

SCA Consumer Study Hygiene Matters 2014



OCEAN
RACING
TEAM
2014-2018

SCA - A Leading Global Hygiene and Forest Products Company



- The Group develops and produces sustainable personal care, tissue and forest products
- Sales are conducted in about 100 countries under many strong brands, including the leading global brands TENA and Tork, and regional brands, such as Libero, Libresse, Lotus, Nosotras, Saba, Tempo and Vinda
- As Europe's largest private forest owner, SCA places considerable emphasis on sustainable forest management
- The Group has about 44,000 employees
- Sales in 2013 amounted to SEK 93bn (EUR 10.7bn)*
- SCA was founded in 1929, has its headquarters in Stockholm, Sweden, and is listed on NASDAQ OMX Stockholm
- For more information, visit www.sca.com.



* Due to new and amended reporting standards net sales in 2013 has been recalculated from SEK 89bn to SEK 93bn.

Hygiene Matters Introduction

- Consumer insights on health and hygiene
- To raise awareness among decision makers, experts and the general public on hygiene, health and well-being
- Contribute to a knowledge-based public dialogue, to strengthen the possibility of improved hygiene for women, men and children
- Theme in Hygiene Matters 2014 has been on “Women and Hygiene”



Raise awareness and enhance perception of SCA as a global hygiene and forest products company, an innovative, sustainable and caring company

Hygiene Matters 2014 Survey

- Fourth global consumer survey since 2008
- Get insights and perceptions from men and women on hygiene and health topics
- About 13.500 male and female respondents
- Web based - Results could be understated
- Theme - “Women and Hygiene”

Hygiene Matters 2014 Survey



Three main areas highlighted from the survey based on consumer insights

- Hygiene in public places and concerns about becoming ill due to poor hygiene
- The menstruation taboo
- Hygiene is important, and internet a growing information source regarding hygiene and health

Countries Surveyed 2014

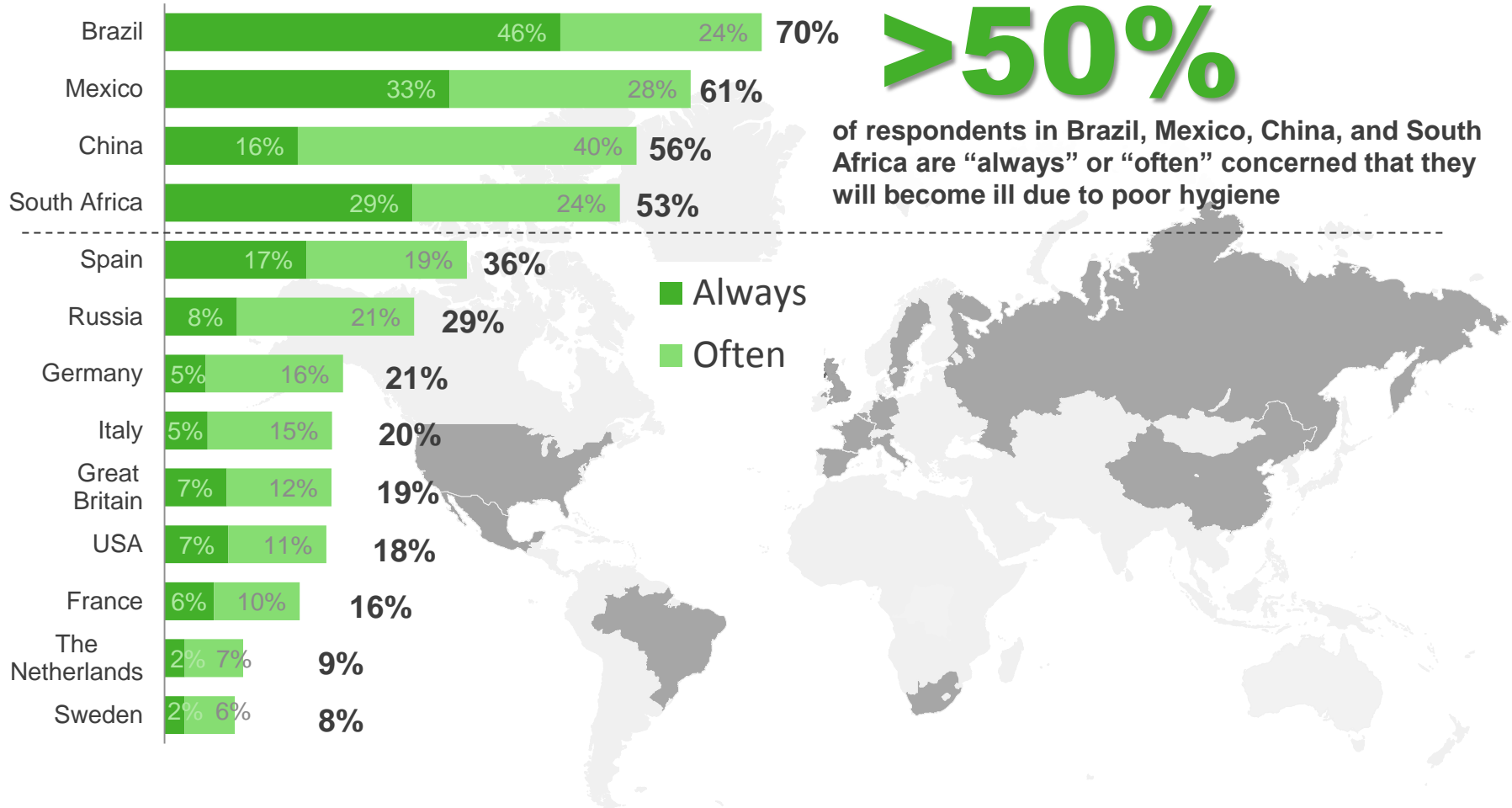
- Brazil, China, France, Germany, Italy, Spain, Sweden, Mexico, the Netherlands, Russia, South Africa, United Kingdom, and the US
- 13,492 respondents from 13 countries
- 500 women and 500 men surveyed in each country
- Overall results as a mean average of the responses from all countries
- Conducted by external business intelligence firm United Minds



Hygiene in Public Places and Concerns About Becoming Ill Due to Poor Hygiene



Hygiene Concerns Differ Greatly Around the World



Q: How often are you concerned about becoming ill due to poor hygiene?

Poor Hygiene Standards an Obstacle Around the World



52%

have refrained from using a public toilet

More than half of all women have recently refrained from using a public toilet because of concerns over lack of hygiene (M:44%)



70%

have refrained from using a public toilet

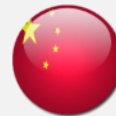
In Brazil, more than two in three have recently refrained from using a public toilet because of concerns over lack of hygiene (T:48%)



21%

have refrained from having dinner at someone's house

In South Africa, one in five have refrained from having dinner at someone else's house because of concerns over lack of hygiene. (T:10%)



59%

have refrained from showering at the gym

In China, almost six in ten have recently refrained from showering or swimming at a certain gym or swimming pool because of hygiene concerns. (T:25%)

Q: Have you recently decided NOT to do one of the following activities because you were concerned about the lack of hygiene and cleanliness?

Poor Hygiene Standards Limit Public Lives

6 out of 10 female respondents have refrained from one of the below activities due to concerns over poor hygiene standards.



52%

Using a public
toilet (Men: 44%)



26%

Showering or swimming at a
public gym (Men: 24%)



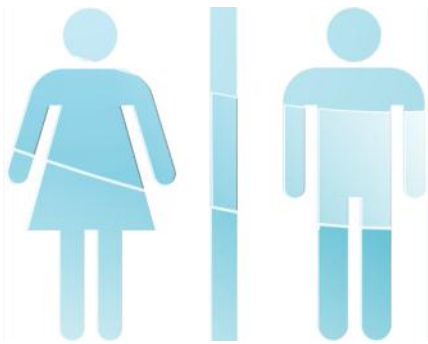
12%

Visit to a cafe, pub or
restaurant (Men: 14%)

Q: Have you recently decided NOT to do one of the following activities because you were concerned about the lack of hygiene and cleanliness?

Most Crucial Hygiene Improvements

PUBLIC TOILETS



39%

In Britain, improved hygiene standards in public toilets is a high priority
(T: 24%)

INDIVIDUAL RESPONSIBILITY



48%

In the US, individuals taking greater personal responsibility is key to increasing hygiene standards
(T: 34%)

IMPROVED LEGISLATION

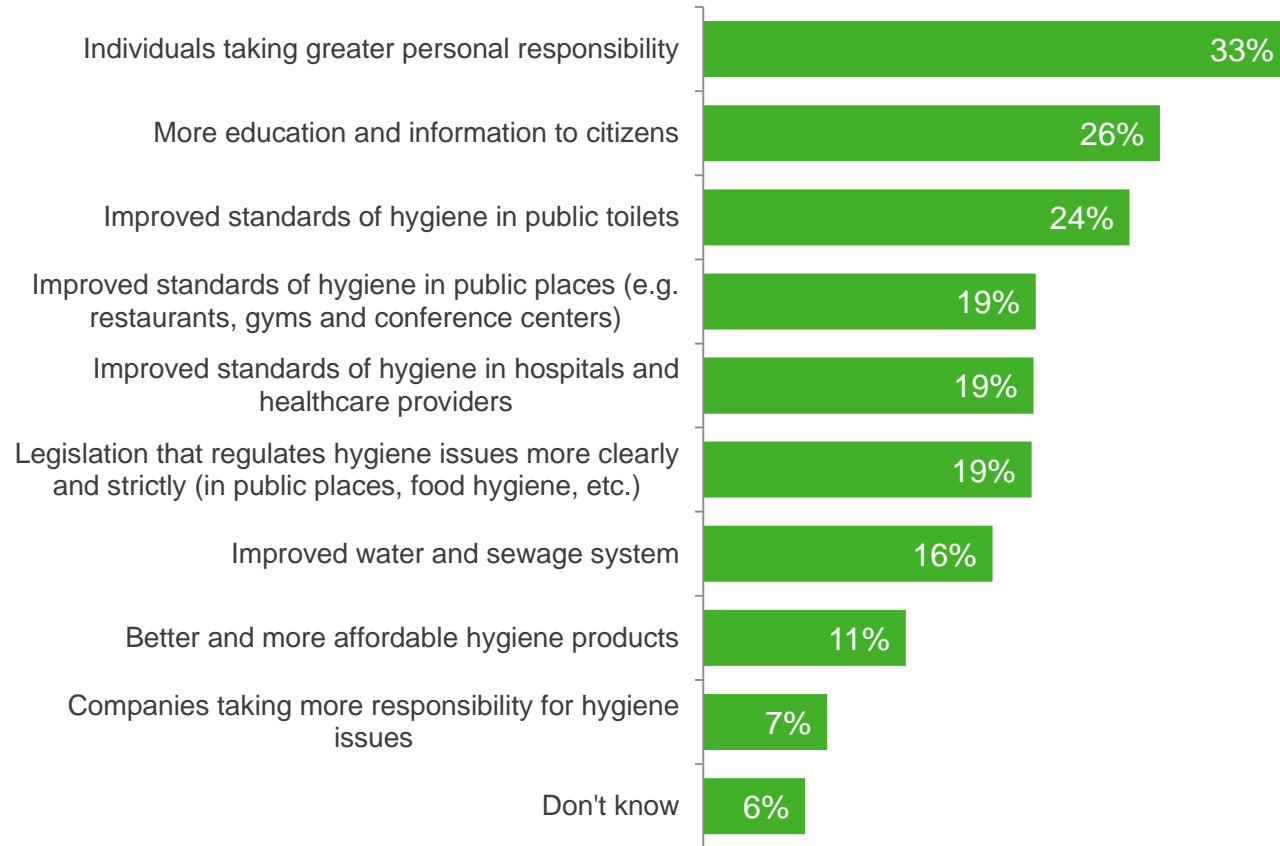


44%

China turns to legislators to regulate hygiene issues more clearly and strictly in order to improve hygiene standards
(T:18%)

Q: *What measures do you think would make the greatest difference in raising standards of hygiene and improving peoples' health in the country where you live?*

Individual Responsibility Key to Improved Hygiene Standards Globally



Q: What measures do you think would make the greatest difference to raising standards of hygiene and improving peoples' health where you live?

Restroom Activities at Work

STANDARD restroom activities

- **Using the toilet - 81%**
- **Washing or freshening up - 46%**
- **Changing panty liners, tampons or other sanitary products - 28%**
- **Talking on the phone - 24%**
- **Changing clothes - 22%**

OCCASIONAL restroom activities

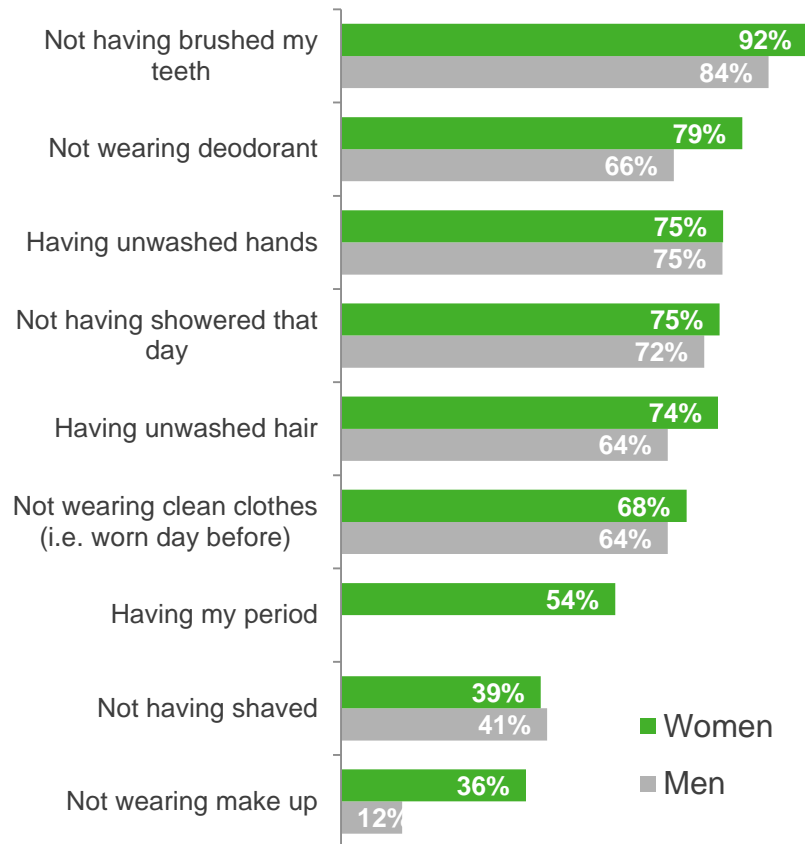
- **Texting (or used chat-app) - 19%**
- **Putting on make-up - 15%**
- **Taking a break to be by myself for a little while - 15%**
- **Taking a break to release frustration - 11%**
- **Having a private conversation face to face - 10%**

INFREQUENT restroom activities

- **Reading magazines or books - 9%**
- **Showering - 8%**
- **Taking a break to cry - 7%**
- **Smoking - 7%**
- **Working (e-mailing, working on computer, etc.) - 6%**
- **Eating - 5%**
- **Rehearsing a presentation - 4%**
- **Napping (taken a rest/slept) - 3%**
- **Exercising - 3%**

Q: Think about the restrooms where you work. What of the following have you done there?

Social Aspect of Hygiene Perceived to be Important



BASE: "Very uncomfortable" OR "Uncomfortable"

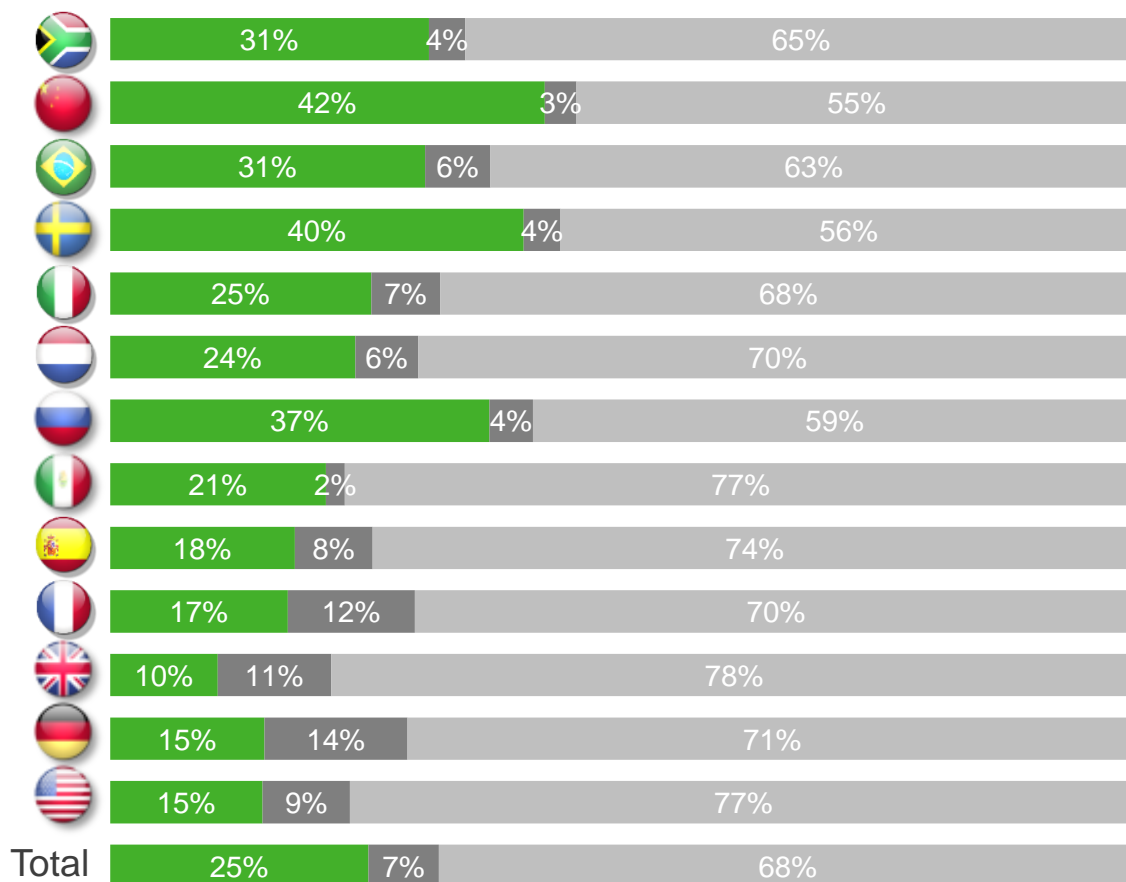


of female respondents say they feel uncomfortable or very uncomfortable in a social situation if they haven't brushed their teeth

Q. To what extent would the following make you feel uncomfortable in a social situation?
 Very uncomfortable, Uncomfortable, Not so uncomfortable, Not at all uncomfortable.

Poor Hygiene Standards Affect Everybody, But Women More Than Men

■ Women are more affected ■ Men are more affected ■ Men and women are equally affected

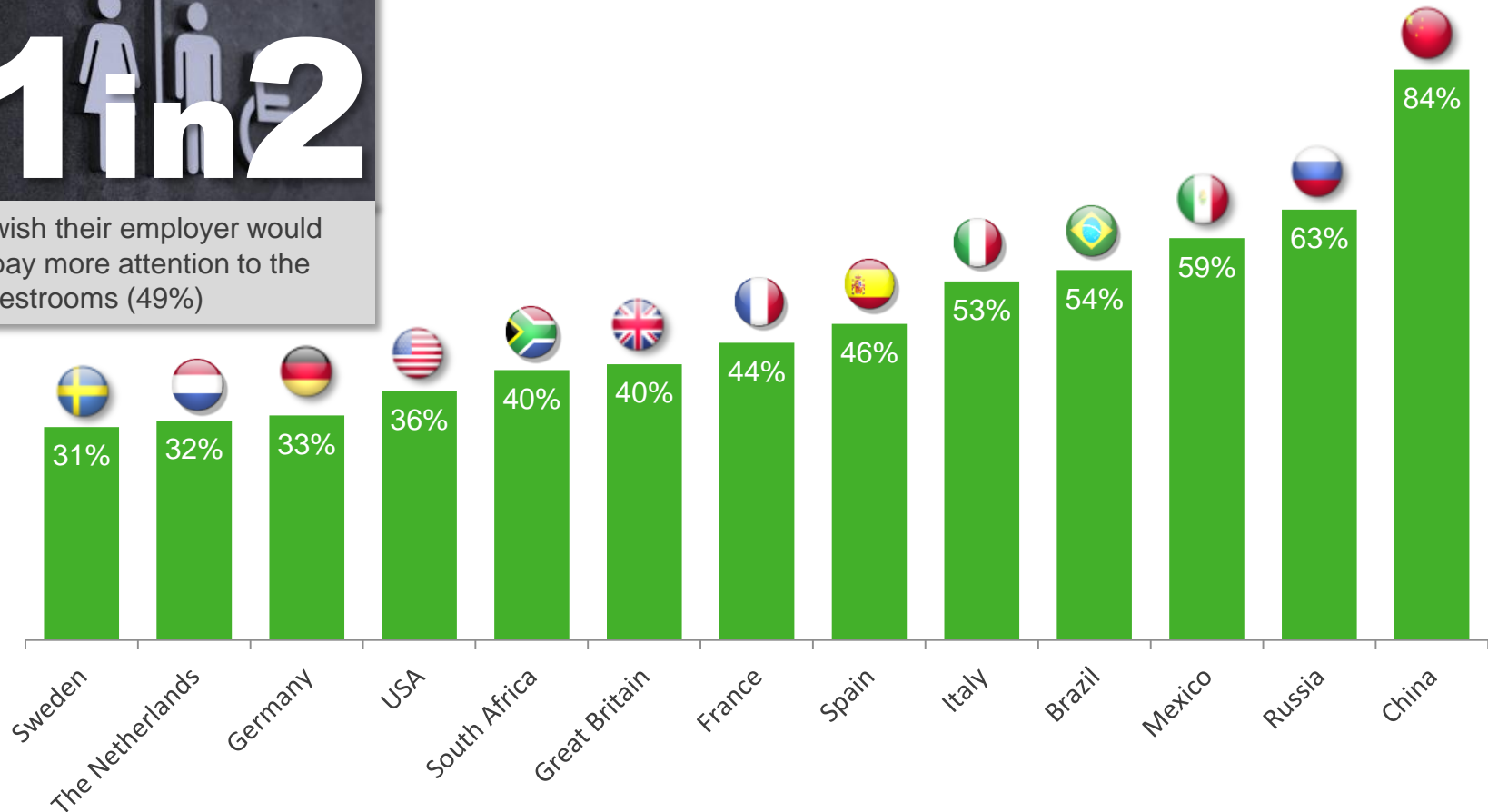


25%

of respondents believe women are more affected by the problems connected to hygiene standards where they live

Q: If you think about the problems with hygiene standards where you live, do you think women or men are affected most?

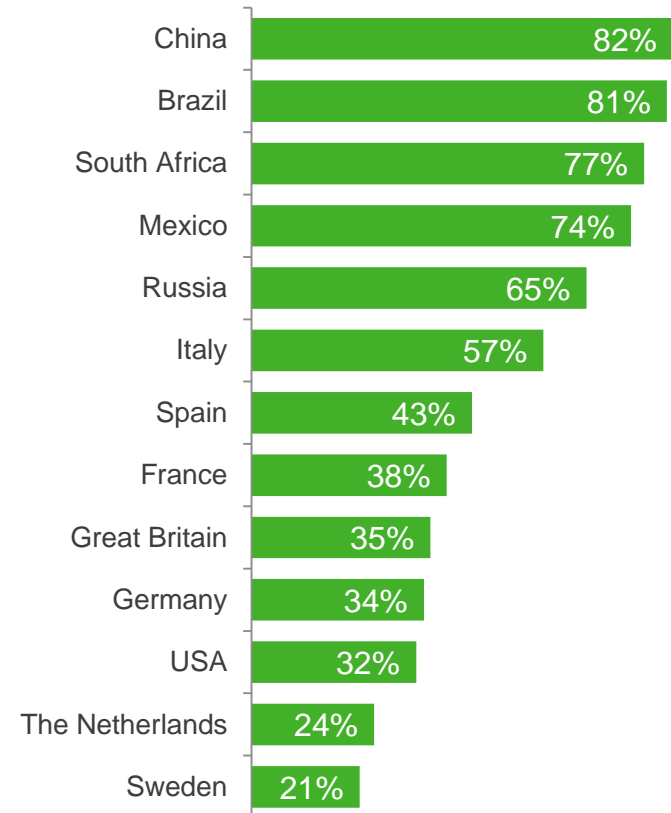
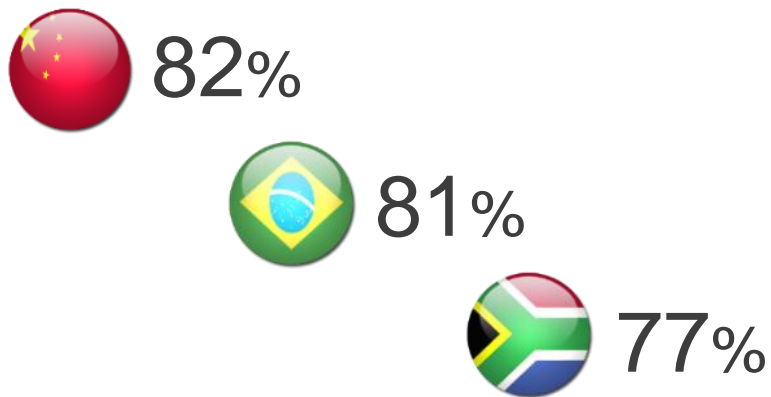
Pressure on Governments to Improve Restroom Standards



Q: What of the following applies to the restrooms where you work? I wish my employer would pay more attention to the restrooms at our workplace

Chinese and Brazilian Governments most Pressed to Improve Overall Hygiene

Respondents believing that hygiene issues should be given higher priority in society by, for example, politicians and the media



Q: Do you believe that hygiene issues should be given higher priority in society by, for example, politicians and the media?

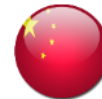
Focus on Improving Water and Sewage Systems in Some Countries



BRAZIL 34%



RUSSIA 34%



CHINA 31%



SOUTH AFRICA 30%

(T: 16%)

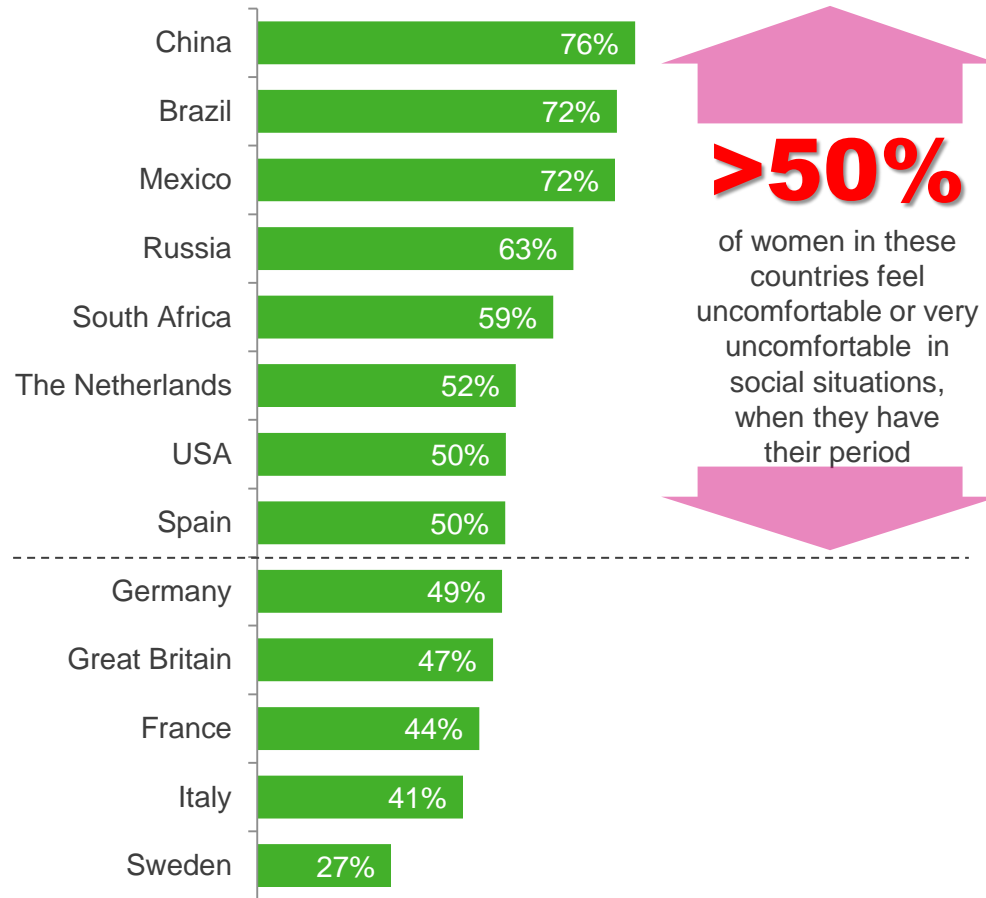
Improved water and sewage system is the number one priority in BRIC countries to raise hygiene standards and improve health

Q: What measures do you think would make the greatest difference to raising standards of hygiene and improving peoples' health where you live?

Menstruation Perceived to be Taboo

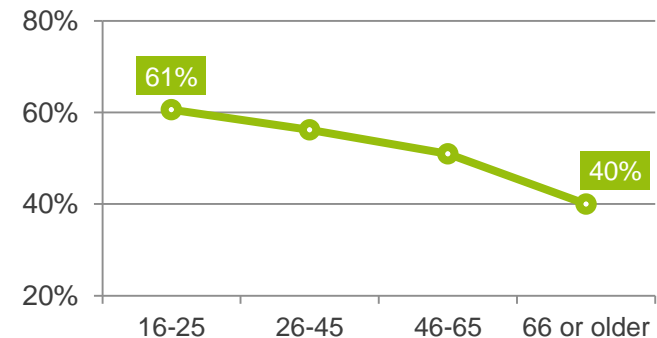


Menstruation Causes Social Discomfort for the Majority of Women



>50%

of women in these countries feel uncomfortable or very uncomfortable in social situations, when they have their period



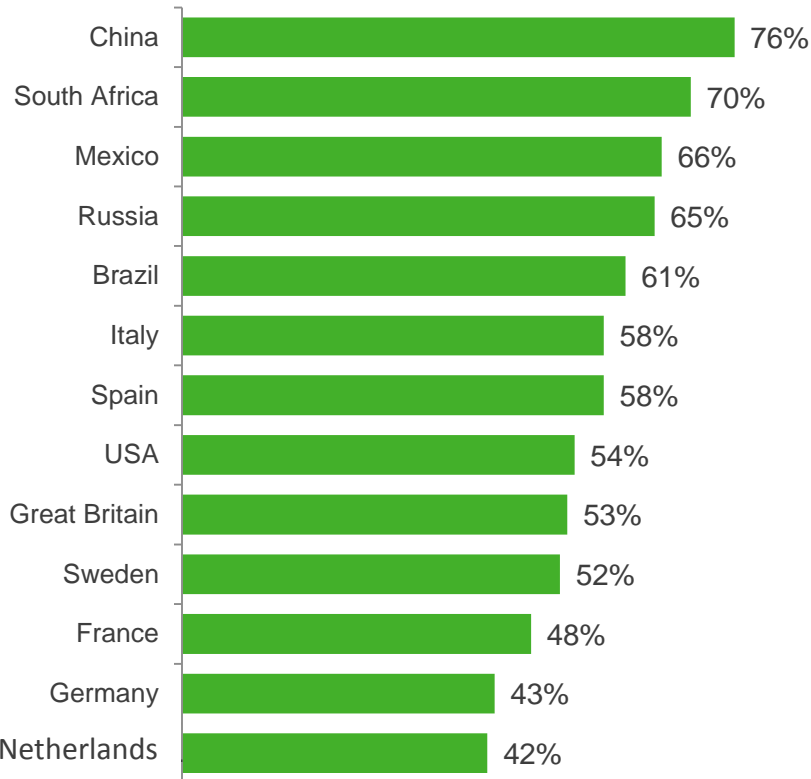
BASE: "Very uncomfortable" OR "Uncomfortable"

Q: To what extent would the following make you feel uncomfortable in a social situation? **HAVING MY PERIOD.**
 Very uncomfortable, Uncomfortable, Not so uncomfortable, Not at all uncomfortable.

Internet as a Growing Information Source Regarding Hygiene and Health



More Than 50% Use the Internet to Search for Hygiene Information

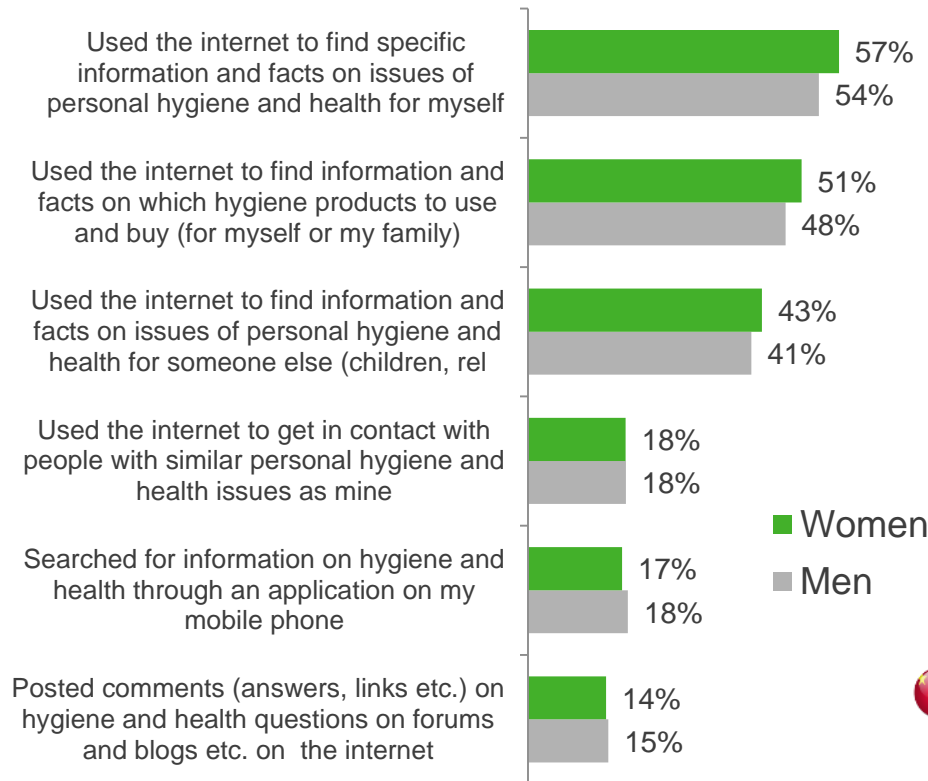


57% of female and **54%** of male respondents have searched the Internet for specific information and facts on personal hygiene and health for themselves




Q: Have you searched the Internet for Hygiene Information?

78% Actively Search for or Discuss Hygiene and Health on the Internet



* None of the above
 MEN 23%
 WOMEN 21%



 **51%** of respondents in China have used the Internet to get in touch with people with similar personal hygiene and health issues

Q: What of the following have you done?

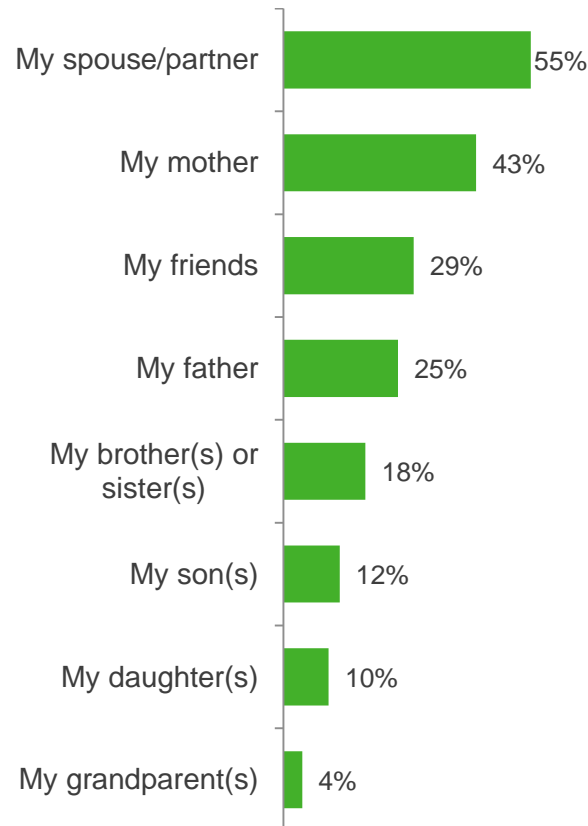
Women Most Common Dialog Partner for Hygiene Discussions



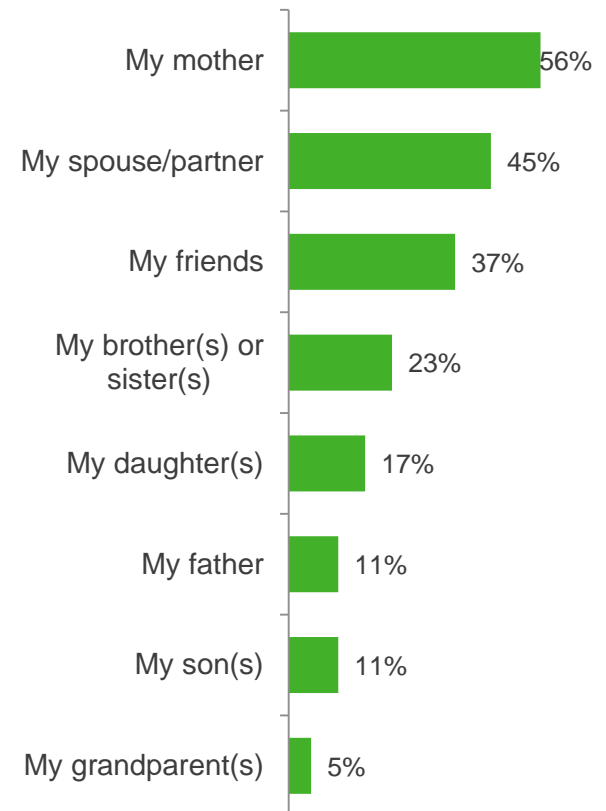
13%

never discuss personal hygiene issues with anyone they know

Men



Women



Q: Have you ever discussed your personal hygiene or related problems with any of the following people you know?

Women as Knowledge Hubs

- Focus on women to maximize knowledge sharing about hygiene and health
- Women key to improving hygiene standards globally



Hygiene Matters Key Findings: Hygiene, Women and Society

- Both men and women believe good hygiene standards are important and worry about becoming ill from poor hygiene in public places
- Individuals to take greater responsibility
- Governments and employers to improve hygiene standards
- Women extra effected during menstruation due to taboos and lack of hygiene products
- Internet growing as information source



How does SCA contribute?

- Educate, inform and engage public dialogue
- Innovative products and services
 - ✓ TENA, Tork, Libero, Libresse, Lotus, Nosotras, Saba, Tempo, Vinda and many more...
- Solid community involvement, local collaboration
 - ✓ Training programs to break taboos
 - ✓ Education on menstruation and physical development
 - ✓ Distributing sanitary pads in refugee camps
 - ✓ Hand washing programs for children
 - ✓ Education of 10.000 nurses related to incontinence care





SCA
Care of Life

**OCEAN
RACING
TEAM**

2014 - 2015



Libero



