

The consumer's attitude towards being

Closer to nature

Comparative report - all countries
Prepared for Arla by YouGov A/S

This report contains the general results of a market research study among consumers in 6 countries. Please view the country specific reports for more details.



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Background and purpose

YouGov has, on behalf of Arla, conducted a market survey which provides knowledge and understanding of the importance of being “in contact with nature”.

The primary objectives of the survey have been to:

- Provide input regarding consumers choices in relation to “**being in contact with nature**”, and which factors influencing these choices.
- Identify how the consumers act when focusing on “**the small things in life**”
- Identify **consumer attitudes** and concerns in relation to other elements, such as the **food production and agriculture**’s influence on nature.

The market survey is completed in 6 countries, Denmark, Sweden, Finland, Holland, Germany and UK.





Methodology

Interview period and data collection method:

- The data was collected online using YouGov's panels in the period from **29 April 2011 to 3 May 2011**.

Target group:

- The target group for this survey is men and women aged **18-65 years**

Sample size:

- YouGov has conducted a total of 6,061 interviews in **6 countries**.
- The following number of interviews have been conducted in each country:
Denmark: 1,009, Sweden: 1,020, Finland: 1,007, Holland: 1,009, Germany: 1,008 and UK: 1,008.

Data weighting:

- Data is weighted in terms of gender, age and region (according to the **official national statistics**).

Results

The present report contains a comparison of the results from the 6 countries.

Please view the country specific reports for more details in terms of differences in demographics within each country.

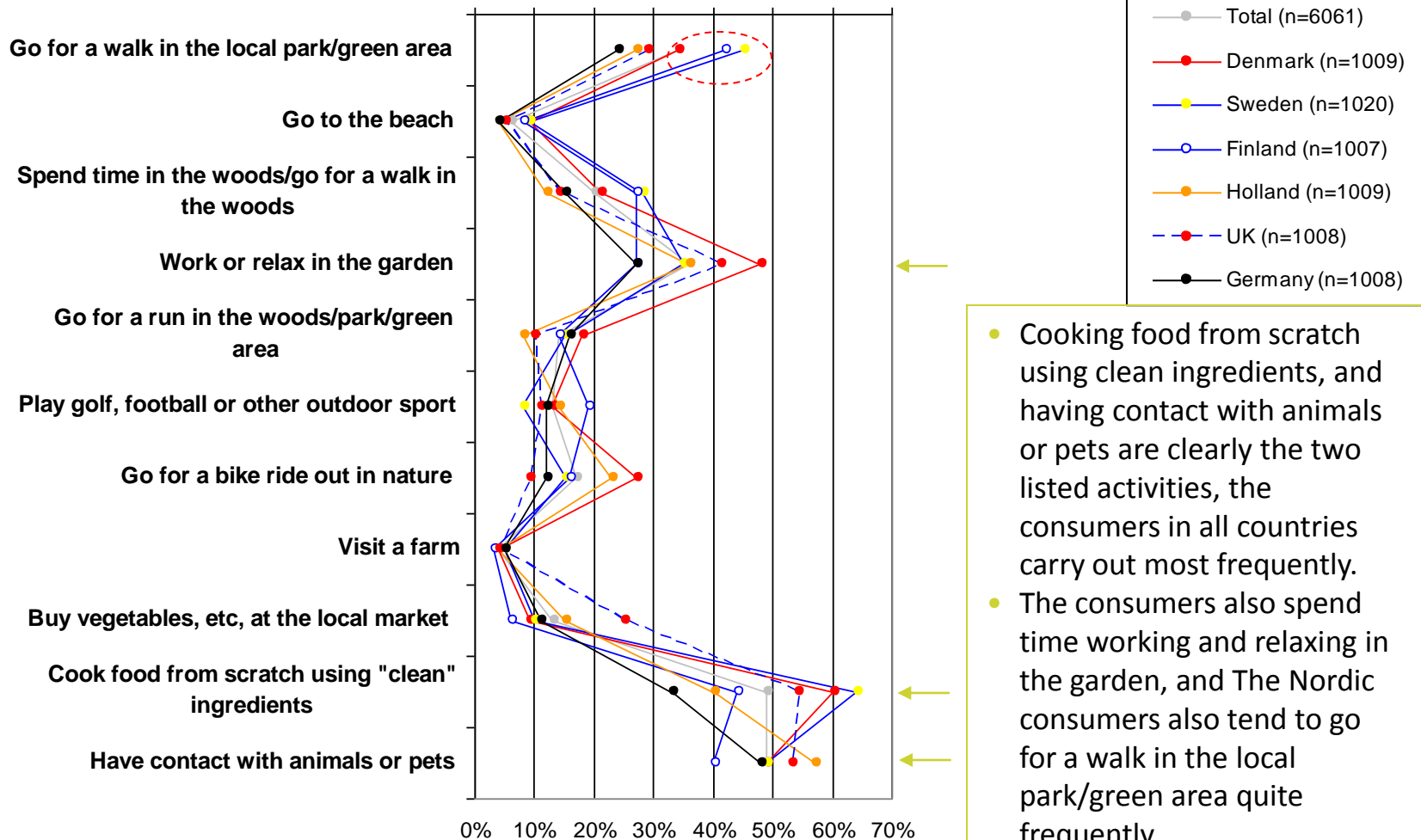
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Frequency of outdoor activities – Profile map

Q.2 How often do you do the following?
(TOP BOX – 4+5 – Every day or a few times per week)

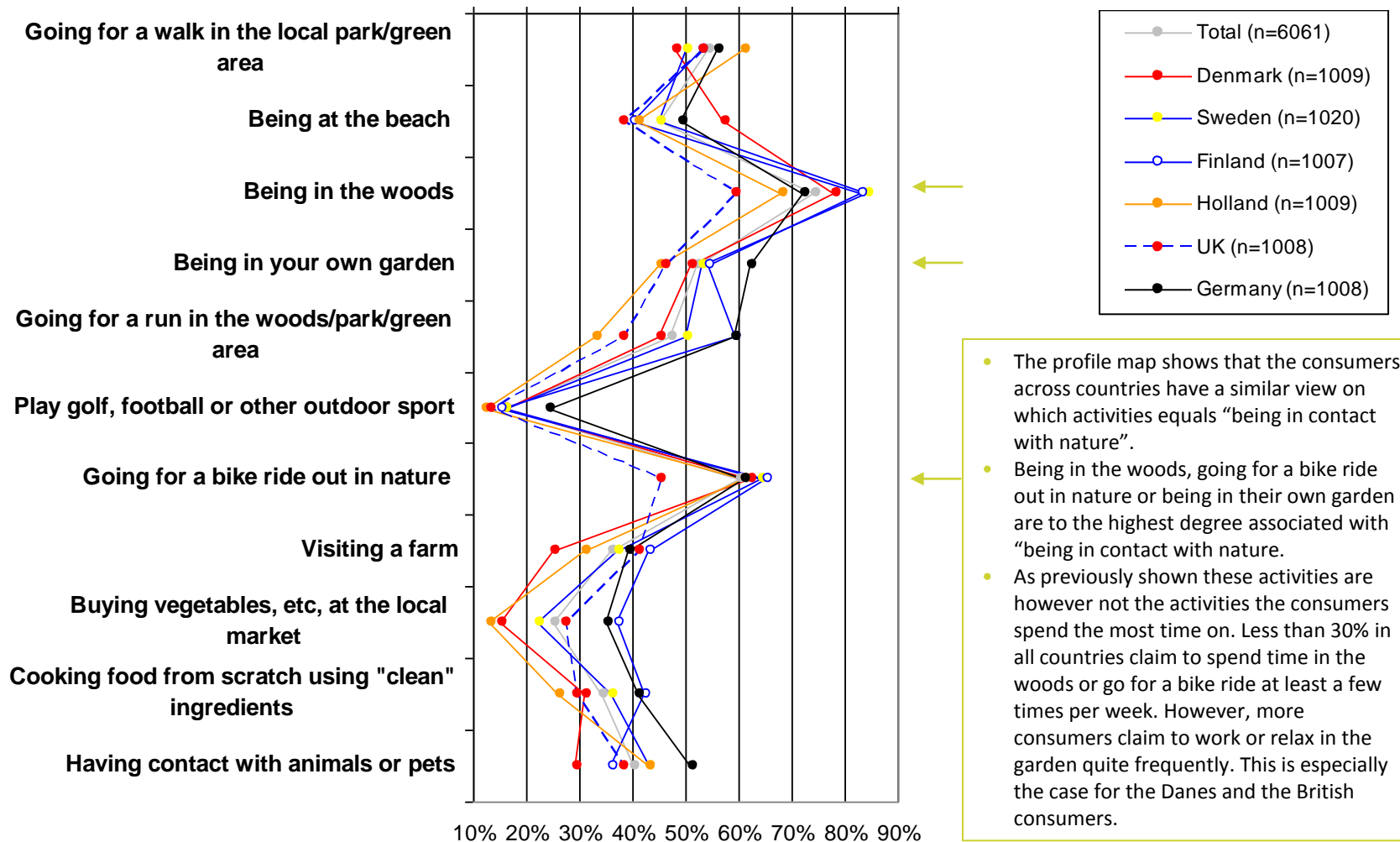


- Cooking food from scratch using clean ingredients, and having contact with animals or pets are clearly the two listed activities, the consumers in all countries carry out most frequently.
- The consumers also spend time working and relaxing in the garden, and The Nordic consumers also tend to go for a walk in the local park/green area quite frequently.

In contact with nature - outdoor activities – Profile map



Q.3 To what extent do you think that the following is "being in contact with nature" in a general sense?
(TOP BOX – 4+5 – agree to a high /very high degree)



- The profile map shows that the consumers across countries have a similar view on which activities equals "being in contact with nature".
- Being in the woods, going for a bike ride out in nature or being in their own garden are to the highest degree associated with "being in contact with nature".
- As previously shown these activities are however not the activities the consumers spend the most time on. Less than 30% in all countries claim to spend time in the woods or go for a bike ride at least a few times per week. However, more consumers claim to work or relax in the garden quite frequently. This is especially the case for the Danes and the British consumers.

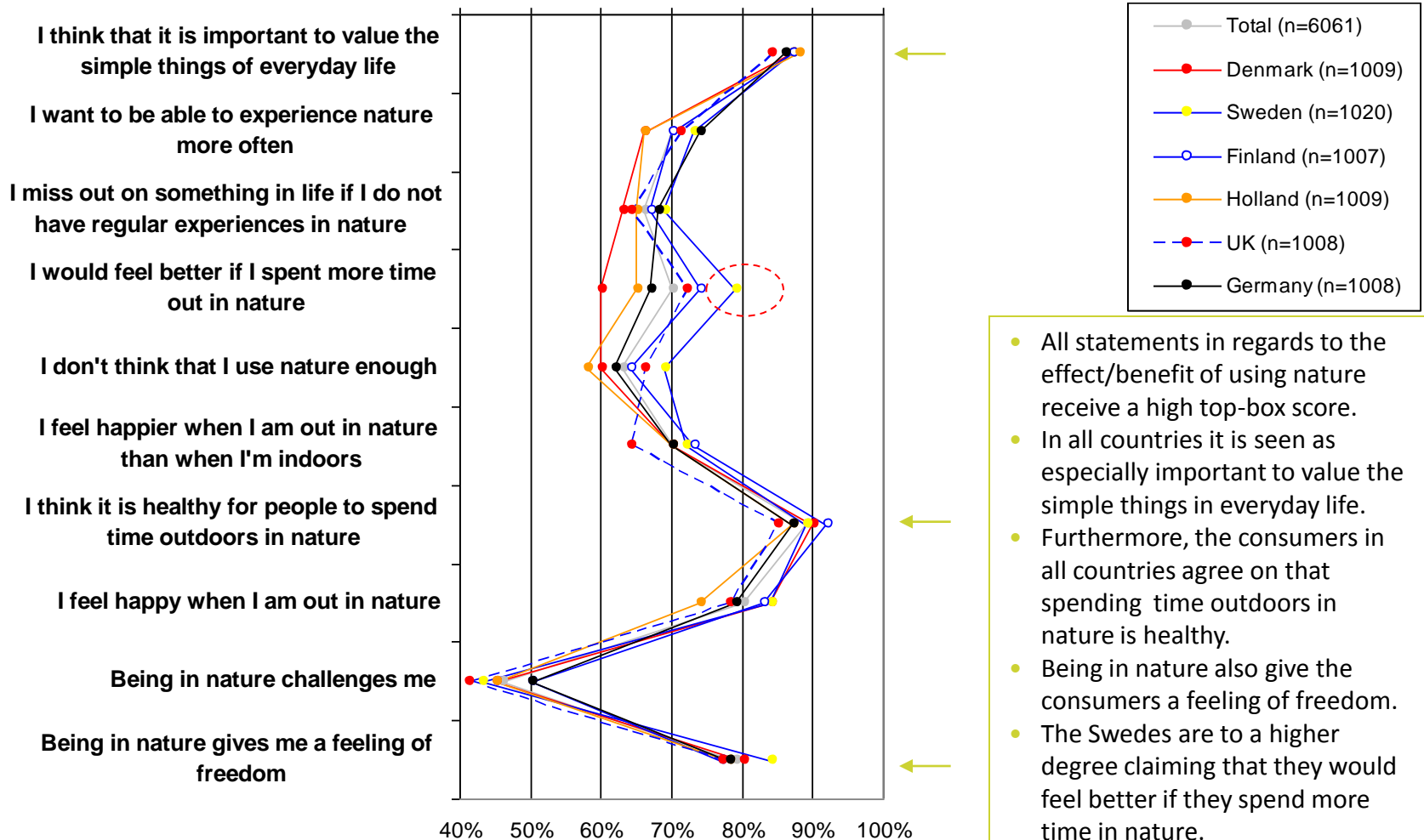


Personal attitude + effect/benefit – Profile map



Q.4 To what extent do you agree or disagree with the following statements?

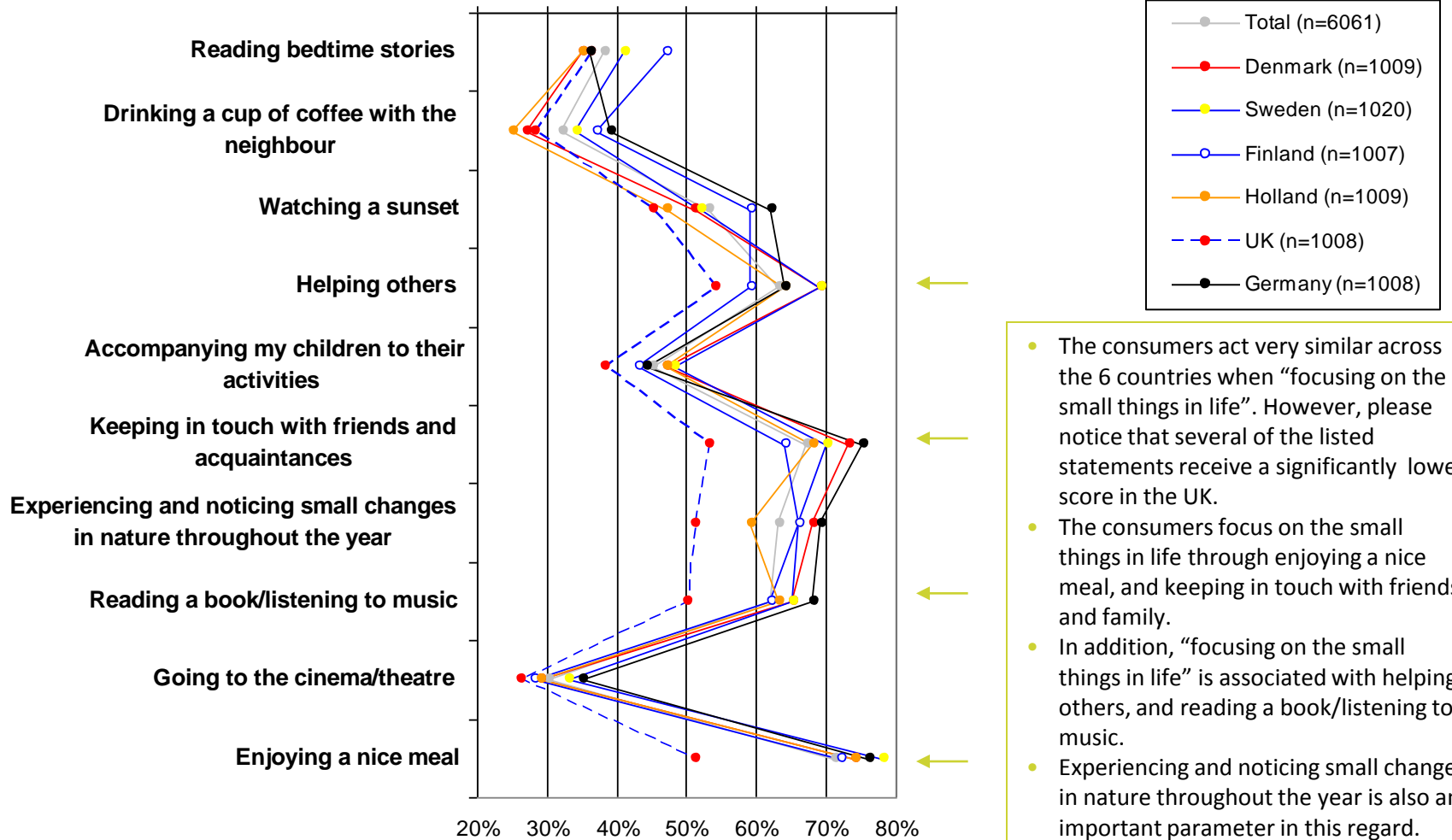
(TOP BOX – 4+5 – agree to a high /very high degree)



The small things in life – Profile map



Q.1 To what extent do you think that the following is "focusing on the small things in life"?
(TOP BOX – 4+5 – agree to a high /very high degree)



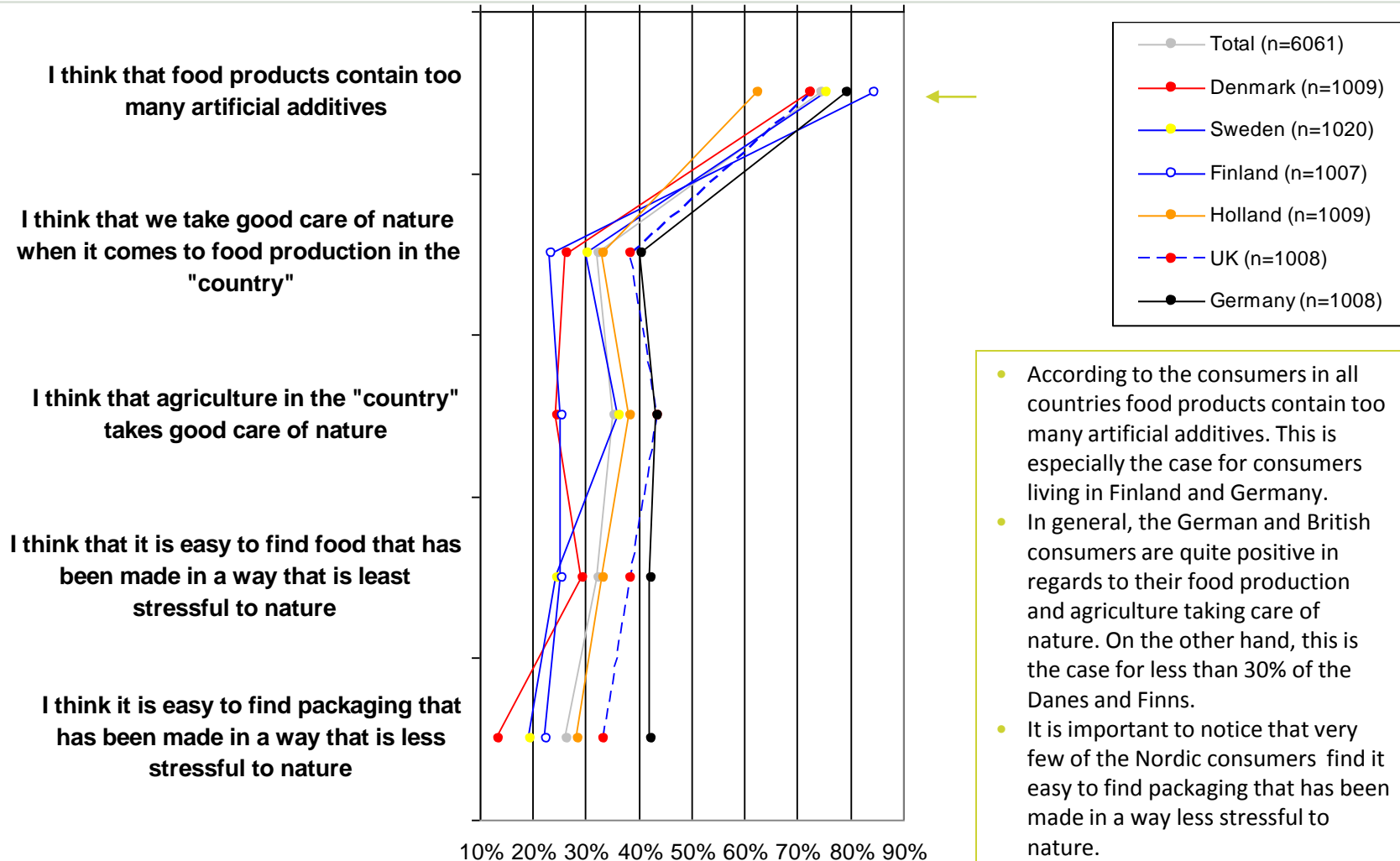
- The consumers act very similar across the 6 countries when "focusing on the small things in life". However, please notice that several of the listed statements receive a significantly lower score in the UK.
- The consumers focus on the small things in life through enjoying a nice meal, and keeping in touch with friends and family.
- In addition, "focusing on the small things in life" is associated with helping others, and reading a book/listening to music.
- Experiencing and noticing small changes in nature throughout the year is also an important parameter in this regard.



Attitude - Food and Agriculture - Profile map



Q.5 To what extent do you agree or disagree with the following statements?
(TOP BOX – 4+5 – agree to a high /very high degree)



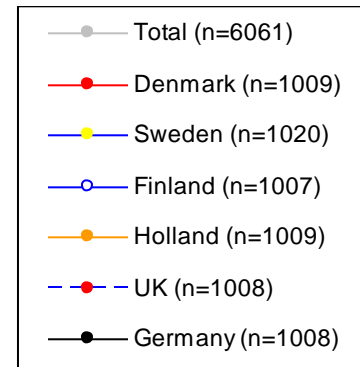
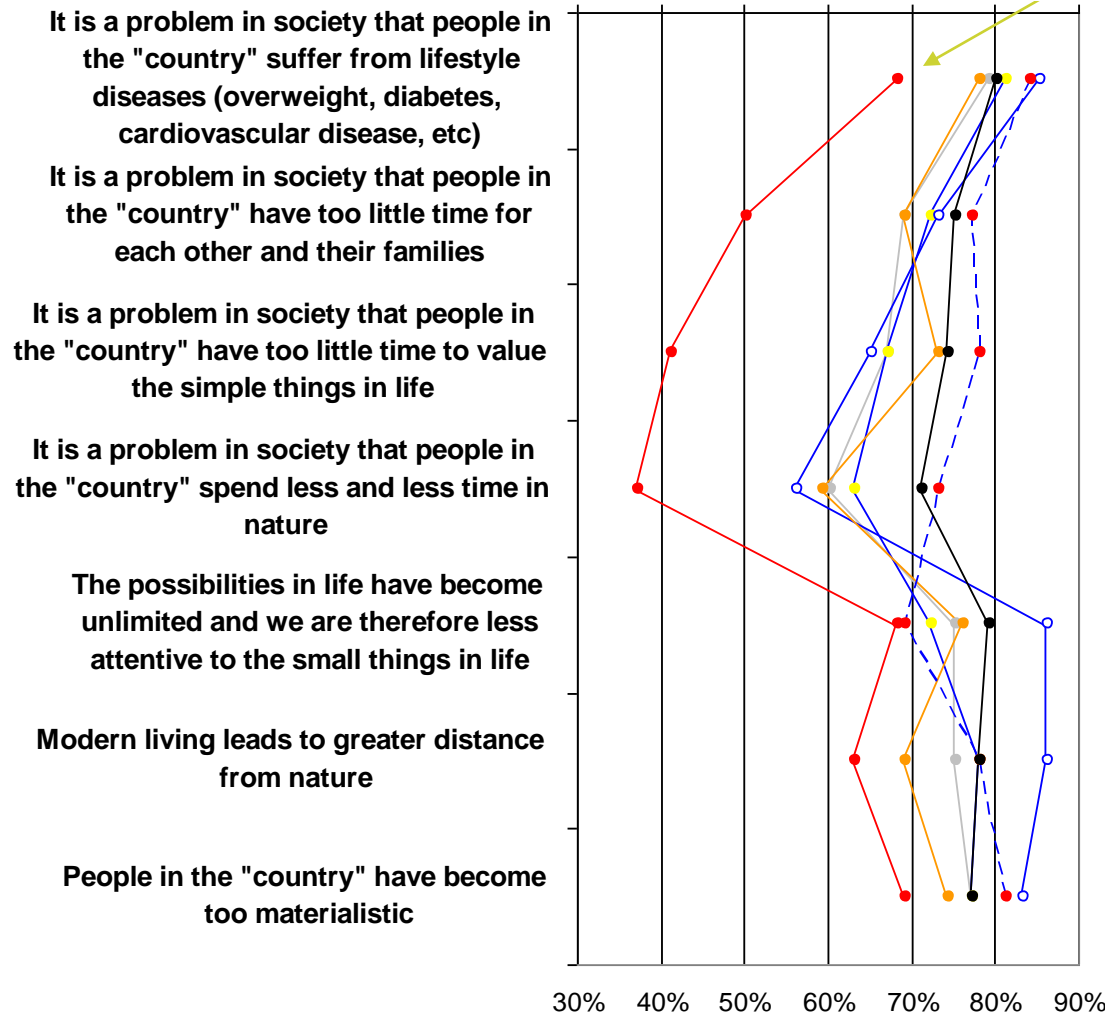
- According to the consumers in all countries food products contain too many artificial additives. This is especially the case for consumers living in Finland and Germany.
- In general, the German and British consumers are quite positive in regards to their food production and agriculture taking care of nature. On the other hand, this is the case for less than 30% of the Danes and Finns.
- It is important to notice that very few of the Nordic consumers find it easy to find packaging that has been made in a way less stressful to nature.

▪ Please notice that the term "country" is used as a general term in the current reporting, however, in the questionnaire the consumers have been asked to answer the questions in relation to their own country

Attitude - community level - Profile map



Q.6 To what extent do you agree or disagree with the following statements?
 (TOP BOX – 4+5 – agree to a high /very high degree)

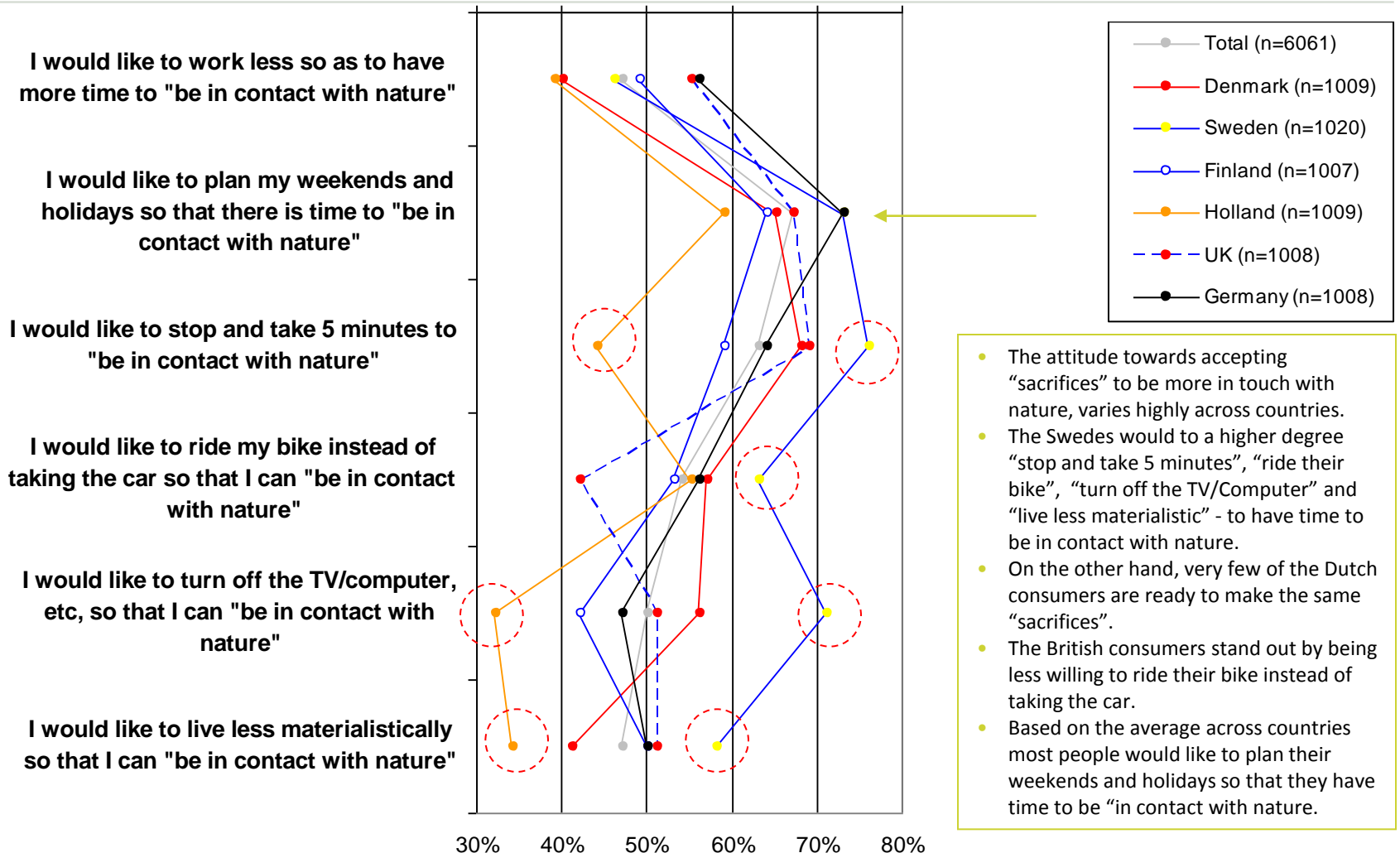


- Consumers in all countries see it as a problem in society that people suffer from lifestyle diseases, and that they have too little time to take care of their families, and to value the simple things in life. Furthermore the fact that people spend less time in nature is seen as a problem.
- Danish consumers stand out by viewing these issues as less of a problem than they do in other countries.
- In all countries the consumers further agree on the fact, that we are less attentive to the small things in life because of the endless possibilities, and that modern living leads to a greater distance from nature. Especially the Finns highly agree on this fact.
- Consumers also agree on the fact that people have become too materialistic.

Sacrifices to be more in touch with nature – Profile map



Q.7 To what extent do you agree or disagree with the following statements?
 (TOP BOX – 4+5 – agree to a high /very high degree)



- The attitude towards accepting “sacrifices” to be more in touch with nature, varies highly across countries.
- The Swedes would to a higher degree “stop and take 5 minutes”, “ride their bike”, “turn off the TV/Computer” and “live less materialistic” - to have time to be in contact with nature.
- On the other hand, very few of the Dutch consumers are ready to make the same “sacrifices”.
- The British consumers stand out by being less willing to ride their bike instead of taking the car.
- Based on the average across countries most people would like to plan their weekends and holidays so that they have time to be “in contact with nature.”



Summary and Conclusion

Please view the country specific reports for more details.

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Conclusion

- **“Being in contact with nature”**, is seen as **very important in all countries**, and contact with nature is associated with *happiness, healthiness* and *freedom*. In all countries the consumers agree on the fact that they *do not use nature enough*, and that they would *feel better* if they spent more time out in nature. In fact, it is viewed as a problem for the society that people spend less time in nature!
- On the other hand the attitude towards **accepting “sacrifices” to be more in contact with nature, varies highly across countries**. The Swedes seem to be willing to sacrifice more than the other consumers. On the other hand, the Dutch seem less willing to make life-style adjustments to have more time “for nature”.
- **The food production and agriculture in Germany and UK are (to some degree) perceived as taking care of nature. On the other hand, – in Denmark and Finland they are not**. Only approximately ¼ of the consumers in Denmark and Finland agree on the fact that the food production and agriculture in the country of origin take care of nature. This should be taken into consideration along with the 30%-40% of the consumers in the Denmark and Finland actually disagreeing on these statements. **It is however important that consumers in all countries believe that food contains too many artificial additives.**
- It is also imperative to recognize, that **the Nordic consumers find it harder than their peers to find food and packaging that has been made in a way that is less stressful on nature.**