



FSC Brand Awareness Survey

20 September 2018



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 - Purchase Intent
 - Willingness to Pay
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Executive Summary



Background

- FSC Malaysia has commissioned a study to measure FSC's brand and logo awareness, and to understand the impact of the FSC brand and logo on purchasing decisions amongst Malaysians. This study will provide a baseline to measure FSC's outreach effort in the coming years.

Awareness of FSC

- One in five respondents (21%) said they were moderately to extremely familiar with the FSC logo. Awareness was highest for the WWF logo (86%).

Purchase Intent

- Over 50% of respondents stated that they are likely to buy products with an eco-friendly logo across all product categories.
- There is an average increase in likelihood of purchase of 20% across all product categories after respondents watched the FSC video.
- If a FSC certified product costs up to 10% more than a non-FSC certified product, 57% of the respondents would still be willing to purchase the product.

Understanding of FSC

- Respondents most commonly associate FSC with responsible forest management and the protection of ecosystem. Respondents are not as aware of FSC's other aims to protect the rights of indigenous people and workers.
- There are also certain misconceptions about FSC's objectives. For example, 25% of the respondents thought FSC advocates the reduction of usage of forest products or is related to recycling.
- The top 3 channels to learn about FSC are social media, websites / blogs and logo on a product.

- **FSC Malaysia has commissioned WAYY Consulting to perform a study to understand**
 - FSC's brand and logo awareness
 - Impact of the FSC brand and logo on purchasing decisions and willingness to pay
 - Information channels used to understand FSC**amongst Malaysians.**

- **6 questions were posed to 1,000 Malaysians. The sample profile is representative of the Malaysian population by race, age, gender and location.**

- **The sample of n=1,000 yields a margin of error of $\pm 3\%$ based on the population size* at a 95% confidence level. This means we can be 95% confident that if the study was replicated, the findings would be within the range of $\pm 3\%$.**

- **To check for any significant variation between responses online and offline, 75% of the respondents participated in the survey online. The remaining 25% were interviewed in person. Post interview, FSC leaflets were distributed to the offline respondents as part of the outreach effort.**

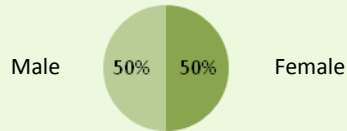
- **For both interviews, a one-minute FSC video was played to provide information about FSC to the respondents and measure changes in purchase intent.**

- **Data was collected during the following period:**
 - **Online:** 26 July – 10 August 2018
 - **Offline:** 28 July – 4 August 2018

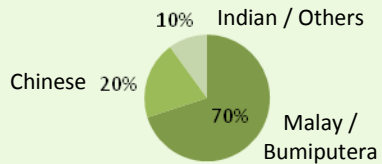
Respondent Profile



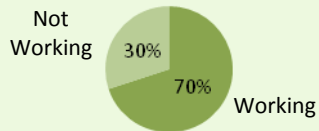
Gender



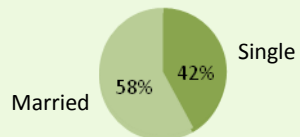
Race



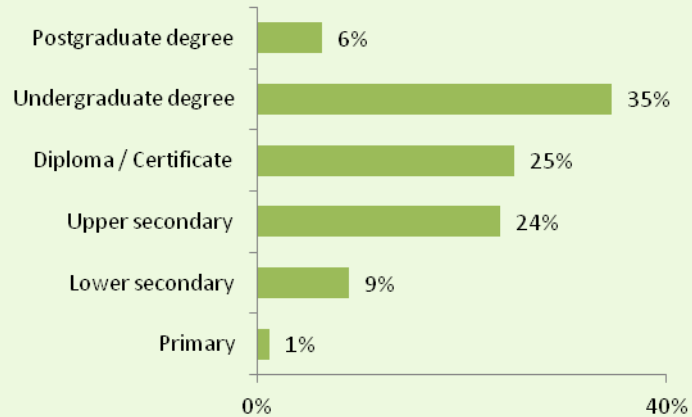
Working Status



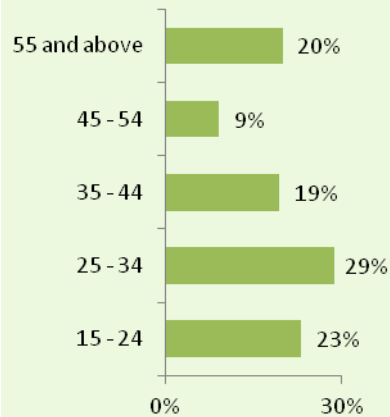
Marital Status



Education



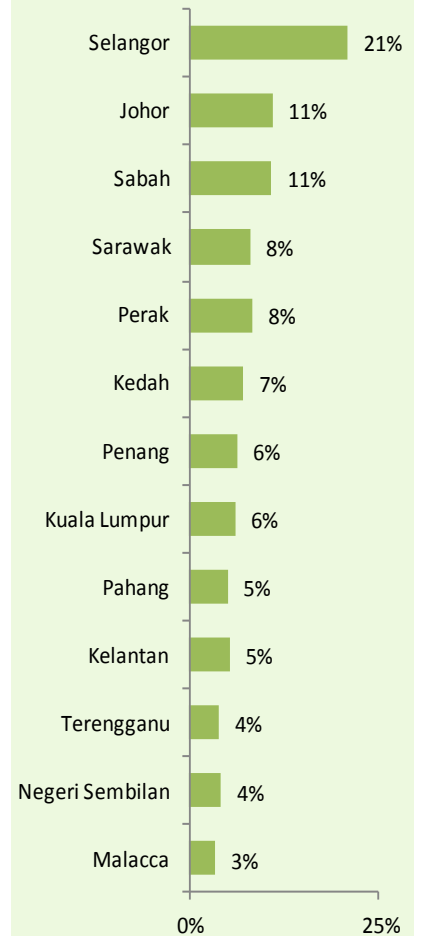
Age



Income



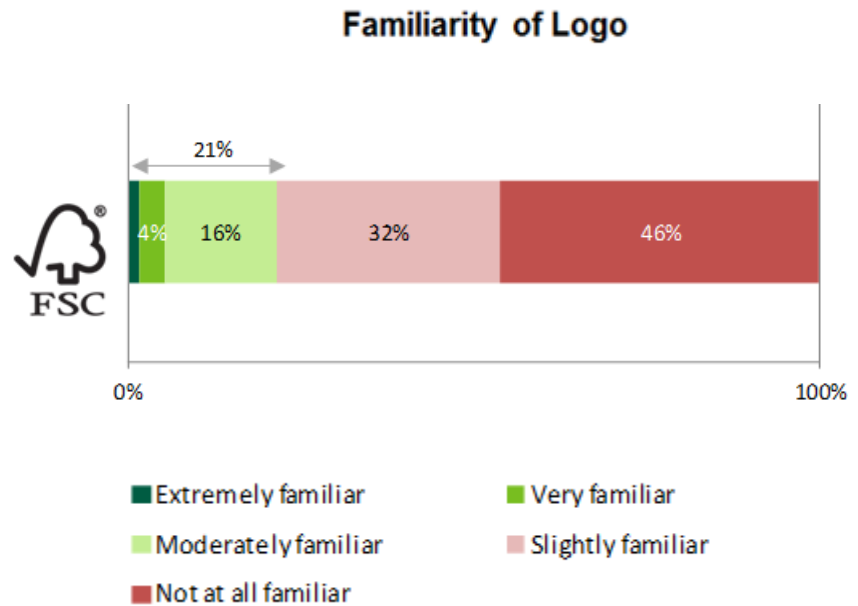
State



Key Findings – Familiarity (1/2)



- One in five respondents (21%) said they were moderately to extremely familiar with the FSC logo.
- Awareness levels are similar between online and offline respondents.



Key Findings – Familiarity (2/2)



- **Age**
 - Familiarity of the FSC logo is higher amongst younger respondents younger than 44 years old.
 - WWF has a consistently high penetration (over 80%) across all age groups.

- **Education**
 - Awareness of FSC logo amongst respondents with an education level of diploma and above is higher than those with a primary/high school education.

- **State**
 - Malacca, Kedah and Perak have higher levels of familiarity than other states.

- **Race**
 - Chinese / Indian / Others show marginally higher levels of familiarity than Malays / Bumiputeras.

- **Working Status**
 - Awareness is marginally higher for working respondents.

- **Marital Status**
 - Single people have a higher level of familiarity across all logos except WWF.

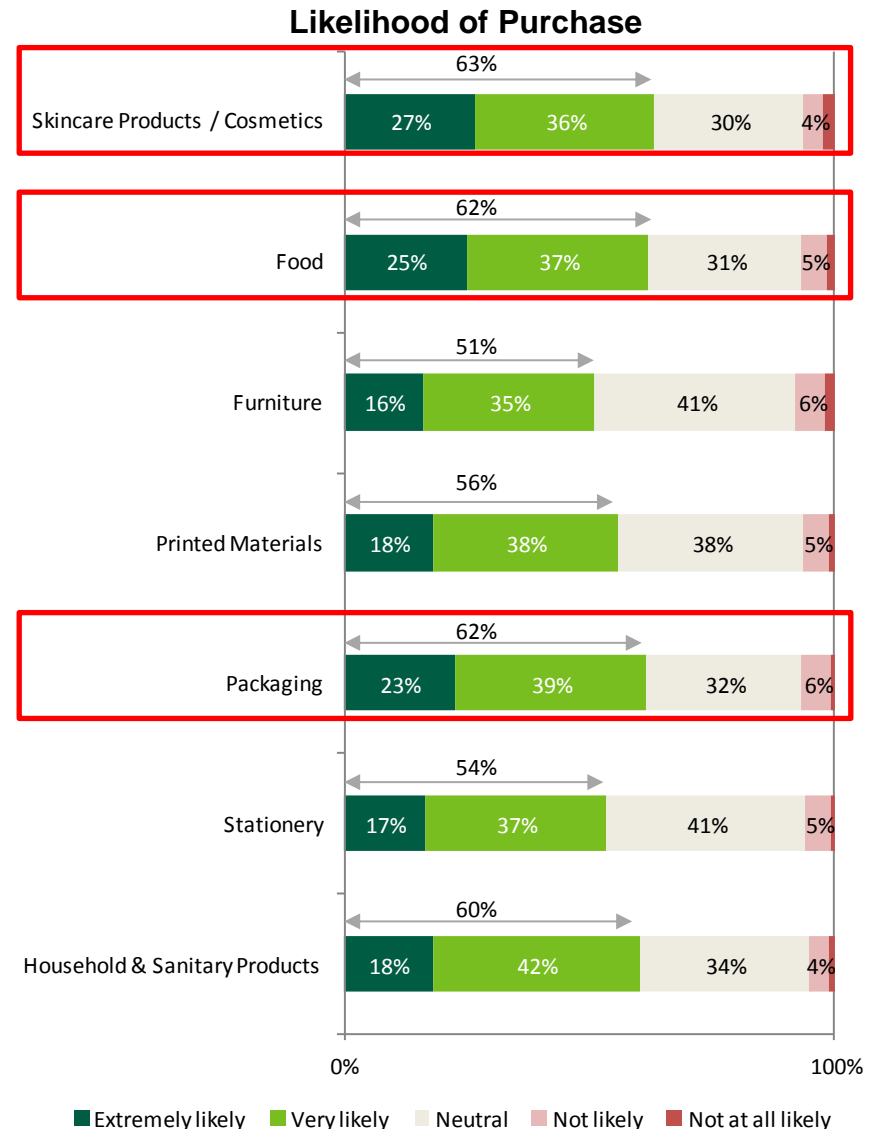
- **Gender / Household Income Level**
 - There is not much variation in awareness between the different groups.

Key Findings – Purchase Intent

- **Over 50% of respondents stated that they are more likely to buy products with an eco-friendly logo across all product categories.**
 - In particular, food, skincare / cosmetics and packaging scored highly between 62%-63%.

- **Respondents who are very or extremely familiar with the FSC logo are more likely to purchase products with an eco-friendly logo.**
 - The likelihood of purchase is particularly high (over 80%) for household & sanitary products, packaging and food.
 - Printed materials and stationery have the lowest score.

- **The following groups have a higher likelihood to purchase products with an eco-friendly logo:**
 - Men -> All product categories except skincare / cosmetics
 - Malay / Bumiputera -> Skincare / cosmetics and food
 - Respondents with a university education -> Household & sanitary products, packaging
 - Respondents who are working -> Furniture
 - Respondents who are married -> Household & sanitary products, food



Key Findings – Purchase Intent after FSC Video

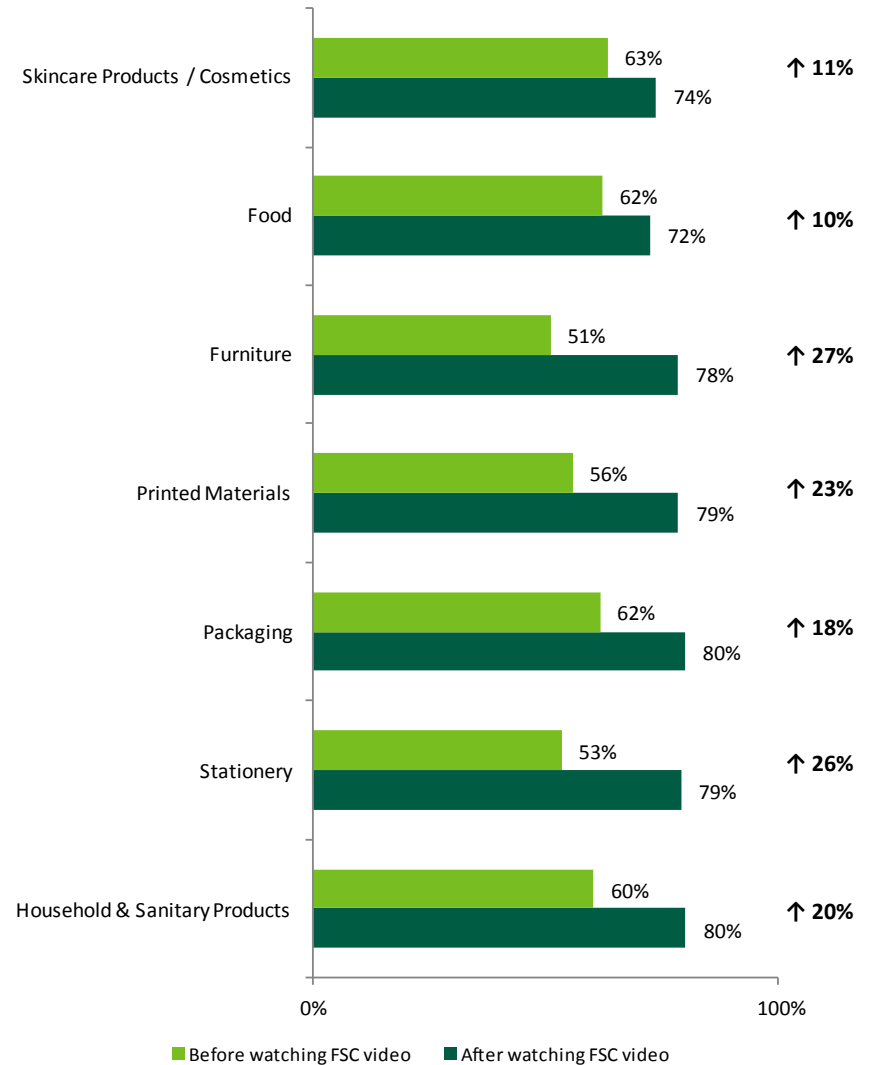


- **There is an average increase in likelihood of purchase of 20% across all product categories after respondents watched the FSC video.**
 - The highest gains are in the following categories: Furniture (27%), Stationery (26%) and Printed Materials (23%)

- **The increase in likelihood of purchase appears to be higher for offline respondents compared to online respondents.**

- **Increase in likelihood of purchase varies by demographics and product categories:**
 - **Gender:** Females | packaging, printed materials, household & sanitary products
 - **Race:** Malay / Bumiputera | skincare products / cosmetics
 - **Education Level:** Respondents with primary / high school education | skincare products / cosmetics
 - **Working Status:** Non working respondents | household & sanitary products, printed materials and furniture
 - **Household Income Level:** Respondents who earn less than RM6,000 | household & sanitary products

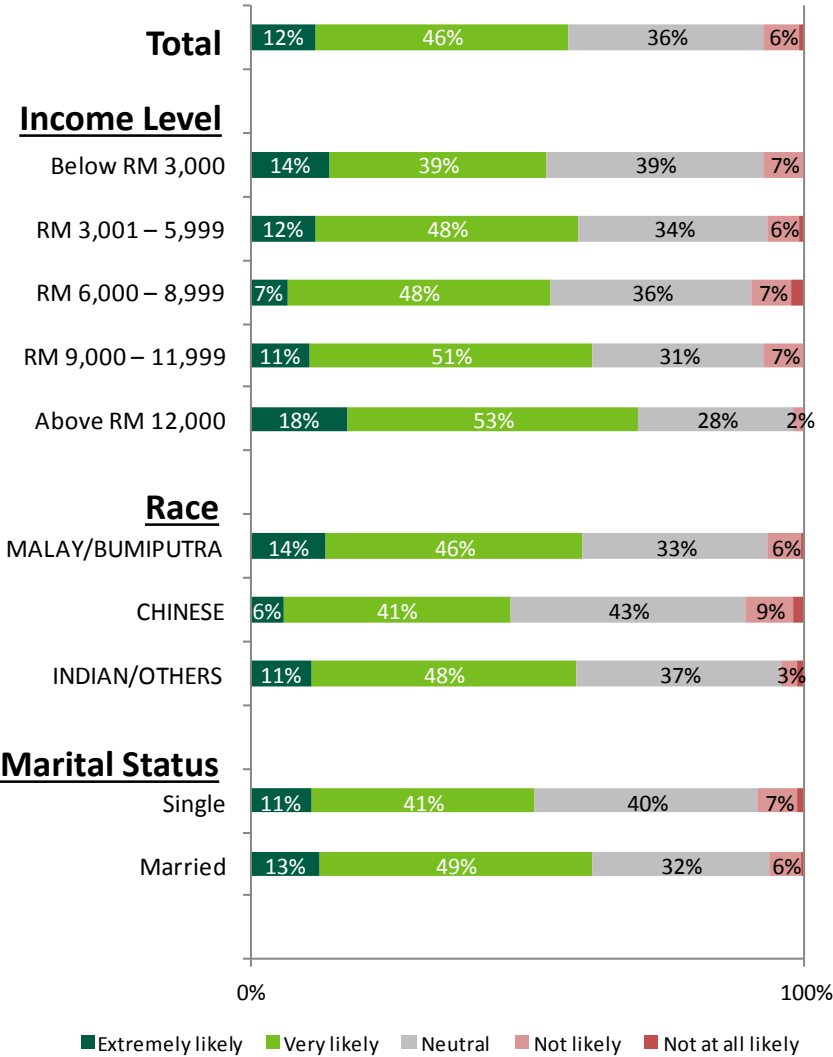
Respondents Likely to Purchase



Key Findings – Willingness to Pay

- If a FSC certified product costs up to 10% more than a non-FSC certified product, 57% of the respondents would still be willing to purchase the product.
- Willingness to pay does not vary by age group, gender, working status and state.
- The following groups have a higher willingness to pay:
 - Respondents who are married
 - Malay / Bumiputera & Indian / Others
 - Respondents who have a household income of more than RM12,000
- Penang and Terengganu stood out as having over 70% of the respondents who are willing to pay.

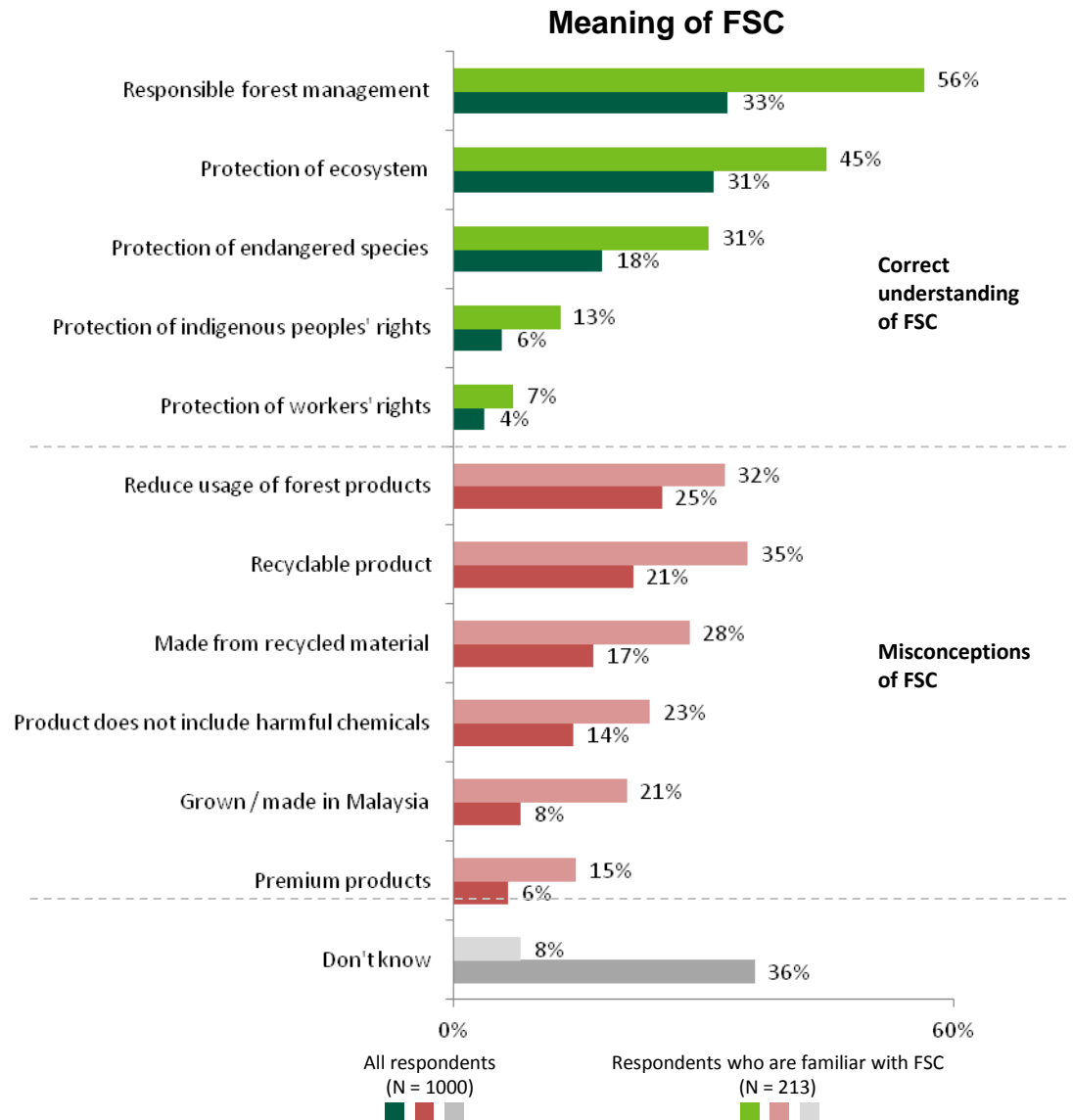
Willingness to Pay



Key Findings – Level of Understanding



- Respondents most commonly associate FSC with responsible forest management and the protection of ecosystem.
- Respondents are not as aware of FSC's other aims to protect the rights of indigenous people and workers.
- There are also certain misconceptions about FSC's objectives. For example, 25% of the respondents thought FSC advocates the reduction of usage of forest products or is related to recycling.
- Amongst respondents who said they are familiar with the FSC logo (N=213), the understanding of FSC is more accurate than the whole population. However, misconceptions of FSC also persist within the group.



Key Findings – Information Sources

- Over 50% of the respondents indicated that social media is the best way to learn about FSC.
- This is followed by logo on a product and websites / blogs at over 37%.
- 23% of the respondents, who were previously not aware of FSC, stated that this survey has helped them to learn about FSC.
- The top 5 information channels are consistent across all demographic attributes. Beyond that, certain demographic differences exist:
 - **Age:** Respondents above 45 also use catalogue and word of mouth.
 - **Race:** Chinese is mostly focused on the top 3 channels. Malays / Bumiputerans have more information channels, e.g., store, school and work.
 - **Marital Status:** Respondents who are married also peruse catalogues.
 - **State:**
 - **Word of mouth:** Kelantan / Terengganu
 - **In-store:** Perak / Penang / Kelantan
 - **School:** Perak

Information Channels to learn about FSC

