



THE FUTURE OF GREEN

Defining Eco in the UK



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RECKITT INTRODUCTION



OUR PURPOSE

We exist to **protect**, **heal** and **nurture** in the relentless pursuit of a cleaner and healthier world

OUR FIGHT

To make access to the highest quality **hygiene**, **wellness** and **nourishment** a right and not a privilege.

Long standing, trusted and loved brands



WHY BEHAVIORAL?

Traditional Surveys make research accessible, but they have limitations...

STATED

While necessary for certain methodologies, traditional surveys do not always align with the way purchase decisions are made.

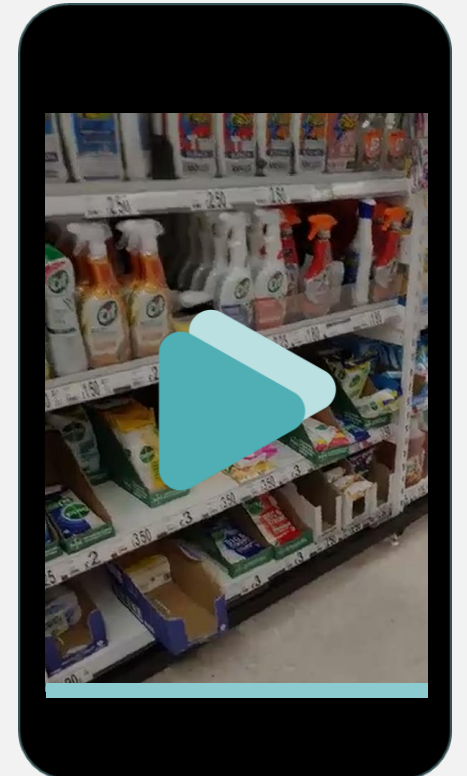
- ✗ Heavy reliance on recall
- ✗ Awareness does not align with consideration at POS
- ✗ Rationalizing and overstatement of behaviors
- ✗ No additional context

VS.

OBSERVED

Capturing what consumers & shoppers say and do through **observed behaviors** takes research a step further.

- ✓ Less consumer burden to recall
- ✓ Validated by actual, real behavior
- ✓ Observations of natural, irrational behaviors with real world influences
- ✓ Validated & unique measures captured (videometrics)



WHY NAILBITER?



- ▶ More Behavioral (In Real Life)
- ▶ Scalable
- ▶ Efficient
- ▶ Actionable
- ▶ Collaborative



DEFINING ECO IN THE UK: HOW IT WORKS

KEY BUSINESS QUESTION

With the sustained prominence of Sustainability and Eco claims in the market, Reckitt wanted to observe and gain a full foundational understanding of shopper motivations in this space.

The goal was to understand:

- ◆ ? What does "eco" mean to shoppers in the UK?
- ◆ ? How do they engage with Eco-brands on shelf (in-store and online)?
- ◆ ? Are shoppers in the UK willing to pay more for Eco-brands?

CAPTURED IN THE MOMENT OF TRUTH

The right shoppers are asked to take a video on their next shopping trip for the category.



2
Channels

In-store
Online



VALIDATED VIDEOMETRICS

Videos and audio are converted into metrics and insights at quant scale



600
Videos



ACTIONABLE INSIGHTS

Videos and metrics are woven into powerful brand, category, and retailer stories.



5
Retailers

- Asda
- Morrisons
- Sainsburys
- Tesco
- Waitrose

Eco-friendly needs are simple as eco-shoppers desire recyclable packaging.

HOW SHOPPERS DEFINE ECO-FRIENDLY



“ *That’s very good. They’ve indicated that I can recycle this product.* ”



Recyclable packaging



Shoppers look for **cardboard** and **less plastic packaging**



Other Eco-Friendly definitions



No Harsh Chemicals



Natural/ Plant-Based Ingredients



Plastic-Free



Bio-degradable

ECO-FRIENDLY MINDSET



More than half of shoppers do not Notice an eco-brand at shelf. When Noticed, Conversion is strong!

ECO-BRAND PERFORMANCE

<50%

Of Eco-shoppers
Notice an **Eco-Brand**,

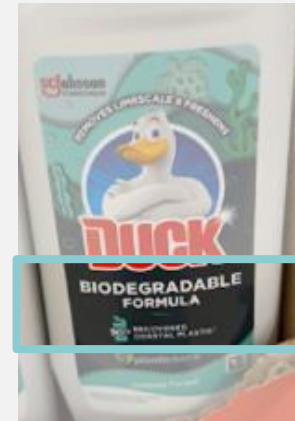
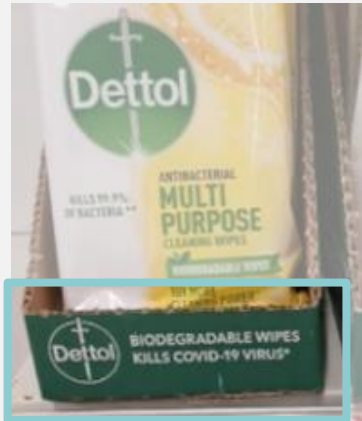
BUT...

>50%

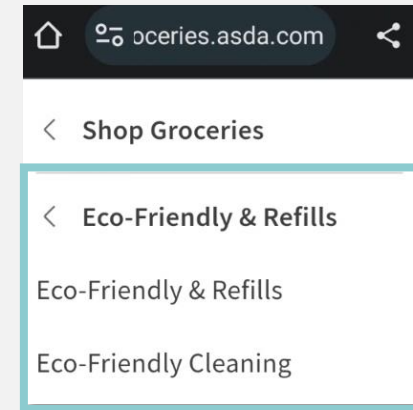
buy when they see one!

ECO-BRAND OPPORTUNITIES

Limited eco-friendly labelling / information



Hard to find without a dedicated section/page



Across in-store and
online retailers,
shoppers would like
if there was a
dedicated section
for eco-friendly
products.

ECO-BRAND OPPORTUNITIES

The screenshot displays a product listing interface on the Nailbiter website. At the top, there are filters for 'Filters (0)' and 'Relevance'. The listing features three products:

- Fairy Original All In One Regular Dishwasher Tablets x70:** Price £10.00 (£8.83 / kg). Includes a 'PRICE LOCK*' badge and an 'Add' button.
- Fairy Platinum All In One Lemon Dishwasher Tablets x32:** Price £9.00 (£16.27 / kg). Includes a 5-star rating (4573 reviews) and an 'Add' button.
- Finish Power All In One Regular Dishwasher Tablets x26:** Price £5.00 (19p / ea). Includes a 5-star rating (28 reviews), a 'PRICE LOCK*' badge, and an 'Add' button.

The Nailbiter logo is visible in the bottom left corner of the screenshot. A partial product listing for 'Finish Ultimate All in One' is visible at the bottom of the page.

While Conversion is high, there is an opportunity to address the lack of perceived value at shelf for Eco brands

Non-buyers are unwilling to pay more for eco-friendly products

1. Cost of Living Crisis

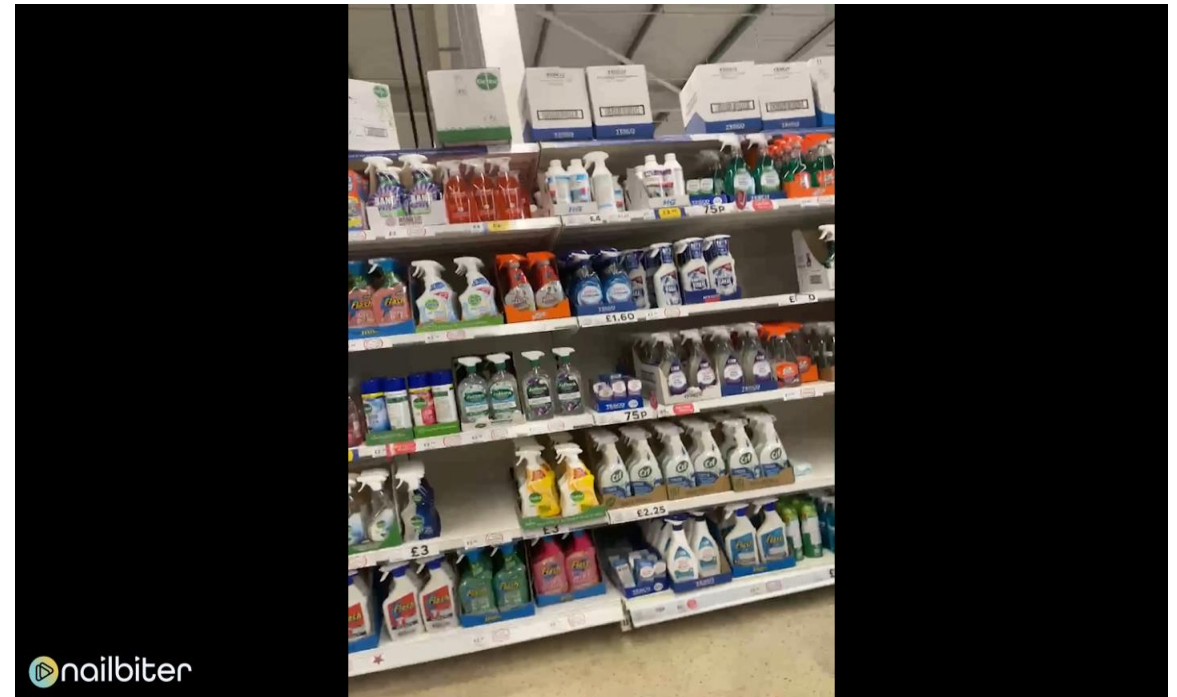


Eco-Shoppers feel they can no longer justify paying a premium for the environment due to the cost of living

2. Doubts on the impact



“Even though they claim to be more sustainable, I don’t think that there is much that a company or brand can really do.”



WHAT WE LEARNED

1

RECYCLABLE



2

DIFFERENTIATION



3

VALUE



THANK YOU

CONNECT with us at

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