

A photograph of a man with grey hair and a beard, smiling warmly while holding two young children. The child on the left is a toddler with curly hair, wearing a blue striped shirt and bright yellow rain boots. The child on the right is a baby, wearing a light purple patterned outfit and blue rain boots. The man is wearing a white long-sleeved shirt under a dark jacket and blue jeans. They are standing in a lush green forest with trees and foliage in the background.

# Green Response Report UK 2021



**essity**



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## 03 Introduction

**“The COVID-19 pandemic caused huge disruption to everyday life – and led to a questioning and rethinking of the way we live and work.”**

Health concerns were suddenly paramount, but many people were also thinking more deeply about the impact their lifestyles have on the natural environment.

At Essity we continuously conduct research among the general public to understand behaviours and attitudes related to hygiene and health; and how they impact the world around us. This report is based on findings of two research studies conducted in June and October 2021. The first sought to understand how changes forced upon people during the pandemic impacted their attitudes to the environment and sustainability. The second was conducted in the light of political and economic developments that will increase the cost of living in the UK; and asked how this might affect consumers' ability and inclination to keep trying to live in a more sustainable way.

Our findings show that UK consumers are more conscious of their environmental impact and are optimistic about the potential positive impacts of actions they take as individuals. They are also prepared to pay a premium for environmentally sustainable goods and services.

But it is also clear that they are also anxious about the rising cost of living. With the costs of energy, food and other goods increasing, alongside planned tax rises, can people still afford to spend more time and money seeking environmentally sustainable goods and services? Our findings show that many are determined to try.

For Essity, it is vital to understand how we can support and enable our customers and consumers 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 useful. We welcome you to learn more about our sustainability work at [Essity.com](https://www.Essity.com).



**Kevin Starr**  
Country Manager, UK and ROI

*K. Starr*

## 04 Key Findings: Summary & Analysis

**As a leading hygiene and health company, Essity has produced this report to enhance our understanding of how the COVID-19 pandemic affected consumers' ability and ambition to lead more environmentally friendly lifestyles.**

It is based on two research projects that have produced valuable insights into how the attitudes and behaviours of UK consumers have been influenced by the impact of lockdowns and other restrictions – and how their desire to adopt more sustainable lifestyles may be affected by increases in the cost of living.

This report reveals the following **key findings**:



**Consumers are optimistic about making a difference.**

More than six out of ten UK consumers (61%) believe they can make a positive difference to the environment through the actions they take as individuals.



**Consumers are committed to sustainability.**

Following changes driven by the pandemic, almost one in two people (45%) say they now have a more environmentally-friendly lifestyle. More than nine out of ten (91%) of those who are now living more sustainably intend to keep doing so when life returns to normal.



**Consumers will pay a sustainability premium.**

Despite the increased cost of living consumers are willing to spend an average of 10% extra for more environmentally friendly goods and services. More than three-quarters (77%) are worried about a rise in the cost of living – yet 70% still say they will keep trying to live sustainably.



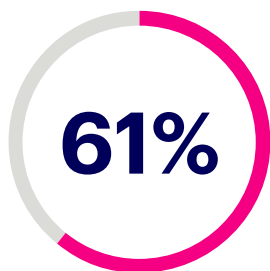
**Health is now a higher priority.**

Almost eight out of ten people (78%) say their health and that of family and friends is more important to them now than before the pandemic. Consumers are also willing to pay the biggest sustainability premium (12%) for environmentally friendly health and hygiene products and services.



## 05 Key Findings: Statistics

Living through the COVID-19 pandemic lockdowns and restrictions gave people in the UK space and time to think about the impact their lifestyles have on the environment and on each other. **Many are now trying to live in a more sustainable way** and are prepared to pay a premium for more environmentally friendly goods and services, despite increases in the cost of living.



of adults in the UK are **optimistic about the actions they take as individuals** having a positive impact on the environment.

### 10% sustainability premium

UK consumers would be willing to pay an average of 10% more for environmentally friendly goods and services.

70%

of consumers say they will keep, or will start, trying to live in a sustainable way, despite an expected increase in the cost of living – but that includes 51% who will try to do this in a cheaper way.



78%

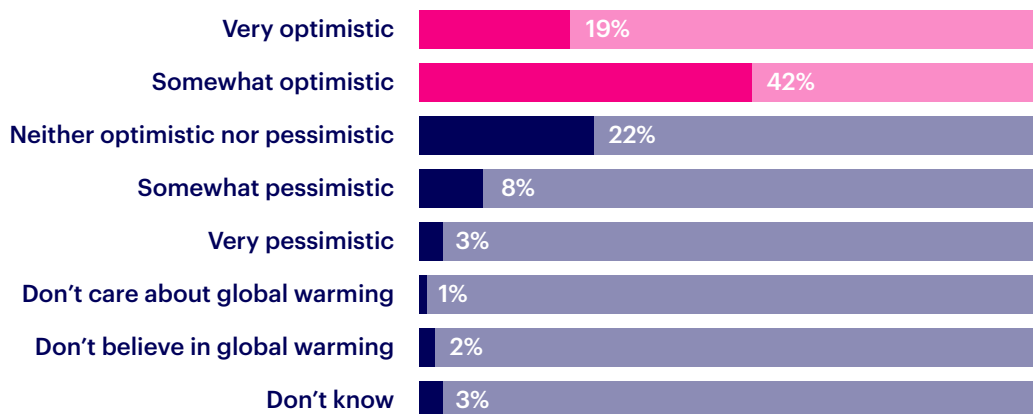
of consumers say **health has become more important to them** since the start of the pandemic.



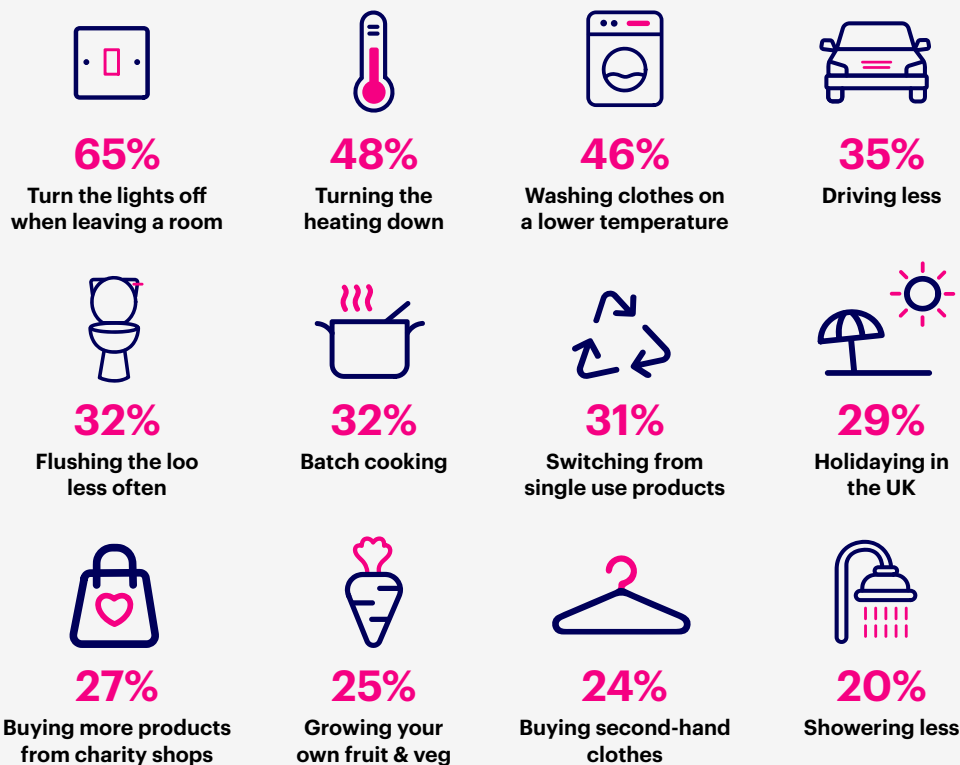


## 06 Taking Action

61% of adults in the UK are optimistic about the actions they take as individuals having a positive impact on the environment and **ultimately helping to slow global warming.**



We asked consumers **which measures they have adopted** to try to save money as well as to help the environment during the past year.



## 07 Taking Action

Compared with before the start of the pandemic, **UK consumers now spend an average 54 minutes and 31 seconds longer** each week doing things they think actively benefit the environment.



**29%**

spend an extra  
hour



**14%**

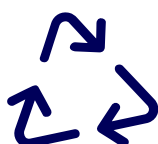
spend an extra  
90 minutes



**15%**

spend at least  
two hours more

Among consumers who have **made an effort to live more environmentally friendly** since the start of the pandemic:



**65%**

recycle more  
than before



**61%**

have reduced their  
food waste



**56%**

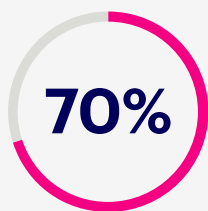
are cycling or  
walking more

Consumers recognise their own power in helping the environment: 42% think the general public has the most power and influence to slow down global warming, while 41% think world leaders and politicians are most powerful and influential. Almost one in four (22%) picked supermarkets and retailers.

They are less impressed by the ability of world leaders to take the most decisive action to combat global warming: only 19% trust them to do so. The most trusted figures are scientists, cited by almost one in three consumers (31%) as most likely to take decisive action.

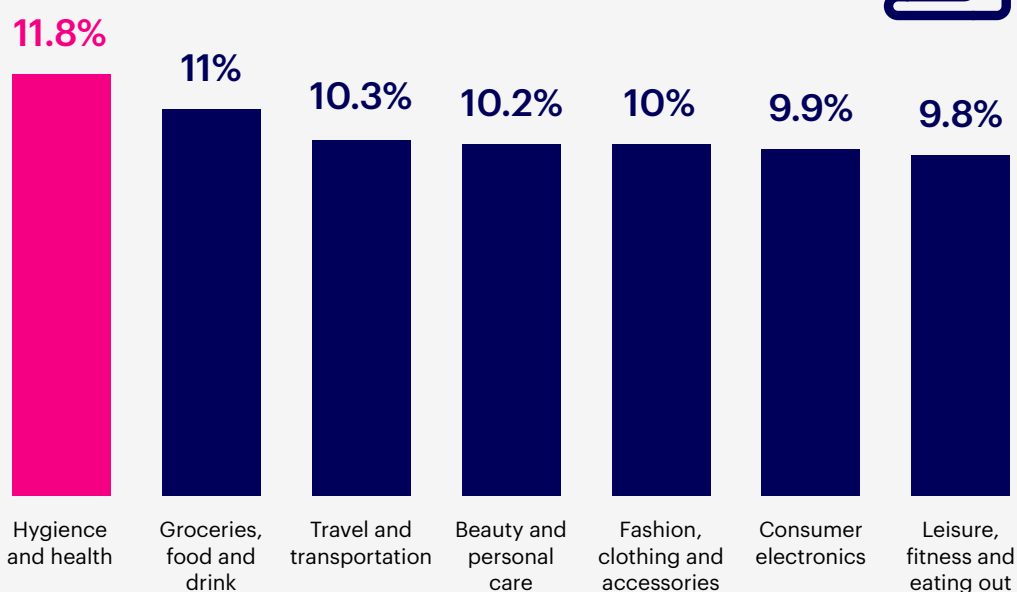
## 08 The Sustainability Premium

Consumers are **willing to pay more for products and services that they know are sustainable** – although an anticipated rise in the cost of living and increased anxiety about finances has reduced the average sustainability premium people are willing to pay from 11.7% in June 2021 to 10% now.



of UK consumers say environmentally friendly or **sustainably sourced products are a priority for them** – but that figure has fallen from 75% who said this was the case in June 2021.

Nearly eight out of ten consumers (78%) say their health, along with that of their families and friends has become more important to them since the start of the pandemic – **and the Sustainability Premium is highest for hygiene and health related products and services**, with consumers willing to pay 12% more for environmentally friendly health and hygiene products.





## 09 Rising Cost of Living

Consumers' attitudes and concerns have been **influenced by recent government announcements and forecasts concerning the cost of living**, with National Insurance contributions set to increase in 2022, recent increases in the cost of energy, fuel and food; and the headline rate of inflation increasing.



77%

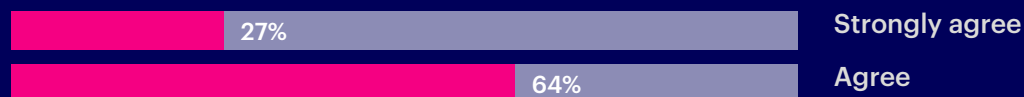


More than three-quarters of respondents are worried about the increase in the cost of living. More than six out of ten (62%) have concerns about affording basic bills and household goods during the coming months. Almost one in three consumers (30%) say they are already struggling financially.

"I will be tightening my purse strings and watching every penny over the coming months"



"I want to be eco-friendly, but I'm fearful the increasing cost of living make such a thing impossible"



"The general rise in the cost of living means I cannot spend more on sustainable options when shopping"



## 10 Rising Cost of Living

The share of consumers **willing to pay extra for environmentally friendly products** and services has fallen since announcements were made in autumn 2021 about the probable increase in the cost of living.



**-9%**

Groceries, food  
and drink



**-14%**

Health and  
hygiene



**-10%**

Beauty and  
personal care



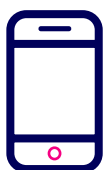
**-13%**

Fashion,  
accessories  
and clothing



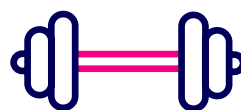
**-7%**

Travel and  
transportation



**-10%**

Consumer  
electronics



**-6%**

Leisure, fitness  
and eating out



**+18%**

None of  
the above



## 11 Rising Cost of Living

Despite the rise in the cost of living, **70% of consumers say they will keep, or will start, trying to live in a more sustainable way** – although this includes 51% who say they will try to find cheaper ways to do so.

“Yes - I’ll try to still be sustainable from now on despite needing to spend more on items.”

12%

“Yes - I’ll try to be sustainable, but will look for cheaper sustainable alternatives.”

51%

“Yes - I wasn’t that sustainable before but want to start now despite the potential cost.”

7%

“No - I was never that sustainable before and have no plans to start so now.”

16%





## 12 Conclusions

**“Looking through the results of this research, the messages we hear from consumers are of engagement and optimism – despite increases in the cost of living. Many have taken time during the pandemic to learn more about sustainability issues and are now trying to live in a more environmentally friendly way.”**

Consumers have shown they are willing to commit more time to activities beneficial for the environment and that they are willing to pay a price premium for sustainable alternatives. They have told us that the pandemic has helped to make health and hygiene a more important priority for them and that the premium they are willing to pay for health and hygiene products is higher than for other goods and services.

But with recent increases in the cost of living, which seems certain to continue to rise further during 2022, consumers have also made it clear that they cannot guarantee their good intentions will be translated into tangible action at present, because they may not be able to afford to increase their spending to benefit the environment. Even so, a majority are still willing to try to find ways to live more sustainably.

The focus for manufacturers must be on developing sustainable products and solutions that do not come at a premium cost, to help consumers follow through on their good intentions to live more sustainably. Essity will continue to listen to consumers and to innovate to try to help everyone to follow more environmentally sustainable lifestyles. We look forward to working with our customers, our employees, partners and others to keep working towards a more sustainable future.



**Kevin Starr**  
Country Manager, UK and ROI

*K. Starr*

## 13 What the Experts Say



“With the recent focus on the COP26 negotiations and the role of Governments in addressing the climate and biodiversity crises, it is easy to forget that we all need play our part. It is encouraging that this research found that most UK consumers believe they can make a positive difference to the environment through the actions they take as individuals and that, despite the increased cost of living, many are willing to pay more for environmentally friendly goods and services. It is, of course, important that consumers can identify such products. Our own research found that 73% of those questions recognise the FSC logo and 71% were aware that buying FSC-certified products is good way to ensure the protection of forests and preserve wildlife and we hope that companies such as Essity will continue to label and promote their FSC-certified products.”

**Rosie Teasdale**

Executive Director, FSC UK



“The Green Response Report 2021 is full of positivity for the future and highlights how important environmental and personal health are to citizens following the Covid-19 crisis. It is fantastic that 61% of UK adults are optimistic about the actions they take as individuals, this shows the growing public willingness to change in ways that have a more positive impact on the environment. The steps that individuals take are so important, but we also need change happening at the top too, and that includes industry. Manufacturers have a responsibility to be leading the way when it comes to making the right choices by people and the planet. When bold and big steps are taken by industry it makes it easier for the public to be more sustainable, because at the end of the day, if eco-friendly options aren’t accessible, how are people going to switch to them?”

**Ella Daish**

Environmental Activist



“The report shows a very encouraging outlook for behaviour change among individuals. The lockdowns removed a lot of ‘noise’ from our daily lives, which has allowed individuals to take more notice of the impacts of their actions on the environment and devote more time to making positive changes. In order for this optimism and willingness to continue, it is our role as key players in the supply chain to remove the confusion from sustainable decision-making ready for when the ‘noise’ of normal life returns. It is in our gift to empower individuals in making the right choices for the planet.”

**Anna McArdle**

Sustainability Manager, Bunzl



## 14 Methodology

This research is based on two independently conducted surveys. The first was carried out via digital questionnaires on behalf of Essity by United Minds with the assistance of survey provider CINT. Data collection took place between July 1 and July 13 2021. The total sample size was 1,000 adults living in the UK. The data was matched to nationally representative figures for age and gender.

The second survey was conducted by OnePoll between September 29 and October 13 2021. The total sample size was 2,000 adults, including 100 who were living in or near major UK cities.

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](http://www.essity.com).





