

The acceptance of environmental friendly products

Full report 2021





Founded in 1923, built for today

A century ago, Arthur C. Nielsen borrowed \$45,000 to start a business that would test the quality of conveyor belts and turbine generators. With each technological advancement and through each new era of business, Nielsen marked the passage of time with trustworthy reporting and the relentless pursuit of truth.





Our Story

Your guide in an ever-changing world

Only NielsenIQ is able to deliver the clear perspective, the breadth and depth of information, and the complete context your business needs. Our insatiable search for knowledge drives our momentum forward, so we stay ahead of the curve to reveal the connected story of your customers and business. Uncovering the truth is critical for your success, and we have the vision to lead you to True Intelligence.



Research design



Respondent criteria



Online
Methodology



15-45 years old
and **upper middle**

Fieldwork time

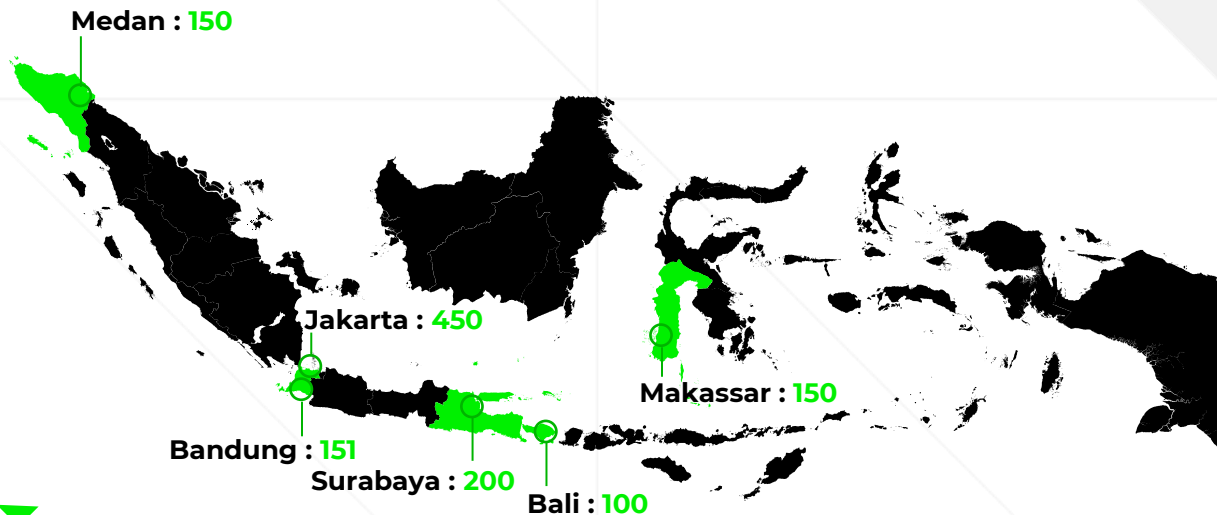


Start :
11th August 2021
(22nd June 2017)



End :
4th September 2021
(21st July 2017)

City wise



Total respondent :
1201

Demographic profile



		Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %	Actual no. Of interviews	1201 (916)	450 (301)	151	200 (200)	150 (162)	150 (151)	100 (102)
Jobs	Working	73	74	68	74	71	71	75
	Student	18	14	19	20	24	22	17
	Housewife	5	6	7	4	3	3	6
	Not working	4	6	6	2	2	4	2
Age groups	16-19 yo	17	15	17	18	20	18	18
	20-25 yo	20	16	20	20	24	26	20
	26-29 yo	19	19	18	18	17	19	21
	30-35 yo	17	19	17	16	15	12	18
	36-39 yo	15	17	15	15	13	13	12
	40-45 yo	13	14	13	13	11	12	11
SES	Middle 2	17	17	18	25	14	19	6
	Middle 1	38	35	33	35	48	49	26
	Upper 2	31	31	32	29	24	27	46
	Upper 1	15	17	18	11	14	5	21

Red: Previous Wave

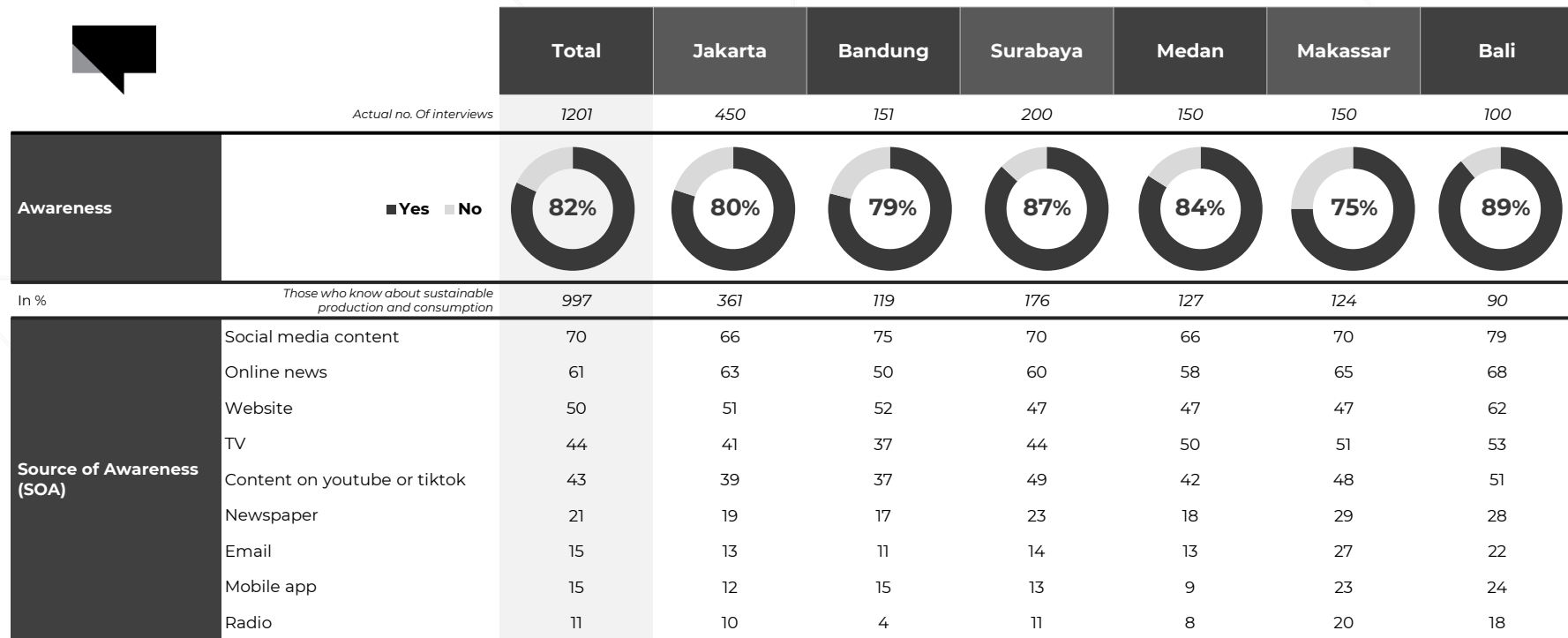


Chapter 1:

Sustainable production & consumption

Awareness & source of awareness by city wise

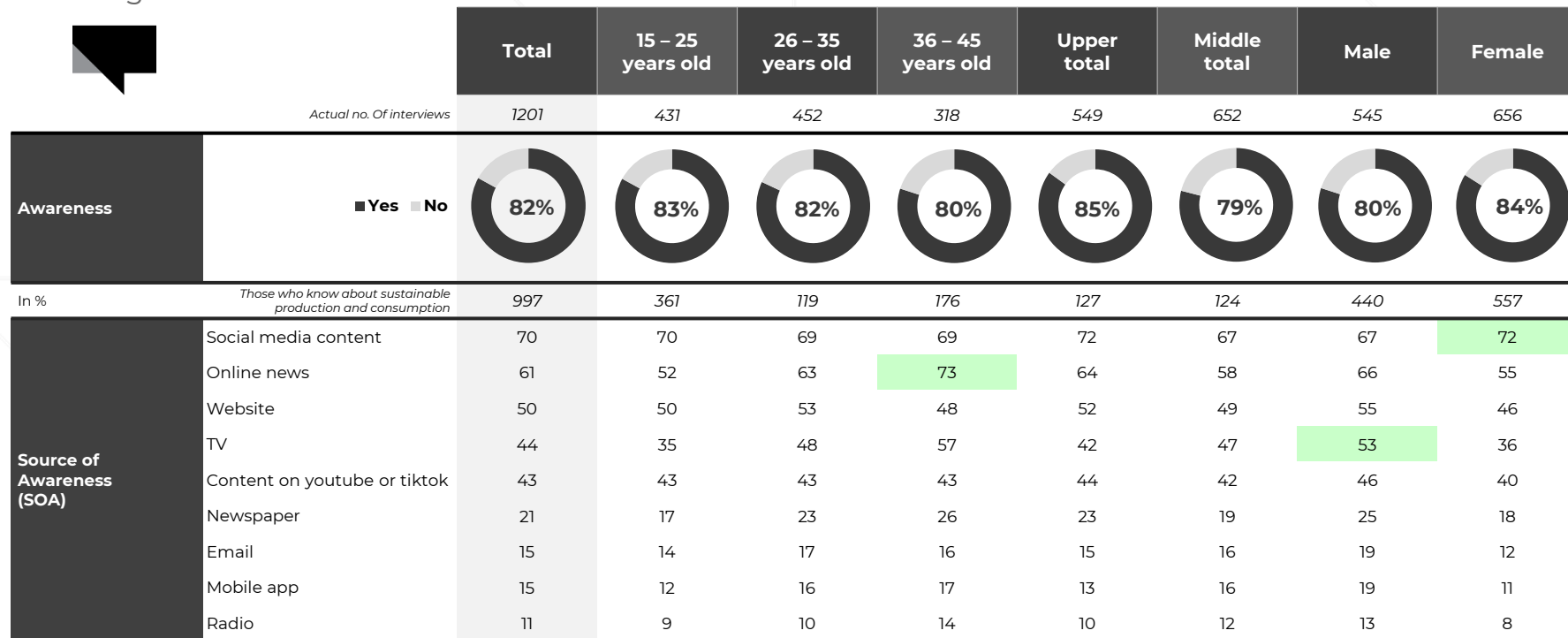
8 out of 10 aware of sustainable product and consumption, led by Bali. Social media is leading across all areas.



Source: Q40: Do you know/ever heard about sustainable production & consumption | Q44: Where did you get the information

Awareness & source of awareness by age group, SES & gender

Relatively similar across demography. Most of the older age group gets awareness from online news, while Female gets awareness from social media and Male from TV.



Source: Q40: Do you know/ever heard about sustainable production & consumption | Q44: Where did you get the information

Source of information by city wise


Statement on the packaging plays important role in giving information about sustainable product Area with more advanced knowledge about sustainability have more source of information.

		Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %	Those who know about sustainable production and consumption	997	361	119	176	127	124	90
Source of Information (SOI)	Information product/packaging	54	54	45	52	51	69	59
	Private companies	48	44	43	50	56	47	58
	Celebrity/influencer	42	38	39	45	41	42	53
	Information from relatives, friends, or coworkers	39	37	32	37	37	44	53
	Government	33	33	29	30	37	38	36
	Community	33	29	33	36	25	40	42
	Non profit organization	31	31	27	33	25	39	36
	NGO	17	16	10	17	13	24	29
	Others*	1	2	2	1	1	0	0

*Survey institute, lecturer, teacher, people on social media (non influencer), read articles, subject matter, search independently, advertisement, school

Perception toward “sustainable consumption”

Reducing single-use grocery bag and buying eco friendly product are top 2 perception related to sustainable consumption. Bali recalls higher in terms of Buying Local Product.



		Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %	Those who know about sustainable production and consumption	997	361	119	176	127	124	90
Perception towards Sustainable products	Reduce or stop the use of single-use grocery bags	77	79	76	77	76	77	75
	Buy eco-friendly products	77	73	73	85	77	76	79
	Reduce or stop the use of straws and disposable cutlery	66	64	69	68	68	67	66
	Doing waste recycling	65	61	61	71	65	70	66
	Using tumblr / reusable drinking bottles	58	58	58	58	58	55	63
	Doing waste sorting	50	47	42	53	53	49	59
	Buy organic products	46	43	47	49	48	49	44
	Buy durable goods	42	38	38	46	40	54	37
	Buy local products	38	34	39	42	35	38	52
	Buy eco-labeled products	27	23	22	29	27	33	37
	Shop using the shopping list	24	22	23	28	19	30	31

Source: Q36: What goes through your mind when heard about “sustainable consumption”

Perception toward “sustainable products”

Most of people perceive eco-friendly and recyclable products as “sustainable product”. Their perception mostly are related to not putting the environment in danger.



		Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %	Actual no. Of interviews	997	361	119	176	127	124	90
Perception towards Sustainable products	Eco-friendly product	75	72	78	80	75	85	81
	Recyclable products	68	65	62	73	74	78	73
	The product waste can be decomposed in nature and does not pollute	55	53	56	61	50	55	62
	Not made with raw materials that endanger environmental sustainability	51	49	54	60	45	50	64
	Recycled products	47	46	47	48	42	57	56
	Products that are safe for long-term consumption	47	45	54	50	49	49	46
	Organic product	42	40	40	45	49	54	46
	Ecolabel certified product	36	34	42	39	37	40	50
	Durable product	35	31	41	40	34	53	34
	High quality product	27	24	30	30	34	37	35
	Not made with animal testing	21	19	22	25	24	30	34
	Local products	19	16	24	22	21	26	36
	Expensive product	11	12	9	10	11	6	9
	Low quality product	3	4	2	3	2	*	3

Source: Q37: What goes through your mind when heard about “sustainable products”



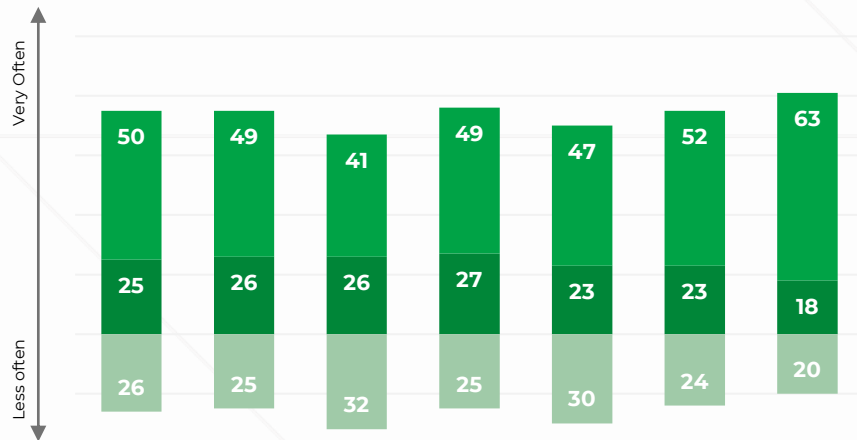
Sustainable production & consumption by city wise

About half claim they are relatively often receiving information related to sustainability and also well informed about it. Areas with more developed awareness also scores better in perception and frequency.

Frequency of receiving information

In %

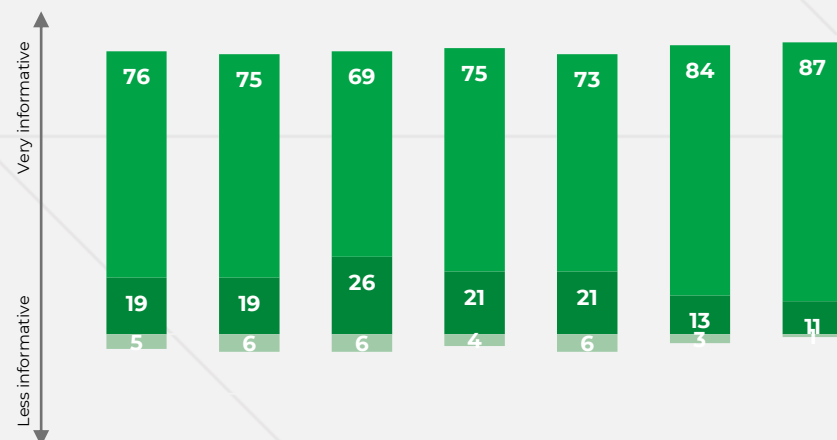
Top 2 box (4-5) In between (3) Bottom 2 box (1-2)



Perception toward given information

In %

Top 2 box (4-5) In between (3) Bottom 2 box (1-2)



Source: Q45: In the past 3 months, how often you see/received information related to sustainable production & consumption | Q46: Compared to 3 years ago, how informative is the information regarding sustainable production & consumption given today

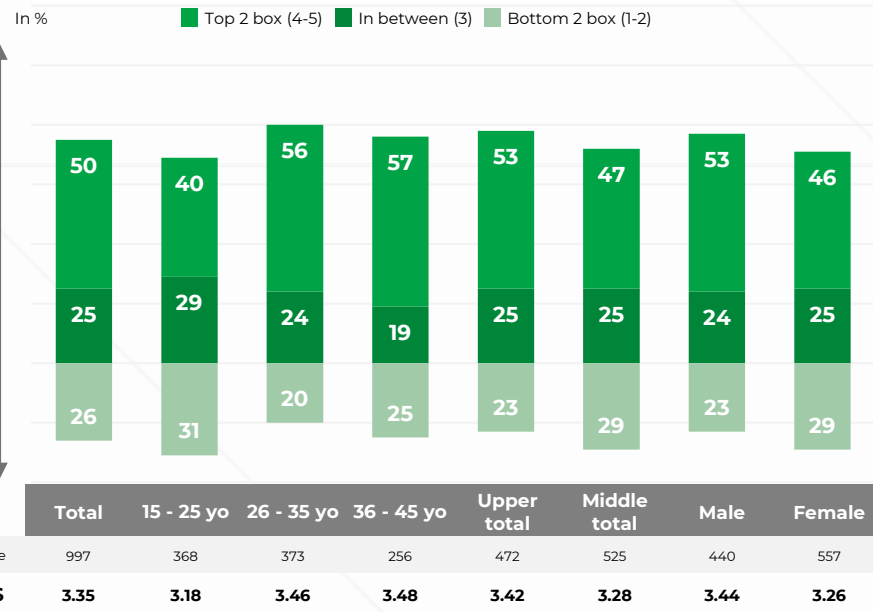


Sustainable production & consumption by age, ses & gender

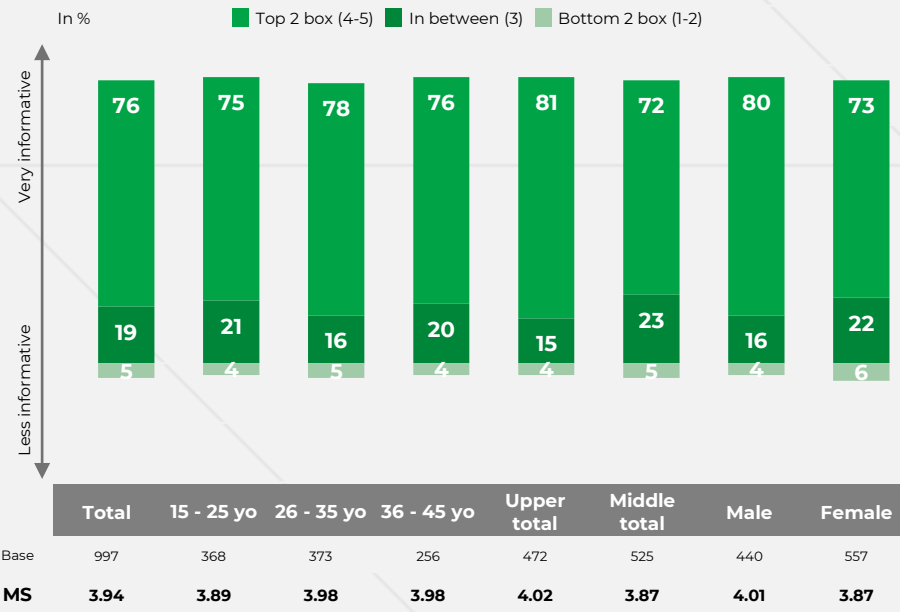
Relatively similar across profile, with upper SEC seems to be more often informed as well.



Frequency of receiving information



Perception toward given information



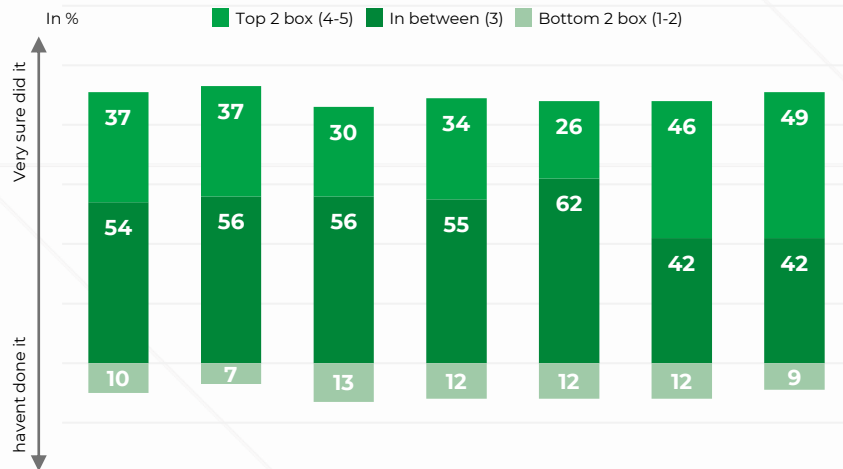
Source: Q45: In the past 3 months, how often you see/received information related to sustainable production & consumption | Q46: Compared to 3 years ago, how informative is the information regarding sustainable production & consumption given today



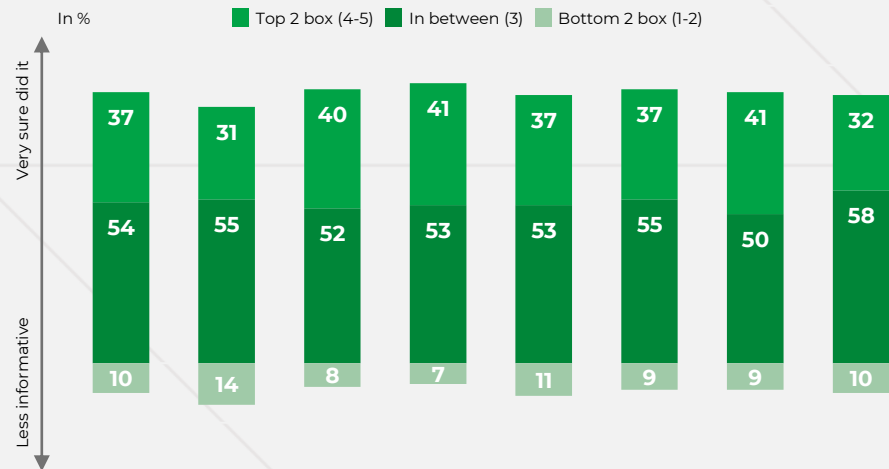
Sustainable consumption practice lifestyle

Less than half feel that they already carried out sustainable consumption, with Medan area scores the lowest. While demographic wise, younger respondents scores the lowest.

By city wise



By age group, ses, and gender



Source: Q38: Do you currently feel have carried out sustainable consumption?



Chapter 2 :

Product purchased P1M

Top 6 product categories purchased in past 1 month

In P1M, electronic appeared as top 6 product purchased, with 30% came from handphone. The others are related to repeat consumption categories.

Food	99%
Snack <i>(including biscuits)</i>	84%
Cooking oil	71%
Sauce / soy sauce	69%
Frozen food	68%
Vitamin	67%

Personal care	97%
Toothpaste	90%
Soap	89%
Deodorant	66%
Body lotion	63%
Perfume	59%

Beverage	97%
Packaged tea	67%
Liquid milk	64%
Mineral water	62%
RTD coffee	59%
Powder milk	46%

Home care	94%
Dish washing soap	86%
Laundry soap	81%
Toilet cleaning liquid	68%
Air freshener	63%
Glass cleaning liquid	41%

HH Appliance	95%
Floor cleaning tools	42%
Brush	36%
Broom	34%
Books	31%
Paper	30%

Electronic	51%
Handphone/tablet	30%
Laptop	18%
TV	17%
Electronic toys	17%
Refrigerator	16%

Product purchased in past 1 month

Similar pattern is seen across cities when it comes to F&B and personal care.



		Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %	Actual no. Of interviews	1201	450	151	200	150	150	100
Food		99	100	100	99	98	98	98
	Snack (including biscuits)	84	86	81	85	83	81	84
	Cooking oil	71	72	73	71	81	63	58
	Sauce / soy sauce	69	71	64	68	77	66	66
	Frozen food	68	72	68	68	61	63	64
	Vitamin	67	68	53	69	73	73	67
Personal care		97	96	100	99	97	99	93
	Toothpaste	90	89	91	90	93	90	90
	Soap	89	88	88	93	90	85	88
	Deodorant	66	69	67	65	73	61	57
	Body lotion	63	60	67	58	60	65	78
	Perfume	59	59	57	57	63	56	59
Beverage		97	96	100	98	97	99	94
	Packaged tea	67	68	66	69	63	71	63
	Liquid milk	64	65	61	64	66	63	63
	Mineral water	62	62	62	64	58	59	69
	RTD coffee	59	60	55	57	56	62	63
	Powder milk	46	45	47	45	50	46	46

Source: Q14: Products that bought routinely in the past 1 month

Product purchased in past 1 month

Similar pattern is seen across demographic status



		Total	15 – 25 yo	26 – 35 yo	36 – 45 yo	Upper Total	Middle Total	Male	Female
In %	Actual no. Of interviews	1201	431	452	318	549	652	545	656
Food		99	99	100	99	99	99	99	100
	Snack (including biscuits)	84	83	86	84	86	83	79	89
	Cooking oil	71	65	75	73	76	66	67	75
	Sauce / soy sauce	69	64	73	73	74	66	63	75
	Frozen food	68	62	76	66	74	63	64	72
	Vitamin	67	62	74	67	75	61	64	71
Personal care		97	98	98	95	96	98	96	99
	Toothpaste	90	90	91	90	90	90	88	92
	Soap	89	86	91	89	88	89	86	91
	Deodorant	66	64	71	63	68	65	62	71
	Body lotion	63	59	70	58	67	59	53	73
	Perfume	59	59	65	49	61	57	56	61
Beverage		97	97	98	96	97	97	97	98
	Packaged tea	67	69	66	66	67	68	65	70
	Liquid milk	64	60	67	66	69	60	58	70
	Mineral water	62	60	65	62	68	57	61	63
	RTD coffee	59	55	62	60	61	57	63	54
	Powder milk	46	43	51	44	49	43	38	54

Source: Q14: Products that bought routinely in the past 1 month

Product purchased in past 1 month

Relatively different pattern seen for electronic, with Bali have more various purchases of electronic.



		Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %	Actual no. Of interviews	1201	450	151	200	150	150	100
Home care		94	92	96	96	96	98	91
	Dish washing soap	86	86	88	87	90	83	77
	Laundry soap	81	81	84	86	85	83	65
	Toilet cleaning liquid	68	66	63	63	72	75	77
	Air freshener	63	62	59	61	61	67	76
	Glass cleaning liquid	41	43	42	37	41	38	51
HH appliance		75	72	73	77	70	80	82
	Floor cleaning tools	42	43	40	37	37	49	56
	Brush	36	36	30	39	28	35	46
	Broom	34	36	29	28	31	36	48
	Books	31	33	28	35	31	27	30
	Paper	30	34	26	30	28	22	33
Electronic		51	50	50	49	47	52	68
	Handphone/tablet	30	30	28	25	29	29	42
	Laptop	18	19	16	19	18	16	24
	TV	17	18	16	15	12	21	27
	Electronic toys	17	15	14	16	12	17	35
	Refrigerator	16	17	11	12	14	19	33

Source: Q14: Products that bought routinely in the past 1 month

Product purchased in past 1 month

Similar pattern is seen across demographic status



		Total	15 – 25 yo	26 – 35 yo	36 – 45 yo	Upper Total	Middle Total	Male	Female
In %	Actual no. Of interviews	1201	450	151	200	150	150	100	1201
Home care		94	93	97	92	94	94	92	97
	Dish washing soap	86	83	89	87	88	84	81	91
	Laundry soap	81	81	82	82	82	81	75	88
	Toilet cleaning liquid	68	63	75	67	73	64	67	69
	Air freshener	63	59	70	60	65	61	64	62
	Glass cleaning liquid	41	37	49	38	46	38	41	42
HH appliance		75	76	76	71	72	76	74	76
	Floor cleaning tools	42	40	46	42	44	41	42	43
	Brush	36	32	40	34	35	36	35	36
	Broom	34	33	36	34	33	35	37	32
	Books	31	35	29	28	31	32	27	36
	Paper	30	30	32	28	34	27	26	34
Electronic		51	54	54	43	53	50	55	48
	Handphone/tablet	30	30	29	30	29	30	34	25
	Laptop	18	17	20	18	20	17	21	16
	TV	17	17	18	18	17	18	21	14
	Electronic toys	17	15	19	16	18	15	20	13
	Refrigerator	16	15	17	18	16	17	18	15

Source: Q14: Products that bought routinely in the past 1 month

Awareness & ever buy of eco friendly brand (electronic)

Samsung, Apple, and LG are in the top 3 of eco-friendly brand for electronic.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
In %	Actual no. of interviews	1201		450		151		200		150		150		100	
Eco friendly brands	Samsung	55	49	57	52	46	40	53	45	51	47	59	52	64	55
	Apple	40	21	38	21	39	22	40	18	36	18	47	24	43	25
	LG	38	27	35	25	32	25	41	31	33	24	44	28	50	30
	Panasonic	33	20	32	22	27	16	32	21	28	20	39	20	48	20
	Philips	32	25	25	21	32	26	32	24	27	23	47	33	40	30
	Acer	29	19	26	16	30	16	21	10	30	18	44	33	37	33
	Asus	29	21	29	20	33	23	27	19	21	15	38	30	29	26
	Sharp	26	16	25	16	20	14	23	11	23	16	37	23	30	22
	Electrolux	24	11	23	10	27	10	25	12	21	14	24	9	27	14
	Cosmos	23	14	23	16	22	14	20	12	14	12	27	11	37	18
	Maspion	22	14	18	12	17	11	28	19	20	13	21	10	40	20
	Sony	21	12	20	11	24	12	20	9	14	11	28	17	23	19
	Canon	19	10	17	11	17	12	17	10	14	9	30	9	30	10
	Epson	19	9	15	9	17	9	22	9	18	11	27	7	23	4
	Toshiba	19	10	18	10	14	10	16	9	19	10	27	14	29	11

Source: Q31a: Which electronic brands do you know that have eco-friendly products? | Q31b: What brands have you ever bought?

Awareness & ever buy of eco friendly brand (electronic)

Relatively similar pattern across demography, with Samsung more desirable for older age while apple is more desirable among younger age and upper SEC.

		Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper Total		Middle Total		Male		Female	
		Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
In %	Actual no. of interviews	1201		431		452		318		549		652		545		656	
Eco friendly brands	Samsung	55	49	52	45	57	51	58	53	60	53	51	46	56	49	54	49
	Apple	40	21	42	23	39	21	38	17	42	24	38	18	44	23	36	19
	LG	38	27	32	20	38	28	47	36	40	30	36	24	41	28	35	25
	Panasonic	33	20	29	16	36	26	36	21	40	25	28	17	34	17	33	24
	Philips	32	25	30	22	32	26	34	26	34	28	30	22	30	21	33	28
	Acer	29	19	31	19	27	17	29	20	28	18	31	20	29	22	29	16
	Asus	29	21	31	23	27	21	30	20	30	21	29	22	30	23	28	20
	Sharp	26	16	21	12	27	18	32	22	27	19	24	15	26	17	25	16
	Electrolux	24	11	13	4	25	12	42	20	25	12	24	10	27	13	21	8
	Cosmos	23	14	19	8	24	18	28	19	24	15	22	14	24	13	22	15
	Maspion	22	14	16	7	21	15	34	23	22	15	22	13	27	15	17	12
	Sony	21	12	16	8	22	14	28	17	24	13	19	11	25	17	17	7
	Canon	19	10	18	7	20	11	20	14	19	13	19	9	20	11	18	10
	Epson	19	9	18	6	18	10	21	12	18	10	20	8	21	10	16	8
	Toshiba	19	10	16	7	20	10	25	17	21	11	18	10	22	13	16	7

Source: Q31a: Which electronic brands do you know that have eco-friendly products? | Q31b: What brands have you ever bought?



Top 5 store brands have applied green policies/sell EF product

In general, people feels that top retailers already applied green policies / sell environmentally friendly product.

In %	Aware	Routinely visit
Minimarket	94	86
Alfamart	78	78
Indomaret	74	74
Alfamidi	53	53
Circle K	24	24
Familymart	21	21

In %	Aware	Routinely visit
Dept. store	51	19
Matahari	40	40
Ramayana	31	31
Metro	14	14
Sogo	14	14
Central	9	9

In %	Aware	Routinely visit
Hypermarket	91	91
Carrefour	51	51
Hypermart	42	42
Lottmart	35	35
Giant	28	28
Indogrosir	16	16

In %	Aware	Routinely visit
Drug store	41	17
Guardian	35	35
Watsons	31	31
Century	15	15

In %	Aware	Routinely visit
Supermarket	66	35
Superindo	34	34
Hero	22	22
Farmers Market	19	19
Yogya	16	16
Food Hall	13	13

Source: Q32a: Which store/retail brands do you know have implemented green policies or sell eco-friendly products? | Q32b: Eco-friendly retailers that routinely visited each month

Retail brands that implements green policies/sell EF product



In general, people feels that top retailers already applied green policies / sell environmentally friendly product.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit
In %	Actual no. Of interviews	1201		450		151		200		150		150		100	
Mini Market		94	86	95	87	95	85	92	84	90	80	97	88	96	91
	Alfamart	78	64	80	67	84	70	75	59	69	49	74	64	81	70
	Indomaret	74	60	74	59	72	55	73	61	69	55	72	56	87	82
	Alfamidi	53	25	57	27	39	17	54	28	48	27	57	26	53	14
	Circle K	24	7	21	6	23	7	21	3	14	6	31	8	42	17
	Familymart	21	5	27	8	9		19		18	7	15		32	5
Hyper Market		91	40	91	91	91	91	91	91	91	91	91	91	91	91
	Carrefour	51	23	52	25	46	14	49	21	51	28	49	20	57	25
	Hypermart	42	19	42	19	38	14	45	20	37	18	47	22	51	22
	Lottemart	35	10	36	14	32	8	26	8	31	9	43	7	42	9
	Giant	28	10	28	12	21	6	32	14	20	6	32	7	40	12
	Indogrosir	16	5	15	5	16	8	14	5	16	7	19	4	18	3
Super market		66	35	71	40	79	58	63	32	42	12	59	20	75	39
	Superindo	34	15	38	19	35	15	39	23	19		24		43	
	Hero	22	5	24	6	17	3	21	3	8		33	5	31	
	Farmers Market	19	5	25	9	12	3	16	4	12		14		21	
	Yogya	16	6	13	4	48	30	7		7		11		19	
	Food Hall	13	4	17	5	11	5	12	3	6		12		16	2

Source: Q32a: Which store/retail brands do you know have implemented green policies or sell eco-friendly products? | Q32b: Eco-friendly retailers that routinely visited each month

Retail brand that implements green policies/sell EF product



In general, people feels that top retailers already applied green policies / sell environmentally friendly product.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit
In %		Actual no. Of interviews		1201		450		151		200		150		150	
Dept. store		51	19	50	19	46	17	50	18	48	15	57	18	59	29
	Matahari	40	14	40	14	36	12	38	14	36		45		49	
	Ramayana	31	10	30	10	29	7	30	9	30	10	38	9	37	15
	Metro	14	3	16	4	14	3	8	1	8		19	2	17	
	Sogo	14	3	15	3	14	4	13	2	12	4	10		20	4
	Central	9	2	9	2	6		6		7		13		18	
Drug store		41	17	43	15	43	13	37	12	28	11	44	25	53	32
	Guardian	35	13	36	12	39	12	32	10	26	8	37	19	46	28
	Watsons	31	11	32	9	31	8	24	8	22	8	36	17	41	22
	Century	15	4	16	5	12	3	10	3	11	3	20	7	21	6

Source: Q32a: Which store/retail brands do you know have implemented green policies or sell eco-friendly products? | Q32b: Eco-friendly retailers that routinely visited each month

Retail brands that implements green policies/sell EF product



In general, people feels that top retailers already applied green policies / sell environmentally friendly product.

		Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper Total		Middle Total		Male		Female	
		Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit
In %	Actual no. Of interviews	1201		431		452		318		549		652		545		656	
Mini Market		94	86	95	85	92	86	94	88	94	86	94	86	95	88	93	84
	Alfamart	78	64	74	58	80	66	80	69	80	65	76	62	78	63	78	64
	Indomaret	74	60	70	58	75	58	80	65	78	63	71	57	77	64	71	55
	Alfamidi	53	25	47	23	56	25	57	29	53	26	53	24	54	24	52	26
	Circle K	24	7	22	6	24	8	26	7	27	8	21	6	26	9	21	5
	Familiymart	21	5	20	4	22	8	22	4	25	7	18	5	21	5	21	6
Hyper Market		91	40	65	31	73	47	73	44	72	47	67	34	70	39	69	40
	Carrefour	51	23	45	15	53	28	57	29	54	27	48	19	51	23	51	22
	Hypermart	42	19	36	13	46	25	49	21	47	24	39	15	43	19	42	19
	Lottemart	35	10	32	8	34	12	40	13	36	12	33	9	35	10	34	11
	Giant	28	10	25	7	29	14	32	11	29	13	27	8	28	10	29	10
	Indogrosir	16	5	13	3	18	6	18	9	17	6	15	5	17	6	15	5
Super market		66	35	59	31	71	39	70	36	71	41	62	29	66	35	66	35
	Superindo	34	15	31	13	34	18	40	17	39	19	30	12	34	16	34	15
	Hero	22	5	12	2	25	7	37	8	25	6	21	5	25	6	20	5
	Farmers Market	19	5	14	4	21	6	23	5	23	7	15	4	18	4	19	6
	Yogya	16	6	14	4	15	7	21	9	18	7	15	5	18	6	14	6
	Food Hall	13	4	11	2	16	6	14	3	16	5	11	2	12	4	14	4

Source: Q32a: Which store/retail brands do you know have implemented green policies or sell eco-friendly products? | Q32b: Eco-friendly retailers that routinely visited each month



Retail brand that implements green policies/sell EF product



In general, people feels that top retailers already applied green policies / sell environmentally friendly product.



		Total		15 – 25 yo		25 – 35 yo		36 – 45 yo		Upper Total		Middle Total		Male		Female	
		Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit	Aware	Visit
In %	Actual no. Of interviews	1201		431		452		318		549		652		545		656	
Dept. store		51	19	46	13	54	26	55	18	53	22	49	16	53	19	49	18
	Matahari	40	14	35	9	42	20	46	15	41	17	39	12	42	14	38	14
	Ramayana	31	10	27	6	35	13	34	11	32	11	31	9	34	10	28	9
	Metro	14	3	11	1	13	5	21	4	15	4	13	2	16	3	12	3
	Sogo	14	3	8	1	14	4	22	4	15	4	13	2	14	3	14	3
	Central	9	2	7	1	9	3	13	3	9	3	9	1	12	2	6	2
Drug store		41	17	38	15	43	18	45	19	46	19	38	15	37	15	46	19
	Guardian	35	13	34	12	35	14	39	14	38	15	33	12	30	11	41	16
	Watsons	31	11	29	10	31	12	33	11	35	13	27	9	25	10	37	12
	Century	15	4	13	2	14	6	21	7	15	5	15	4	17	5	13	4

Source: Q32a: Which store/retail brands do you know have implemented green policies or sell eco-friendly products? | Q32b: Eco-friendly retailers that routinely visited each month

Awareness & ever buy of eco friendly brand among categories by total



Unilever scores the highest association as eco friendly brand across 3 categories.

In %	Aware	Ever buy
F&B		
Unilever	56	49
Indofood	49	42
ABC	46	35
Nestle	46	35
Danone	38	25
Frisian flag	35	28
Lemonilo	35	20
Garuda food	33	21
Coca cola	28	15
Ultra jaya	26	18
Wings	26	20
Ajinomoto	25	17
Mayora	25	14
Nabati	24	15
Sidomuncul	24	13

In %	Aware	Ever buy
Personal care		
Unilever	58	51
Wardah	51	37
J&J	45	24
Body shop	40	23
L'oréal	37	19
Mustika ratu	28	12
P&G	28	17
Maybelline	27	13
Wings	26	20
Zwitsal	26	15
Purbasari	23	10
Viva	22	11
Sari ayu	21	7
Kao	19	10
Unicharm	18	10

In %	Aware	Ever buy
Home care		
Unilever	84	79
P&G	48	32
Wings	48	37
Bagus	29	15
Sinarmas	28	14
Reckitt benckiser	14	6
Enesis	12	5
Godrej	11	4

Source: Q41a: Which F&B brands do you know that have eco-friendly products? | Q41b: What brand have you regularly bought each month?

Awareness & ever buy of eco friendly brand (F&B)

Unilever is in the first position as eco friendly brand across all cities, except Bali – lead by Indofood.



		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
In %	Actual no. Of interviews	1201		450		151		200		150		150		100	
F&B	Unilever	56	49	55	47	61	50	57	50	50	45	57	52	60	58
	Indofood	49	42	47	39	45	40	53	45	46	39	51	42	62	60
	ABC	46	35	46	34	42	32	48	34	39	31	52	41	54	44
	Nestle	46	35	46	34	41	32	44	30	45	38	48	38	53	49
	Danone	38	25	37	25	37	23	36	24	38	23	39	26	45	29
	Frisian flag	35	28	37	29	23	19	38	26	33	27	34	31	44	40
	Lemonilo	35	20	33	20	38	22	40	21	26	18	35	18	40	26
	Garuda food	33	21	32	19	25	18	32	14	33	24	40	27	40	32
	Coca cola	28	15	26	13	22	12	27	13	22	12	34	15	41	33
	Ultra jaya	26	18	26	20	30	24	26	18	13	8	30	15	28	19
	Wings	26	20	25	20	25	18	22	15	23	18	31	27	35	28
	Ajinomoto	25	17	24	16	17	10	27	17	20	15	31	19	39	31
	Mayora	25	14	26	14	24	14	21	10	22	9	23	13	34	24
	Nabati	24	15	23	15	24	15	21	13	21	17	30	16	31	18
	Sidomuncul	24	13	25	15	22	12	21	11	16	10	28	12	33	20

Source: Q41a: Which F&B brands do you know that have eco-friendly products? | Q41b: What brand have you regularly bought each month?

Awareness & ever buy of eco friendly brand (F&B)

Nestle is seems to be popular among age 26+ and Upper SEC



In %

Actual no. Of interviews

Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper Total		Middle Total		Male		Female	
Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
1201		431		452		318		549		652		545		656	
56	49	50	43	59	51	61	57	58	52	54	46	54	47	58	51
49	42	42	35	51	45	59	53	52	46	47	39	53	47	45	37
46	35	41	29	47	36	55	44	49	38	44	33	50	38	43	32
46	35	42	28	47	41	50	40	49	41	43	31	44	34	48	37
38	25	32	19	40	27	46	30	42	30	35	20	42	28	34	21
35	28	29	22	36	30	43	37	38	31	33	26	35	29	35	28
35	20	37	22	34	21	31	17	35	24	34	18	31	17	39	25
33	21	27	14	35	24	39	27	34	23	32	19	35	24	30	17
28	15	26	13	26	15	33	17	29	17	27	13	30	17	25	13
26	18	20	11	27	19	34	27	27	21	24	15	24	16	27	19
26	20	20	16	28	21	32	26	27	22	25	19	27	21	24	19
25	17	22	14	26	17	30	21	25	18	26	15	26	18	24	15
25	14	21	10	25	14	31	20	26	16	24	12	27	14	22	13
24	15	24	14	24	16	24	16	25	16	23	14	25	15	23	15
24	13	19	8	25	16	30	18	26	14	22	13	27	15	20	11

Source: Q41a: Which F&B brands do you know that have eco-friendly products? | Q41b: What brand have you regularly bought each month?

Awareness & ever buy of eco friendly brand (personal care)



Wardah follows behind Unilever for eco friendly brand in Personal Care category, and is seen more popular in Makassar and Bali.



		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
In %	Actual no. Of interviews	1201		450		151		200		150		150		100	
Personal care	Unilever	58	51	55	48	59	53	63	56	57	51	62	52	59	58
	Wardah	51	37	47	33	47	32	54	33	48	35	60	50	59	50
	J&J	45	24	43	25	43	21	45	21	43	24	48	22	53	31
	Body shop	40	23	41	25	42	24	37	20	35	23	37	15	52	29
	L'oréal	37	19	34	18	31	17	35	16	33	15	45	22	52	35
	Mustika ratu	28	12	27	13	28	16	25	10	22	12	35	13	35	7
	P&G	28	17	26	17	27	17	31	20	20	11	35	19	35	17
	Maybelline	27	13	23	13	27	12	26	9	25	13	38	15	38	24
	Wings	26	20	25	18	24	16	23	18	23	19	29	22	36	35
	Zwitsal	26	15	26	15	24	13	24	14	20	11	41	22	25	17
	Purbasari	23	10	24	11	18	10	24	9	15	7	25	6	36	15
	Viva	22	11	20	10	18	11	24	13	20	10	26	10	27	13
	Sari ayu	21	7	21	9	20	8	21	8	14	6	24	6	27	4
	Kao	19	10	19	11	20	10	16	10	14	7	19	9	30	14
	Unicharm	18	10	17	10	16	11	15	10	16	10	25	10	27	11

Source: Q42a: Which personal care brands do you know that have eco-friendly products? | Q42b: What brand have you regularly bought each month?

Awareness & ever buy of eco friendly brand (personal care)



Aside from the top 3, P&G is seen higher used by 36+ YO and Wings also among 36+ and Male respondents.



In %

Actual no. Of interviews

Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper Total		Middle Total		Male		Female	
Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
1201		431		452		318		549		652		545		656	
58	51	54	45	61	54	63	58	60	53	57	50	60	54	57	49
51	37	49	34	51	37	54	40	51	38	51	36	46	31	57	43
45	24	39	17	47	27	51	31	47	29	43	19	47	26	42	21
40	23	38	20	40	26	44	24	44	27	37	20	32	18	49	28
37	19	35	15	38	23	37	21	39	24	35	15	42	21	31	17
28	12	24	8	29	15	34	14	29	15	27	10	30	13	26	11
28	17	22	13	28	18	38	23	29	18	27	16	32	18	24	16
27	13	28	12	27	16	27	13	30	17	25	11	24	9	31	18
26	20	18	13	29	22	34	28	26	20	25	19	29	23	22	17
26	15	23	12	28	18	30	18	27	16	26	15	26	15	26	15
23	10	22	8	24	12	24	10	25	14	21	7	24	10	22	10
22	11	21	10	19	11	26	13	21	12	22	10	19	9	24	13
21	7	18	6	20	8	26	8	20	8	21	6	22	7	20	8
19	10	11	5	21	13	31	16	20	12	18	9	22	10	16	11
18	10	13	6	20	12	24	15	17	11	19	10	17	7	19	13

Source: Q42a: Which personal care brands do you know that have eco-friendly products? | Q42b: What brand have you regularly bought each month?



Awareness & ever buy of eco friendly brand (home care)

Wings is in the second position for eco friendly brand ever purchased across all cities.



In %

Actual no. Of interviews

Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
1201		450		151		200		150		150		100	
84	79	81	76	87	80	89	81	81	79	84	81	90	85
48	32	45	30	48	30	56	36	45	31	45	27	51	39
48	37	48	34	42	33	51	38	44	34	51	42	55	50
29	15	25	14	32	13	28	13	28	16	33	15	43	23
28	14	22	12	31	15	30	13	26	16	37	17	38	15
14	6	14	8	13	7	11	6	11	7	18	2	22	4
12	5	11	7	9	4	10	5	6	4	17	2	27	5
11	4	10	5	8	4	8	5	7	3	15	2	21	3

Source: Q43a: Which home care brands do you know that have eco-friendly products? | Q43b: What brand have you regularly bought each month?

Awareness & ever buy of eco friendly brand (home care)

Wings is in the second position for eco friendly brand ever purchased across all demography.



In %

Actual no. Of interviews

Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper Total		Middle Total		Male		Female	
Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy	Aware	Ever buy
1201		431		452		318		549		652		545		656	
84	79	82	77	85	81	87	81	86	82	82	77	83	77	86	82
48	32	41	25	50	36	56	35	52	34	44	29	47	32	48	31
48	37	40	30	51	38	59	48	50	40	46	34	51	40	45	33
29	15	25	11	32	18	33	18	31	17	28	13	33	15	26	15
28	14	31	13	27	16	26	13	28	16	28	12	32	16	24	12
14	6	11	4	13	7	21	9	16	8	12	4	14	6	14	7
12	5	11	3	13	8	14	5	12	6	12	4	13	5	11	6
11	4	10	3	11	7	11	3	11	6	10	2	11	3	10	6



Chapter 3 :

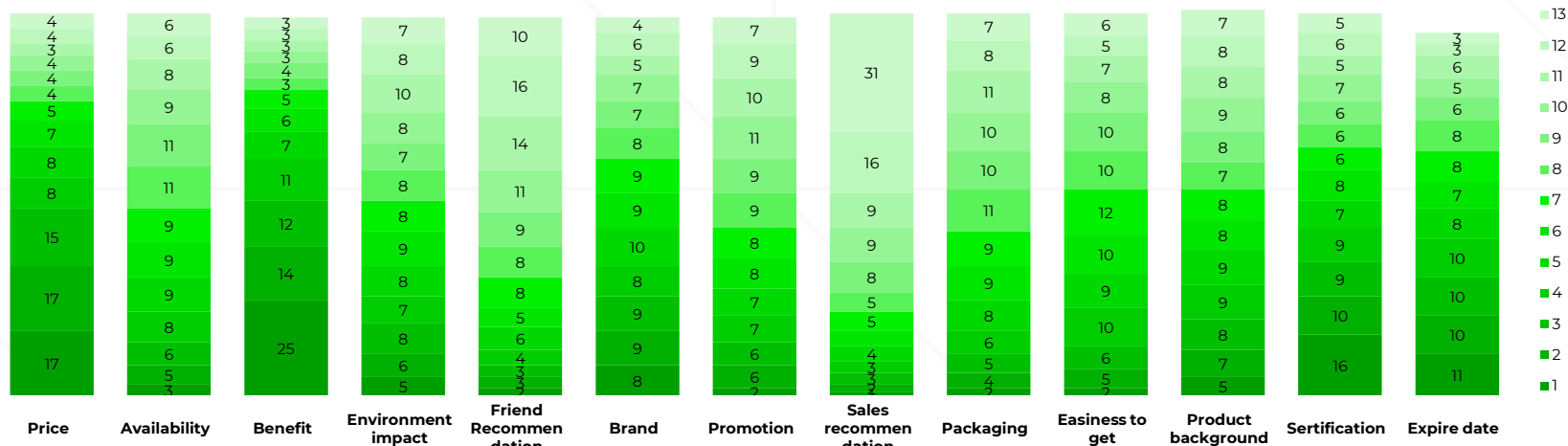
Consumer behavior



Importance factor in choosing product

Product benefit and price are in the top two most important factor in choosing product, while Impact to the environment is less considered.

In %




	Price	Availability	Benefit	Environment impact	Friend Recommendation	Brand	Promotion	Sales recommendation	Packaging	Easiness to get	Product background	Certification	Expire date
Top 3 box	48	14	51	19	9	26	14	5	11	14	20	36	35
Bottom 3 box	11	20	9	25	40	15	27	56	27	18	23	16	13
Mean Score	4.90	7.45	4.42	7.26	8.84	6.41	7.79	10.05	7.99	7.2	7.15	5.82	5.71

Source: Q15: Please rank which factors you consider the most to the least considered when choosing a product

Most (1) to least (13) important

Importance factor of choosing product

Product benefit and price are still in the top 2, while impact on environmental score is not significantly growing. Certification is seen moving to the top 3.



		Rank in 2017	Total top 3 box	Mean Score	Total bottom 3 box	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
In %		Actual no. Of interviews									
		916	1201			450	151	200	150	150	100
Importance factor of choosing product	Benefit	2	<div><div></div></div> 51	4.42	9	72	78	80	75	85	81
	Price	1	<div><div></div></div> 48	4.90	11	65	62	73	74	78	73
	Certification	6	<div><div></div></div> 36	5.82	16	53	56	61	50	55	62
	Expired date	3	<div><div></div></div> 35	5.71	13	49	54	60	45	50	64
	Brand	5	<div><div></div></div> 26	6.41	15	46	47	48	42	57	56
	Product background	10	<div><div></div></div> 20	7.15	23	45	54	50	49	49	46
	Environment impact	8	<div><div></div></div> 19	7.26	25	40	40	45	49	54	46
	Availability	4	<div><div></div></div> 14	7.45	20	34	42	39	37	40	50
	Promotion	7	<div><div></div></div> 14	7.79	27	31	41	40	34	53	34
	Easiness to get	9	<div><div></div></div> 14	7.20	18	19	22	25	24	30	34
	Packaging	13	<div><div></div></div> 11	7.99	27	16	24	22	21	26	36
	Friend recommendation	11	<div><div></div></div> 9	8.84	40	12	9	10	11	6	9
	Sales recommendation	12	<div><div></div></div> 5	10.05	56	4	2	3	2	*	3

Source: Q15: Please rank which factors you consider the most to the least considered when choosing a product

Social media is moving up as the highest source of information in choosing product



81% Social media
(57%)



73% Television
(80%)



58% In store - promo
(48%)



56% Family
recommendation
(50%)



51% Friend
recommendation
(56%)



51% In store - display
(33%)



37% Print ads
(28%)



30% Billboard
(23%)



29% Spg/sales
(21%)



26% Event
(23%)



14% Radio
(21%)

Red: Previous Wave (2017)

Source: Q16: Through what do you usually get information in considering choosing a product?

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Channel routine and most visit by city wise

Minimarket is getting stronger as channel routinely and most visited – while the trend of convenience store is dimming.

		Total				Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		Visited		Most visited		Visited	Most visited	Visited	Most visited	Visited	Most visited	Visited	Most visited	Visited	Most visited	Visited	Most visited
In %		2017	2021	2017	2021	2021		2021		2021		2021		2021		2021	
		916	1201	916	1201	450		151		200		150		150		100	
Store channel	Actual no. of Interview	64	86	17	38	84	34	84	34	88	37	84	34	89	55	90	42
	Minimarket	64	73	19	25	72	27	78	30	68	21	69	20	73	19	82	26
	Supermarket	48	59	10	10	55	6	53	10	63	15	68	16	66	13	55	6
	Traditional market	50	57	13	7	56	8	59	10	52	5	60	5	61	3	56	5
	Warung	29	49	4	4	45	6	46	1	59	6	47	3	53	0	46	1
	Grocery store	35	47	9	10	47	12	40	7	45	9	47	13	51	3	58	13
	Hypermarket	35	36	2	2	33	2	33	2	40	3	34	1	36	2	50	1
	Modern trade	25	33	2	2	29	2	29	3	33	1	47	5	33	2	37	2
	Wholeseller	13	26	*	*	23	0	17	0	28	1	23	0	29	0	49	1
	Modern drug store	51	22	24	2	21	1	19	2	20	3	21	2	26	3	31	2
	Convenience store																

Source: Q17a: Purchase channel which visited regularly each month | Q17b: Purchase channel which visited most often each month



Channel routine and most visit by age, SES, and gender

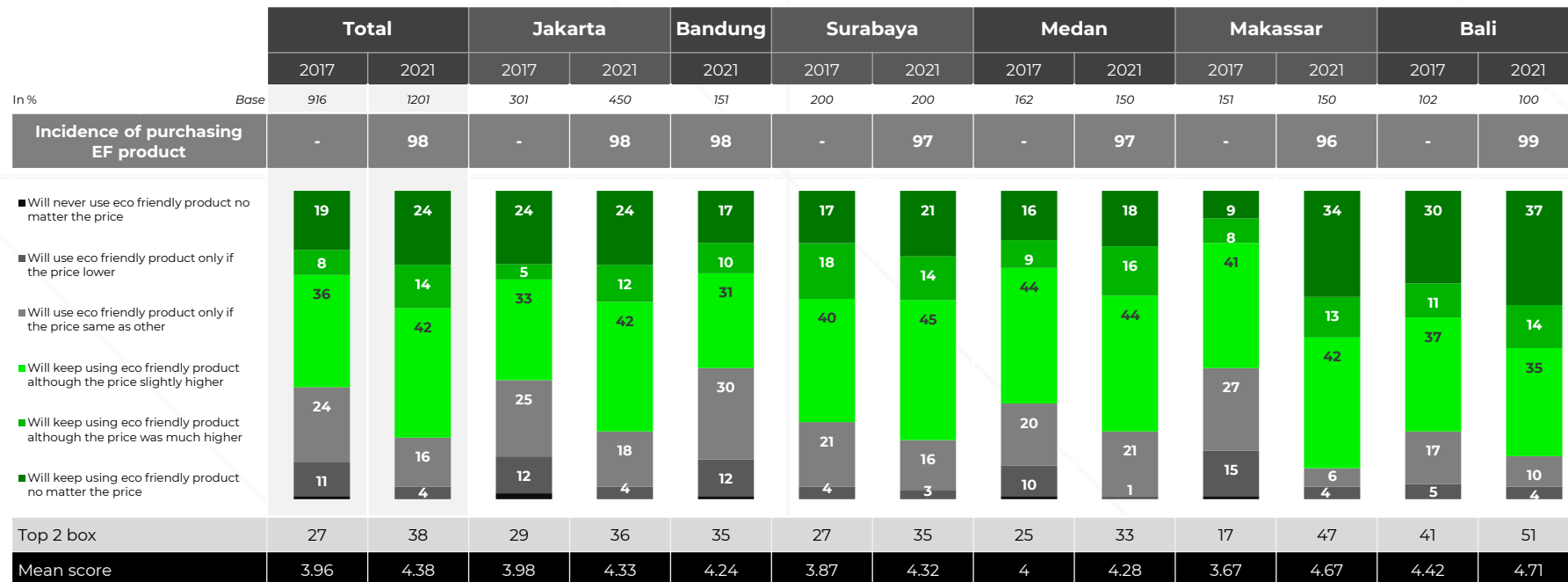
Similar pattern is relatively seen across age, with Minimarket and Supermarket is in the top 2, while Hypermarket is seen more popular across 26-35 YO and Upper SEC.

		Total				15-25 yo		26-35 yo		36-45 yo		Upper total		Middle total		Male		Female	
		Visited		Most visited		Visite d	Most visite d	Visite d	Most visite d	Visite d	Most visite d	Visite d	Most visite d	Visite d	Most visite d	Visite d	Most visite d	Visite d	Most visite d
In %		2017	2021	2017	2021	2021		2021		2021		2021		2021		2021		2021	
Actual no. of Interview		916	1201	916	1201	431		452		318		549		652		545		656	
Store channel	Minimarket	64	86	17	38	83	39	87	33	89	44	87	35	85	40	86	43	86	32
	Supermarket	64	73	19	25	72	22	74	28	72	24	77	29	69	21	73	22	73	27
	Traditional market	48	59	10	10	59	13	58	8	61	8	57	8	61	12	57	10	62	10
	Warung	50	57	13	7	60	7	56	7	53	5	52	3	61	9	58	5	56	8
	Grocery store	29	49	4	4	48	3	49	3	50	6	48	3	49	5	52	4	46	4
	Hypermarket	35	47	9	10	39	8	55	13	48	9	56	14	40	7	47	9	47	11
	Modern trade	35	36	2	2	31	3	41	1	38	1	38	1	35	2	39	2	33	1
	Wholeseller	25	33	2	2	31	3	34	2	35	2	33	2	33	3	34	3	32	2
	Modern drug store	13	26	*	*	20	0	30	0	30	0	30	0	22	0	28	*	23	0
	Convenience store	51	22	24	2	23	3	25	3	18	0	26	3	19	1	20	1	24	3

Source: Q17a: Purchase channel which visited regularly each month | Q17b: Purchase channel which visited most often each month

Price premium

In general, almost all ever purchase environmentally friendly product. They also are relatively more willing to pay higher for EF product – especially in Makassar and Bali.



Source: Q21: Which statement best describes your willingness to buy eco-friendly products?

Q39: Have you ever bought eco-friendly products?

Price margin for eco-friendly product

Related to price margin (between EF product vs general), Electronic have the highest price margin, while for the others (F&B, personal care and home care) are in the same margin range. Again, Makassar and Bali are more willing to pay higher.

		Total	City wise						Age group			SES		Gender	
			Jakarta	Bandung	Surabaya	Medan	Makassar	Bali	15 – 25 yo	26 – 35 yo	36 – 45 yo	Upper total	Middle total	Male	Female
Actual no. of interview		964	350	114	161	116	137	86	335	381	258	447	517	448	516
Price margin (in rupiah)	Electronic	251,999	260,820	228,273	249,603	263,054	244,329	249,050	256,507	271,615	213,737	273,164	234,093	237,361	268,309
	Food and Beverage	11,673	11,742	8,079	8,434	10,621	15,650	17,361	12,096	10,554	12,690	12,188	11,237	12,672	10,560
	Personal Care	14,496	14,272	11,679	10,974	15,238	16,954	20,806	16,117	13,380	13,453	15,542	13,611	14,855	14,095
	House Maintenance	15,303	15,171	12,775	12,287	14,252	17,235	23,158	16,899	13,941	14,686	16,509	14,283	16,291	14,202

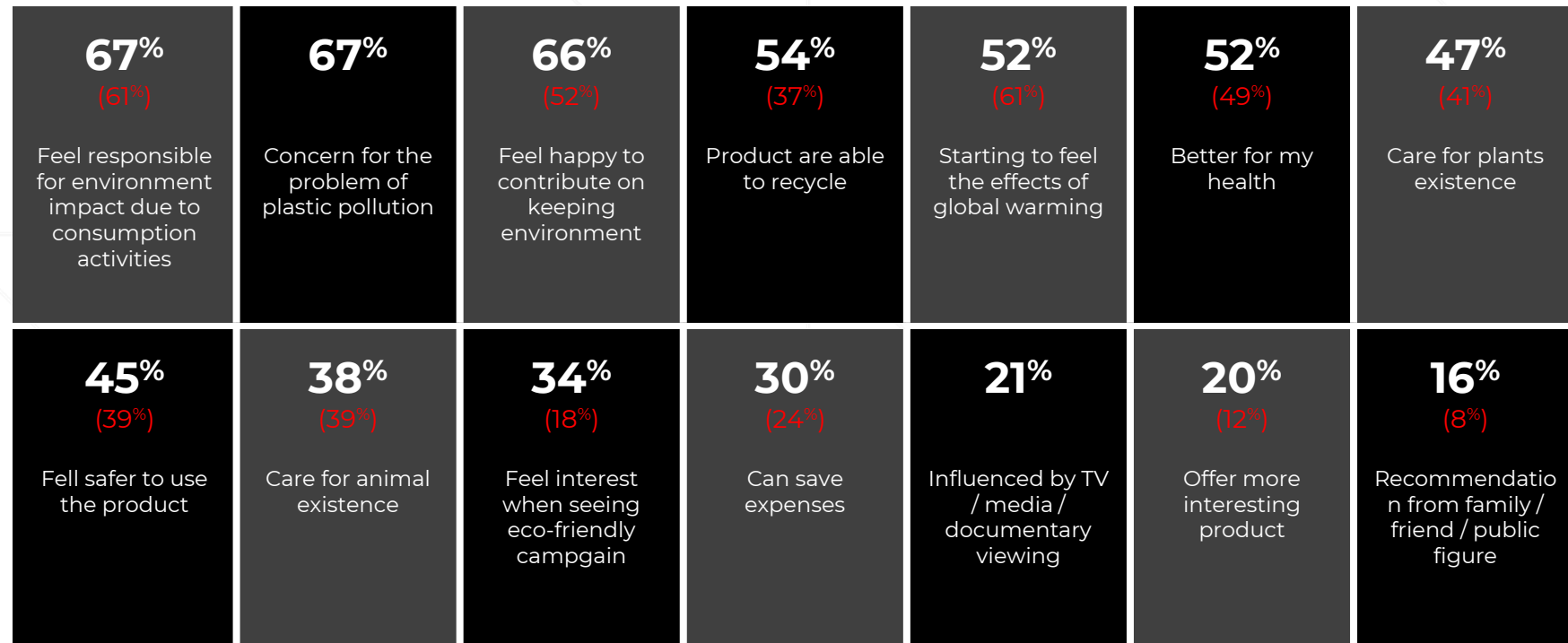
Base: Respondents who are willing to purchase more expensive eco-friendly product

Source: Q48 – Q51: How much is the price margin you can accept to buy eco friendly products, if sold at a higher price?



Trigger to buy / use eco-friendly product

Feel responsible of environment impact and plastic pollution became the main trigger to buy / use eco friendly product.



Base: Respondents who ever purchased eco-friendly product : 1172
Source: Q18: Things that motivate you to buy eco-friendly products?

Red: Previous Wave (2017)

Trigger to buy / use eco-friendly product

Surabaya is now more driven by responsibility to care for the environment – previously feeling the effect of global warming.

			Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
			2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021
In %	Actual no. Of interviews		559	1172	180	441	-	147	122	193	102	146	84	146	71	99
Feel responsible for environment impact due to consumption activities			61	67	67	62	-	64	68	72	59	68	56	64	47	83
Concern for the problem of plastic pollution			-	67	-	64	-	64	-	68	-	64	-	72	-	81
Feel happy to contribute on keeping environment			52	66	61	64	-	60	55	71	55	70	44	60	29	78
Product are able to recycle			37	54	34	54	-	49	43	50	43	59	32	54	32	57
Starting to feel the effects of global warming			61	52	53	45	-	54	71	49	67	60	67	59	55	65
Better for my health			49	52	45	48	-	46	61	53	38	52	46	57	58	63
Care for plants existence			41	47	44	44	-	51	45	45	38	50	42	48	34	55
Feel safer to use/consume the product			39	45	34	42	-	40	43	47	50	50	42	52	26	47
Care for animal existence			39	38	37	36	-	32	42	37	33	40	41	42	47	52
Feel interest when seeing eco friendly campaign			18	34	21	31	-	28	19	42	19	31	18	34	11	43
Can reduce expenses			24	30	26	29	-	27	29	31	21	31	19	31	22	34
Influenced by TV / Media / Documentary viewing			-	21	-	19	-	17	-	19	-	22	-	28	-	32
Offer more interesting product			12	20	10	16	-	15	15	19	17	22	9	30	10	25
Recommendation from family / friend / public figure			8	16	12	14	-	11	5	12	8	16	8	22	5	27

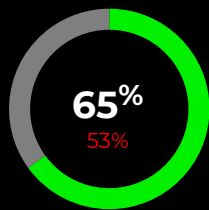
Trigger to buy / use eco-friendly product

Pattern is relatively similar by age group and SEC.

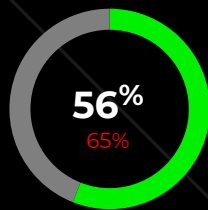
	Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper total		Middle total		Male		Female	
	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021
In %	Actual no. Of interviews		559	1172	296	420	208	443	55	309	264	535	295	637	497	534
	359	638														
Feel responsible for environment impact due to consumption activities	61	67	60	64	64	65	62	73	59	68	64	66	60	66	52	68
Concern for the problem of plastic pollution	-	67	-	68	-	65	-	68	-	69	-	65	-	67	-	68
Feel happy to contribute on keeping environment	52	66	50	63	54	68	52	69	48	69	56	64	51	64	43	68
Product are able to recycle	37	54	28	50	46	56	47	57	36	53	38	54	37	56	39	51
Starting to feel the effects of global warming	61	52	53	53	71	51	67	52	67	56	55	49	58	50	65	55
Better for my health	49	52	42	51	59	51	52	54	49	52	48	51	48	56	58	47
Care for plants existence	41	47	39	51	44	45	42	45	40	46	43	49	40	49	37	46
Feel safer to use/consume the product	39	45	37	46	46	46	30	42	43	46	36	44	38	43	46	47
Care for animal existence	39	38	36	41	41	37	45	36	39	39	40	38	33	37	35	40
Feel interest when seeing eco friendly campaign	18	34	15	32	25	35	17	36	21	32	15	35	21	35	22	33
Can reduce expenses	24	30	28	33	18	27	20	28	23	30	24	30	26	30	32	29
Influenced by TV / Media / Documentary viewing	-	21	-	21	-	24	-	19	-	23	-	20	-	24	-	19
Offer more interesting product	12	20	10	22	15	18	12	18	12	19	12	20	13	22	13	17
Recommendation from family / friend / public figure	8	16	6	17	12	14	8	15	8	16	9	16	8	18	9	13

Source: Q18: What motivates you to buy eco-friendly products?

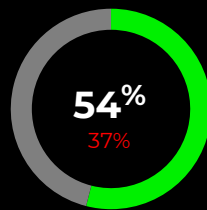
Barrier to buy / use eco-friendly product (in%)



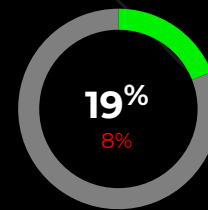
Hard to find eco-friendly product



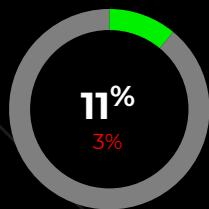
More expensive



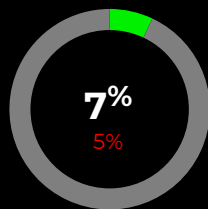
Limited information/promotion



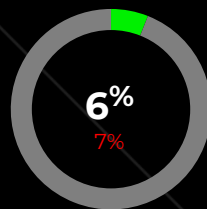
Doesn't have same quality with product that I usually bought



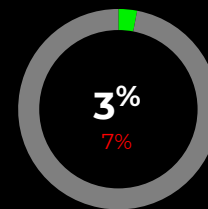
Doesn't see any benefit using it



Doesn't trust eco-label mechanism



Doesn't make a difference if I buy that product



Doesn't feel safe about the product

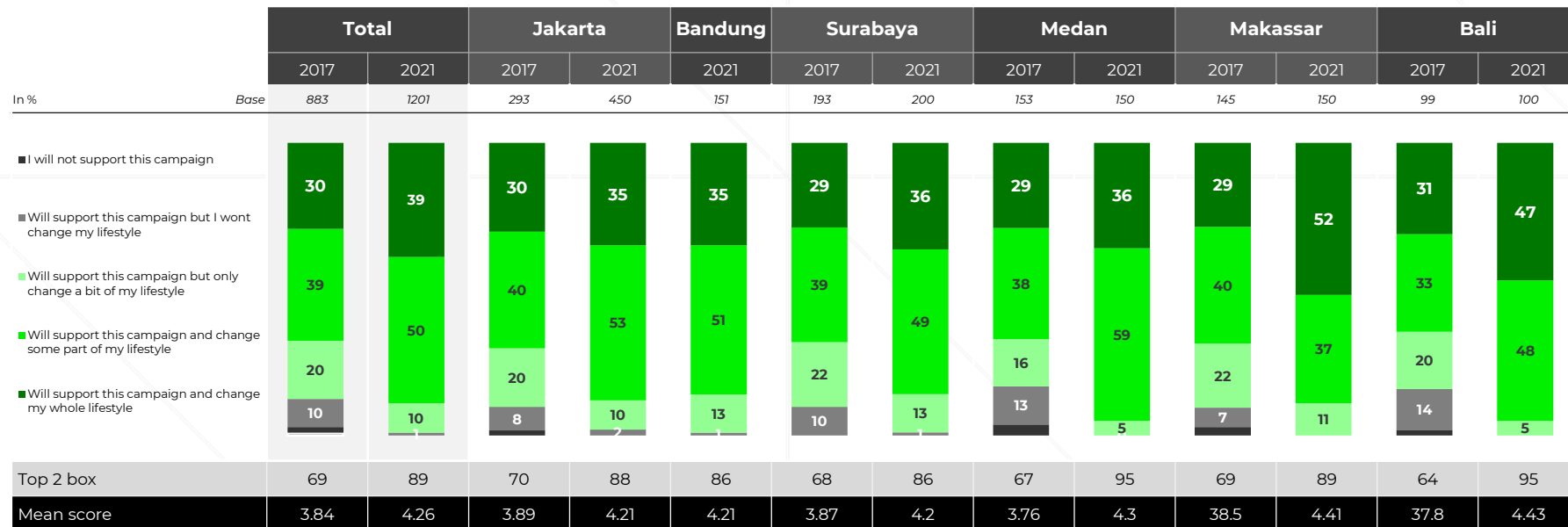
Red: Previous Wave (2017)

Base: Respondents who never purchased eco-friendly product, N = 29

Source: Q19: What makes you reluctant to buy eco-friendly product?

Willingness to support eco-friendly campaign

Even higher percentage of those who are willing to support eco friendly campaign, at least half are willing to change some part of their lifestyle to support the campaign.



Source: Q22: Which statement best describes your attitude in responding to eco-friendly product campaigns

Things already done to support eco friendly lifestyle

Majority of the respondent already do the basic things to support eco friendly lifestyle as in throwing trash in its place or avoid using plastic, considerate in using water or electricity.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021
In %	Base	916	1201	301	450	-	151	200	200	162	150	151	150	102	100
Always throw trash in its place		79	<div><div></div></div> 75	80	71	-	79	77	76	82	78	82	75	76	82
Avoid using single-use plastic		46	<div><div></div></div> 64	47	64	-	64	51	60	41	65	43	62	44	72
Using electricity only if necessary		59	<div><div></div></div> 63	61	60	-	62	62	67	51	68	65	58	48	65
I only use water as needed		54	<div><div></div></div> 63	58	59	-	63	57	69	45	70	56	62	46	54
I prefer to buy recyclable products		43	<div><div></div></div> 49	45	47	-	45	51	47	42	53	35	50	36	61
Doing waste sorting		-	<div><div></div></div> 48	-	43	-	49	-	52	-	45	-	49	-	66
Buy eco-labeled products		18	<div><div></div></div> 44	20	43	-	42	17	45	17	45	15	42	17	54
Buy organic products		-	<div><div></div></div> 41	-	38	-	40	-	43	-	41	-	46	-	40
Support campaign through socmed		-	<div><div></div></div> 35	-	33	-	32	-	34	-	34	-	40	-	43
Stop smoking to reduce air pollution		48	<div><div></div></div> 31	49	30	-	24	50	27	40	33	54	32	41	44
Buy eco-friendly electronics		25	<div><div></div></div> 29	23	26	-	25	22	24	31	35	27	34	24	44
Use public transportation more often		29	<div><div></div></div> 24	40	26	-	23	27	15	19	26	24	23	22	32
Avoid products made from animal parts		28	<div><div></div></div> 24	27	21	-	19	38	22	25	23	25	31	23	42
Taking the initiative to make compost		-	<div><div></div></div> 23	-	20	-	17	-	26	-	22	-	28	-	32

Source: Q20: What things have you done to preserve environment?



Chapter 4 :

Campaign, NGO and Eco-friendly guidance section

“Beli yang baik” campaign photocard

Apa sih #BeliYangBaik?

#BeliYangBaik adalah ajakan kepada kita semua sebagai konsumen untuk menerapkan gaya konsumsi yang lebih bertanggung jawab yang menjamin kelestarian lingkungan, sumber daya alam dan kesejahteraan hidup kita bersama.

Secara singkat, gaya konsumsi #BeliYangBaik mencakup keenam praktik ini:



beliyang
perlu



beliyang
awet



beliyang
alami



beliyang
Lokal



beliyang
ecolabel



maudibawa
kemana



“Beli yang baik” campaign photocard



**Yang baik untuk Bumi,
baik untuk kita**

#BeliYangBaik www.beliyangbaik.org @wwf_id



**PANDUAN
KONSUMEN**

  beliyangbaik

**Semua yang kita beli & konsumsi
berpengaruh terhadap diri kita & Bumi.**

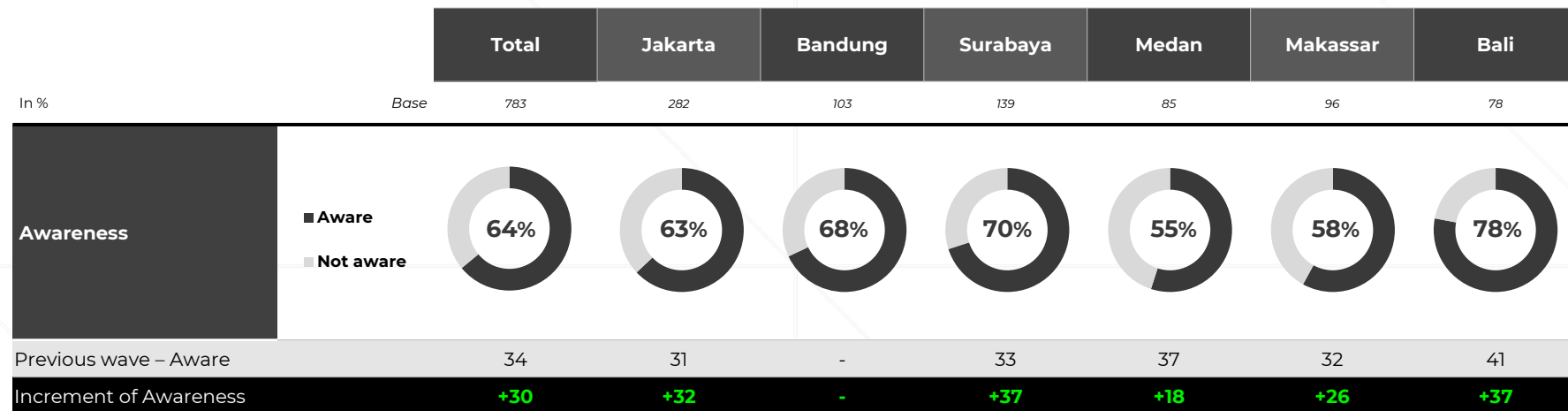
Ayo #BeliYangBaik !

The photograph shows a shopping cart filled with various items, including a blue bag and a green bag, in a supermarket aisle. The background is a yellow banner with text and logos.



Awareness “Beli yang baik” campaign

6 out of 10 aware of this campaign, lead by Bali area.



Source: Q23: Have you ever know/heard about “Beli yang Baik” campaign?

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Perception towards “Beli yang baik” campaign

Highest recall of the campaign is related to supporting green consumption, promote EF product, and sustainable lifestyle.

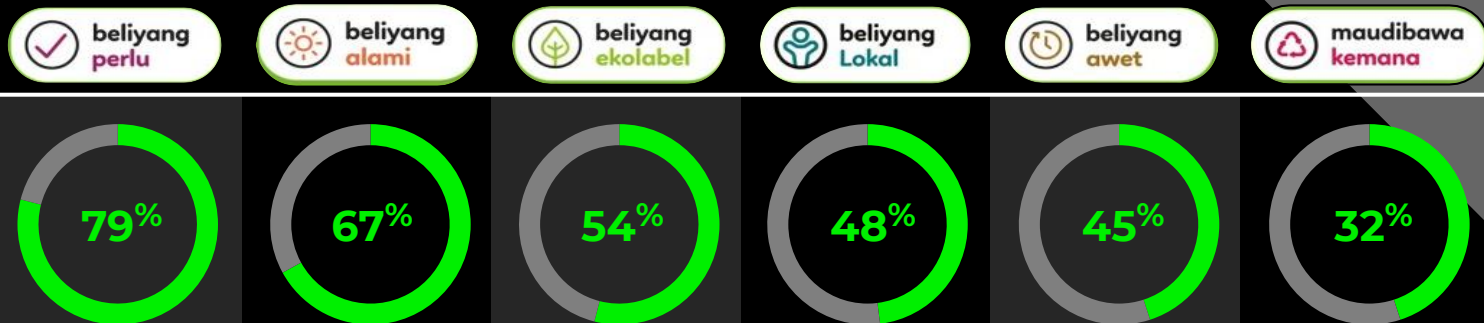
sustainable lifestyle.

	Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali	
In %	Actual no. Of interviews	783	282	103	139	85	96	78
Campaign that encourage green consumption	68	62	68	67	71	82	77	
Campaign promoting eco-friendly products	66	65	63	66	59	74	78	
Campaign that promote sustainable consumption styles	57	53	48	67	54	67	55	
Campaign that encourage consumers to buy in moderation	56	52	54	58	57	63	61	
Campaign that introduces certified eco-friendly products	52	46	50	54	56	60	59	
Campaign that support the zero-waste movement	48	46	47	50	44	49	59	
Campaign that support organic products	48	43	43	52	57	50	52	
Campaign that encourage consumers to buy durable products	45	38	40	47	47	66	50	
Campaign that support local products consumption	44	39	41	43	47	56	53	
Campaign that encourage consumers to reduce consumption of goods	42	35	42	43	51	57	42	
Campaign that deliver messages to manage waste	42	39	35	47	41	45	50	
Campaigns that encourage consumers to buy chemical-free products	40	35	40	37	37	56	50	
Consumer-directed campaigns	33	30	23	34	31	49	36	
Campaign that support consumption of cheap products	16	13	15	12	19	21	25	
Campaign that support consumption of branded products	11	10	7	8	6	22	23	
Campaign that support consumption of expensive products	10	8	7	7	4	19	23	

Source: Q29: What do you know about “Beli yang Baik” campaign?

Awareness on the campaign message

Highest recall of the campaign tagline is “Beli yang perlu” followed by “Beli yang alami”.



In % n = 783

Jakarta (n= 282)

78

67

47

45

42

27

Bandung (n=103)

77

61

55

47

41

31

Surabaya (n=139)

78

69

61

43

44

30

Medan (n= 85)

82

65

51

45

44

35

Makassar (n= 96)

77

70

55

57

55

40

Bali (n= 78)

86

69

66







59

50

44

Changing behavior – aware of the campaign

Buy what you need is the easiest habit to be followed – as well as the campaign tagline.

		Total	 beliyang perlu	 beliyang alami	 beliyang ekolabel	 beliyang Lokal	 beliyang awet	 maudibawa kemana
In %	Base	783	625	534	435	387	360	261
Buy what you need		44	49	43	45	45	48	47
Will always buy environmentally friendly products		26	25	28	28	26	25	28
More aware to consume natural non-chemical and recyclable product		20	19	25	24	25	23	27
Prioritize shopping for local products		16	16	17	22	22	21	23
Buy durable goods		13	14	15	16	16	19	17
Start stopping the use of plastic bags every time you shop		9	9	9	9	8	11	11
Bringing grocery bags from home		6	5	5	7	6	6	6
Throw garbage in its place		3	3	3	4	2	3	4
Don't buy just because it's cheap but look at the quality of the item		3	3	4	4	3	3	2
Will change the lifestyle for the better		3	4	3	4	4	3	2

Source: Q24: After seeing/knowing about this campaign, what behavior changes have you made in buying the product?

Q30: Which of these messages have you heard from "Beli yang Baik" campaign

Changing behavior – non aware of the campaign



39%

Buy only what you need



11%

Buy natural product



24%

More care for the environment



10%

Really consider what to wear responsibly



17%

Buy durable products



7%

Buy eco-label products



12%

Buy local products



7%

Products that are easy to recycle



Source: Q25: After seeing/knowing about this campaign, what behavior change would you like to make in buying the product?

See information from the packaging

Checking information stated on the packaging is still necessary and is having similar pattern across all cities.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021
In %	Base	916	1201	301	450	-	151	200	200	162	150	151	150	102	100
Every time seeing the information on the packaging	33	<div><div></div></div> 43	30	44	-	35	33	40	35	47	24	41	49	61	
Quite often seeing the information on the packaging	34	<div><div></div></div> 43	40	43	-	42	31	47	30	43	36	51	29	26	
Occasionally seeing the information on the packaging	30	<div><div></div></div> 13	29	13	-	23	32	12	31	10	37	6	22	13	
Never seeing the information on the packaging	3	0	1	*	-	0	4	*	5	0	3	2	*	0	
Top 2 box	67	86	70	86	-	77	64	87	65	90	60	92	78	87	
Mean score	2.97	3.29	2.98	3.29	-	3.12	2.93	3.29	2.95	3.36	2.80	3.32	3.26	3.48	

Source: Q26: When you want to buy a product, how often do you read the information on the packaging?

Information read on the packaging

Aside from Expired date and ingredients, certification and eco friendly label are also increasing quite significantly as information read on the packaging.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021
In %	Base	916	1201	301	450	-	151	200	200	162	150	151	150	102	100
Expired date		82	<div><div></div></div> 93	75	79	-	74	75	85	82	76	75	83	70	87
Ingredients/material		70	<div><div></div></div> 85	62	68	-	63	63	78	44	70	63	61	52	72
Certification labels (SNI, ISO, Halal)		65	<div><div></div></div> 79	39	48	-	41	40	48	38	53	40	41	43	63
Eco-friendly label		41	<div><div></div></div> 69	41	38	-	37	39	39	31	48	37	48	39	45
Manufacturer		38	<div><div></div></div> 46	37	47	-	41	46	49	33	49	31	38	45	50
No animal testing		23	<div><div></div></div> 34	-	33	-	36	-	38	-	40	-	37	-	38

Base: Respondents who read info on packaging

Source: Q27: Information that usually search on the packaging



Retailer activation that motivates consumer buying EF product by city wise

Price discount and in store activity are still the most preferable campaign from retailer that drives consumer to buy environmental friendly products.

		Total		Jakarta		Bandung		Surabaya		Medan		Makassar		Bali	
		2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021
In %	Base	916	1201	301	450	-	151	200	200	162	150	151	150	102	100
Discount promotions for certain products labeled eco-friendly	76	<div></div> 80	75	79	-	74	75	85	82	76	75	83	70	87	
Placement of clear information and educational materials regarding eco-friendly products in the store	58	<div></div> 69	62	68	-	63	63	78	44	70	63	61	52	72	
Implementation of in-store educational events regarding eco-friendly products	40	<div></div> 48	39	48	-	41	40	48	38	53	40	41	43	63	
Placement of SPG that can explain eco-friendly products in the store	38	<div></div> 41	41	38	-	37	39	39	31	48	37	48	39	45	
Involvement of influencers/ celebrities associated with eco-friendly products	-	<div></div> 36	-	33	-	36	-	38	-	40	-	37	-	38	

Source: Q28: What kind of retailer programs that can motivate you to buy eco-friendly products?



Retailer activation that motivates consumer buying EF product by age group and SES

The result is relatively similar across age and SEC

	Total		15 – 25 yo		26 – 35 yo		36 – 45 yo		Upper total		Middle total		Male		Female		
	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	2017	2021	
In %	Base	916	1201	500	431	336	452	80	318	432	549	484	652	530	545	386	656
Discount promotions for certain products labeled eco-friendly	76	<div></div> 80	73	81	78	80	80	79	79	82	72	79	72	79	81	82	
Placement of clear information and educational materials regarding eco-friendly products in the store	58	<div></div> 69	58	65	61	72	51	72	61	72	54	66	60	70	55	68	
Implementation of in-store educational events regarding eco-friendly products	40	<div></div> 48	37	43	44	53	40	51	41	51	38	46	36	51	44	46	
Placement of SPG that can explain eco-friendly products in the store	38	<div></div> 41	32	37	41	42	52	48	41	41	34	41	42	43	33	39	
Involvement of influencers/ celebrities associated with eco-friendly products	-	<div></div> 36	-	38		35	-	36	-	36	-	36	-	36	-	36	

Source: Q28: What kind of retailer programs that can motivate you to buy eco-friendly products?



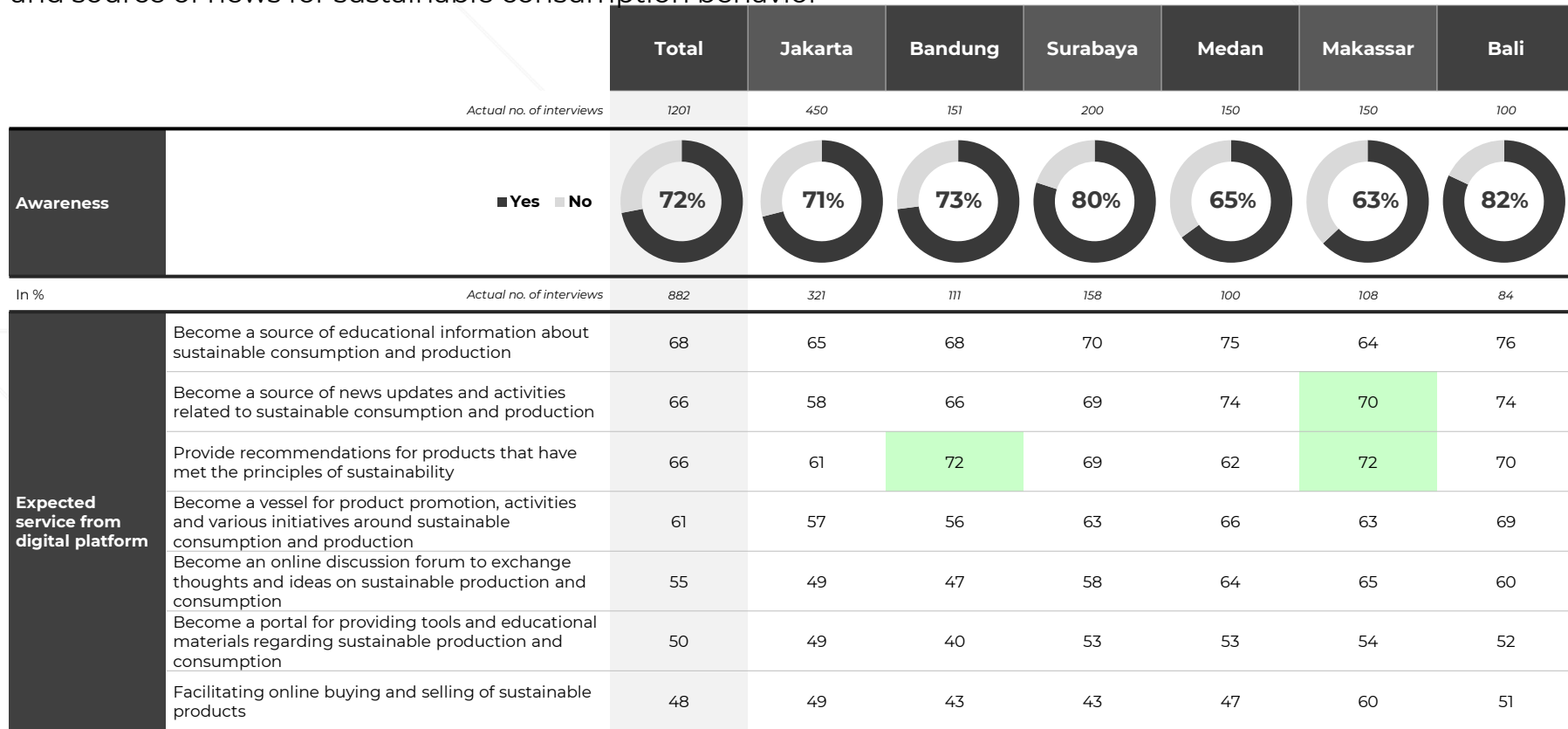
Chapter 5 :

Digital platform

Digital platform by city wise



About 3 out of 4 ever heard about this digital platform and expected them to deliver educational information and source of news for sustainable consumption behavior



Source: Q33: Have you ever heard about digital platform which consist information and recommendation of sustainable consumption and production?

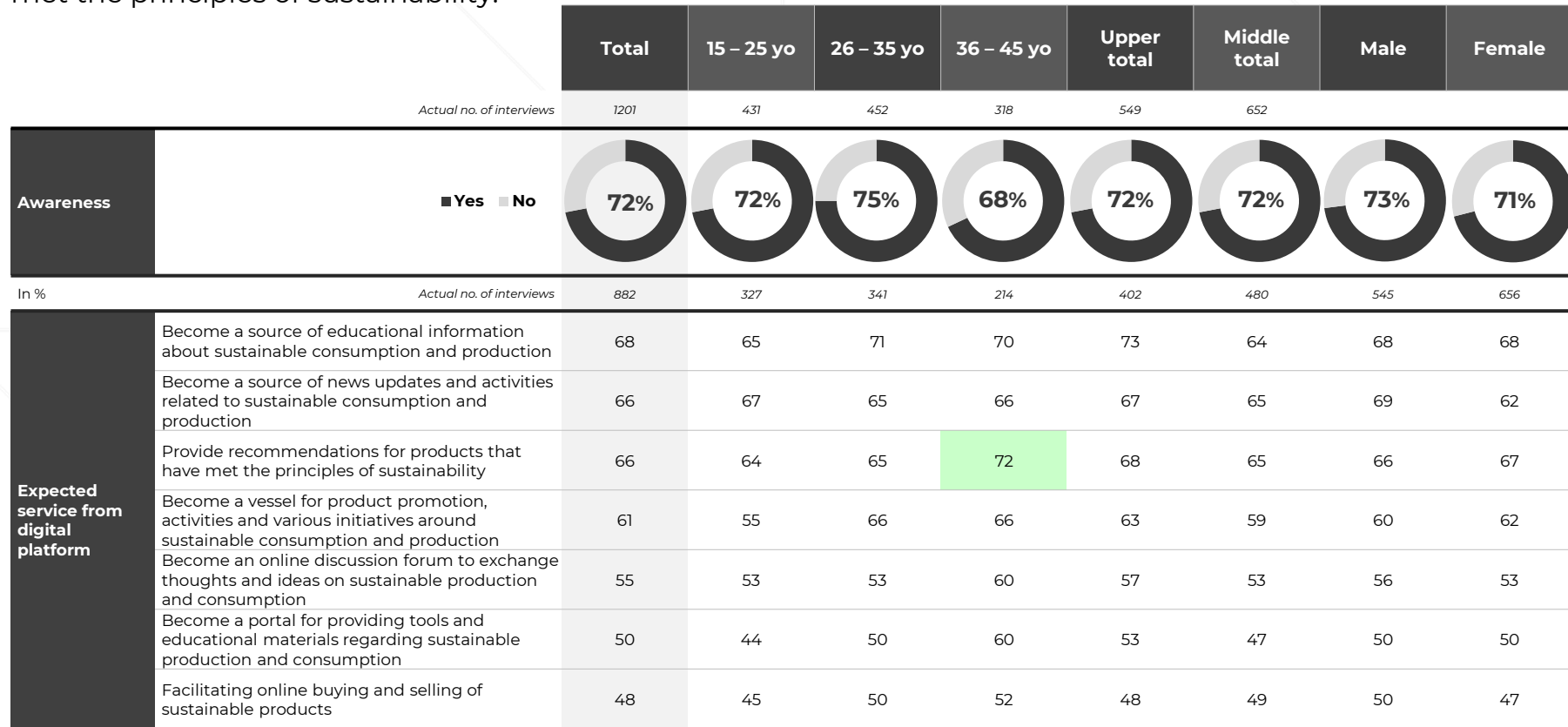
Q34: What kind of service do you expect from a digital platform related to sustainable consumption and production?



Digital platform by age group, SES, and gender



Among 36 – 45 YO samples, they expect the platform could provide recommendations of product that have met the principles of sustainability.



Source: Q33: Have you ever heard about digital platform which consist of information and recommendation to sustainable consumption and production?
Q34: What kind of service do you expect from a digital platform related to sustainable consumption and production?

Expected information from digital platform by city wise

The platform also expected to give information related to various consumer product that supports sustainable consumption. While in Surabaya, it is seen higher on promotion information, while Bali is higher in terms of information related to innovation and technologies.

	Total	Jakarta	Bandung	Surabaya	Medan	Makassar	Bali
Actual no. Of interviews	882	321	111	158	100	108	84
Information on various consumer products that have complied with the principles of sustainability	68	64	65	69	72	67	81
Information on offerings or promotions of sustainable products as motivation to implement sustainable consumption practices	67	64	57	71	70	70	72
Information around innovations and technologies that support sustainable production and consumption	66	62	60	66	69	68	83
Information on activities that can be followed to enrich insight about sustainable production and consumption	62	60	66	64	58	59	68
Tips and tricks for practicing sustainable consumption	58	52	60	57	61	66	72
Information regarding sustainable production practices of several commodities	50	44	52	52	62	58	47
Profiles of figures or institutions that have successfully carried out initiatives or businesses that put forward the principles of sustainability	40	39	36	36	45	45	42

Base: Respondents who aware of digital platform

Source: Q35: What kind of information you expect to be found related to sustainable production & consumption from digital platform?



Expected information from digital platform by age, SES & gender

Relatively similar pattern seen across age and SEC, with 26-35 YO expect information related to promo as the highest and 36 – 45 YO expect information related to innovation and technologies.

	Total	15 – 25 yo	26 – 35 yo	36 – 45 yo	Upper total	Middle total	Male	Female
Actual no. Of interviews	882	327	341	214	402	480	406	476
Information on various consumer products that have complied with the principles of sustainability	68	65	67	73	70	66	66	70
Information on offerings or promotions of sustainable products as motivation to implement sustainable consumption practices	67	62	71	68	68	65	66	67
Information around innovations and technologies that support sustainable production and consumption	66	64	63	73	69	63	68	64
Information on activities that can be followed to enrich insight about sustainable production and consumption	62	60	62	65	67	58	64	60
Tips and tricks for practicing sustainable consumption	58	56	61	59	60	57	57	60
Information regarding sustainable production practices of several commodities	50	43	54	59	53	48	51	50
Profiles of figures or institutions that have successfully carried out initiatives or businesses that put forward the principles of sustainability	40	35	41	47	38	41	45	34

Base: Respondents who aware of digital platform

Source: Q35: What kind of information you expect to be found related to sustainable production & consumption from digital platform?



Chapter 6 :

Summary & way forward



Across years, people are getting more adjusted to sustainable living practices

Guidance is seen as necessary for them to implement further lifestyle changes

After 3 years, people are getting more informed towards sustainability issue. Presence of behavior changes are also seen, especially in Bali – areas with more advanced information and habit.

Aside from avoiding plastic usage, behavior related to skimping is the easiest way to relate to sustainable practices (e.g: use water or electricity only if necessary).



Social Media may play important role in educating people about ways of living the sustainable practices, as well as listing brands that already met the principle of sustainability.





About NielsenIQ

Arthur C. Nielsen, who founded Nielsen in 1923, is the original name in consumer intelligence. After decades of helping companies look to the future, we are setting the foundation for our future by becoming NielsenIQ. We continue to be the undisputed industry leaders as evidenced by our experience and unmatched integrity. As we move forward, we are focused on providing the best retail and consumer data platform, enabling better innovation, faster delivery, and bolder decision-making. We are unwavering in our commitment to these ideals and passionate about helping clients achieve success. For more information, visit: **niq.com**