“Somewhat” + “Strongly support,”) %, by age and by country, 2022



Q14. Do you support or oppose a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world's forests? (Total n=9,000; n=1,000 in each country)

Voters of all the main EU political parties strongly support a Deforestation-free Law

Support for a Deforestation-free Law, 3+4 (“Somewhat” + “Strongly support,”) %, by country and voters of main political parties,* 2022



Political orientation

Far-left

Left-wing

Centre-left

Centre

Centre-right

Right-wing

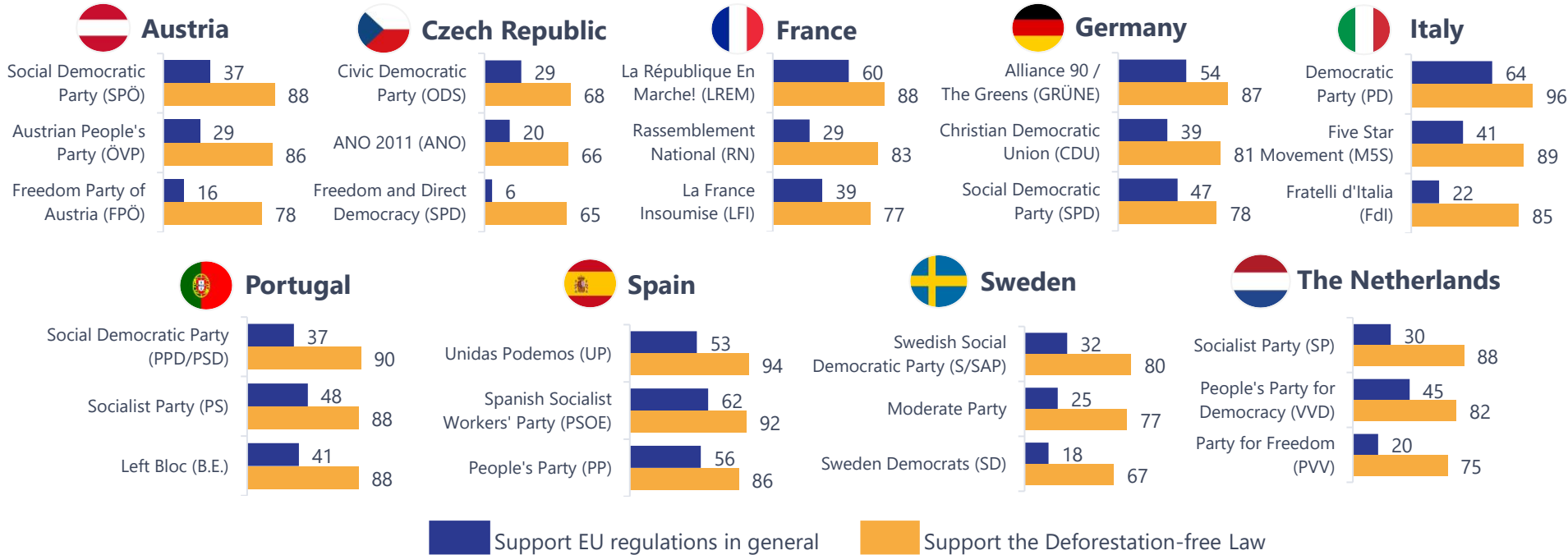
Far-right

Q14. Do you support or oppose a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world's forests? (Total n=9,000; n=1,000 in each country)

* Top three political parties indicated

Voters of all the main EU political parties strongly support a Deforestation-free Law, at a much higher rate than they support EU regulations in general

Support for a Deforestation-free Law, 3+4 (“Somewhat” + “Strongly support”) and Support of EU legislations, 4+5 on a 5-point scale, “To a large extent” + “To a great extent”, %, by country and voters of main political parties,* 2022

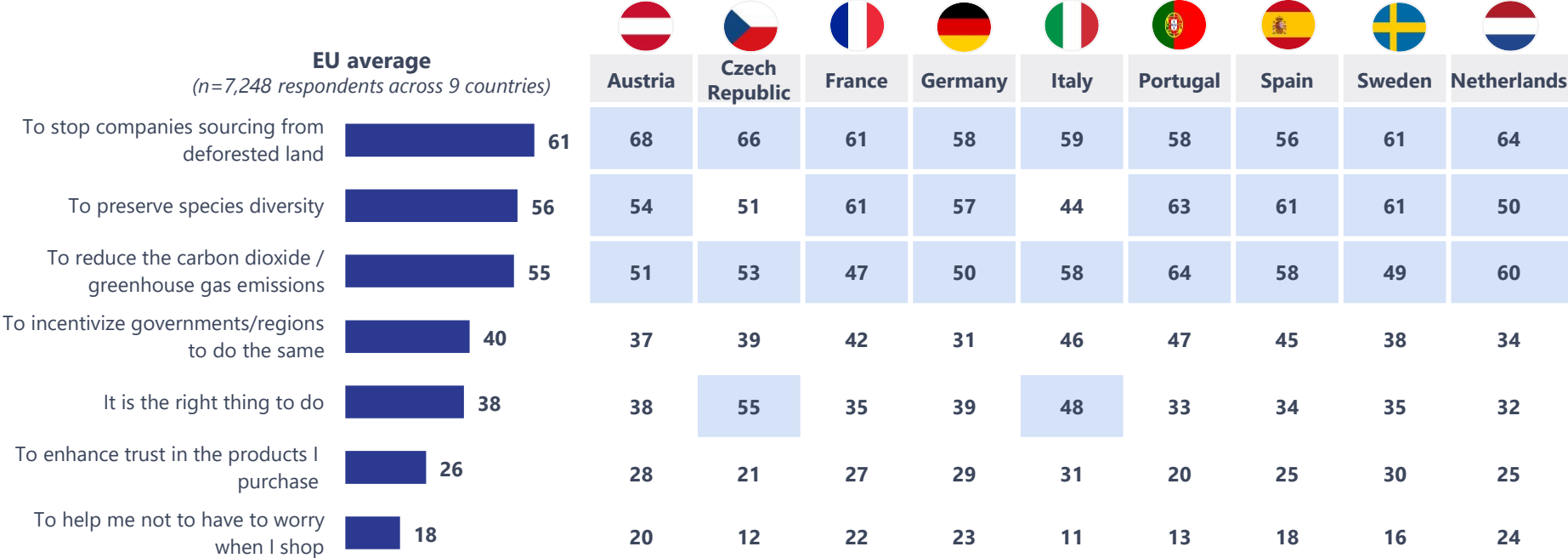


Q14. Do you support or oppose a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world's forests? D7. Thinking about EU legislations/regulations generally, to what extent would you say that you usually support them? (Total n=9,000; n=1,000 in each country)

* Top three political parties indicated – Please refer to the appendix for the full name and abbreviations of political parties

Europeans' main reasons for supporting a Deforestation-free Law are to stop companies sourcing from deforested land, to preserve species diversity, and to reduce GHG emissions

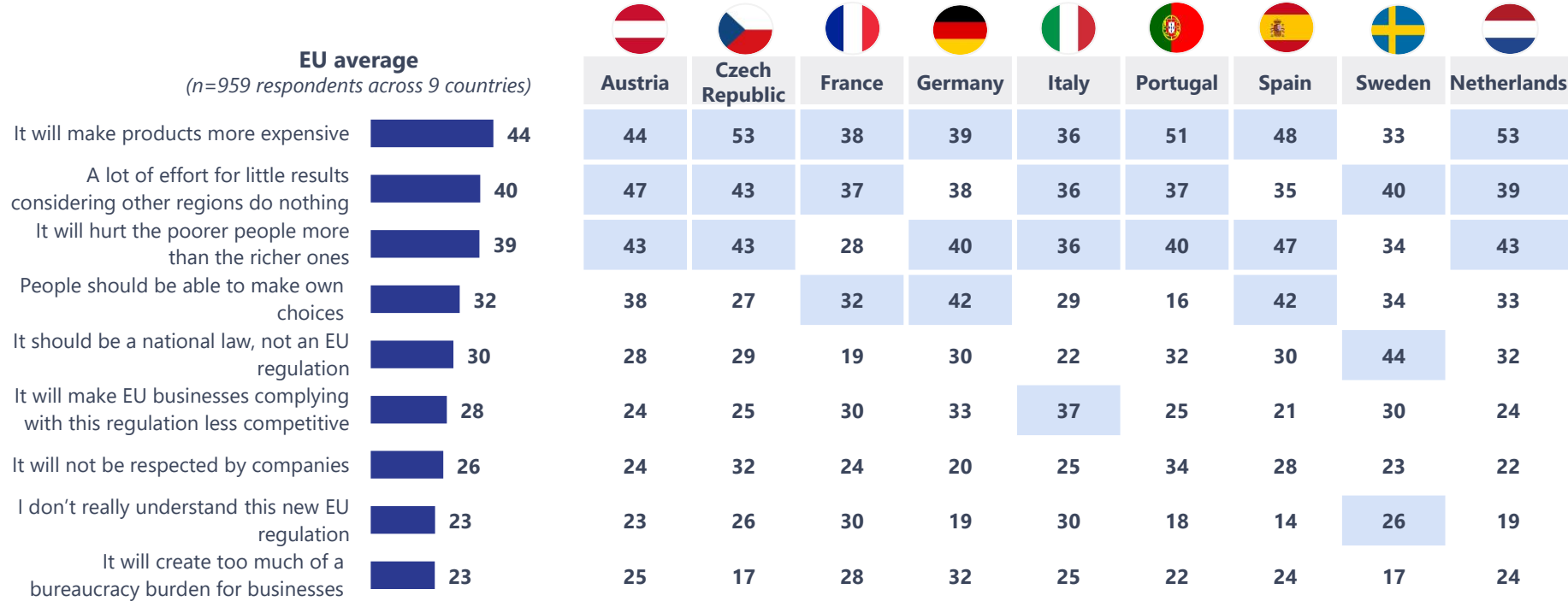
Reasons for supporting a Deforestation-free Law, %, EU average and by country, 2022



Q15a. You said that you support a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world's forests. Please indicate the three main reasons that motivate you to support this EU regulation. (Total n=7,248; Austria n=831; Czech Republic n=662; France n=819; Germany n=767; Italy n=884; Portugal n=869; Spain n=859; Sweden n=746; The Netherlands n=810)

The main reasons given by the 11% who oppose the Deforestation-free Law are the potential increase of prices, that it will hurt the poor more than the rich, and it is a lot of effort for little results

Reasons for opposing the new EU regulation, %, EU average and by country, 2022



Top 3 reasons by country



Q15b. You said that you oppose a Deforestation-free Law that would require companies in the EU to stop selling products that destroy the world's forests. Please indicate the three main reasons for you to oppose this EU regulation. (Total n=959; Austria n=90; Czech Republic n=202; France n=108; Germany n=122; Italy n=67; Portugal n=87; Spain n=74; Sweden n=118; The Netherlands n=91)

Information Sources on Deforestation



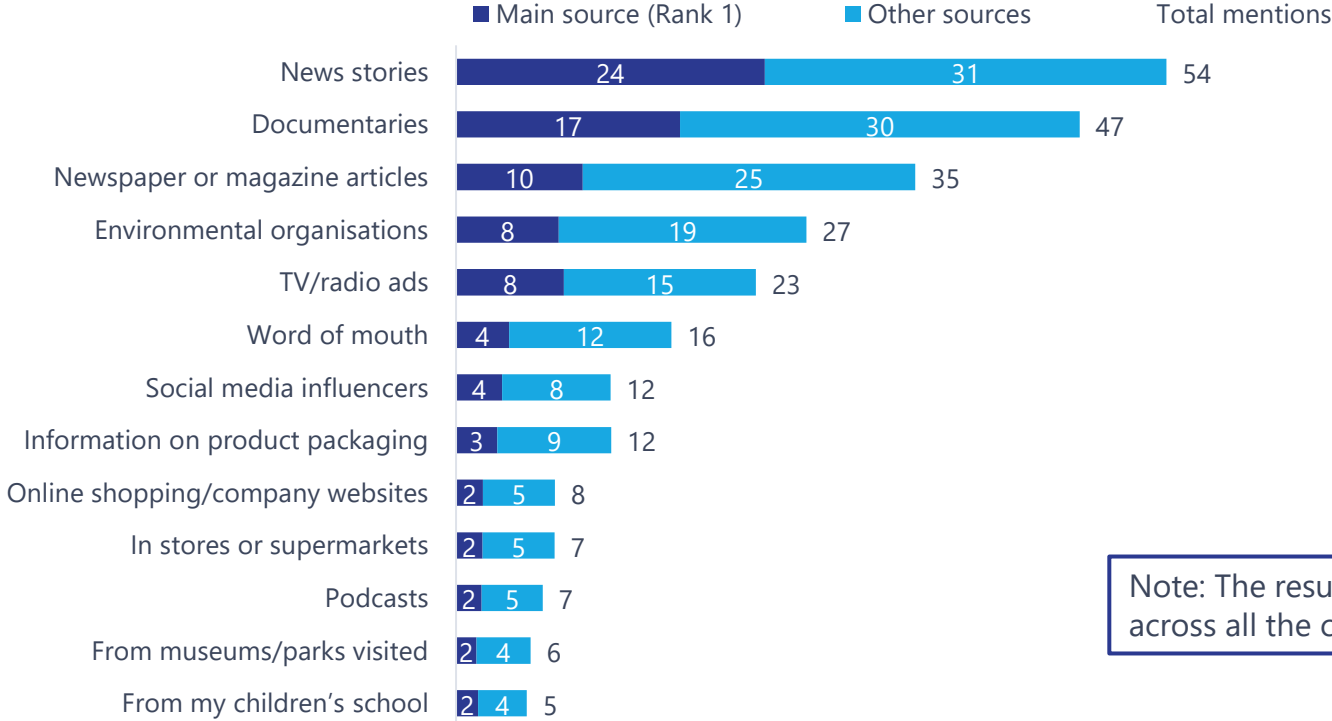
In a Nutshell...

The public's main information sources on deforestation are news stories, documentaries, and newspaper/magazine articles.

They mostly trust scientists, documentaries, and charities/NGOs for providing information about deforestation. The other sources surveyed receive low levels of trust.

The public heard information about forest issues and deforestation the most from news stories, followed by documentaries and newspaper or magazine articles

Main information sources on deforestation, %, EU average, 2022

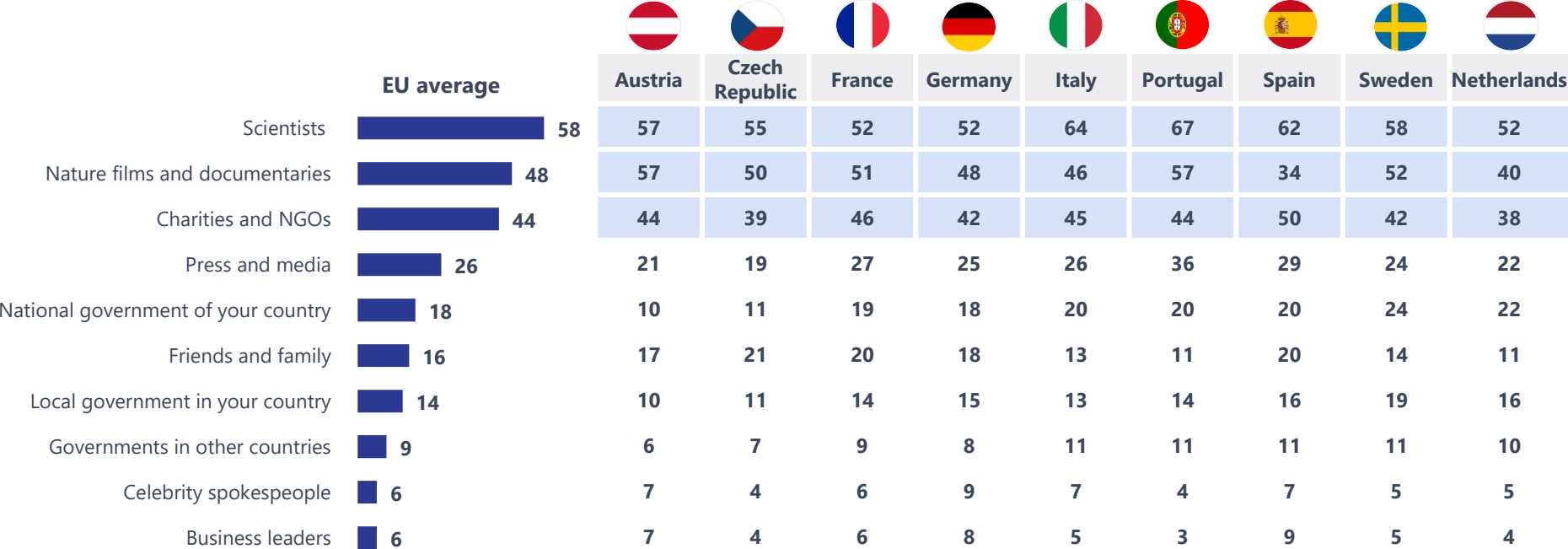


Note: The results are similar across all the countries surveyed.

44 Q16. From which of the following sources have you heard information about forest issues and deforestation the most in the last 12 months? (Total n=9,000)

Europeans trust scientists the most for providing information about deforestation, followed by documentaries and charities/NGOs

Most trusted information sources on deforestation, %, EU average and by country, 2022



 Top 3 by country

45 Q17. Which of the following sources/organisations do you trust the most for providing information about deforestation?
 (Total n=9,000; n=1,000 in each country)

Consumer Segmentation



In a Nutshell...

Engaged Influencers and Individual Boycotters are willing to fully disengage from businesses if they do not see them taking action.

Four in ten Europeans belong to these two segments.

Consumer Segmentation

Successful communication is the one that is well aligned with attitudes, needs and expectations of the specific target groups. To help describe the public's attitudes towards the Deforestation-free Law and potential behavioural responses, we have grouped all respondents into homogenous groups or segments. The segments were identified using reported customer behaviour towards products with negative impact on forests (q9) and their favourability towards the Law (q14).

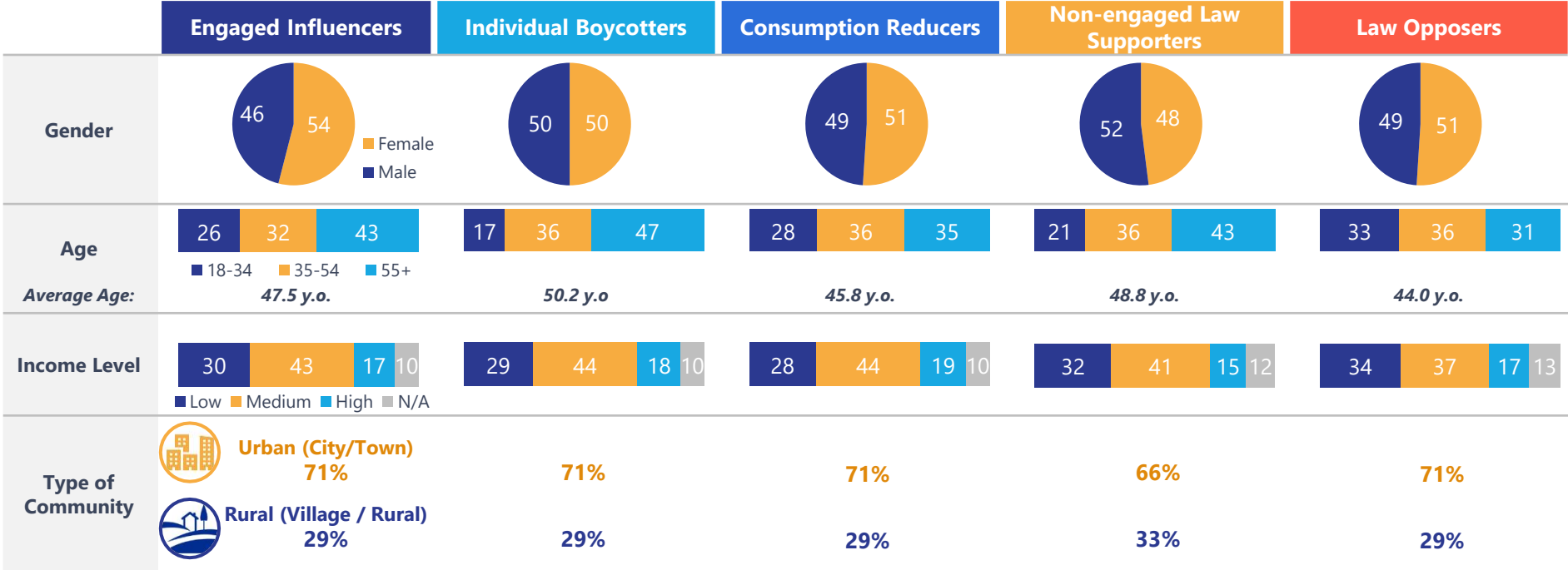
This segmentation aims to visualize the difference in consumers potential response to the Deforestation-free Law and the risk businesses could face if they do not proactively support this piece of legislation.

Segments:

Engaged Influencers	Favourable towards the Law, ready to fully boycott products or brands with negative impact on forests and engage other people in the protest action
Individual Boycotters	Prepared to individually boycott the products or brands contributing to deforestation
Consumption Reducers	Predisposed to reducing their purchases of products or brands contributing to deforestation
Non-engaged Law Supporters	Support the Law in general, but unlikely to react behaviorally
Law Opposers	Oppose the Deforestation-free Law and generally don't trust claims made by companies, NGOs actions, etc.

Engaged Influencers are skewed towards Female; Individual Boycotters are older; Non-engaged Law Supporters and Law Opposers are defined by a lower income

Segments' Demographic Profile, %, EU average, 2022












Segments' attitudes, shopping behaviours, and political engagement

Segments' description, EU average, 2022

	Engaged Influencers	Individual Boycotters	Consumption Reducers	Non-engaged Law Supporters	Law Opposers
Description	Want to influence/convince people to stop buying brands / from retailers contributing to deforestation.	Willing to fully stop buying brands / from retailers contributing to deforestation. Hold large companies as responsible for changing their practices vs them changing their behavior	Willing to reduce their consumption of products with negative impact on forests, although price and quality remain main drivers	Passive support of the law, with no impact on their consumption / choice of products	Oppose the Deforestation-free Law
Attitudes (Most differentiating attitudes vs other segments)	<ul style="list-style-type: none"> Ready to boycott and pressure companies if not acting responsibly Think that governments have a primary role to ban products impacting forests Willing to pay more for deforestation-free products Support taxes on products with negative impact 	<ul style="list-style-type: none"> Find it frustratingly difficult to distinguish if a product is deforestation-free or not Ready to boycott and pressure companies if not acting responsibly Willing to pay more for deforestation-free products Support taxes on products with negative impact 	<ul style="list-style-type: none"> Find it frustratingly difficult to distinguish if a product is deforestation-free or not Would prefer to buy from a company known for its forest conservation efforts Price and quality are more important 	<ul style="list-style-type: none"> Lack of trust in NGOs Find it frustratingly difficult to distinguish if a product is deforestation-free or not Price and quality are more important than impact on deforestation 	<ul style="list-style-type: none"> Price and quality are more important than impact on deforestation Don't trust companies saying that a product is environmentally responsible Lack of trust in NGOs Believe NGOs make an issue of deforestation only to raise money
Shopping behaviour	<ul style="list-style-type: none"> Main shopper Choice of retailer driven by quality, trust in retailer, and sustainability policy 	<ul style="list-style-type: none"> Main shopper Choice of retailer driven by quality of the products and trust of retailer 	<ul style="list-style-type: none"> Main shopper Choice of retailer driven by product quality and availability 	<ul style="list-style-type: none"> Main shopper Choice of retailer driven by low prices and convenience 	<ul style="list-style-type: none"> Share shopping decisions Choice of retailer driven by low prices, out of habit
Political engagement and key priorities	<ul style="list-style-type: none"> Highly engaged High support of EU legislations Priority: Improving natural environment, fighting rising prices 	<ul style="list-style-type: none"> Highly engaged High support of EU legislations Priority: Improving natural environment and fighting rising prices 	<ul style="list-style-type: none"> Highly engaged Priority: Improving natural environment and fighting rising prices 	<ul style="list-style-type: none"> Moderately engaged Priority: Improving natural environment and fighting rising prices 	<ul style="list-style-type: none"> Disengaged Low support of EU legislations Priority: Economic growth and fighting rising prices

The Boycotters and the Consumption Reducers are the most prominent segments across the EU countries surveyed

Segmentation breakdown within each country, %, by country, 2022

										
	EU average	Austria	Czech Republic	France	Germany	Italy	Portugal	Spain	Sweden	Netherlands
Engaged Influencers	13	17	9	15	13	13	15	16	15	8
Individual Boycotters	26	27	13	26	24	36	29	33	25	21
Consumption Reducers	28	29	27	26	25	32	34	25	23	29
Non-engaged Law Supporters	13	11	17	14	15	8	9	12	12	23
Law Opposers	19	17	34	18	23	12	13	14	25	19

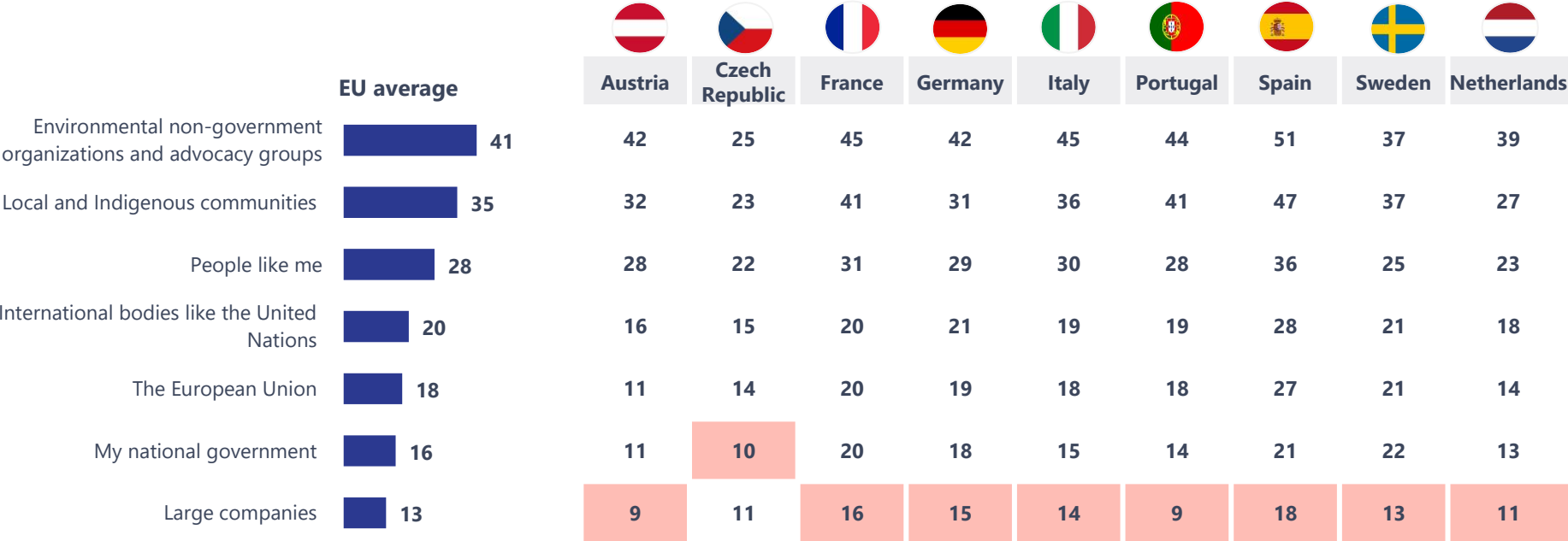
 Largest segment by country

Appendix



Large companies are almost always viewed as being the worst performing actor

Performance of actors on forest protection, 4+5 on a 5-point scale, "Good" + "Very good", %, EU average and by country, 2022

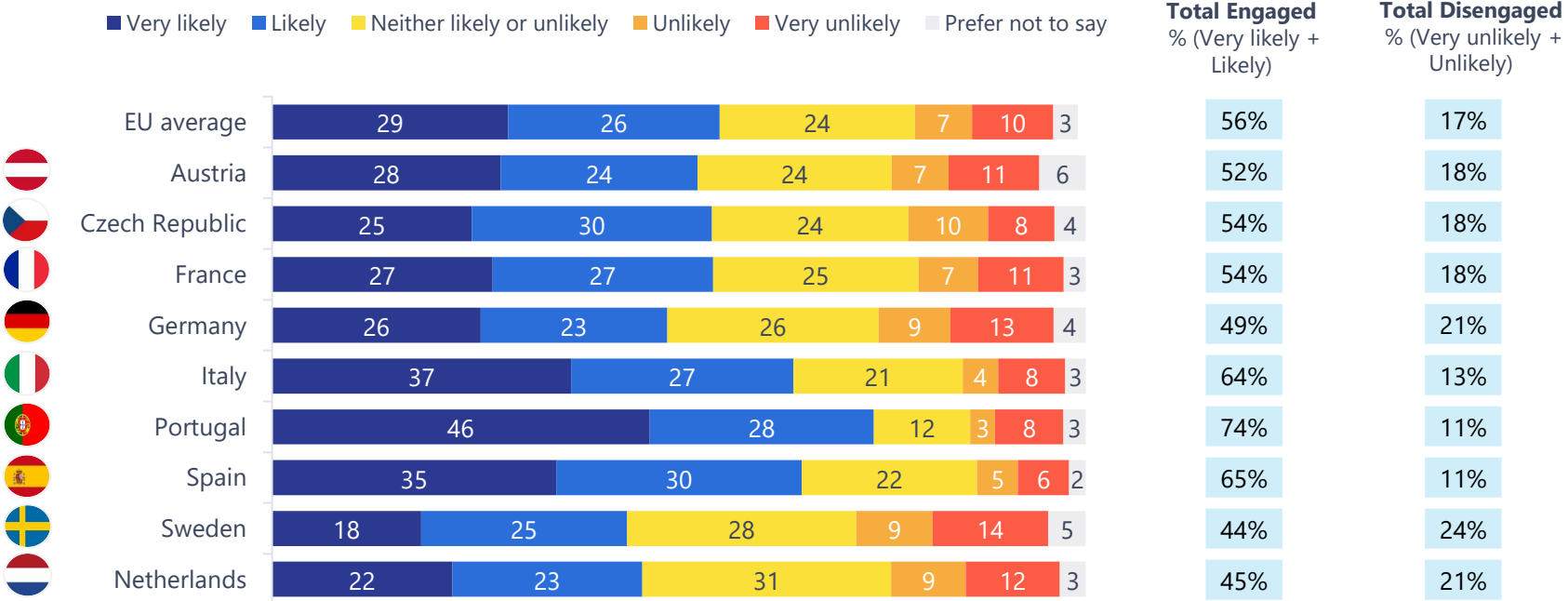


Bottom 1 by country

53 Q5. Now, we would like to get your impression of how well these actors are doing in protecting the world's forests / preventing deforestation today. (Total n=9,000; n=1,000 in each country)

A majority of people are willing to take action in favour of an EU anti-deforestation law, particularly in Portugal, Italy, and Spain


Level of engagement with the EU anti-deforestation law, %, by country, 2022



D5. If you were to receive an email/alert from an environmental group/NGO asking you to sign a petition or send a letter to a member of Parliament to ask for the EU anti-deforestation law to be adopted, how likely is it that you would do it? (Total n=9,000; n=1,000 in each country)

Voting preferences (1)

Voting preferences among the main political parties, %, by country, 2022

 Austria	
Sozialdemokratische Partei Österreichs (SPÖ)	20%
Österreichische Volkspartei (ÖVP)	14%
Die Grünen – Die Grüne Alternative (GRÜNE)	13%
Freiheitliche Partei Österreichs (FPÖ)	13%
NEOS – Das Neue Österreich und Liberales Forum (NEOS)	7%
Other	7%
Don't know / Prefer not to say	26%






 Czech Republic	
ANO 2011 (ANO)	25%
Svoboda a přímá demokracie (SPD)	13%
Občanská demokratická strana (ODS)	9%
Ceská pirátská strana (Piráti)	7%
Starostové a nezávislí (STAN)	7%
Křesťanská a demokratická unie – Československá strana lidová (KDU-CSL)	3%
TOP 09	3%
Other	12%
Don't know / Prefer not to say	21%

 France	
Rassemblement National (RN)	17%
La République En Marche! (LREM)	13%
La France Insoumise (LFI)	11%
Europe Écologie Les Verts (EELV)	10%
Parti socialiste (PS)	9%
Les Républicains (LR)	7%
Other	12%
Don't know / Prefer not to say	21%

 Germany	
Social Democratic Party of Germany (SPD)	18%
Bündnis 90 / Die Grünen (GRÜNE)	17%
Christian Democratic Union of Germany (CDU)	15%
Freie Demokratische Partei (FDP)	9%
Alternative für Deutschland (AfD)	8%
Die Linke (LINKE)	7%
Other	6%
Don't know / Prefer not to say	19%

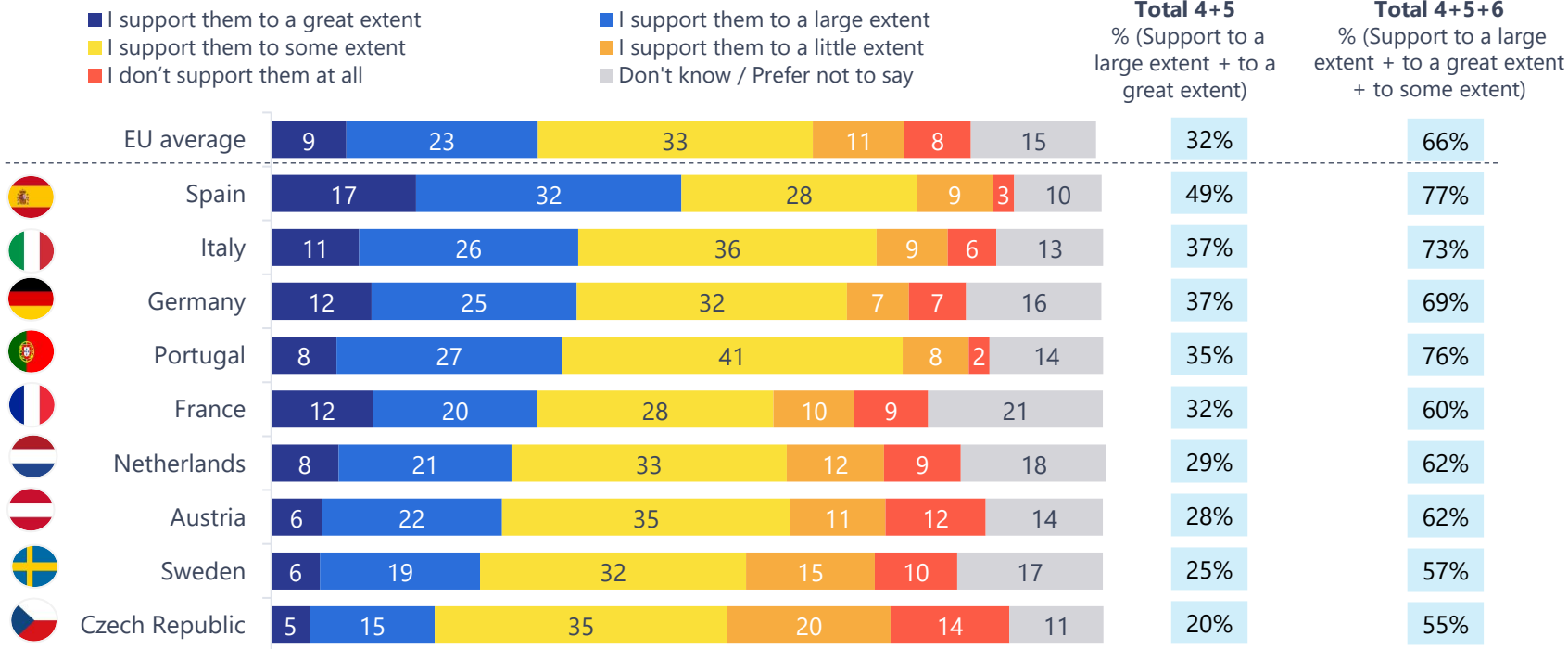
Voting preferences (2)

Voting preferences among the main political parties, %, by country, 2022

 Italy		 Portugal		 Spain		 Sweden		 The Netherlands	
Partito Democratico (PD)	21%	Partido Socialista (PS)	28%	Partido Socialista Obrero Español (PSOE)	23%	Sveriges Socialdemokratiska arbetarparti (S/SAP)	27%	Volkspartij voor Vrijheid en Democratie (VVD)	14%
Fratelli d'Italia (Fdi)	14%	Partido Social Democrata (PPD/PSD)	13%	Partido Popular (PP)	21%	Sverigedemokraterna (SD)	17%	Partij voor de Vrijheid (PVV)	13%
Movimento 5 Stelle (M5S)	12%	Bloco de Esquerda (B.E.)	8%	Unidas Podemos (UP)	11%	Moderata samlingspartiet (M)	15%	Socialistische Partij (SP)	11%
League	6%	CHEGA (CH)	8%	Vox	9%	Vänsterpartiet (V)	10%	Democraten 66 (D66)	9%
Forza Italia (FI)	5%	Iniciativa Liberal (IL)	5%	Ciudadanos (Cs)	6%	Centerpartiet (C)	4%	Christen-Democratisch Appèl (CDA)	5%
Other	12%	Other	12%	Other	13%	Other	8%	Other	27%
Don't know / Prefer not to say	30%	Don't know / Prefer not to say	26%	Don't know / Prefer not to say	18%	Don't know / Prefer not to say	19%	Don't know / Prefer not to say	21%

Generally speaking, the majority of Europeans support EU legislations at least to some extent

Support of EU legislations, %, by country, 2022



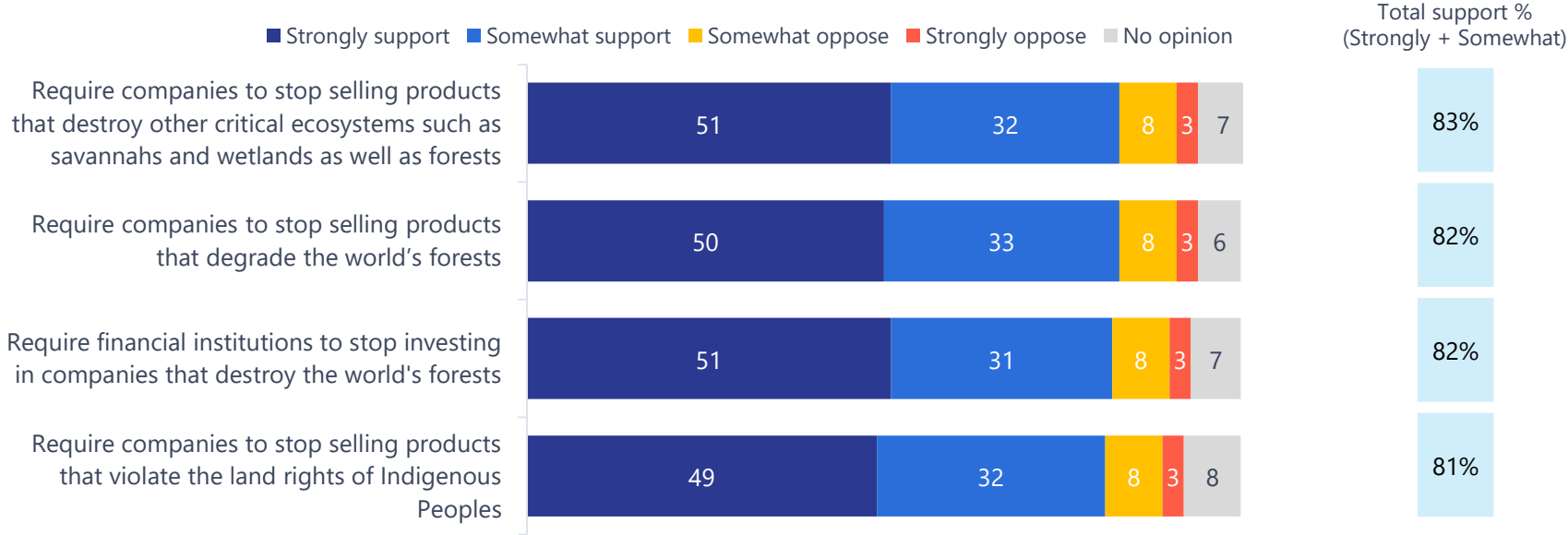
D7. Thinking about EU legislations/regulations generally, to what extent would you say that you usually support them?

(Total n=9,000; n=1,000 in each country)

Europeans also largely support the parts of the Deforestation-free Law currently under debate

Level of support for parts of the Deforestation-free Law, %, EU average, 2022

In addition to requiring companies in the EU to stop selling products that destroy the world’s forests, the law should ...



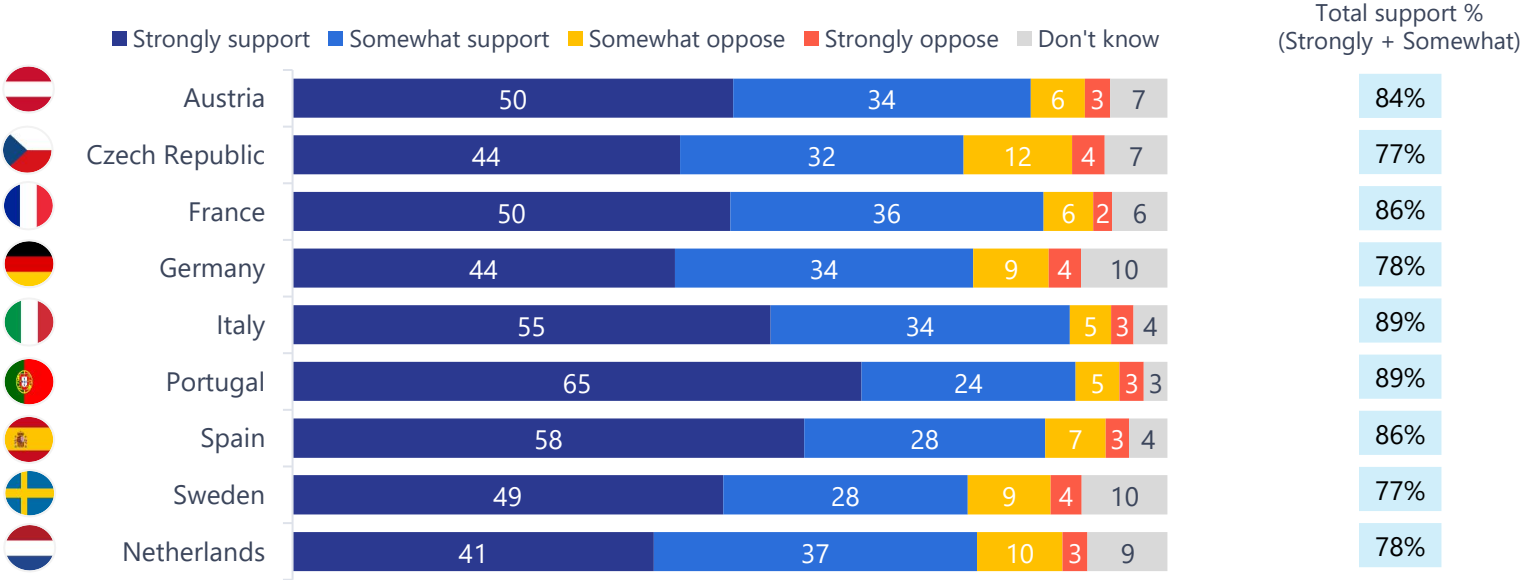
58 Q15c. Thinking a bit more about the Deforestation-free Law, how much do you support or oppose the following part of the proposal from the European Parliament? (Total n=9,000)

The vast majority thinks that the Deforestation-free Law should require companies to stop selling products that destroy other critical ecosystems

Level of support for parts of the Deforestation-free Law, %, by country, 2022

In addition to requiring companies in the EU to stop selling products that destroy the world's forests, the law should ...

Require companies to stop selling products that destroy other critical ecosystems such as savannahs and wetlands as well as forests

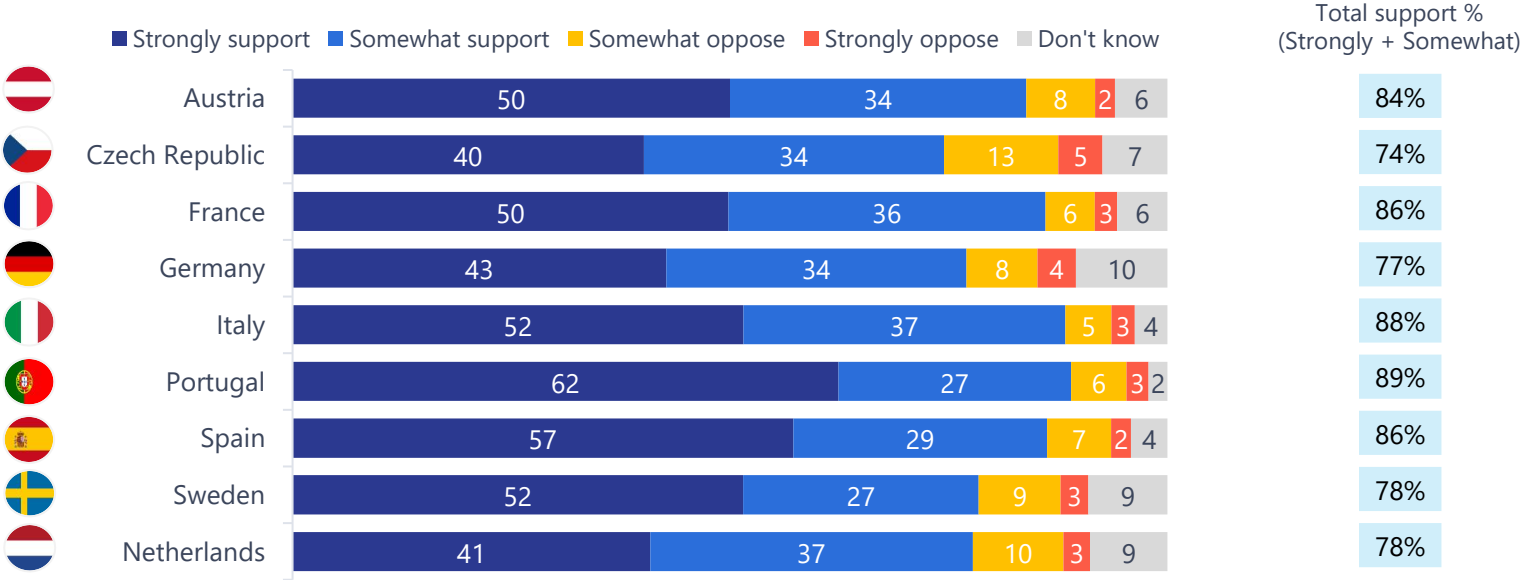


59 Q15c. Thinking a bit more about the Deforestation-free Law, how much do you support or oppose the following part of the proposal from the European Parliament? (Total n=9,000; n=1,000 in each country)

The public supports the fact that the Deforestation-free Law should require companies to stop selling products that degrade the world's forests

Level of support of parts of the Deforestation-free Law, %, by country, 2022

In addition to requiring companies in the EU to stop selling products that destroy the world's forests, the law should ... **Require companies to stop selling products that degrade the world's forests.**

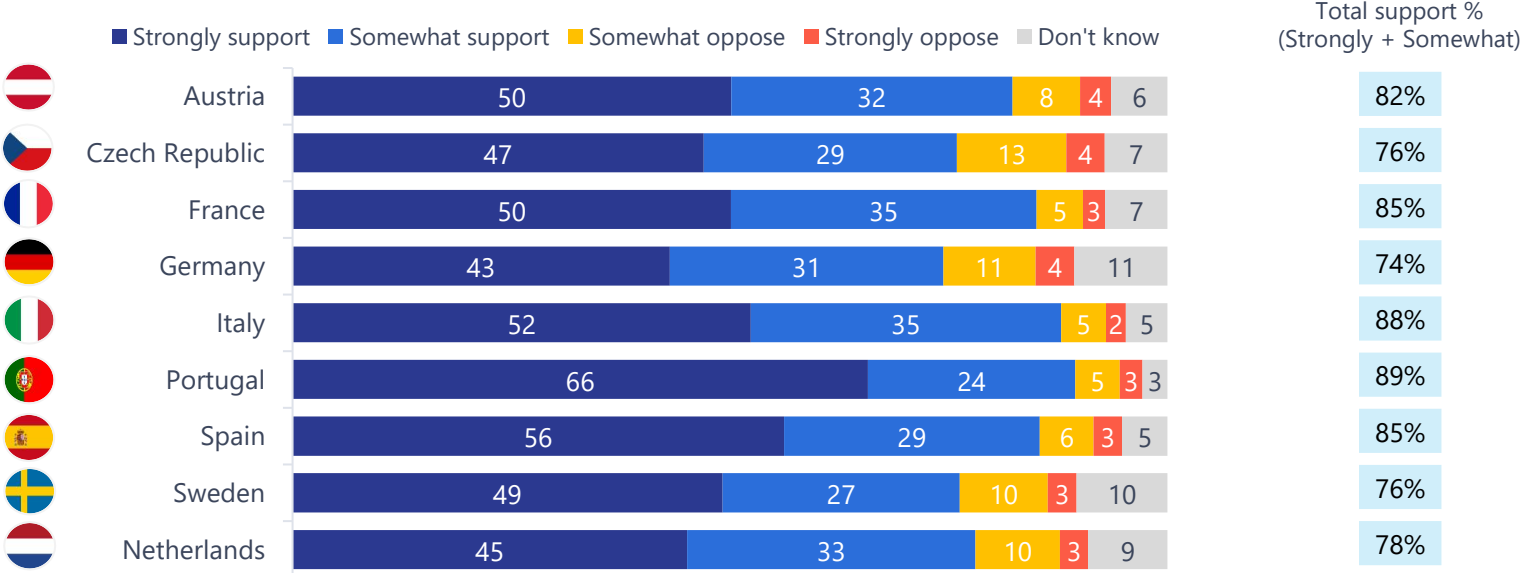


Q15c. Thinking a bit more about the Deforestation-free Law, how much do you support or oppose the following part of the proposal from the European Parliament? (Total n=9,000; n=1,000 in each country)

The public also thinks that the Deforestation-free Law should require financial institutions to stop investing in companies that destroy the world's forests

Level of support of parts of the Deforestation-free Law, %, by country, 2022

In addition to requiring companies in the EU to stop selling products that destroy the world's forests, the law should ... **Require financial institutions to stop investing in companies that destroy the world's forests**

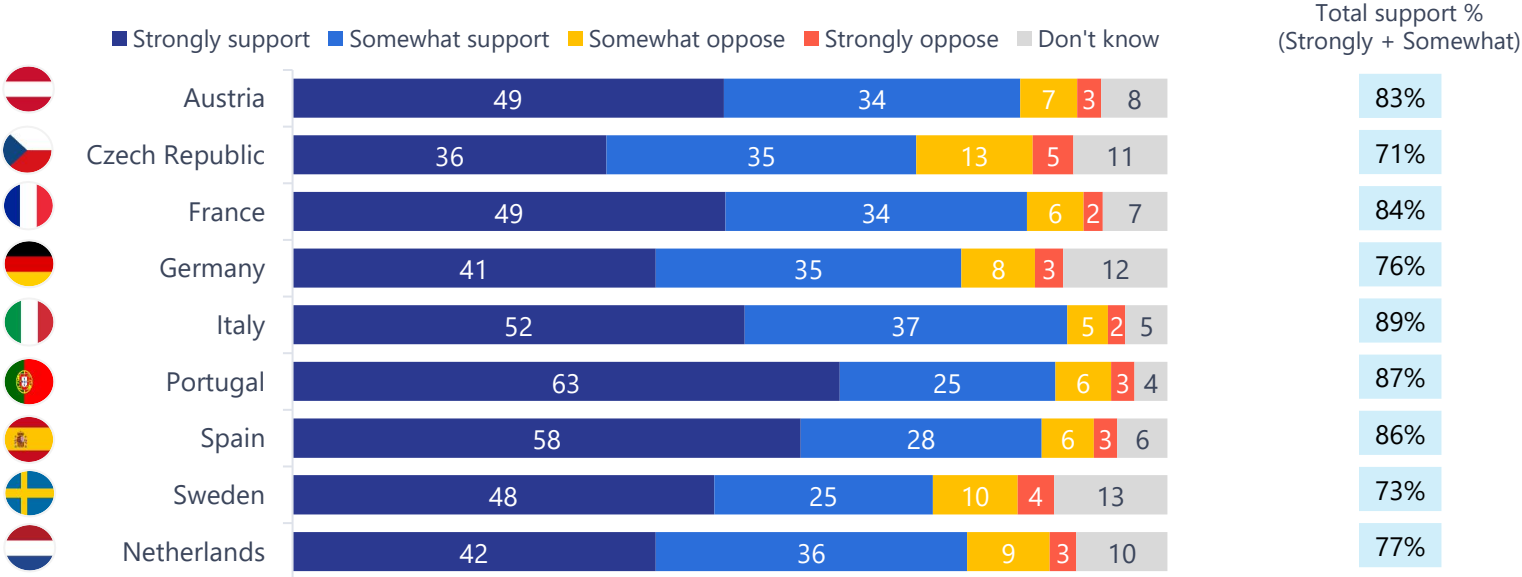


61 Q15c. Thinking a bit more about the Deforestation-free Law, how much do you support or oppose the following part of the proposal from the European Parliament? (Total n=9,000; n=1,000 in each country)

Europeans believe that the Deforestation-free Law should require companies to stop selling products that violate the land rights of Indigenous peoples

Level of support of parts of the Deforestation-free Law, %, by country, 2022

In addition to requiring companies in the EU to stop selling products that destroy the world's forests, the law should ... **Require companies to stop selling products that violate the land rights of Indigenous peoples**



62 Q15c. Thinking a bit more about the Deforestation-free Law, how much do you support or oppose the following part of the proposal from the European Parliament? (Total n=9,000; n=1,000 in each country)



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