

THE ORKLA SUSTAINABLE LIFE BAROMETER

Executed by Ipsos for Orkla

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January 2021



FINNISH EDITION

GAME CHANGERS



ATTITUDES TOWARDS SUSTAINABILITY

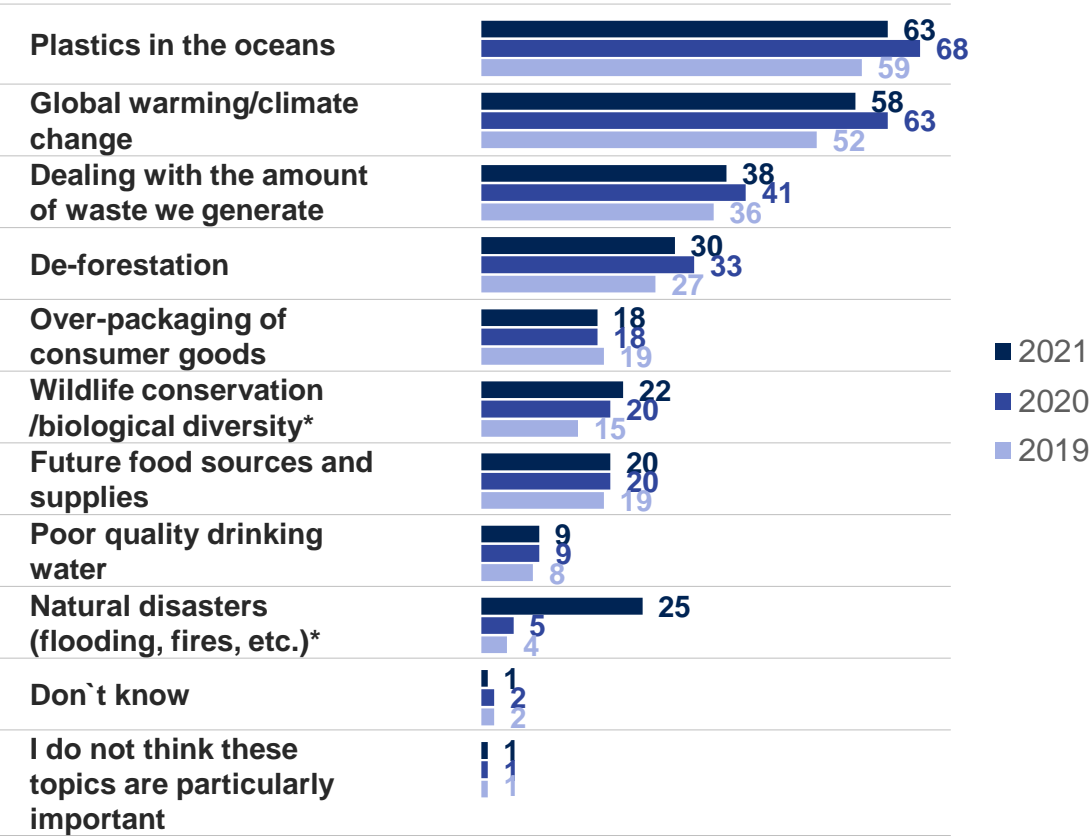
2

In your view, what are the three most important environmental topics we are facing today?

That is, the top environmental topics you feel should receive the greatest attention?

- Plastics in the oceans
- Global warming/climate change
- Dealing with the amount of waste we generate
- De-forestation
- Over-packaging of consumer goods
- Wildlife conservation / *biological diversity (2021)*
- Future food sources and supplies
- Poor quality drinking water
- *Natural disasters (flooding, fires, etc.) (2021)*

MOST IMPORTANT ENVIRONMENTAL TOPICS



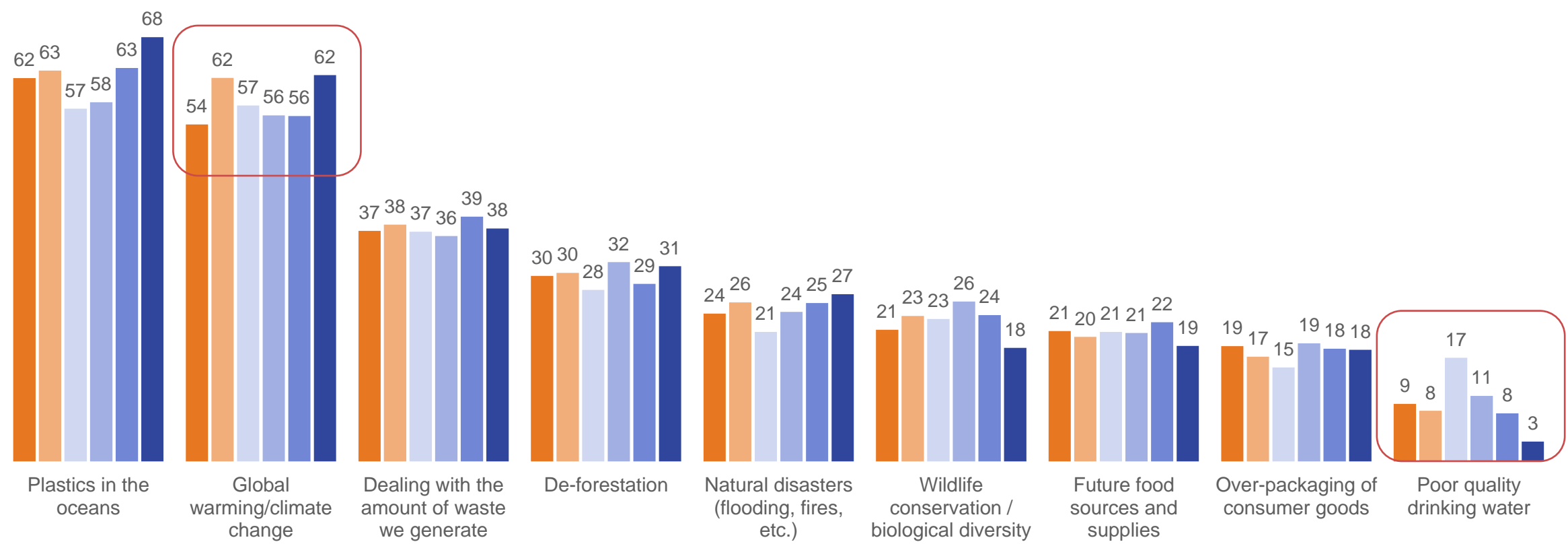
Plastics in the ocean and global warming are still the most important topics for our Swedish respondents in 2021. But the expansion of “natural disasters” (changed from “flooding” in 2021) grabs quite a few percentage points from the top topics in this question, going up 20pp. This comes in at 5th most important topic this year, compared to being last the previous year. This clearly reveals that the scope of this topic was missing in earlier iterations of our survey and that the data has a stronger explanatory power than before. Newly expanded is also “wildlife conservation”, where we have added the aspect of “biological diversity” to the alternative.

The next slides will show demographic and geographic breakdowns. Women are more focused on global warming than men, and the oldest age group is also overrepresented. The younger age groups have a lot more focus on the quality of drinking water. The Helsinki area has a significant higher focus on wildlife conservation.

Base: All, N=1000 Finland
Q1.1. In your view, what are the three most important environmental topics we are facing today? That is, the top environmental topics you feel should receive the greatest attention?

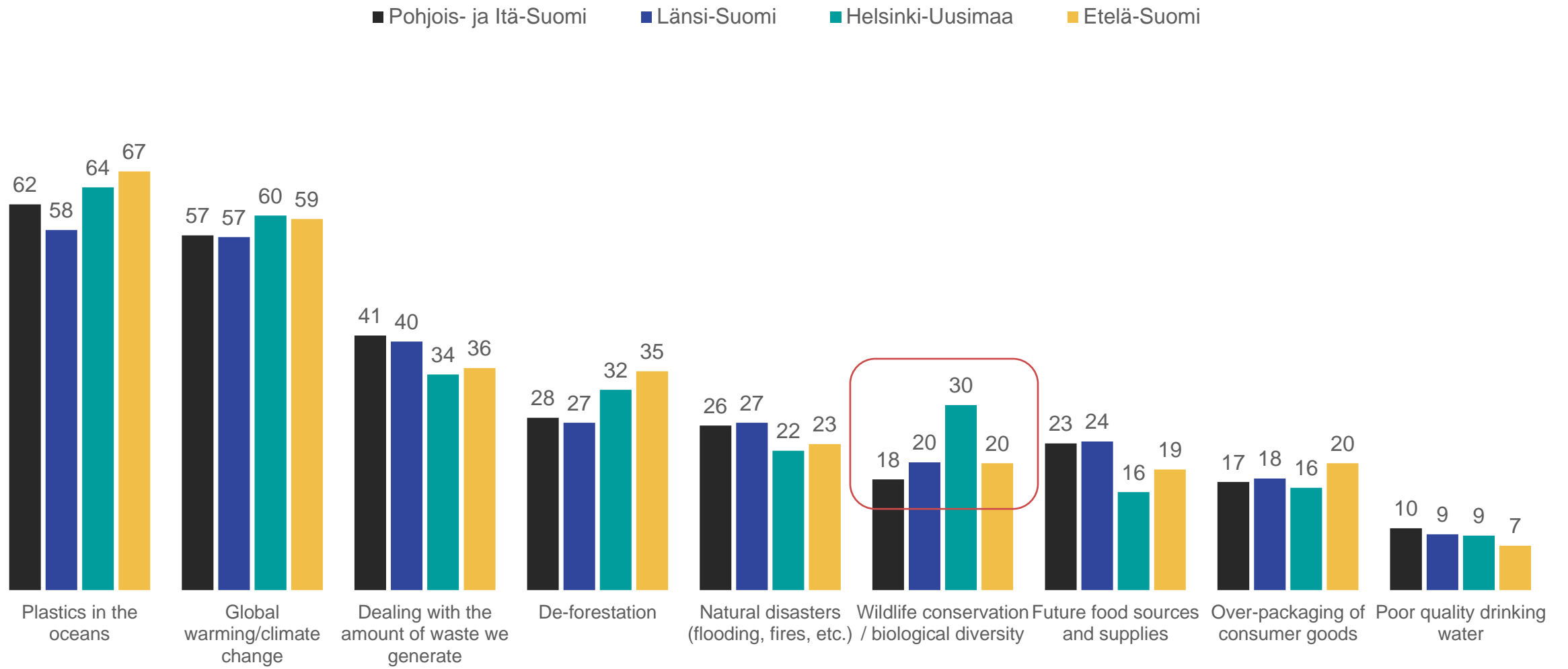
DEMOGRAPHIC BREAKDOWN 2021

Male Female 18 - 29 30 - 44 45 - 59 60 +



Base: All, N=1000 Finland
Q1.1. In your view, what are the three most important environmental topics we are facing today? That is, the top environmental topics you feel should receive the greatest attention?

GEOGRAPHIC BREAKDOWN 2021



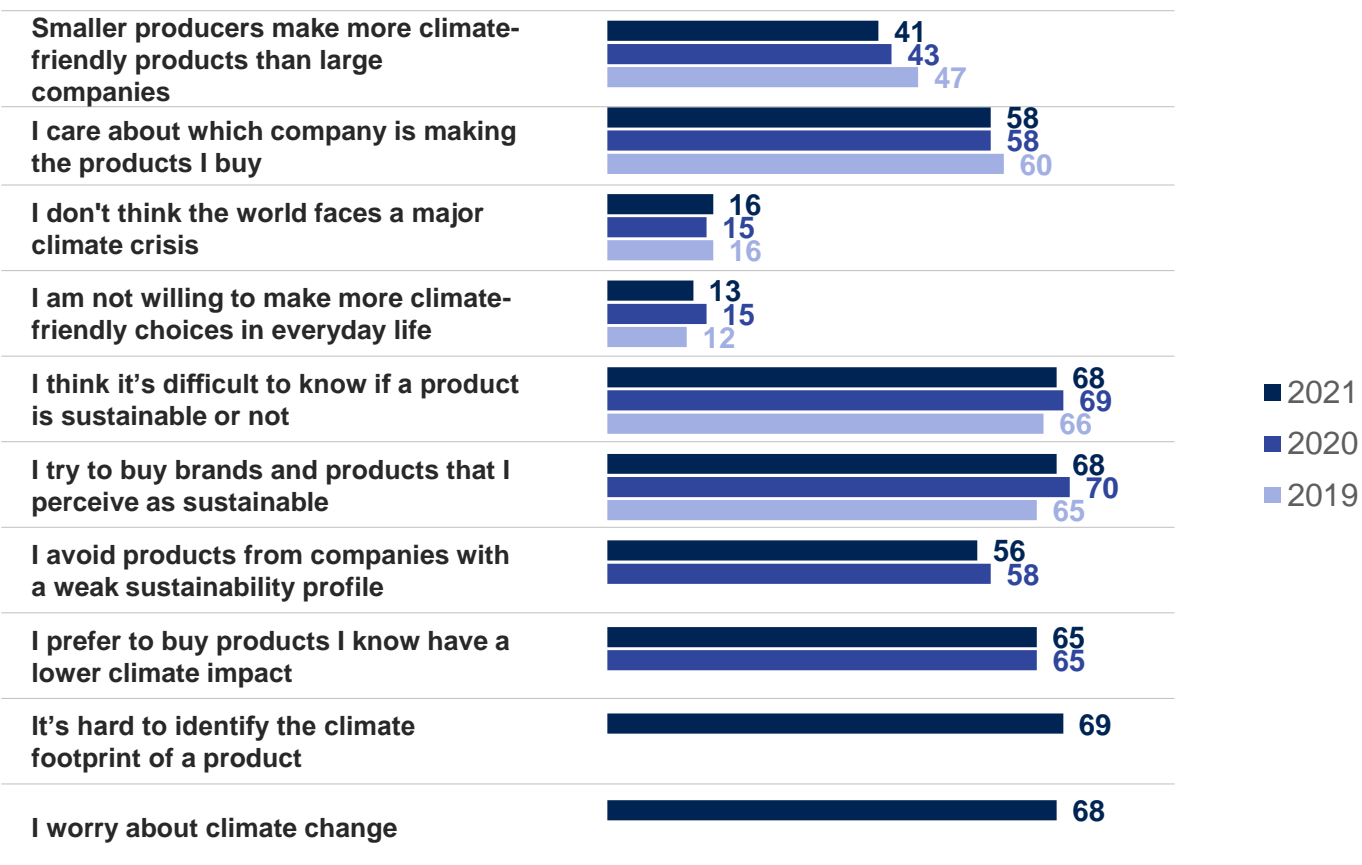
Base: All, N=1000 Finland
Q1.1. In your view, what are the three most important environmental topics we are facing today? That is, the top environmental topics you feel should receive the greatest attention?

To what extent do you agree or disagree with these statements?

- Smaller producers make more climate-friendly products than large companies
- I care about which company is making the products I buy
- I don't think the world faces a major climate crisis
- I am not willing to make more climate-friendly choices in everyday life
- I think it's difficult to know if a product is sustainable or not
- I try to buy brands and products that I perceive as sustainable
- I avoid products from companies with a weak sustainability profile
- I prefer to buy products I know have a lower climate impact
- It's hard to identify the climate footprint of a product (2021)
- I worry about climate change (2021)

Scale 1-5

CLIMATE FRIENDLY PRODUCTS AND BRANDS

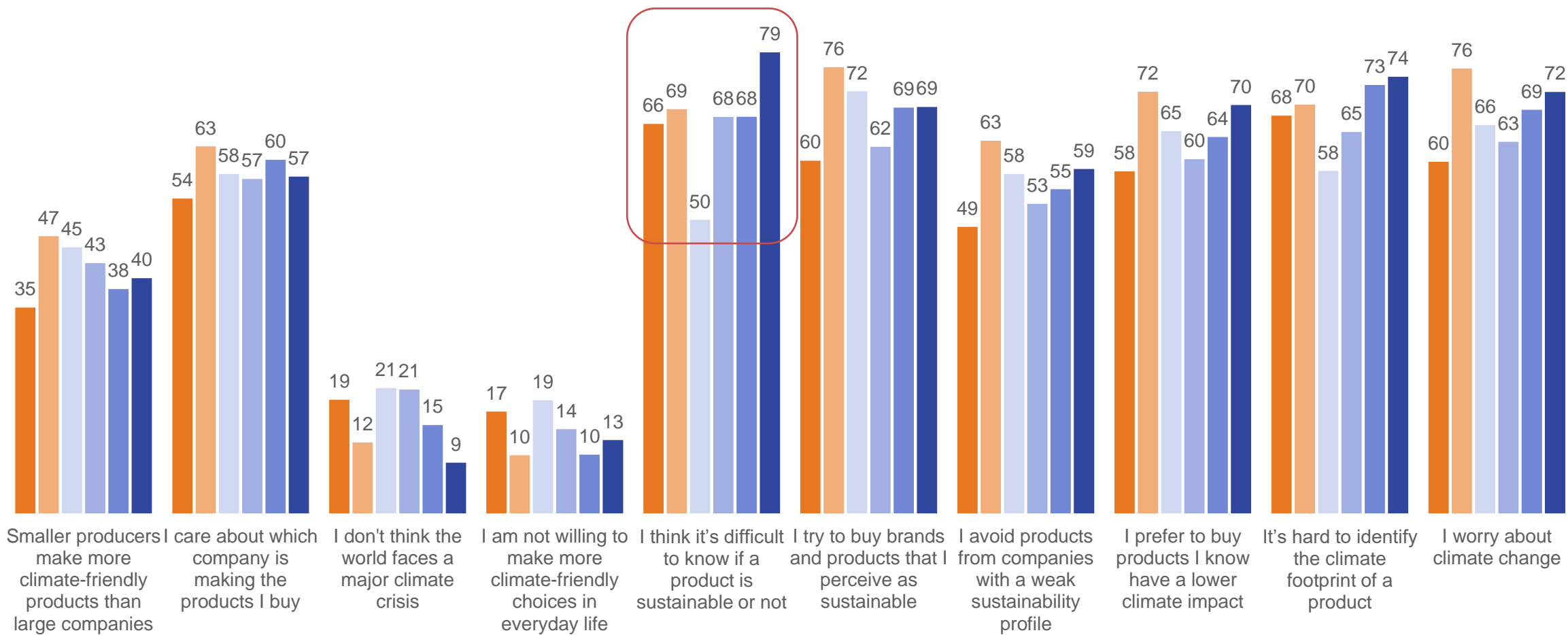


Base: All, N=1000 Finland
Q1.2 To what extent do you agree or disagree to these statements?

- 41% of the sample believe that smaller producers make more climate-friendly products than larger companies. The number has been decreasing, but it is still the highest in our survey.
- There are 68% who agree that they try to buy brands and products they perceive as sustainable. But the exact same share say its hard to know if a products is sustainable or not. The oldest age group especially struggle with this.
- We also see that 68% worry about climate change, this is about average in our survey.

DEMOGRAPHIC BREAKDOWN 2021

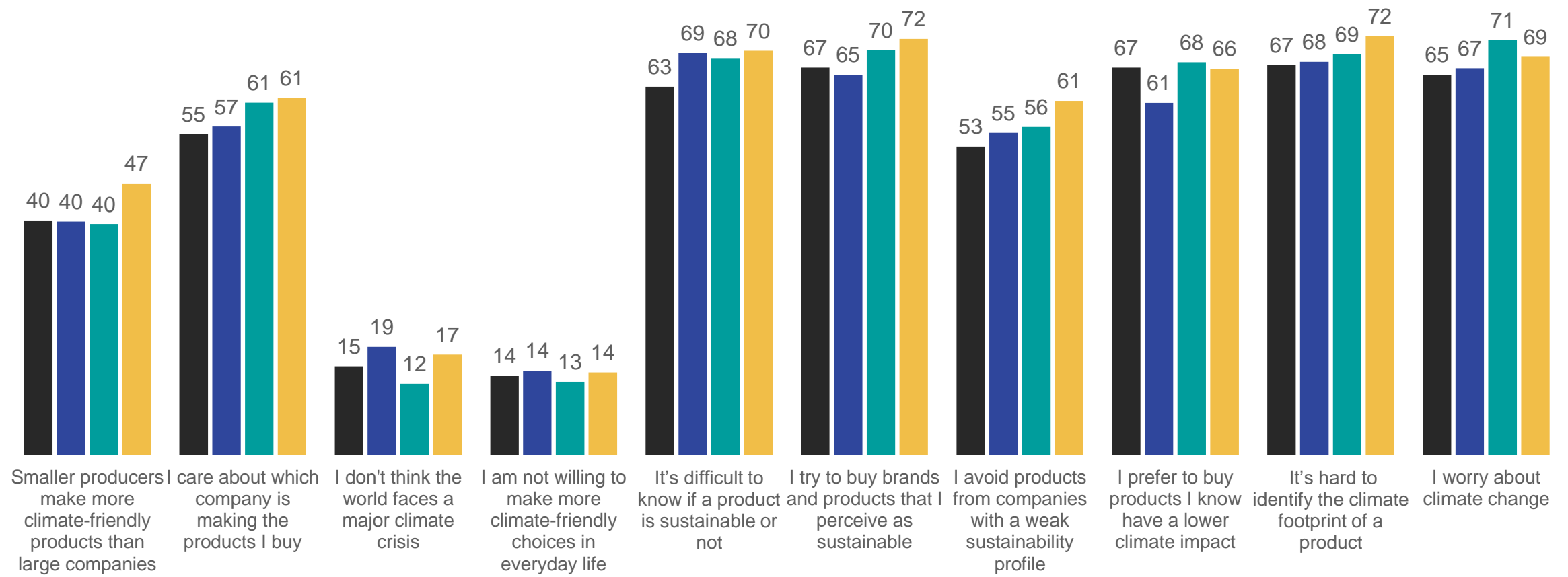
Male Female 18 - 29 30 - 44 45 - 59 60 +



Base: All, N=1000 Finland
Q1_2. To what extent do you agree or disagree to these statements?

GEOGRAPHIC BREAKDOWN 2021

■ Pohjois- ja Itä-Suomi ■ Länsi-Suomi ■ Helsinki-Uusimaa ■ Etelä-Suomi



Base: All, N=1000 Finland
Q1_2. To what extent do you agree or disagree to these statements?

BEHAVIOUR AND CLIMATE TOPICS

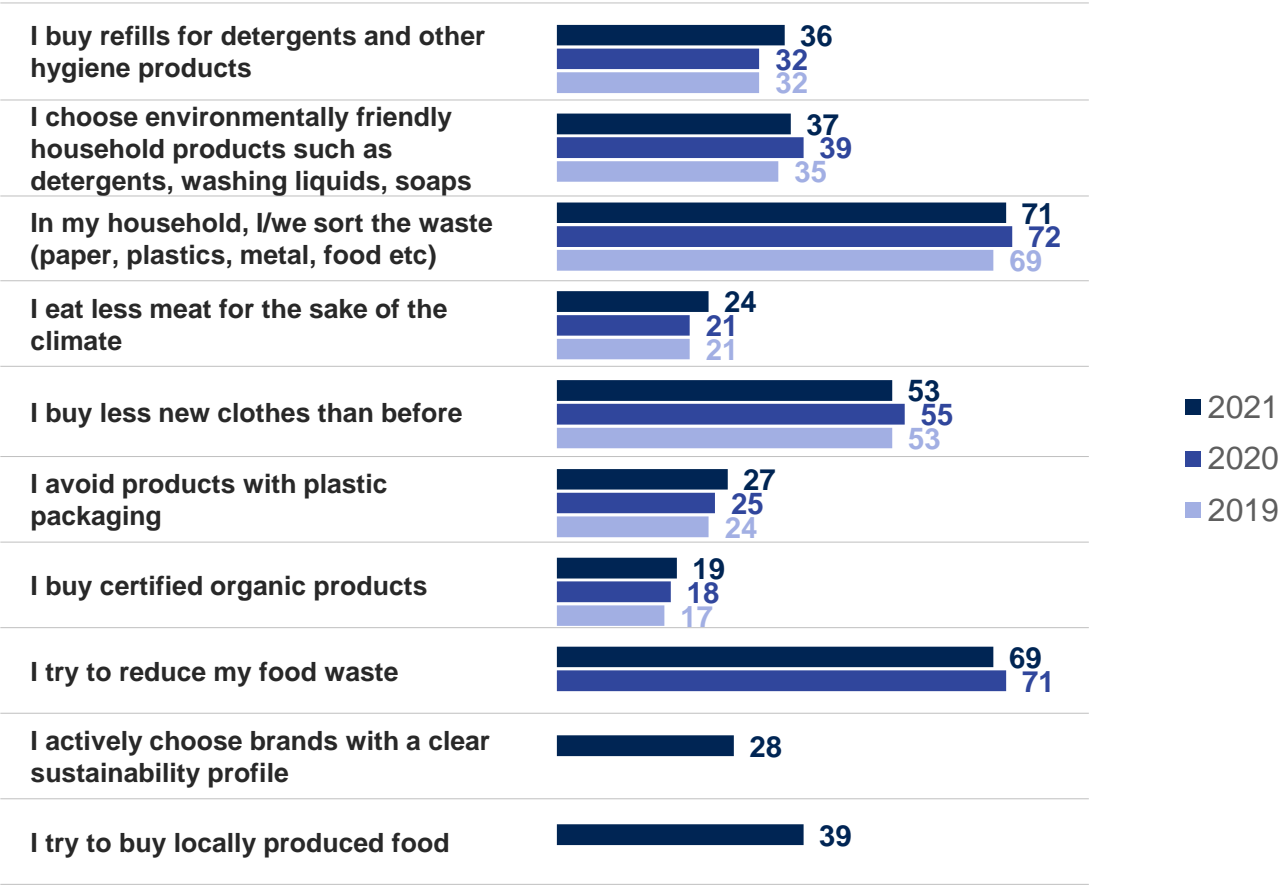
3

To what extent do you feel the statements below reflects your own behavior?

- I buy refills for detergents and other hygiene products
- I choose environmentally friendly household products such as detergents, washing liquids, soaps
- In my household, I/we sort the waste (paper, plastics, metal, food etc.)
- I eat less meat for the sake of the climate
- I buy less new clothes than before
- I avoid products with plastic packaging
- I buy certified organic products
- I try to reduce my food waste
- I actively choose brands with a clear sustainability profile (2021)
- I try to buy locally produced food (2021)

Scale 1-5

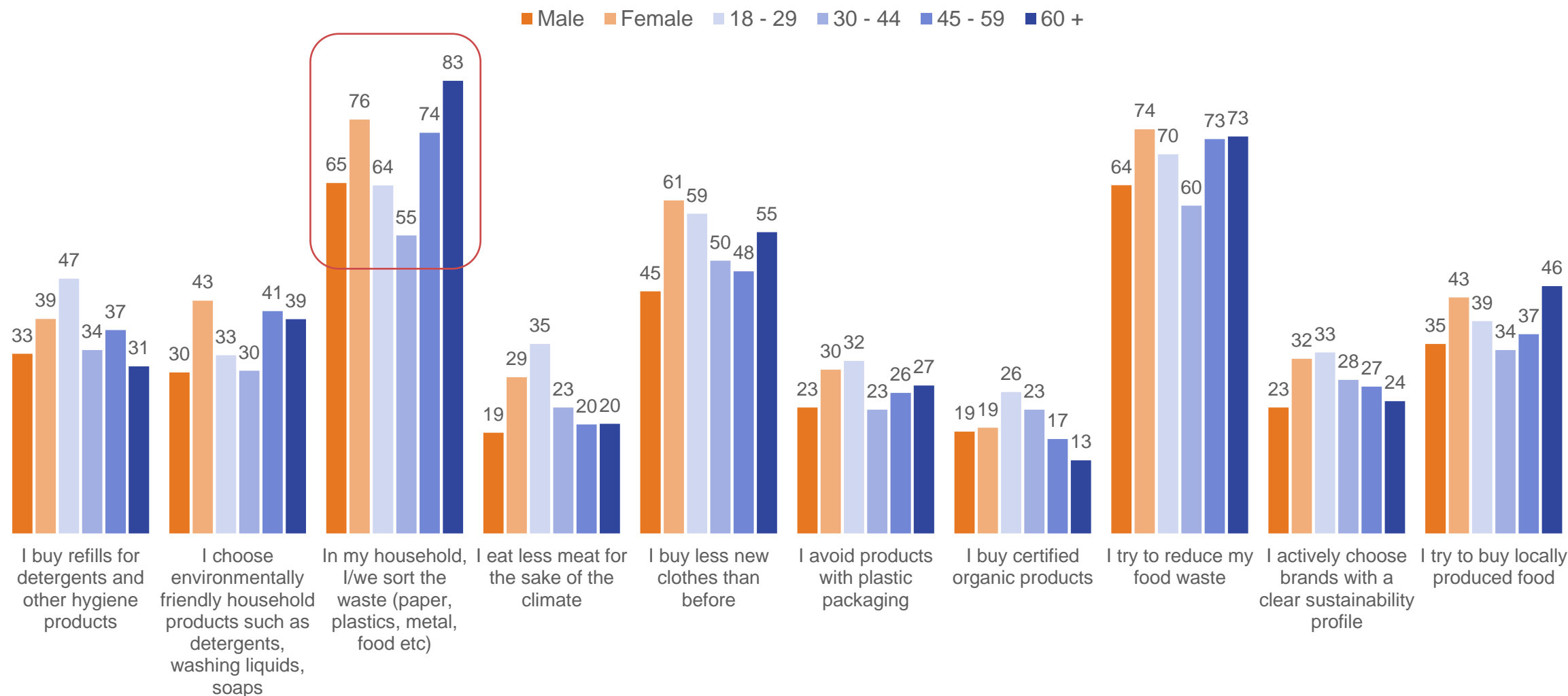
CLIMATE FRIENDLY ACTIONS



Base: All, N=1000 Finland
Q2.3 To what extent do you feel the statements below reflects your own behavior?

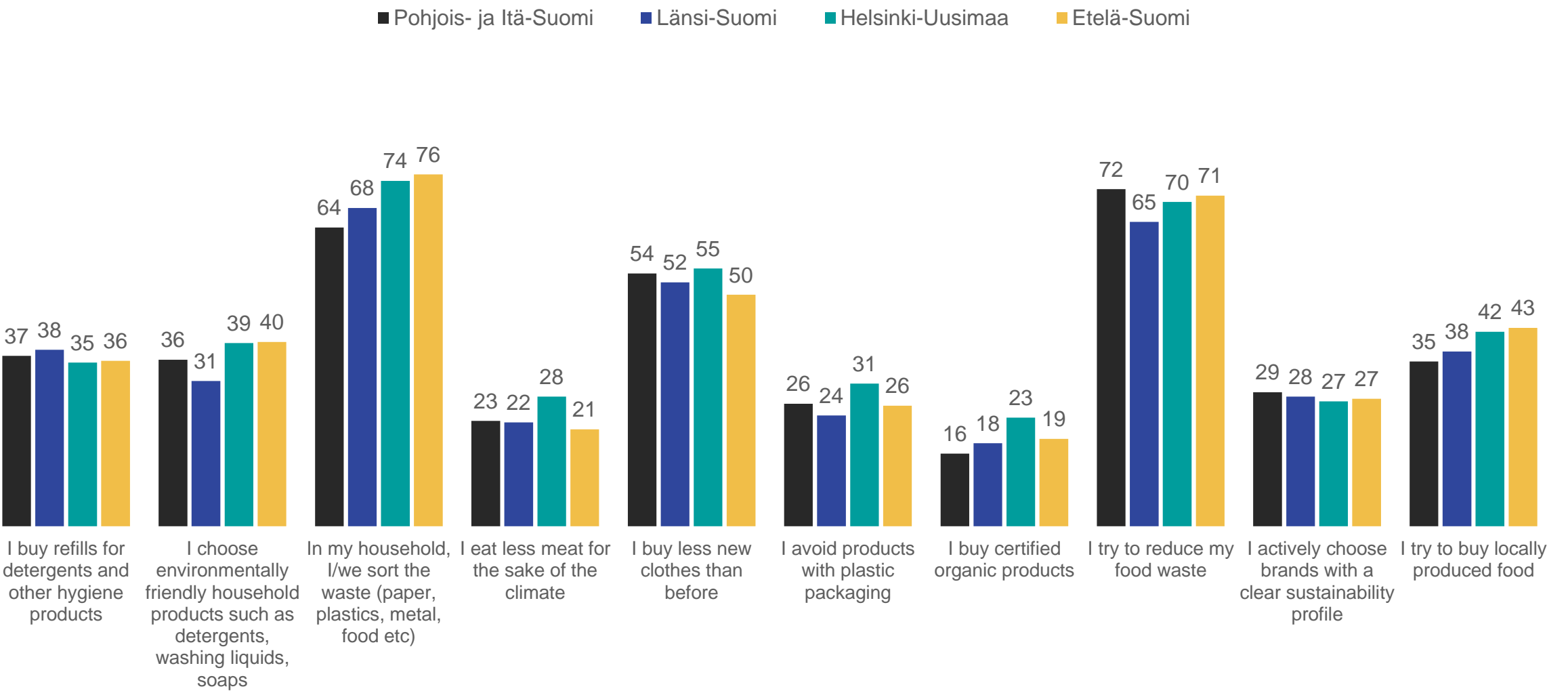
- We have two interesting movements this year. More people say they buy refills than before (up 4pp). And 3pp rise in the group who say they eat less meat for the sake of the climate. These are both led by the youngest consumers.
- Also there seems to be a positive trend in that more people try to avoid products with plastic packaging.
- We have two new statements, one focusing on if people try to buy locally produced food. The numbers for Finland are about average on both statements.
- Women are in general overrepresented in these numbers. Also, the elderly seem to more actively recycle their waste than younger generations.

DEMOGRAPHIC BREAKDOWN 2021



Base: All, N=1000 Finland
Q2.3 To what extent do you feel the statements below reflects your own behavior?

GEOGRAPHIC BREAKDOWN 2021

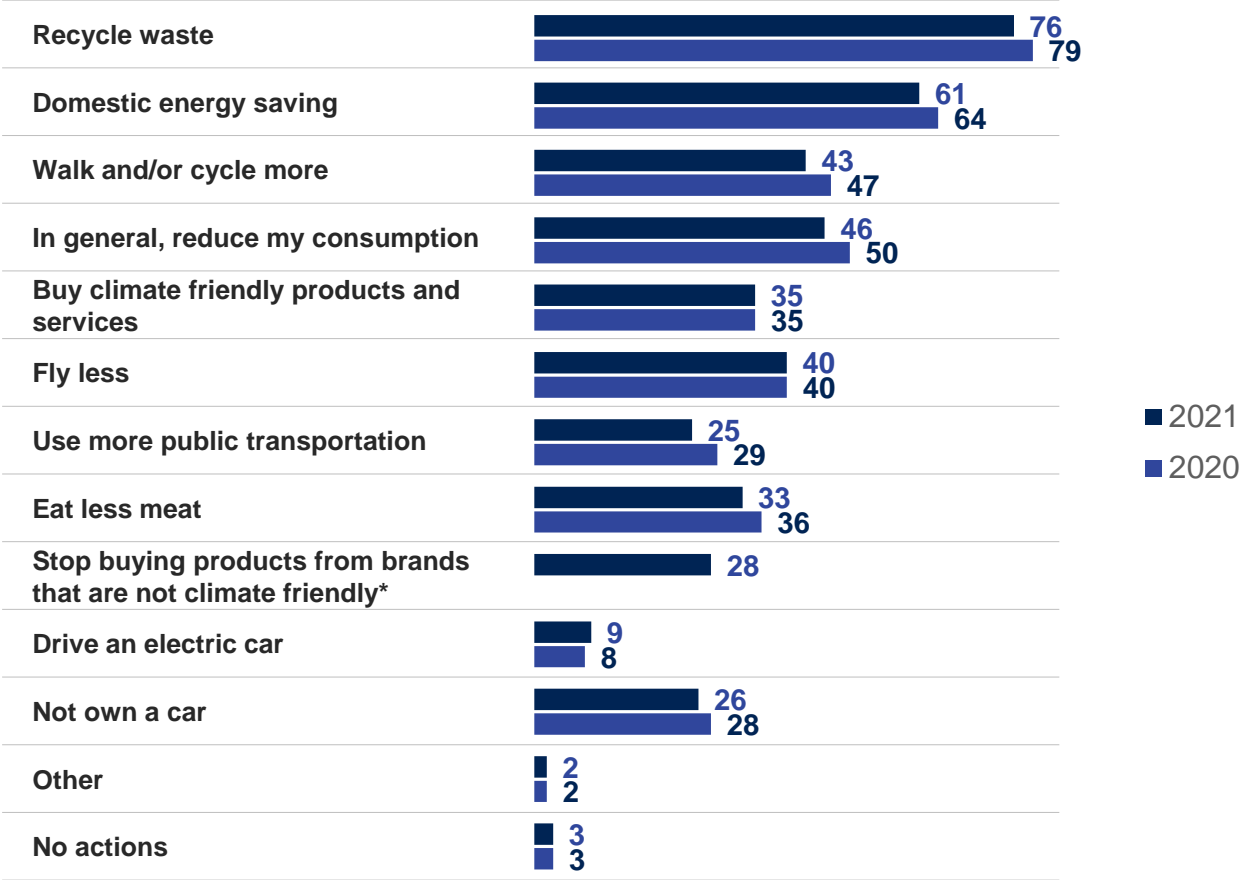


Base: All, N=1000 Finland
Q2.3 To what extent do you feel the statements below reflects your own behavior?

What personal actions are you willing to do to reduce your climate emissions in your daily life?

- Recycle waste
- Domestic energy saving
- Walk and/or cycle more
- In general, reduce my consumption
- Buy climate friendly products and services
- Fly less
- Use more public transportation
- Eat less meat
- Stop buying products from brands that are not climate friendly (2021)
- Drive an electric car
- Not own a car

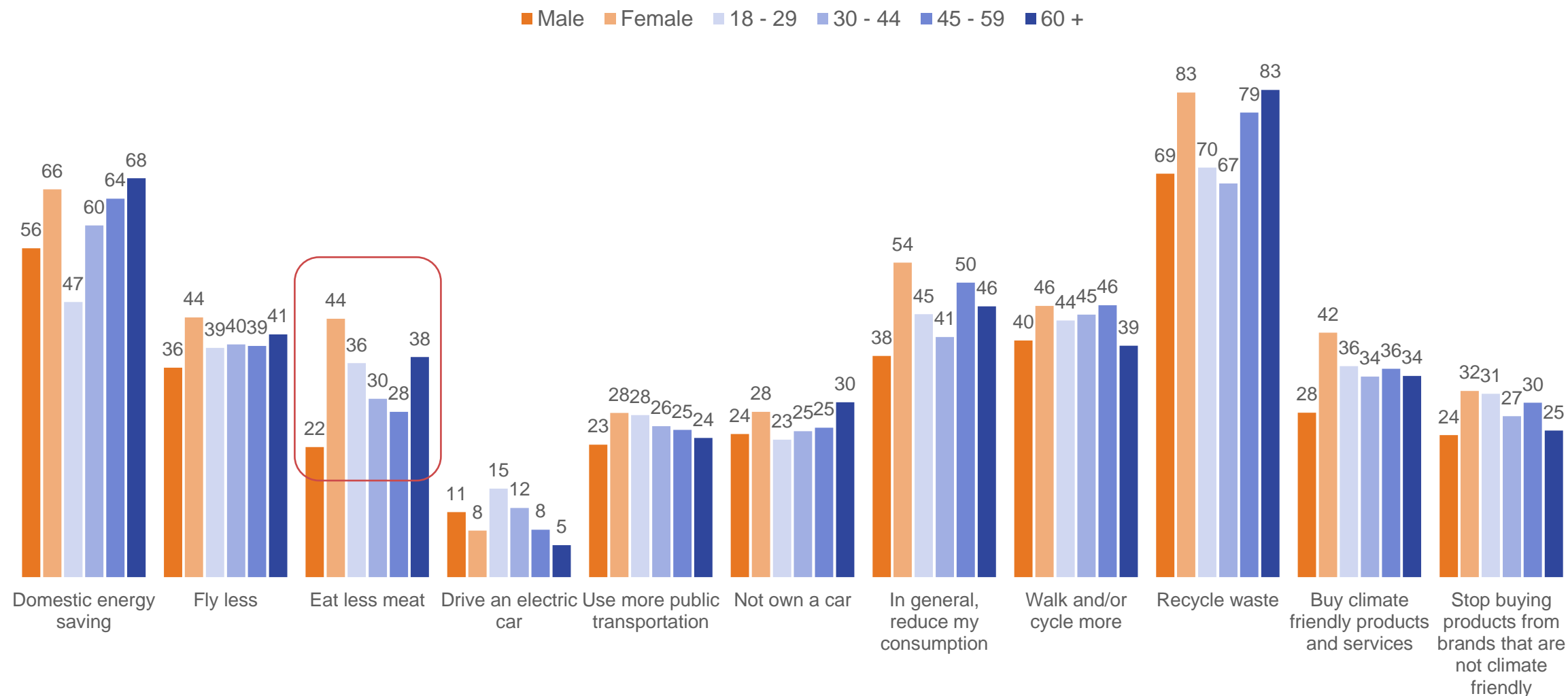
WILLINGNESS TO TAKE ACTION



- We have seen a little positive movement in the actions people say reflect their behavior today, but for the willingness to do more we see a quite negative trend, as most of these answers have a decline.
- This year we have added a new alternative to see if people are willing to stop buying products from brands that are not climate friendly. 28% agree to that statement, this is a bit behind the other Nordic countries.
- In Finland a lot more people say they are willing to fly less (40%), compared to 26% in the whole survey.
- Women are twice as likely to be willing to eat less meat than what men are.

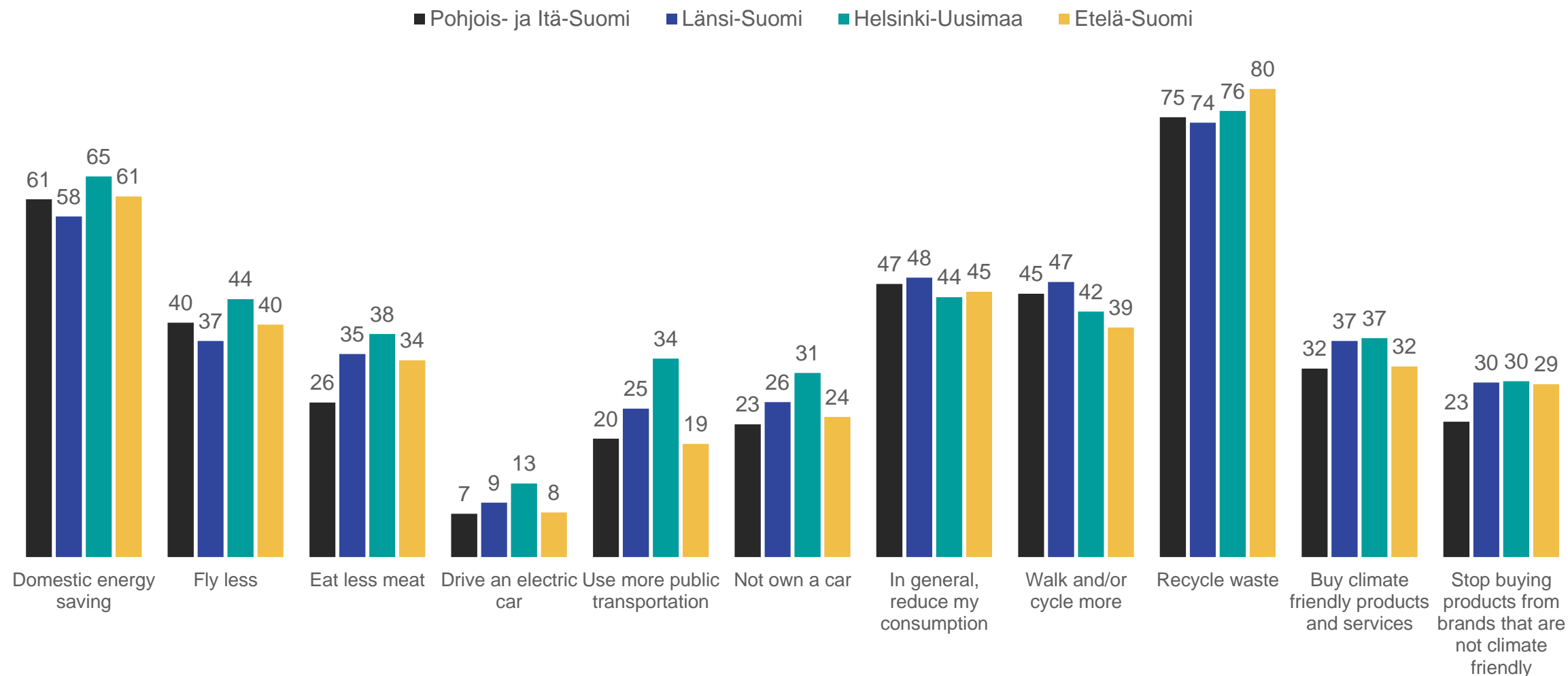
Base: All, N=1000 Finland
Q2_4. What personal actions are you willing to do to reduce your climate emissions in your daily life?

DEMOGRAPHIC BREAKDOWN 2021



Base: All, N=1000 Finland
Q2.3 To what extent do you feel the statements below reflects your own behavior?

DEMOGRAPHIC BREAKDOWN 2021



Base: All, N=1000 Finland
Q2.3 To what extent do you feel the statements below reflects your own behavior?

PACKAGING

4



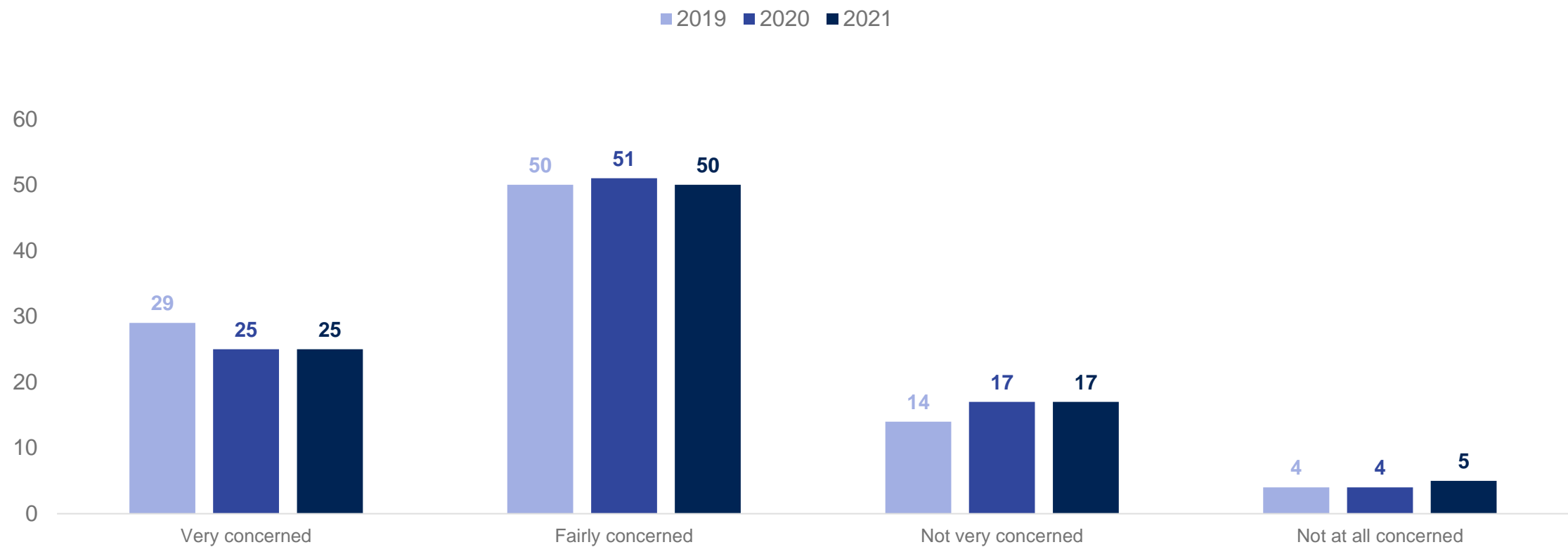
Recently, there have been discussions about the environmental consequences of plastic packaging not made from recycled materials or that is not recycled after use.

How concerned, if at all, would you say you are about this topic?

Scale 1-4

ENVIROMENTAL CONCERN DROPPING

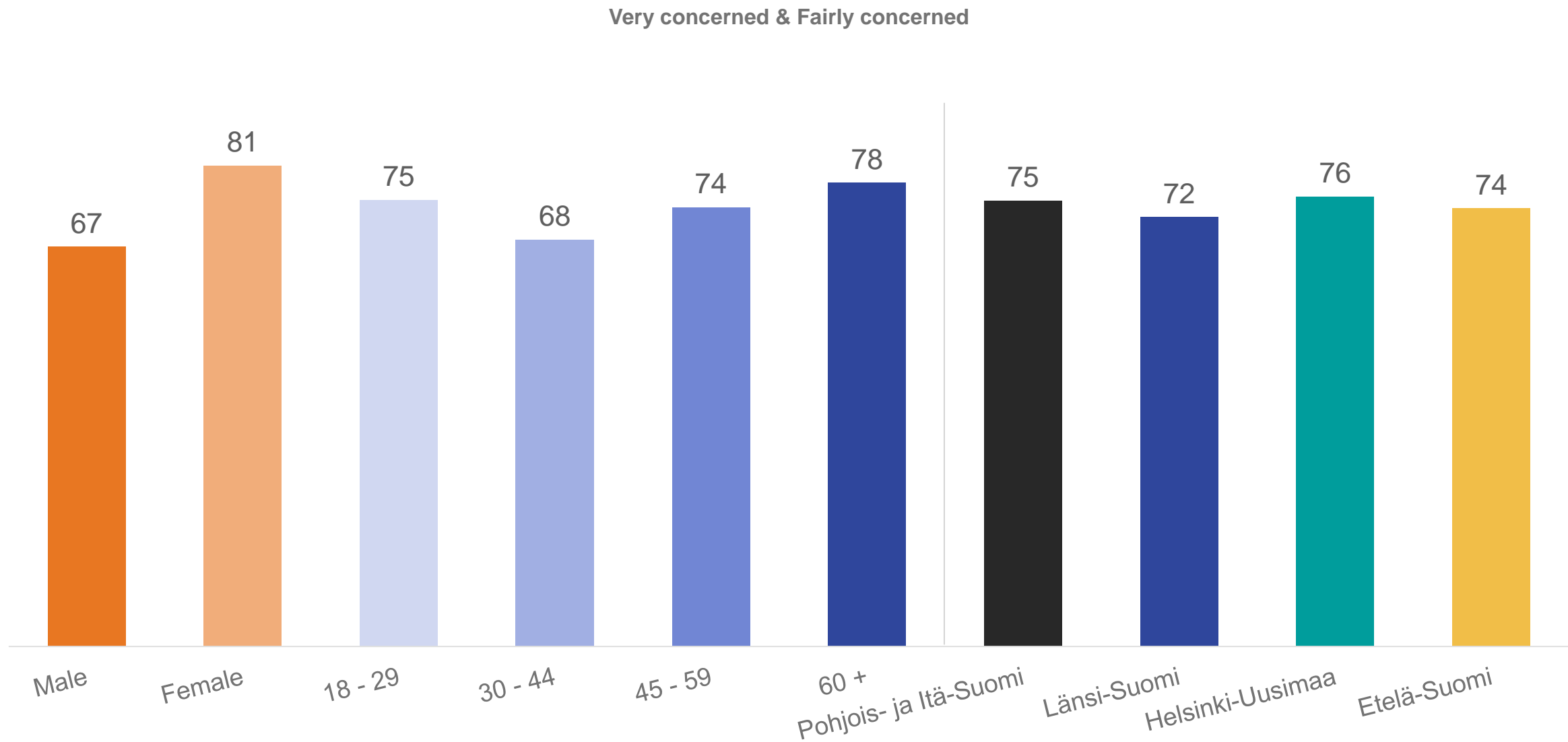
The total concern for environmental consequences of plastic packaging dropped quite a bit in 2020 but remains very stable this year. The level of concern is above average and the highest level among the Nordic countries. Women are significantly more concerned than men.



Base: All, N=1000 Finland

Q3.4 Recently, there have been discussions about the environmental consequences of plastic packaging not made from recycled materials or that is not recycled after use. How concerned, if at all, would you say you are about this topic?

DEMOGRAPHIC AND GEOGRAPHIC BREAKDOWN

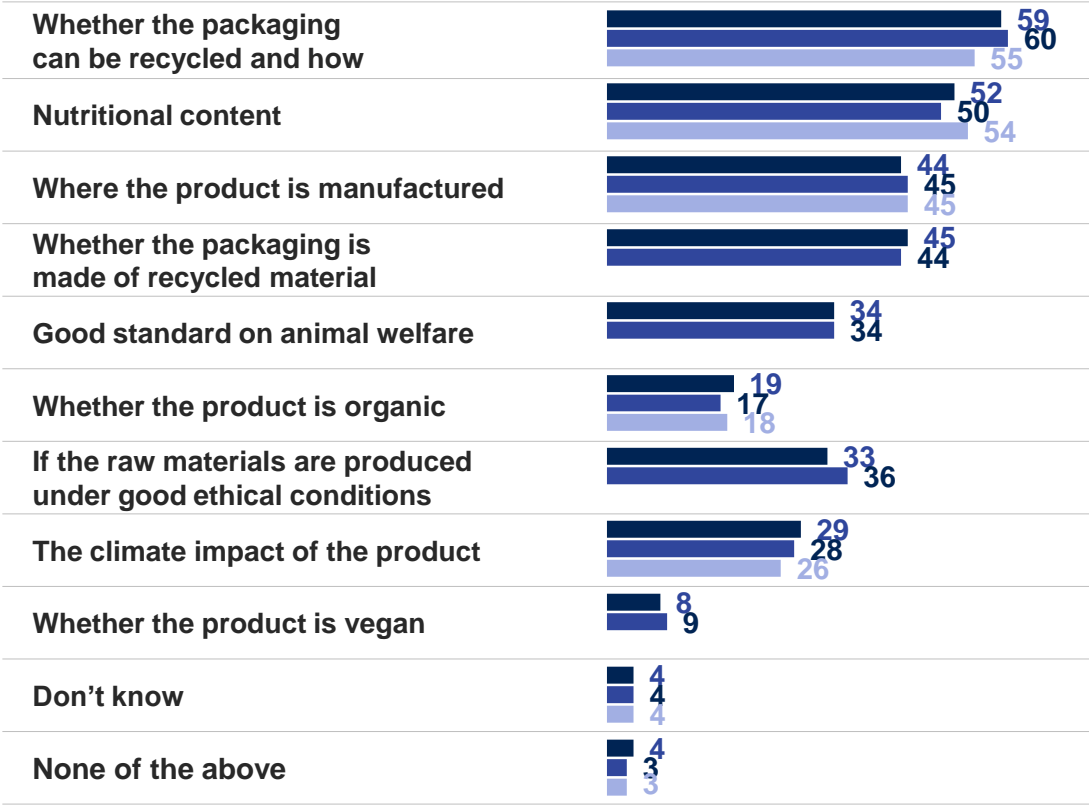


Base: All, N=1000 Finland
Q3.4 Recently, there have been discussions about the environmental consequences of plastic packaging not made from recycled materials or that is not recycled after use.
How concerned, if at all, would you say you are about this topic?

Which if any of the following information are important to you on product packaging?

- Whether the packaging can be recycled and how
- Nutritional content
- Where the product is manufactured
- Whether the packaging is made of recycled material
- Good standard on animal welfare
- Whether the product is organic
- If the raw materials are produced under good ethical conditions
- The climate impact of the product
- Whether the product is vegan

WHAT INFORMATION IS THE MOST IMPORTANT TO INCLUDE ON PRODUCT PACKAGING?

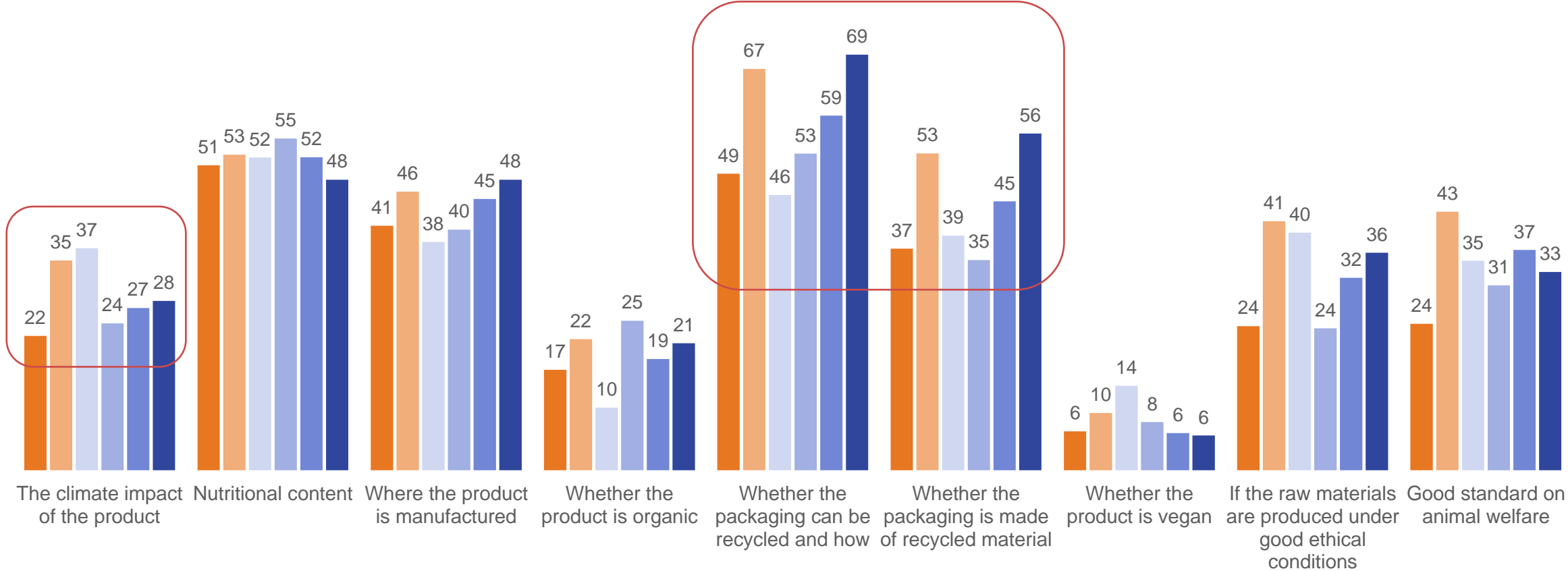


- The most important information to include on product packaging are still recycling instructions, nutritional content and where it was manufactured.
- There is a bit of movement overall, but nothing significant.
- The climate impact of the product is particularly important to the youngest age groups. This has had a positive trend, but the changes are so small that we can't make any conclusions yet. This share is also a bit behind the Nordic average.
- The older the respondent, the more important recycling information will be.

Base: All, N=1000 Finland
Q3_5. Which if any of the following information are important to you on product packaging?

DEMOGRAPHIC BREAKDOWN 2021

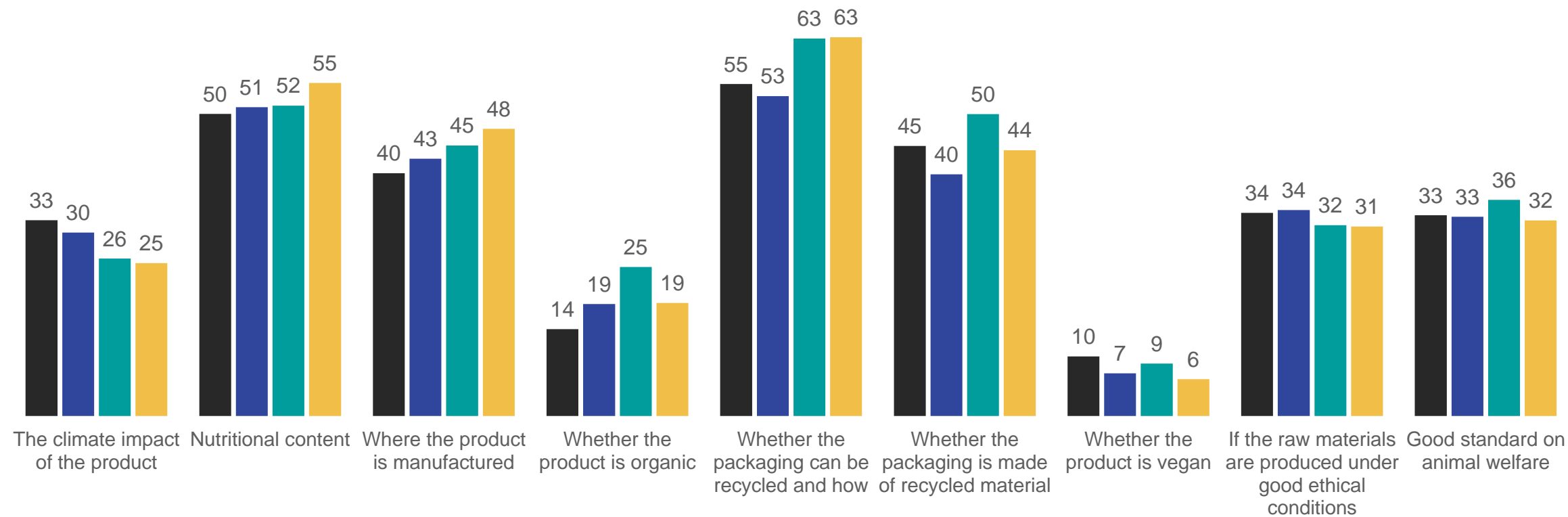
Male Female 18 - 29 30 - 44 45 - 59 60 +



Base: All, N=1000 Finland
Q3_5. Which if any of the following information are important to you on product packaging?

GEOGRAPHIC BREAKDOWN 2021

■ Pohjois- ja Itä-Suomi ■ Länsi-Suomi ■ Helsinki-Uusimaa ■ Etelä-Suomi



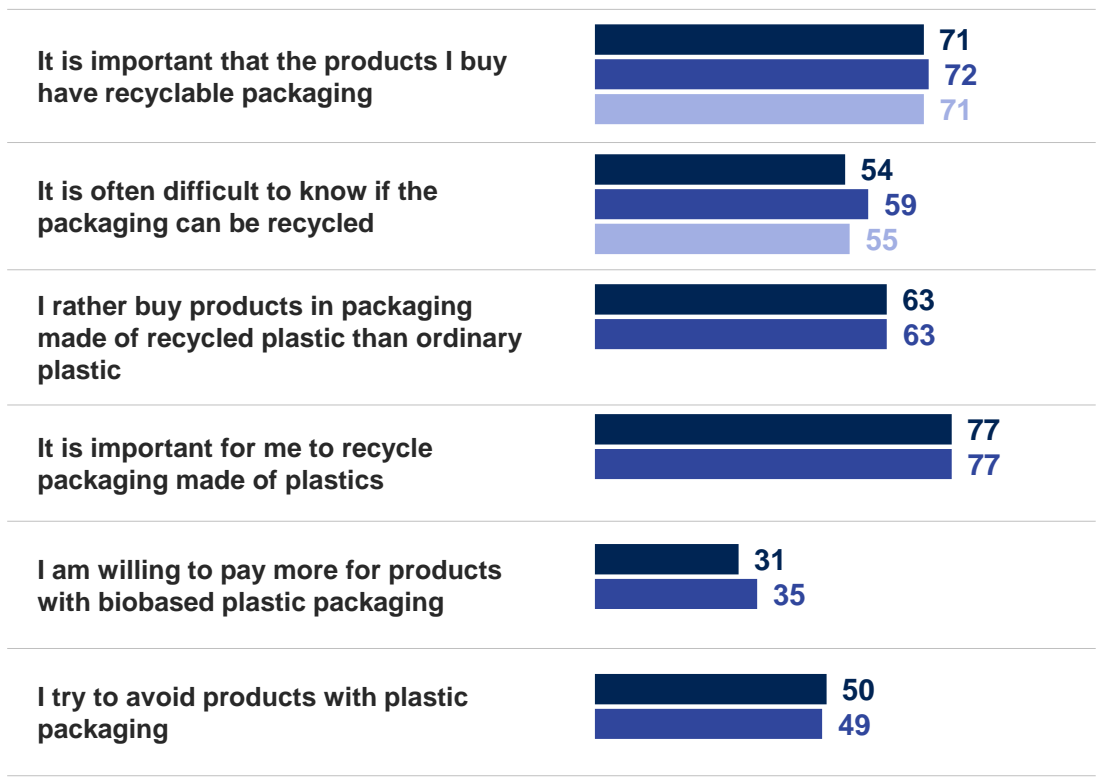
Base: All, N=1000 Finland
Q3_5. Which if any of the following information are important to you on product packaging?

To what extent do you agree or disagree to the following statements?

- It is important that the products I buy have recyclable packaging
- It is often difficult to know if the packaging can be recycled
- I rather buy products in packaging made of recycled plastic than ordinary plastic
- It is important for me to recycle packaging made of plastics
- I am willing to pay more for products with biobased plastic packaging
- I try to avoid products with plastic packaging

Scale 1-5

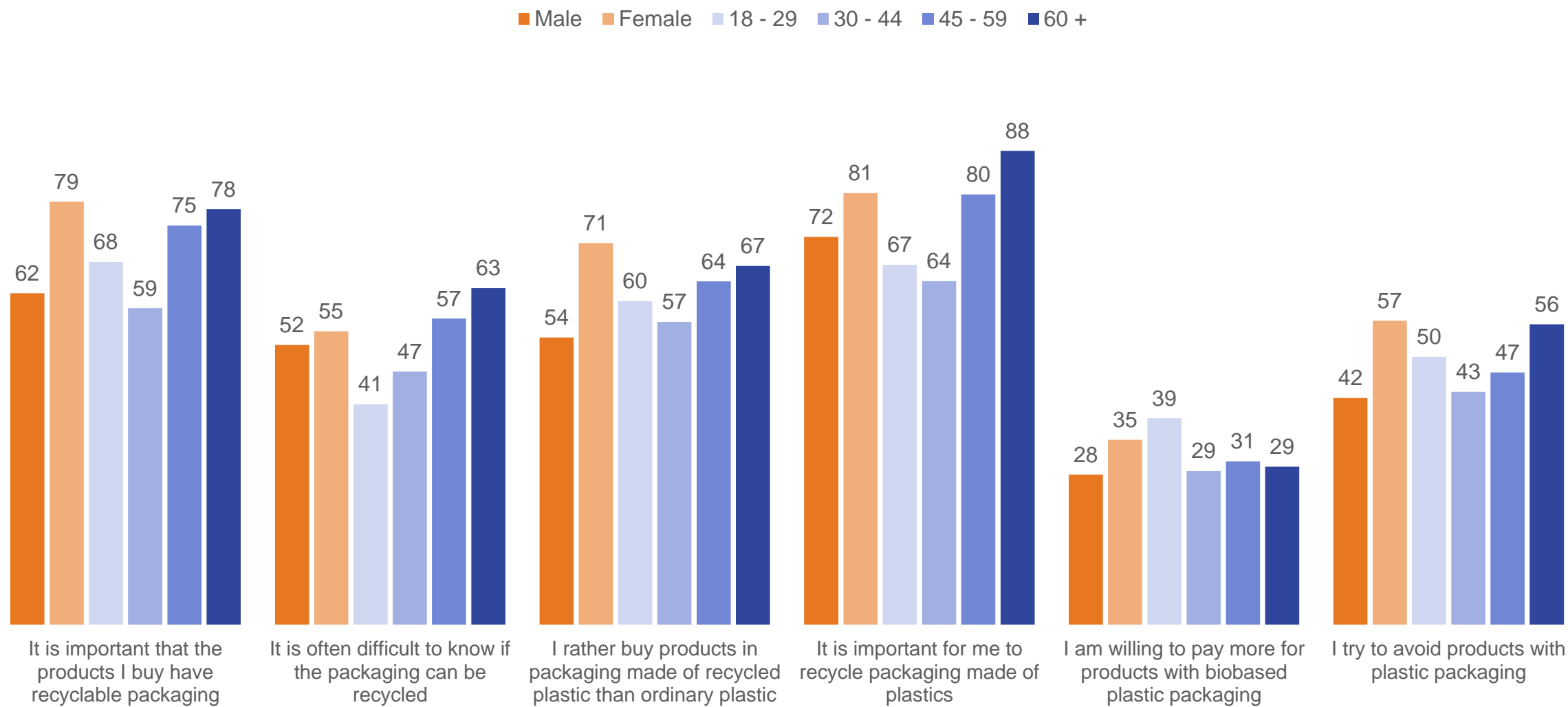
IMPORTANCE OF RECYCLABLE PACKAGING SHRINKING.



- There are less people now who feel like it is difficult to know if the packaging can be recycled, a positive trend. We are only down to the level of 2019, so not much of a difference. The oldest age group do struggle the most though.
- The numbers are remarkable similar to the last years overall.
- Interesting to note that Finland has by far the highest share of people saying they try to avoid products with plastic packaging. Sweden has the second highest value at 41% this year.

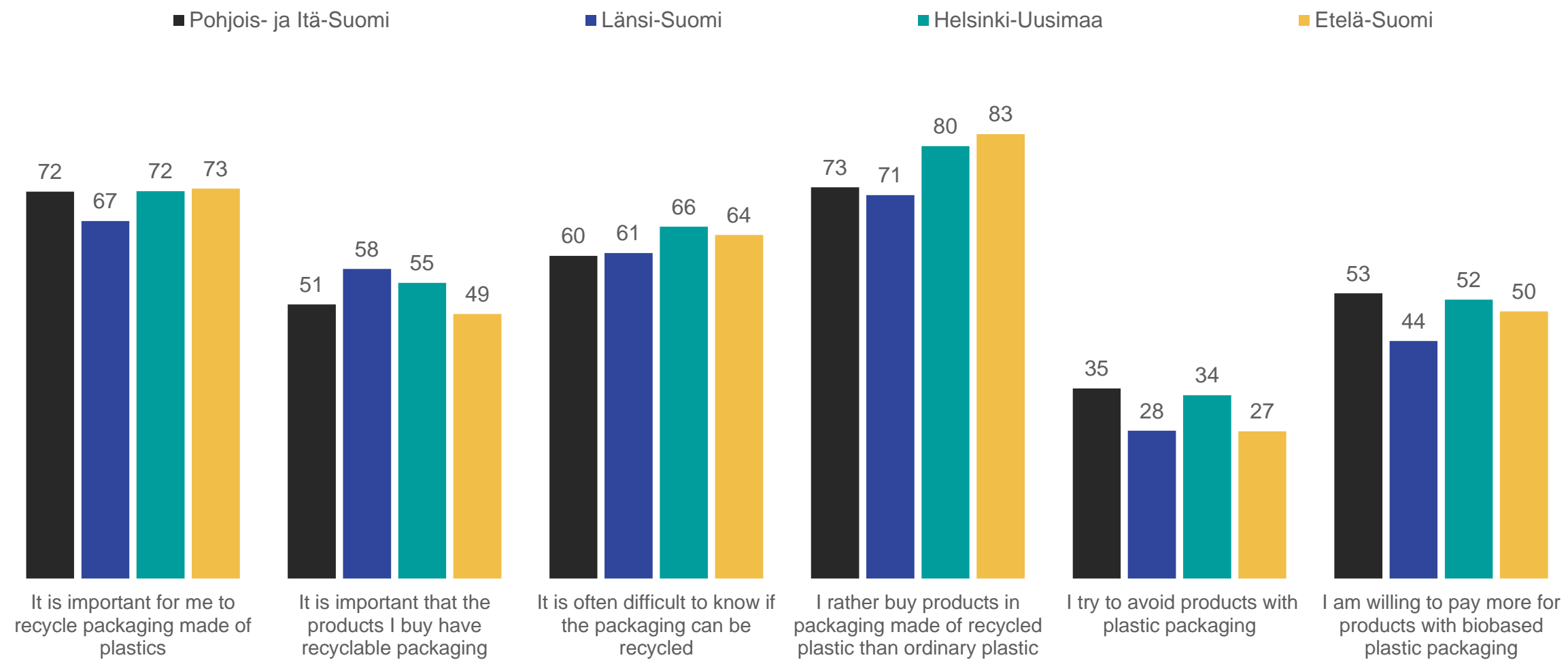
Base: All, N=1000 Finland
Q3.6 To what extent do you agree or disagree to the following statements?

DEMOGRAPHIC BREAKDOWN 2021



Base: All, N=1000 Finland
Q3_6. To what extent do you agree or disagree to the following statements?:

GEOGRAPHIC BREAKDOWN 2021



Base: All, N=1000 Finland
Q3_6. To what extent do you agree or disagree to the following statements?:

DIETARY HABITS

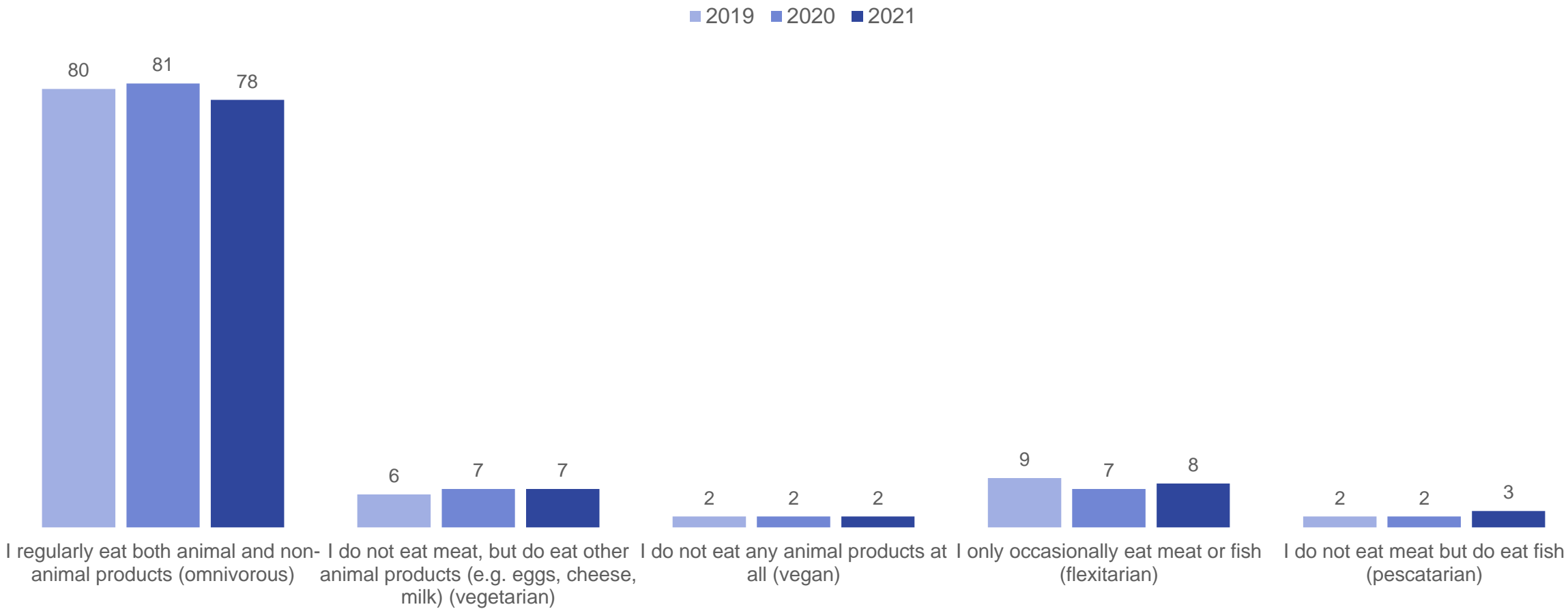
5

Which of the following statements is the best description of your current diet?

- I regularly eat both animal and non-animal products (omnivorous)
- I do not eat meat, but do eat other animal products (e.g. eggs, cheese, milk) (vegetarian)
- I do not eat any animal products at all (vegan)
- I only occasionally eat meat or fish (flexitarian)
- I do not eat meat but do eat fish (pescatarian)

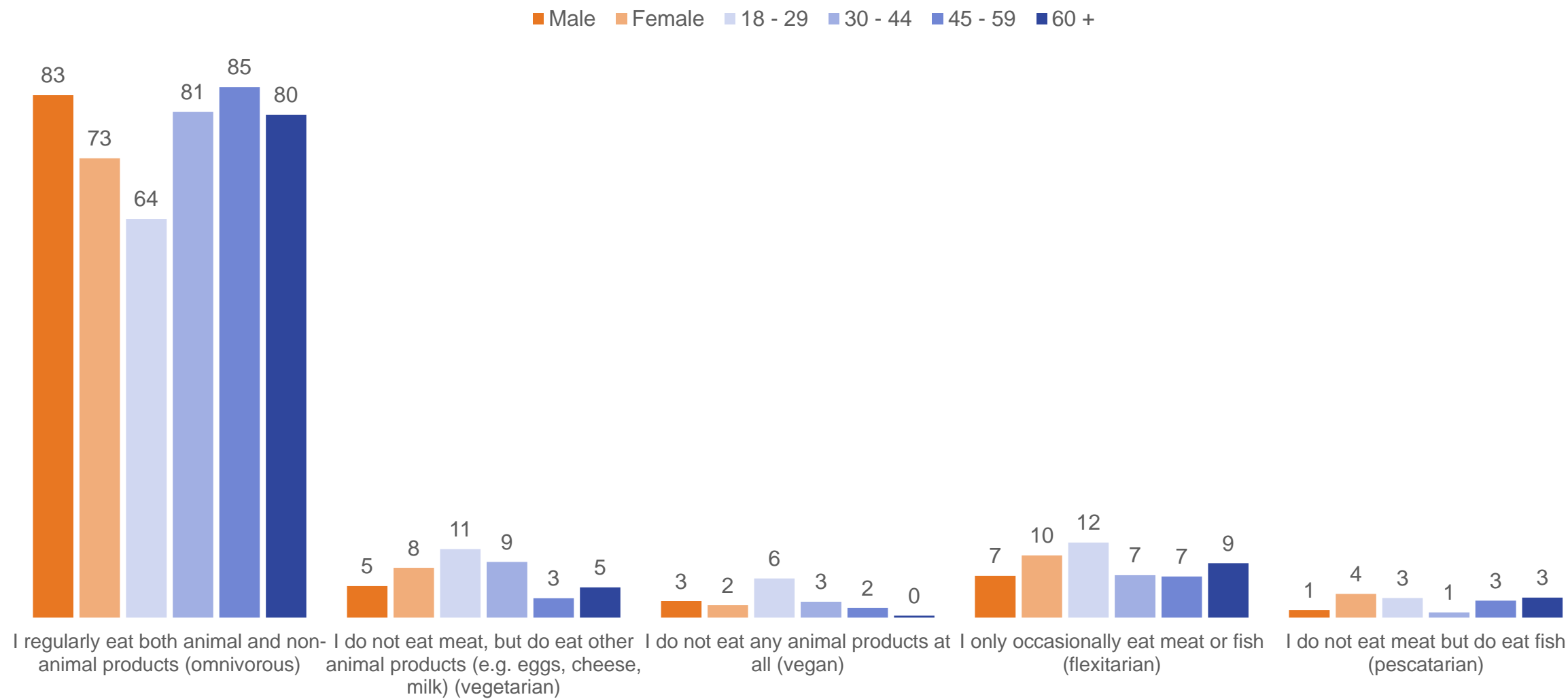
DEMOGRAPHIC BREAKOWN

Finland is still quite a bit behind its neighbors when it comes to dietary climate action. From last year there has not been any significant changes in our surveys. The move towards more sustainable diets are led by the youngest generation. They are significantly overrepresented in almost all the alternative diet categories.



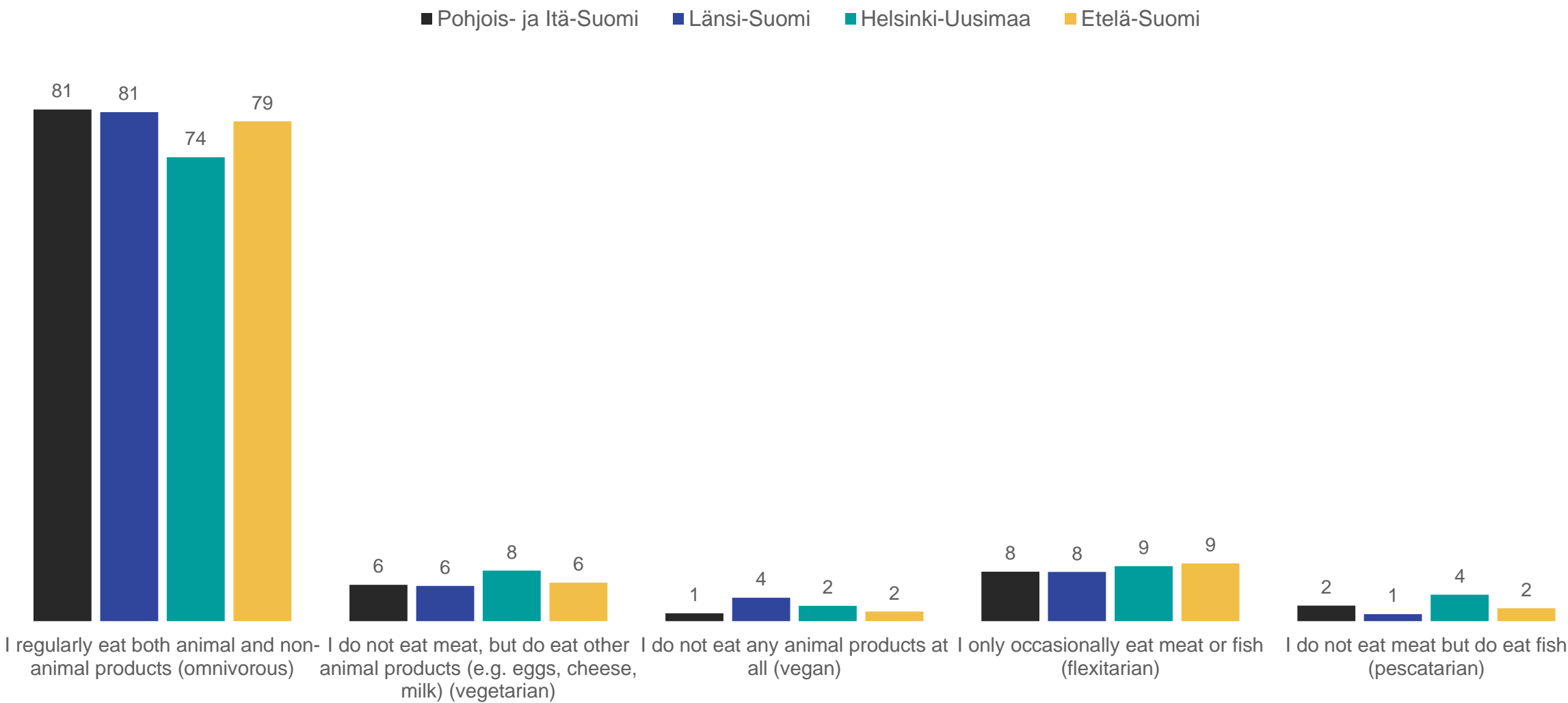
Base: All, N=1000 Finland
Q4.7 Which of the following statements is the best description of your current diet?

DEMOGRAPHIC BREAKDOWN



Base: All, N=1000 Finland
Q4.7 Which of the following statements is the best description of your current diet?

GEOGRAPHIC BREAKDOWN

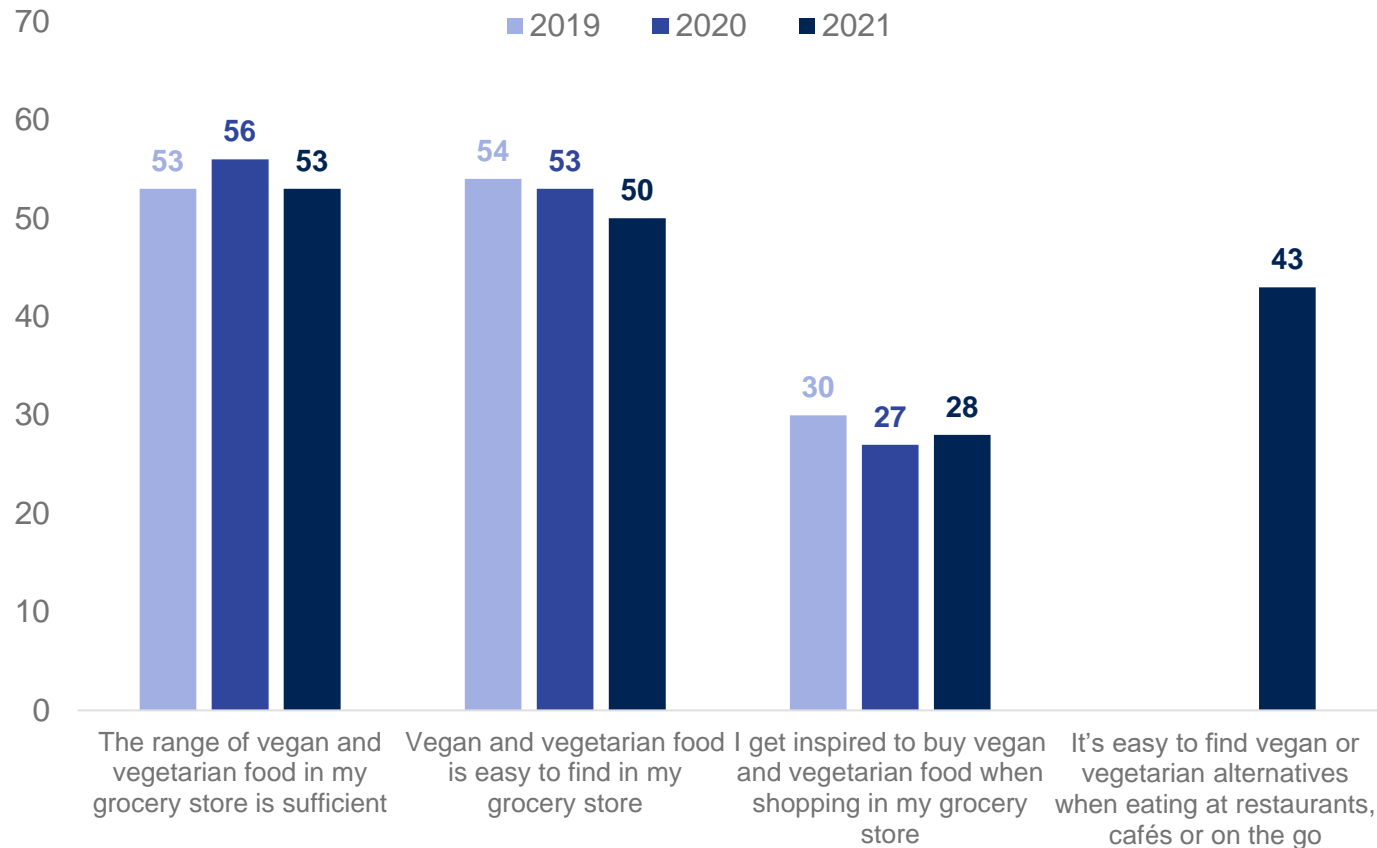


Base: All, N=1000 Finland
Q4.7 Which of the following statements is the best description of your current diet?

To what extent do you agree or disagree with these statements?

- The range of vegan and vegetarian food in my grocery store is sufficient
- Vegan and vegetarian food is easy to find in my grocery store
- I get inspired to buy vegan and vegetarian food when shopping in my grocery store
- It's easy to find vegan or vegetarian alternatives when eating at restaurants, cafés or on the go (2021)

NUMBER BOUNCING BACK FROM A SLIGHT DECLINE LAST YEAR.



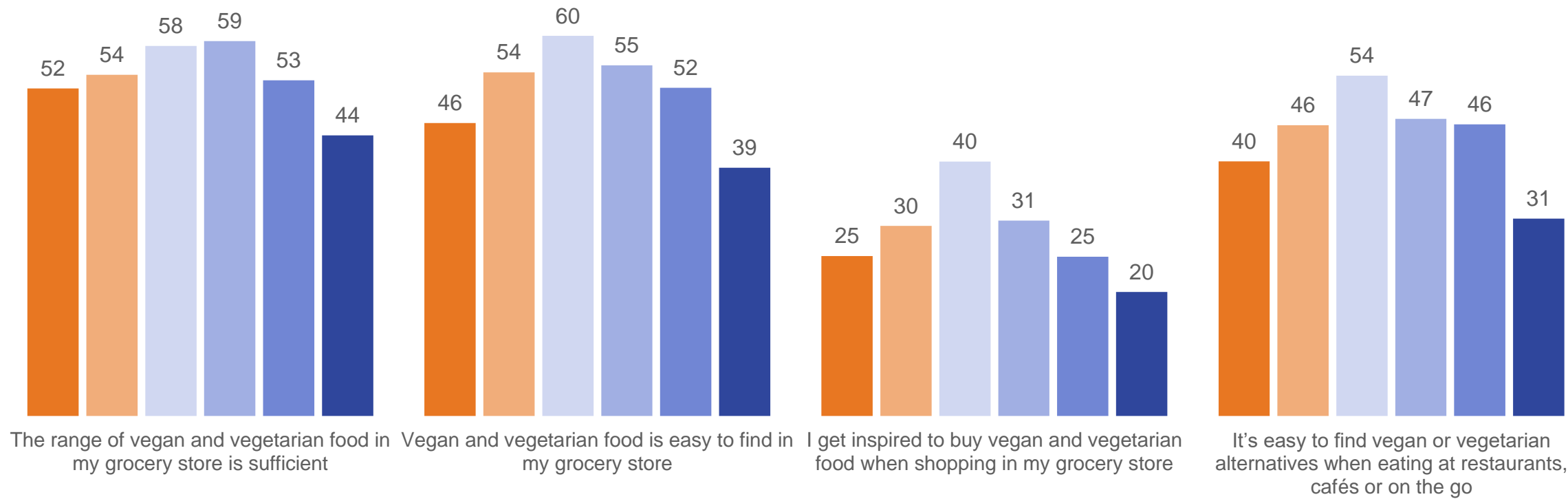
- Slight decline for the two first statements covering plant-based foods in grocery stores. But even with a slight decrease Finland is way above the Nordic average.
- The level of perceived inspiration connected to vegetarian food might seem like a low number at 28%, but we should mention that it is the highest level in the whole survey.
- Not only does it seem a lot easier to find vegan/vegetarian alternatives in your store. When on the go it also seems like it is much easier to get a hold of plant-based food in Finland (43%) compared to the other Nordic countries.

Base: All, N=1000 Finland

Q4.8 To what extent do you agree or disagree with these statements?

DEMOGRAPHIC BREAKDOWN 2021

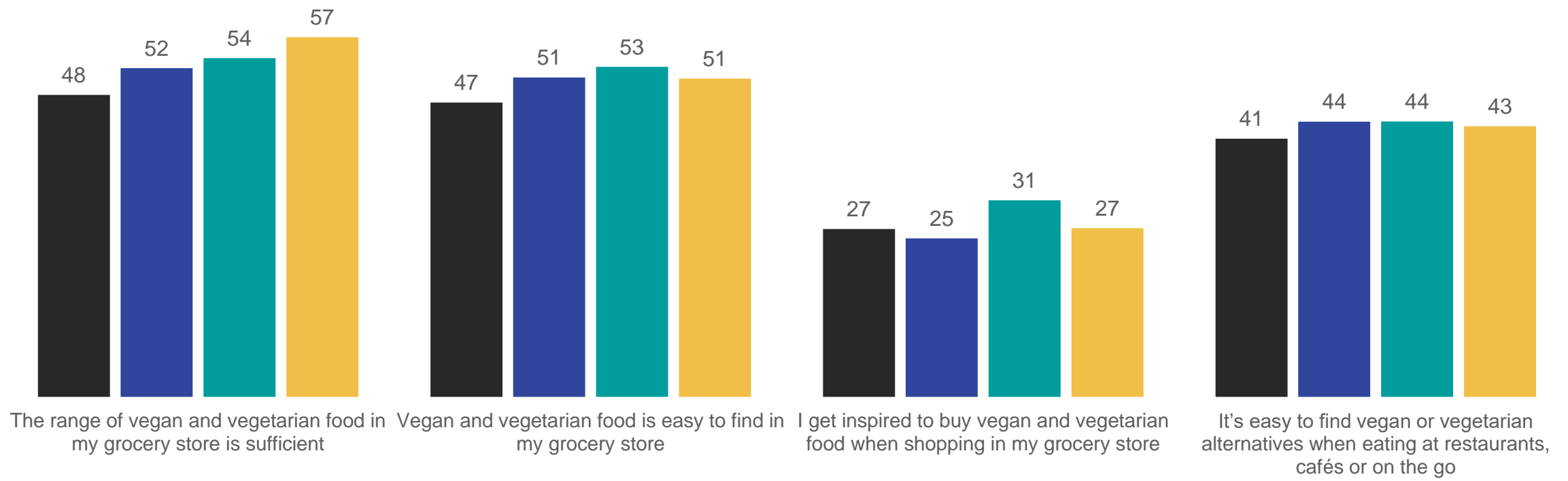
Male Female 18 - 29 30 - 44 45 - 59 60 +



Base: All, N=1000 Finland
Q4.8 To what extent do you agree or disagree with these statements?

GEOGRAPHIC BREAKDOWN 2021

■ Pohjois- ja Itä-Suomi ■ Länsi-Suomi ■ Helsinki-Uusimaa ■ Etelä-Suomi

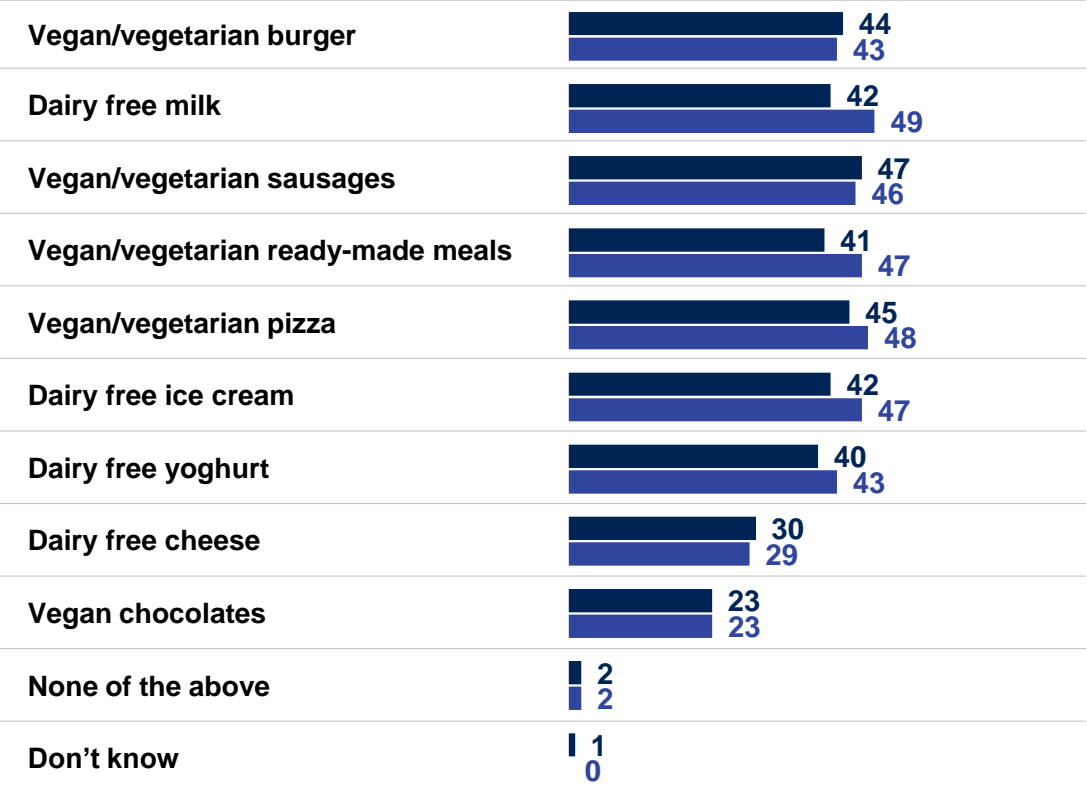


Base: All, N=1000 Finland
Q4.8 To what extent do you agree or disagree with these statements?

Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?

- **Vegan/vegetarian burger**
- **Dairy free milk**
- **Vegan/vegetarian sausages**
- **Vegan/vegetarian ready-made meals**
- **Vegan/vegetarian pizza**
- **Dairy free ice cream**
- **Dairy free yoghurt**
- **Dairy free cheese**
- **Vegan chocolates**

BURGERS AND SAUSAGES ARE STILL THE MOST POPULAR VEGETARIAN/VEGAN PRODUCT CATEGORIES

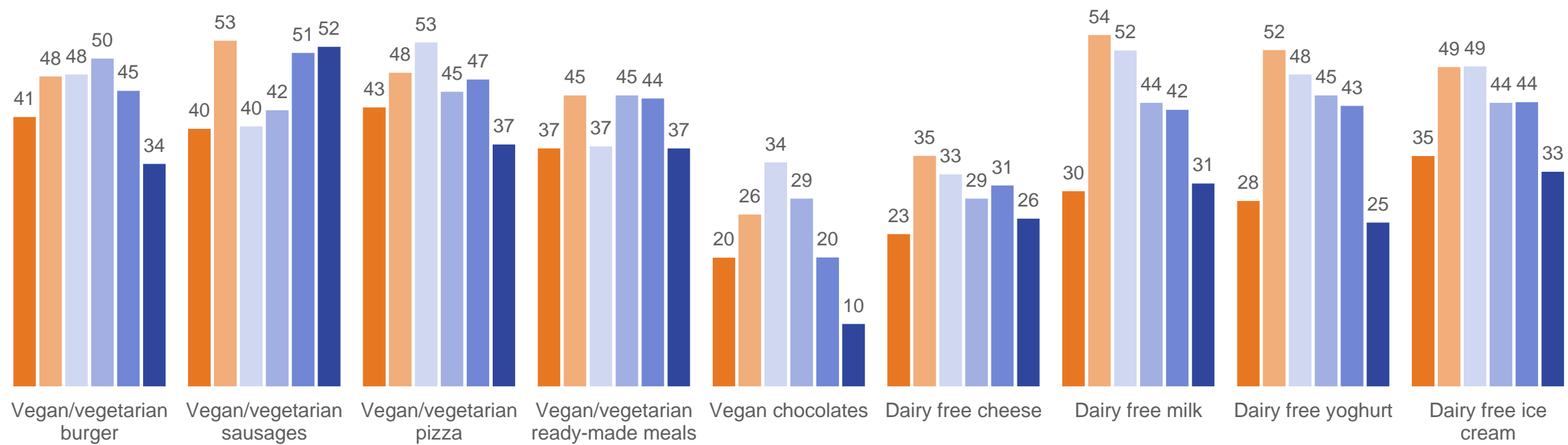


- No other country has the same high levels of adaption across all the categories. Thus, it seems that in Finland this is a more mature market than some of its neighboring countries.
- Overall, most of these numbers have decreased this year. This might seem a bit strange given the nature of the question. Now even if the number is lower than before, this is not always the case as we must consider margins of error. It might tell us that there has been a stagnation in the testing of new types of plant-based foods.
- Since the youngest age groups are the most actively in choosing plant based and sustainable foods, it might not be a surprise that they are overrepresented in the majority of these products categories.

Base: All, N=1000 Finland
Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?

DEMOGRAPHIC BREAKDOWN 2021

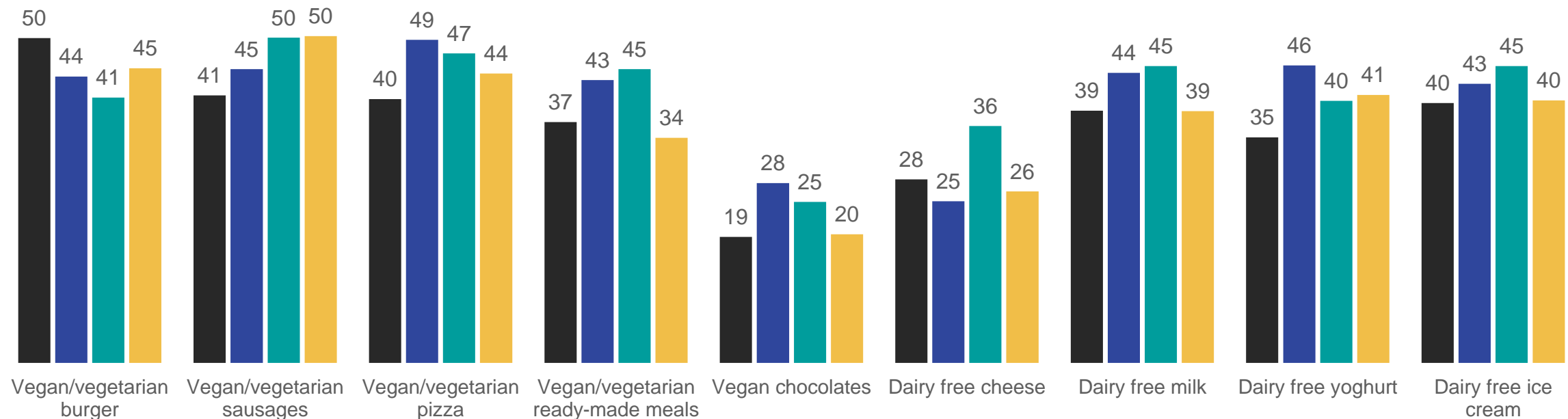
Male Female 18 - 29 30 - 44 45 - 59 60 +



Base: All, N=1000 Finland
Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?:

GEOGRAPHIC BREAKDOWN 2021

■ Pohjois- ja Itä-Suomi ■ Länsi-Suomi ■ Helsinki-Uusimaa ■ Etelä-Suomi



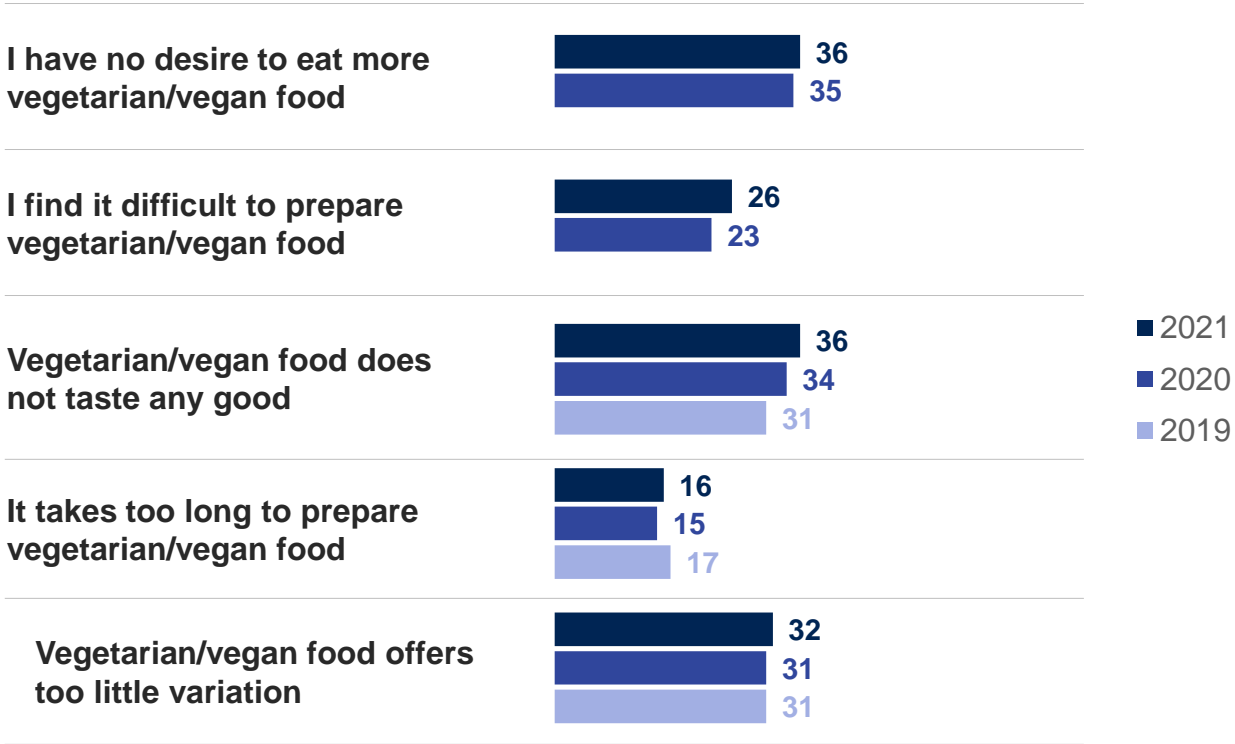
Base: All, N=1000 Finland
Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?:

To what extent do you agree or disagree with these statements?

- I have no desire to eat more vegetarian/vegan food
- I find it difficult to prepare vegetarian/vegan food
- Vegetarian/vegan food does not taste any good
- It takes too long to prepare vegetarian/vegan food
- Vegetarian/vegan food offers too little variation

Scale 1-5

STATEMENTS ABOUT PLANT BASED FOODS

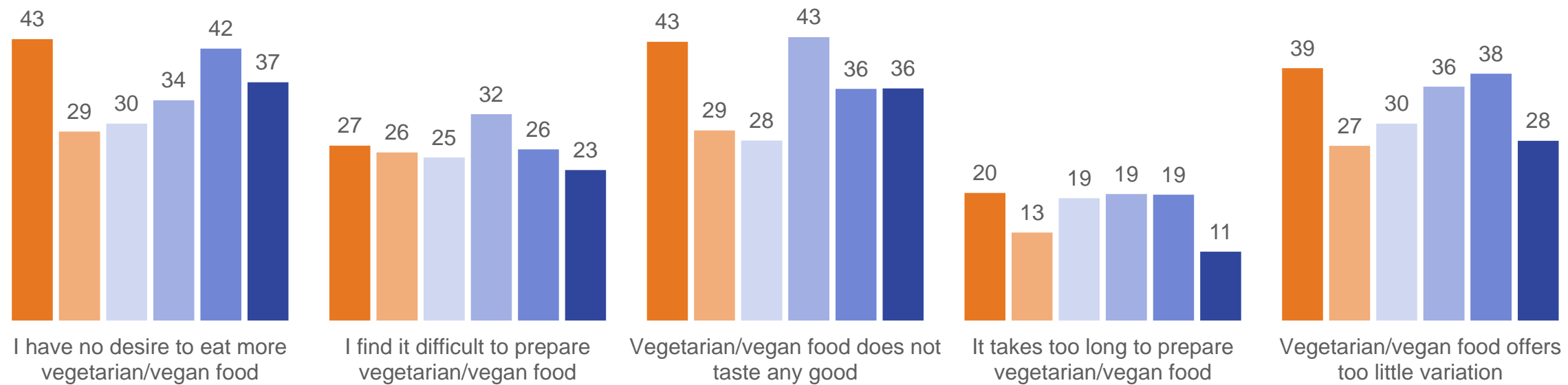


- 36% of the respondents have no desire to eat more vegetarian/vegan food. This is way under the 45% average for our study. In combination with a lower-than-average share of diet conscious people, there could be a potential for growth in the category. The older the respondent, the more likely they are to agree to this statement. This is in line with all other data in our study showing that younger people take climate friendly food choices very seriously.
- Growing trend for those who agree that vegan/vegetarian food does not taste good.

Base: All, N=1000 Sweden
Q4.11 To what extent do you agree or disagree with these statements?

DEMOGRAPHIC BREAKDOWN 2021

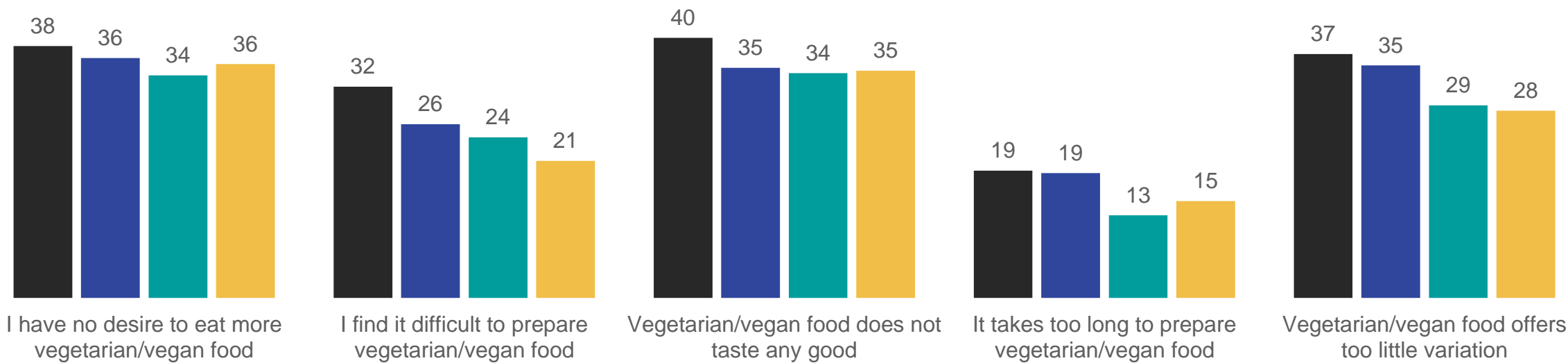
Male Female 18 - 29 30 - 44 45 - 59 60 +



Base: All, N=1000 Finland
Q4_11. To what extent do you agree or disagree to these statements?:

GEOGRAPHIC BREAKDOWN

■ Pohjois- ja Itä-Suomi ■ Länsi-Suomi ■ Helsinki-Uusimaa ■ Etelä-Suomi

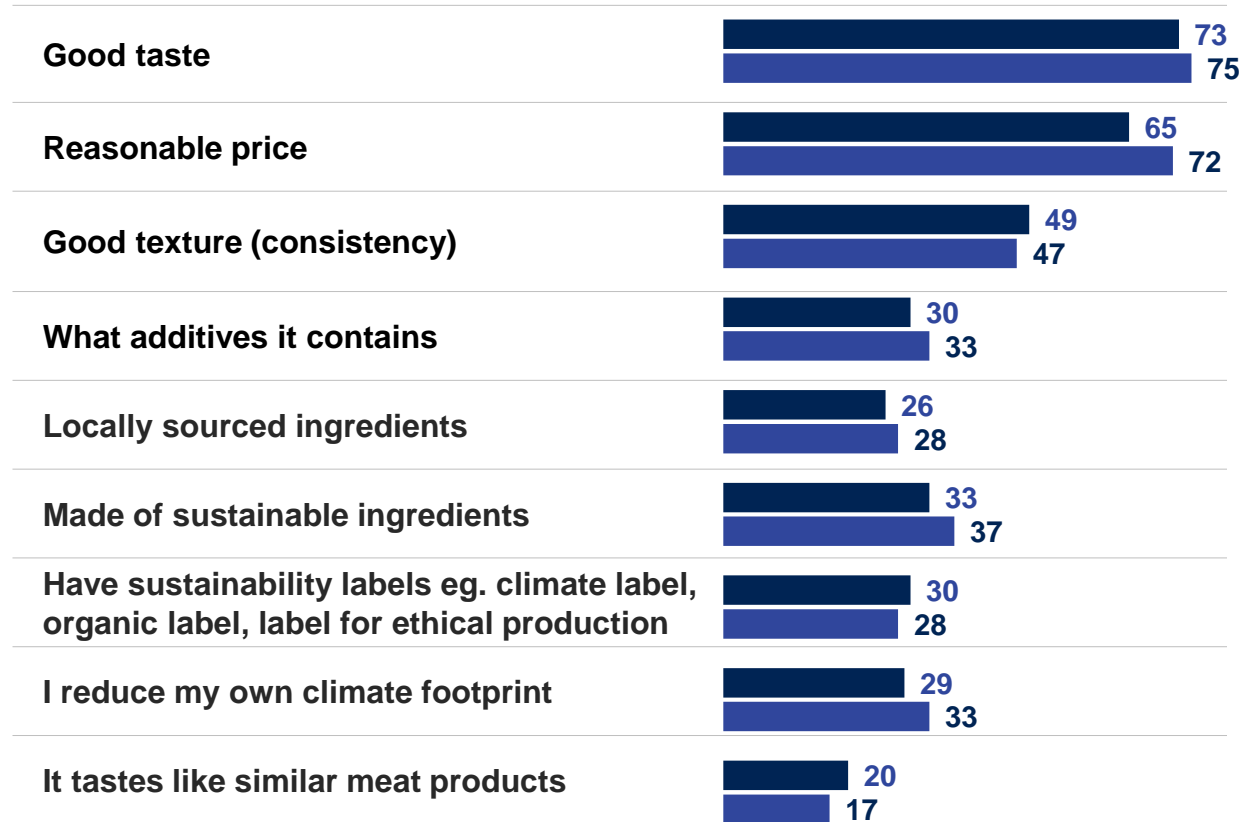


Base: All, N=1000 Finland
Q4_11. To what extent do you agree or disagree to these statements?:

What is most important for you when you are buying plant-based products?

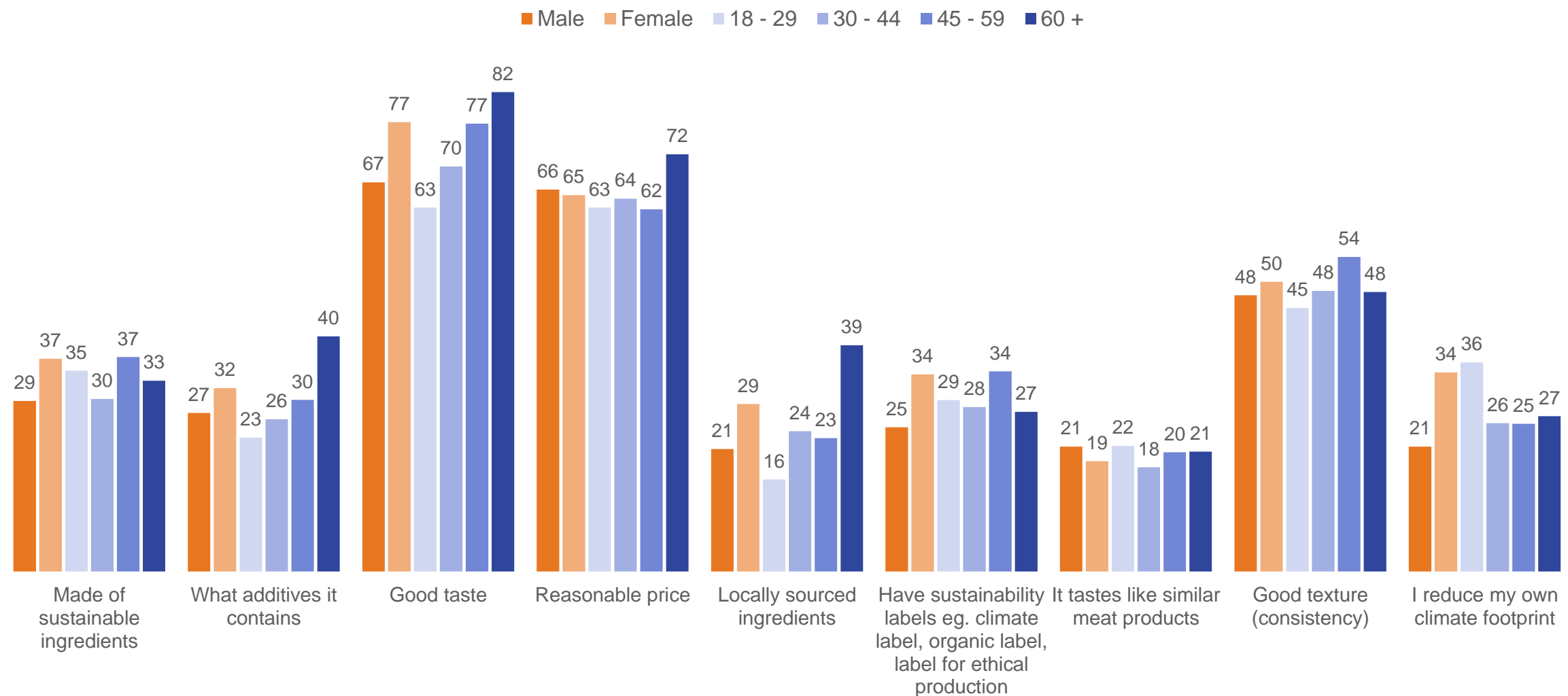
- **Good taste**
- **Reasonable price**
- **Good texture (consistency)**
- **What additives it contains**
- **Locally sourced ingredients**
- **Made of sustainable ingredients**
- **Have sustainability labels eg. climate label, organic label, label for ethical production**
- **I reduce my own climate footprint**
- **It tastes like similar meat products**

TASTE AND PRICE MOST IMPORTANT FACTORS WHEN BUYING PLANT-BASED PRODUCTS



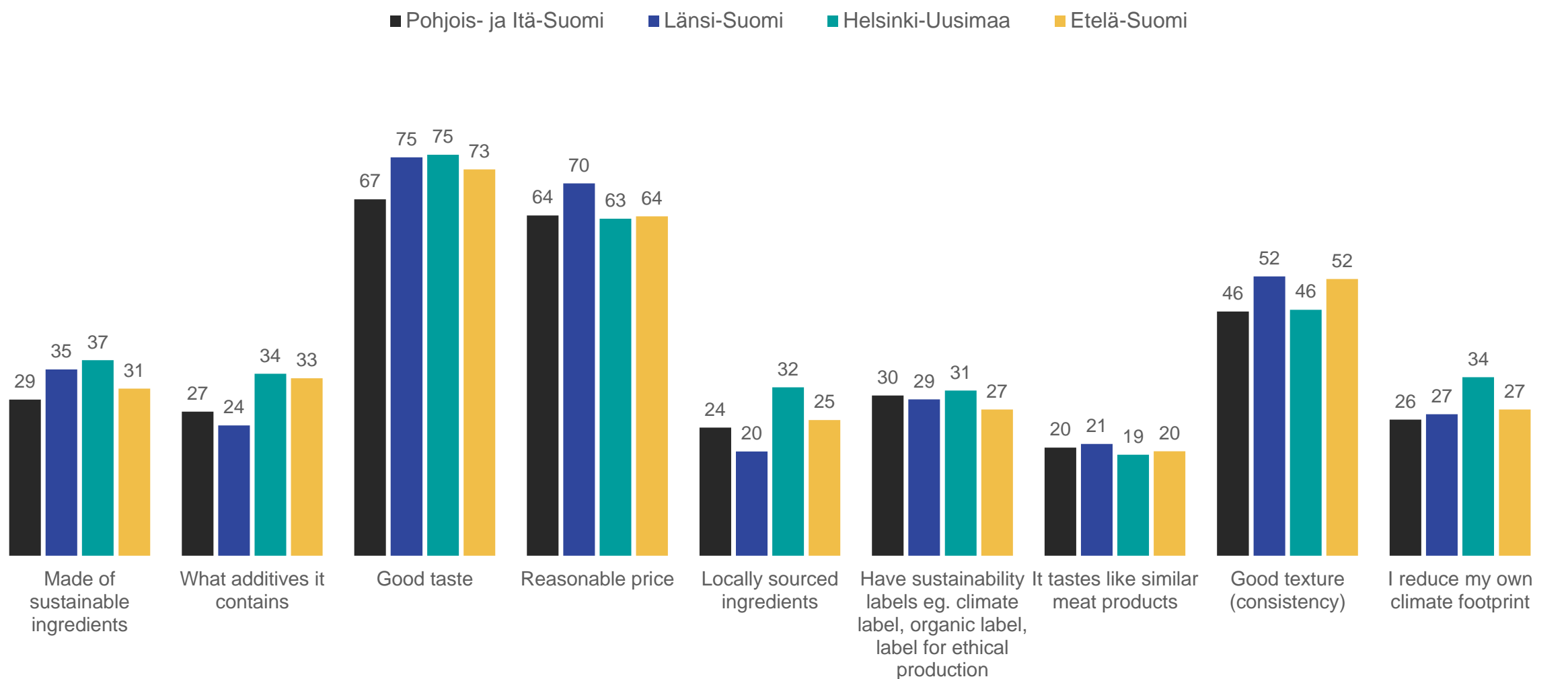
- Good taste is the most important factor when buying a plant-based product, This has had a decrease of 2pp the last year.
- Pricing is not far behind taste and thus clearly a major driver in this market. This also is decreasing, but by a significant 7pp.
- Good texture is also very important in Finland. With an average of 38% in the other Nordic countries (and 36% total for all nations), Finland's 49% makes texture a major differentiator and something to be aware of when trying to get new consumers on board with a sustainable plant-based future.

DEMOGRAPHIC BREAKDOWN 2021



Base: Buys vegetarian food daily-sporadically, FIN=536
Q4_12. What is most important for you when you are buying plant-based products?

GEOGRAPHIC BREAKDOWN 2021



Base: Buys vegetarian food daily-sporadically, FIN=536
Q4_12. What is most important for you when you are buying plant-based products?

THANK YOU!

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