

Green Response Report 2021



essity

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02 Introduction

The lifestyle changes demanded by the emergence of the COVID-19 pandemic in 2020 were sudden and significant. Consumers, communities, businesses, and healthcare systems across the world were forced to change their plans and priorities and adapt to a new reality. Hygiene and health concerns were thrust into the centre of attention as everyday behaviors and attitudes that we had taken for granted were banished overnight.

At Essity we continuously conduct research among the general public to understand behaviours and attitudes related to hygiene and health, and how that impacts the world around us. The objective of this report is to understand if the lifestyle changes demanded by the global pandemic have impacted the way in which international communities feel and behave towards the environment. Has the well-being of our planet dropped down the priority list? Or has the pandemic strengthened our determination to safeguard its future?

Now well into 2021, we are slowly treading back to normal. It is however clear that the normal we return to must be a different one. One clear conclusion from this report is that consumers have had time to reflect on the impact their actions have on the people and environment surrounding them. For Essity, it is vital to understand how we can support and enable our customers and consumers in their ambitions to act more sustainably. This is how we move forward in our work for a more sustainable future.

I hope you will find this report informative and we welcome you to learn more about our sustainability work at [Essity.com](https://www.essity.com).

/ **Tuomas Yrjölä**
President, Global Brand Innovation & Sustainability



03 Key Findings: Summary & Analysis

As a leading hygiene and health company, Essity has produced this report to enhance our understanding of how the coronavirus pandemic has affected consumers' ability and ambition to lead an environmentally friendly lifestyle. The multi-market survey that underpins this report has produced valuable insights into the ways consumers around the globe have been spurred on by lockdowns and restrictions to adopt new sustainable habits and what actions they prioritize in the desire for a more sustainable lifestyle.

Most notably, this report has uncovered the following key findings, essential for the work that lies ahead:



Optimism prevails – **58% of respondents** feel that the actions they are able to take as individuals can have a positive impact on the environment and help slow down global warming.



The pandemic has brought on a shift to **a more sustainable lifestyle for almost every other person** surveyed, and more than **9 out of 10** of these will continue living this way after the pandemic.



Health and hygiene will play a larger role in consumers' everyday lives – **68% of respondents** say that their personal hygiene has become more important to them since the start of the pandemic. Health and hygiene products also top the charts when it comes to consumers' willingness to spend more on environmentally friendly options.

04 Key Findings: Statistics

Living with lockdown or restrictions during the pandemic has **created space and time** for people to evaluate their everyday behaviours.

45% have become more aware of how human behaviour is affecting the planet negatively.

43% have become more aware of the negative impact that some products and services have on the environment.

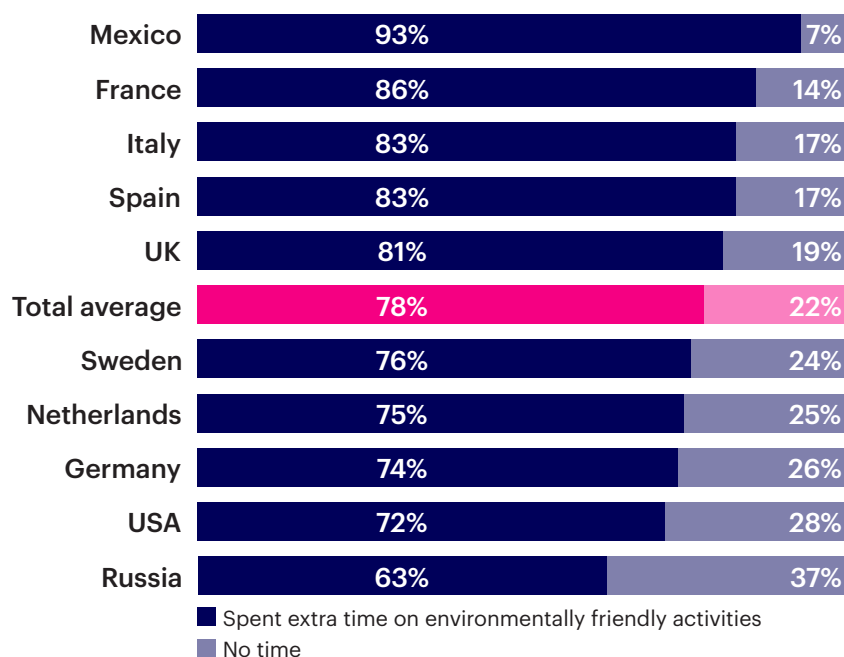
34% have become better at planning their consumption.

27% have spent more time learning about sustainability.

(Base: Those who have lived more of an environmentally friendly lifestyle because of the pandemic)



04 Key Findings: Statistics



Close to **8 out of 10** have spent more time doing something that benefits the environment during the pandemic, with an average of an additional **+52 minutes** per week spent on activities beneficial to the environment.

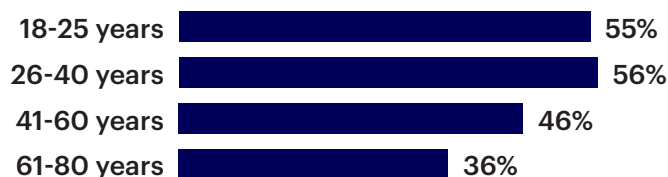


04 Key Findings: Statistics

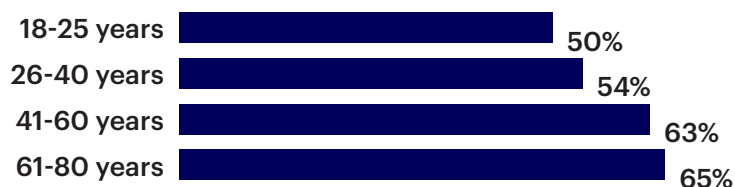
The Age Divide



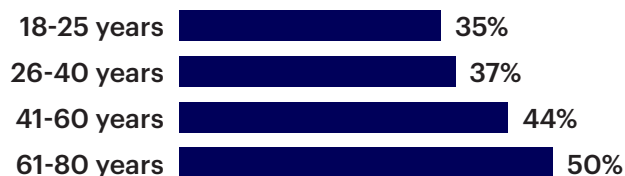
Are very or somewhat optimistic that their individual actions can have a positive impact on the environment and ultimately help slow down global warming.



Have lived more of an environmentally friendly lifestyle because of the pandemic.



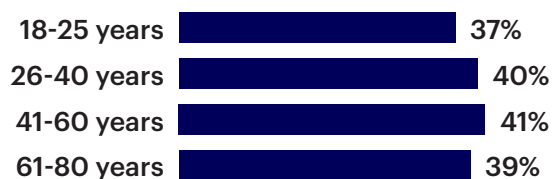
Have recycled more.*



Have reduced their general waste.*



Have bought products with environmentally friendly packaging.*



Have bought more environmentally friendly products.*

*(Base: Those who have lived more of an environmentally friendly lifestyle because of the pandemic)

05 The Sustainability Premium

Consumers are putting their money where their mouth is, showing **willingness** to pay the extra cent for a more sustainable option in every category.



Hygiene and health

+12%



Groceries, food and drink

+12%



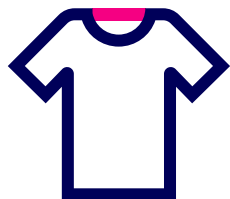
Travel and transportation

+11%



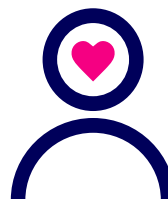
Beauty and personal care

+10%



Fashion, clothing and accessories

+10%



Leisure, fitness and eating out

+10%



Consumer electronics

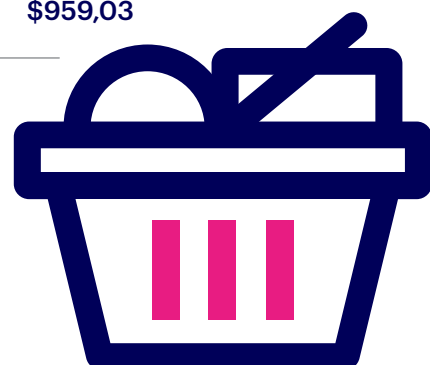
+10%

06 A More Sustainable Foodshop

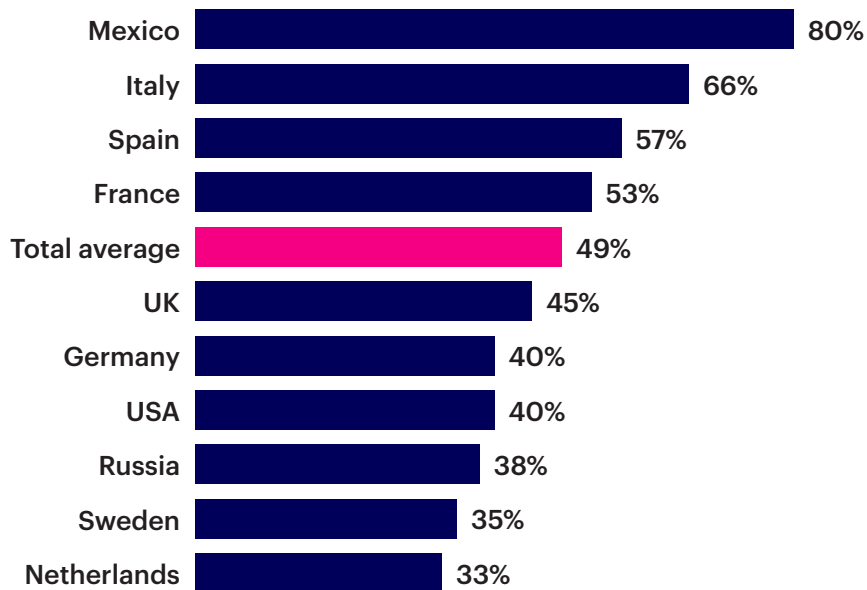
Buying more environmentally friendly products is one of the most common ways consumers have adapted to live more sustainably during the pandemic.

This table demonstrates how much more on average consumers would be willing to spend for more sustainable alternatives when shopping for groceries, across ten markets.

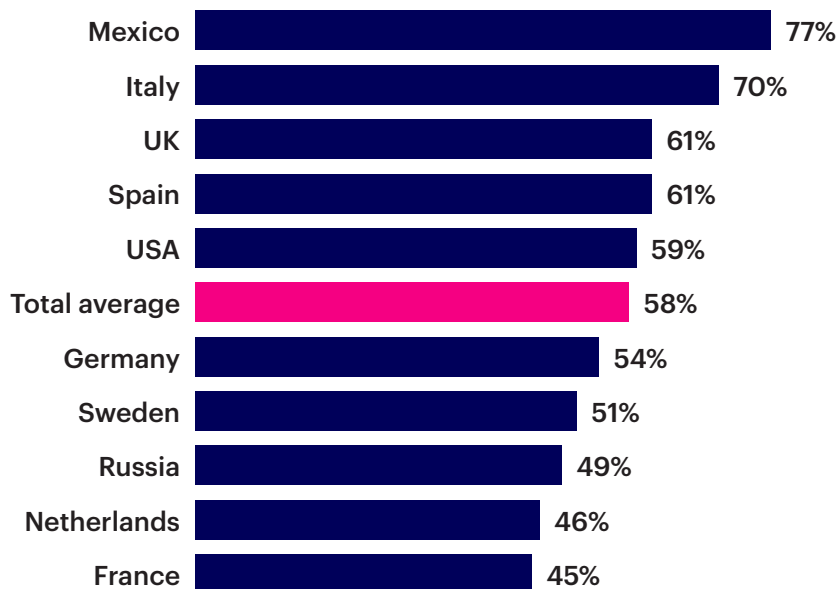
	Average weekly grocery spend	Sustainability premium	Sustainable grocery spend
UK	£88.50	11%	£98.24
Germany	€ 79,43	11%	€ 88,16
France	€ 74,60	18%	€ 88,03
Spain	€ 47,54	9%	€ 51,82
Italy	€ 49,52	13%	€ 55,95
Sweden	793 kr	14%	904 kr
Netherlands	€ 98,75	11%	€ 109,61
Russia	3656 ₪	13%	4131 ₪
US	\$58,37	11%	\$64,79
Mexico	\$841,25	14%	\$959,03



07 Market Breakdown

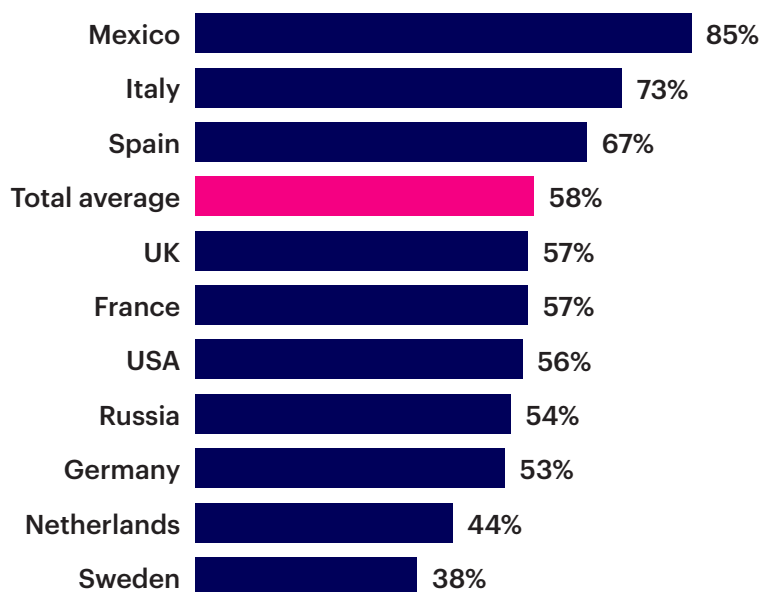


Have led more of an environmentally friendly lifestyle because of the coronavirus pandemic.

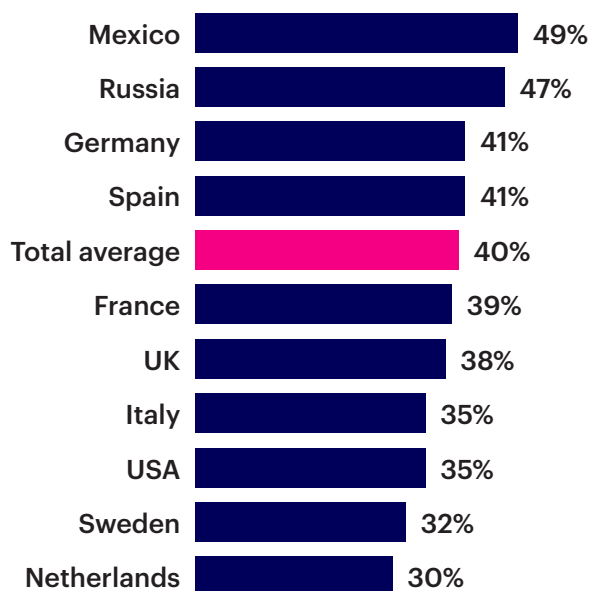


Feel somewhat or very optimistic that the actions they can take as individuals have a positive impact on the environment and ultimately help slow down global warming.

07 Market Breakdown



Have felt increasing concern for the environment since the start of the pandemic.



Have bought more environmentally friendly products.*

*(Base: Those who have lived more of an environmentally friendly lifestyle because of the pandemic)

08 Conclusions

Looking through the results of this research, the message we hear from consumers is one of optimism. Many of them have taken this moment in time to learn more about sustainability issues and have taken actions to lead a more environmentally friendly lifestyle. Consumers also show they are willing to commit more time to activities beneficial for the environment and are willing to pay a price premium for sustainable alternatives.

For Essity, a central finding is that hygiene and health has become an increasing priority for consumers, making it even more important for us as a global hygiene and health company to continue to lead the way with our sustainability work. The pandemic has underlined that the challenges societies meet are interlinked and it has highlighted the important role that Essity plays together with our customers, consumers, and other partners in increasing well-being for both people and the planet.

Consumers are prioritizing actions such as recycling, reducing waste and purchasing more environmentally friendly products, which is strongly aligned with our decision to commit to minimizing our environmental impact by making more from less, working for a circular society and continuing to provide innovative solutions that are both sustainable and increase well-being. This way Essity will provide value both for our customers and the planet.

At Essity, we commit to continue listening and learning from our consumers in our work to innovate for a more sustainable future. We also want to share our knowledge with our employees, partners, customers and the global community, to encourage continued dialogue, innovation and action towards a more sustainable future.

/ **Tuomas Yrjölä**
President, Global Brand Innovation & Sustainability



09 What the Experts Say



This very interesting study gives faith in the future. It shows that the environment and health are now among the top priorities of citizens and that they are ready to act, especially young people. The Covid-19 crisis has been a positive driver of change in this regard. Still, making decisions that reconcile these two priorities is sometimes complicated. For example, the pandemic has led to increased use of plastic containers and home delivery to limit the risk of contagion, which has harmful effects on the environment. Making the "right choices" is therefore not an easy task. Companies can help if they integrate these priorities into their practices and nudge consumers into choices that are better for the environment and society.

Marie-Eve Laporte

Associate Professor at IAE Paris - Sorbonne Business School
and expert in consumer behaviour



In the context of a global pandemic, it is important to consider how sustainability-related concerns stack up in the minds of consumers. The Green Response Survey shows that, while health is understandably a concern, interest in sustainability has not waned at all. Rather, this 'reset' has ushered in more sustainability awareness, engagement, and action. This is supported by the Forest Stewardship Council's own recent independent research that found biodiversity protection and responsible forestry to be top purchase drivers for paper products. As consumers look to convert values into action, metrics for the recognition of FSC's label and demand for independent certification have also increased strongly.

Jeremy Harrison

Chief Markets Officer, Forest Stewardship Council® (FSC®) International



The Green Response Survey 2021 from Essity helps bring to the fore how COVID-19 has changed people's perception of sustainability and their ability to have a positive impact. Such research remains critical in helping businesses meet the needs of both people and the planet, and it is pleasing to see more than half of respondents feel their own individual choices can help slow down global warming. Our job now, as the consumer goods industry, is to help make it easier for people to live more sustainable lives by doing business the right way - sourcing more sustainably, reducing plastic and food waste, securing more sustainable food systems and reducing carbon emissions, etc. We believe our eight CEO-led Coalitions of Action, with the support of members like Essity, will help us to deliver.

Wai-Chan Chan

Managing Director of the Consumer Goods Forum

10 Methodology

This independent study was carried out via digital questionnaires, with the help of survey provider CINT. Data collection took place between the 1st to the 13th of July 2021, in 10 countries. The total sample size was 10 012 respondents. National quotas were used to obtain accurate representation of age and gender.

The markets surveyed were Sweden, Germany, France, UK, Italy, Netherlands, Spain, Russia, Mexico and USA.

The survey has been planned, monitored, and analysed by United Minds.

Essity is a leading global hygiene and health company dedicated to improving well-being through products and services. Sales are conducted in approximately 150 countries under the leading global brands TENA and Tork, and other strong brands, such as JOBST, Leukoplast, Libero, Libresse, Lotus, Nosotras, Saba, Tempo, Vinda and Zewa. Essity is listed on Nasdaq Stockholm.

For more information visit www.essity.com.



A young child with curly hair, wearing a blue and black striped long-sleeved shirt and black pants, is watering a small plant with a yellow watering can. The watering can has a red handle and a red flower-shaped nozzle. Water is spraying out of the nozzle. The child is standing on a forest floor covered with dry leaves and moss. In the background, another child in a pink hoodie is partially visible. The overall scene is outdoors in a forest setting.

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