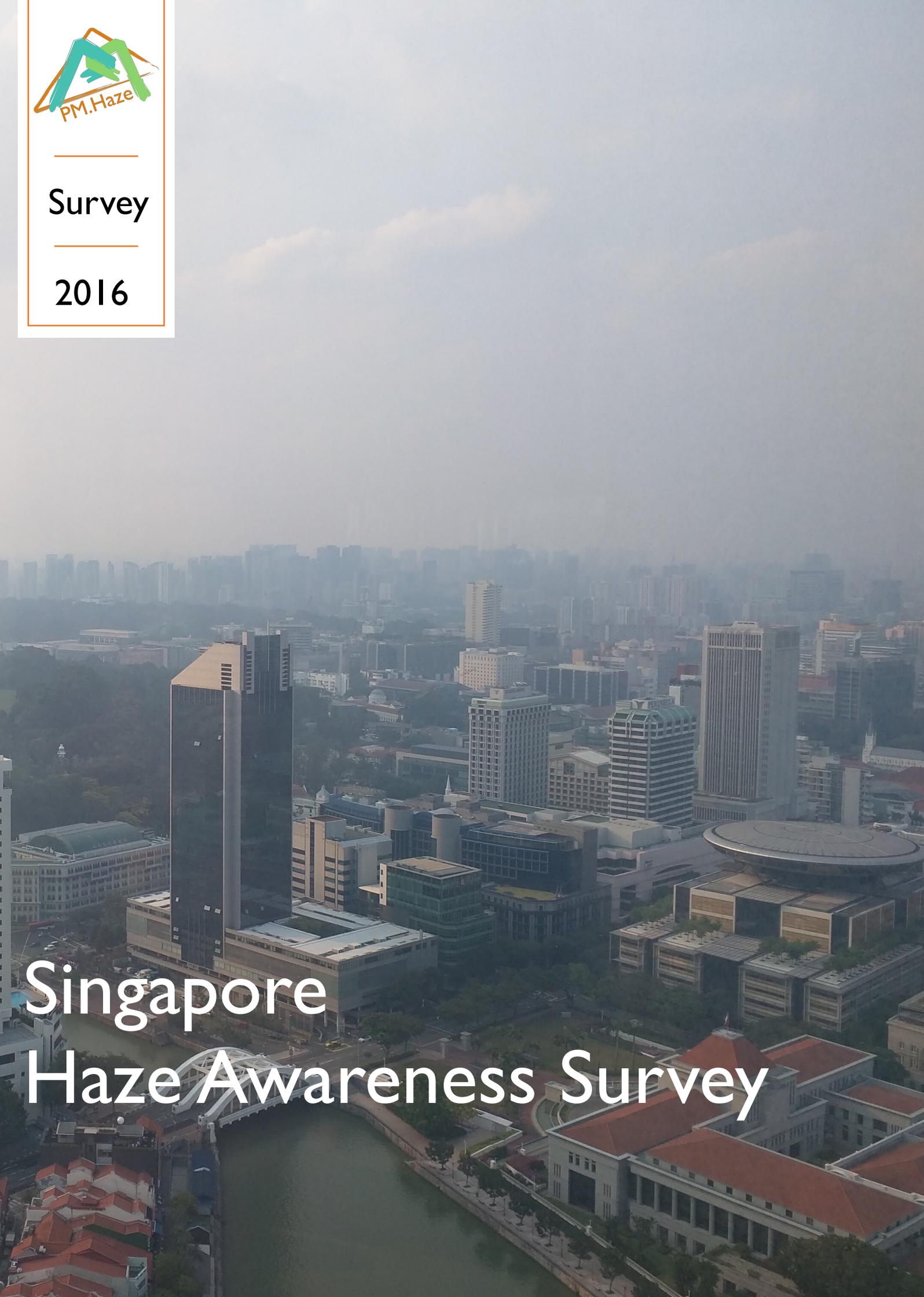




Survey

2016



# Singapore Haze Awareness Survey

## Executive Summary

The objective of the survey was to understand the level of awareness and willingness to act on the haze issue.

The highlights of the survey are:

- Consumers in Singapore are willing to pay more for certified sustainable products that help minimise the haze
- There is good understanding that unsustainable palm oil and paper production causes haze.
- There is strong demand for more transparency from companies on this issue. Consumers want companies to:
  - show evidence of haze-free operation
  - show evidence that their procurement sources are also haze free
- The survey also shows public concern about the environmental impact of investments and loans of financial institutions in Singapore. There is willingness to support those who lend or invest responsibly.

Despite the high awareness of the haze situation in Singapore and the region, our survey shows that consumers could be more aware of ways to identify haze-free companies - for instance, through supporting products certified by Forest Stewardship Council (FSC) and Roundtable of Sustainable Palm Oil (RSPO). As consumer awareness continues to rise, organisations that take action towards haze-free operation will stand to benefit. These actions include:

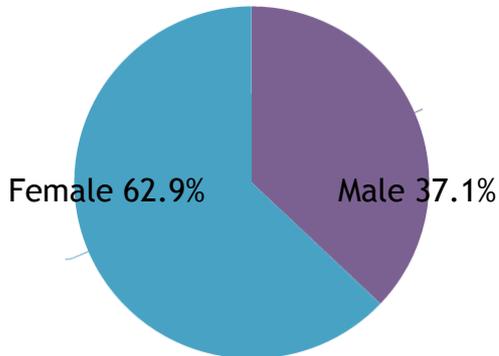
- Palm oil and paper growing and trading companies: better transparency to enable close performance monitoring
- Manufacturing and retail companies: switching supply chain to certified source
- Financial institutions: public disclosure of environment, social and governance (ESG) policies to show evidence that they do not lend/invest in businesses that potentially lead to haze

Haze has plagued Singapore for over four decades and 2015 was the worst haze crisis in history. Although the sources of haze are outside Singapore, everyone contributes to haze by consuming or using products that contain unsustainable palm oil and paper. Business and financial activities in Singapore may effectively contribute to the haze by financing activities that lead to haze.

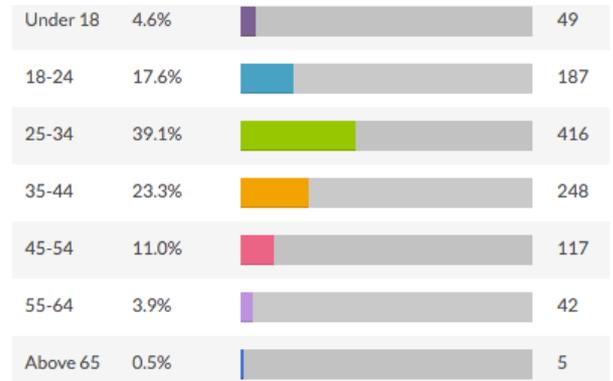
The grim reality is that we do not change, we will choke. P.M.Haze urges everyone to do their part - consumers, industry players and financiers. Together let's X the Haze.

## Profile of respondents

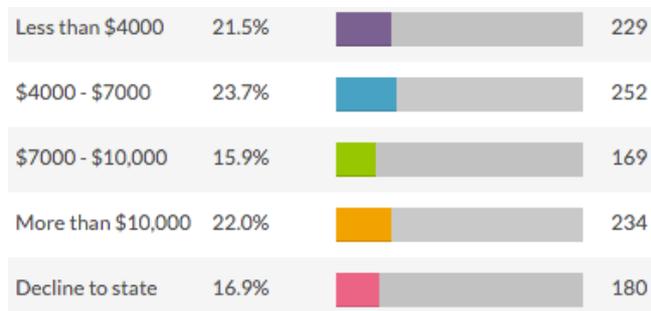
### Gender



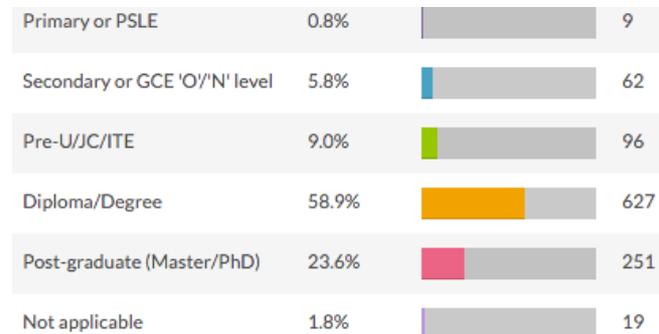
### Age Group



### Monthly Household Income



### Highest Education Level



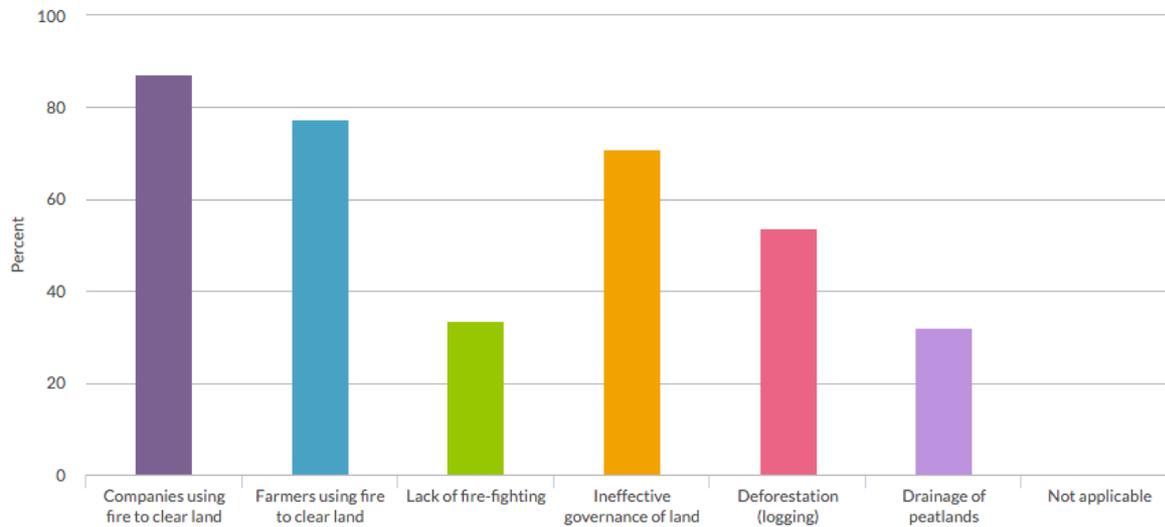
**Number of respondents: 1,083 (1,057 reside in Singapore)**

### Research Design:

1. Objective: to find out the level of awareness and willingness to act on the haze issue
2. Market: Singapore
3. Methodology: 5 minutes on-line questionnaire via SurveyGizmo platform
4. Period 24 March - 12 April 2016

**On awareness**

Q1. What do you think are the causes of haze?



Value	Percent	Count
Companies using fire to clear land	87.2%	977
Farmers using fire to clear land	77.4%	868
Lack of fire-fighting	33.5%	376
Ineffective governance of land	70.7%	792
Deforestation (logging)	53.7%	602
Drainage of peatlands	31.9%	358
Not applicable	0.1%	1

Q2. Which of the above sustainable labels are you aware of?

Value	Percent	Count
Roundtable of Sustainable Palm Oil (RSPO)	24.5%	273
Forest Stewardship Council (FSC)	29.2%	325
Singapore Green Label	57.5%	641
Not applicable	25.2%	281

Q3. Do you know that unsustainable production of palm oil and paper causes haze?

Value	Percent	Count
Yes	79.2%	885
No	20.8%	232



On companies

Q4. Do you know that palm oil and paper companies (growers & traders) registered in Singapore may be contributing to the haze?

Value	Percent	Count
Yes	83.4%	932
No	16.6%	185

Q5. Do you think these companies (growers & traders) should show evidence that their operations do not cause haze?

Value	Percent	Count
Yes	92.7%	1,036
No	4.7%	53
Not applicable	2.5%	28

Q6. Do you think companies (manufacturers & retailers) that sell palm oil and paper products should show evidence that their procurement sources are haze-free?

Value	Percent	Count
Yes	93.5%	1,044
No	4.4%	49
Not applicable	2.1%	23

**On consumers**

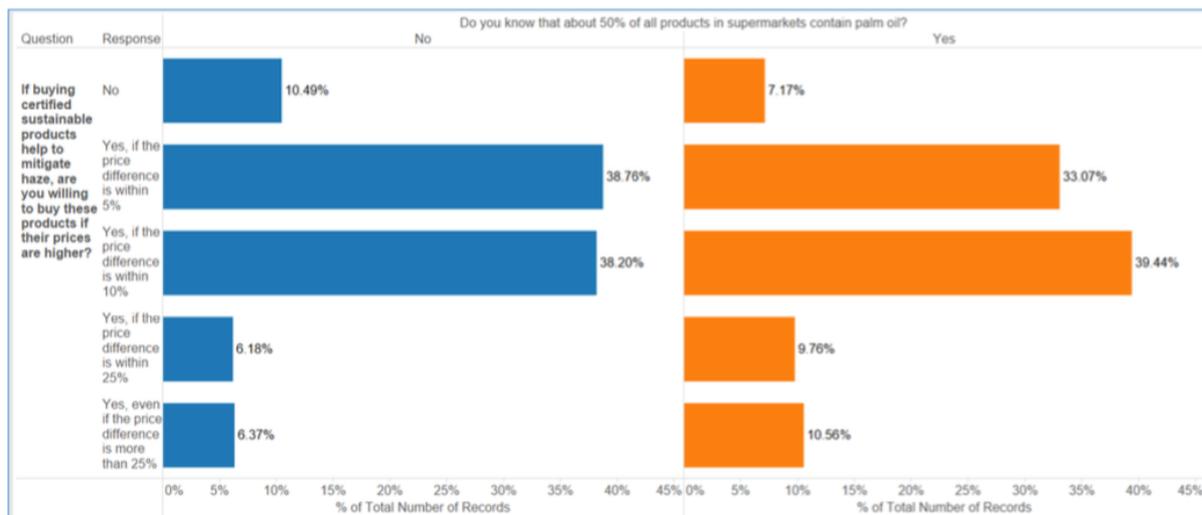
Q7. Do you know that about 50% of all products in supermarkets contain palm oil?

Value	Percent	Count
Yes	48.9%	546
No	51.1%	571

Q8. If buying certified sustainable products help to mitigate haze, are you willing to buy these products if their prices are higher?

Value	Percent	Count
No	8.7%	97
Yes, if the price difference is within 5%	36.3%	405
Yes, if the price difference is within 10%	38.7%	431
Yes, if the price difference is within 25%	8.1%	90
Yes, even if the price difference is more than 25%	8.3%	92

*Respondents who are aware that 50% of all products in supermarkets contain palm oil are more likely to pay a premium price for certified sustainable products. For example, 10.56% of the “aware” respondents are willing to pay a higher price for certified products, vs. 6.37% for the “unaware” respondents.*



*Respondents with higher household incomes are more likely pay a premium price for certified sustainable products. The price premium percentage they are willing to pay for has a positive correlation to their household incomes as well. For example, 13.12% of respondents who have less than S\$4,000 monthly income are not willing to pay a price premium to buy*

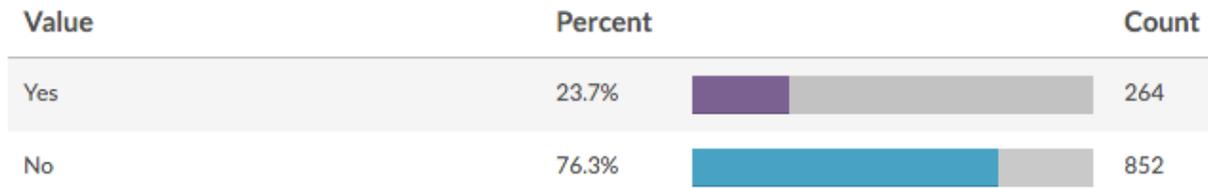


certified sustainable products, vs. 6.93% of respondents who have more than \$10,000 monthly income.

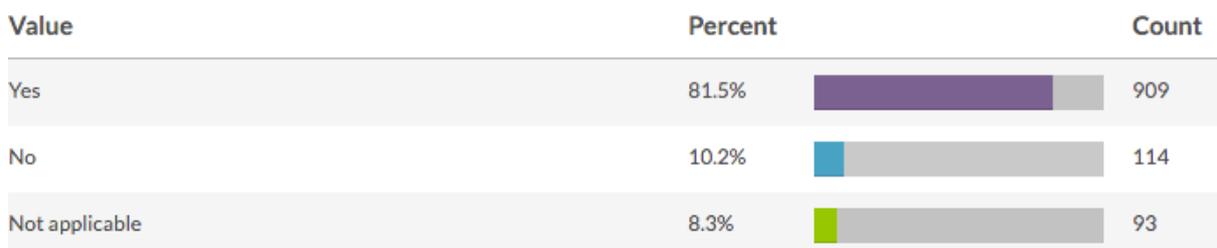


**On financial institutions**

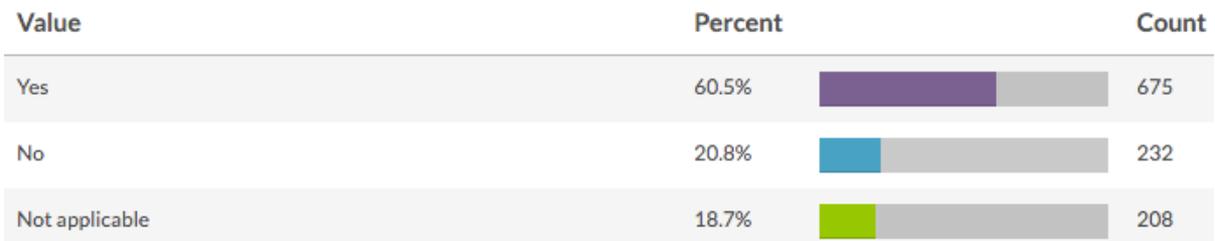
Q9. Do you know that none of the Singaporean financial institutions (e.g. banks) have publicly known policies to ensure that their loans and investments do not lead to haze?



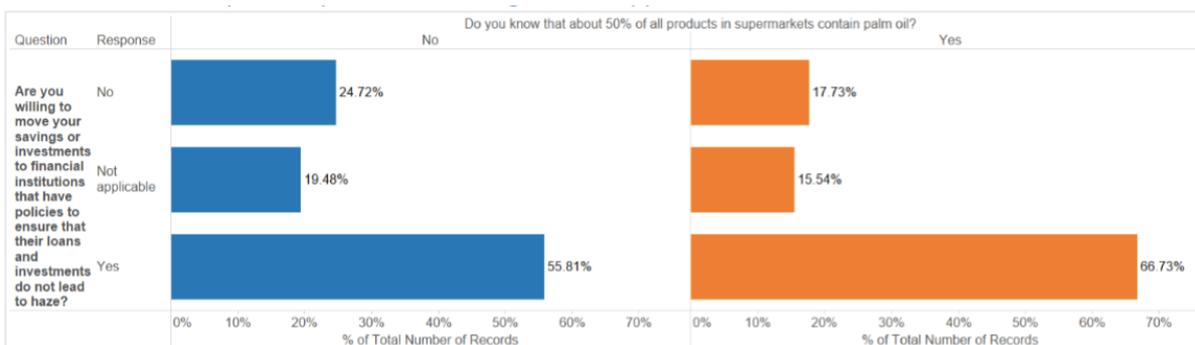
Q10. Do you think financial institutions should ensure that their loans and investments do not lead to haze?



Q11. Are you willing to move your savings or investments to financial institutions that have policies to ensure that their loans and investments do not lead to haze?



*Respondents who are **aware** that 50% of all products in supermarkets contain palm oil are **more likely to support haze-free financial institutions**. For example, 66.73% of the “aware” respondents are willing to move their savings or investments to financial institutions that have policies to ensure that their loans and investments do not lead to haze, vs. 55.81% for the “unaware” respondents.*



Majority of the respondents from different income level categories support haze-free finance operations. Respondents with higher household incomes are more likely to support haze-free financial institutions. For example, 68.83% of respondents who have more than S\$10,000 monthly income are willing to move their savings or investments to financial institutions that have policies to ensure that their loans and investments do not lead to haze, vs. 56.11% of respondents who have less than S\$4,000 monthly income.



**On belief**

Q12. How much influence do you think Singapore has in stopping the haze?

Value	Percent	Count
Not at all influential	13.5%	150
Slightly influential	30.6%	341
Moderately influential	38.2%	426
Very influential	13.5%	151
Extremely influential	4.2%	47

Q13. How much influence do you think you, as an individual, have in stopping the haze?

Value	Percent	Count
Not at all influential	27.2%	303
Slightly influential	43.7%	487
Moderately influential	20.3%	226
Very influential	6.9%	77
Extremely influential	2.0%	22

*Respondents who are **aware** that 50% of all products in supermarkets contain palm oil have **greater faith in their own influence to stop the haze**. For example, 12.35% of the “aware” respondents believe that they are **extremely or very influential** in stopping the haze, vs. 5.8% for the “unaware” respondents.*

