

eye see

A united green front: Making sustainable products mainstream





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Nominee: Client-side researcher Award 2021

Finalist: Client-side team 2019

The Marketing Research and Insight
EXCELLENCE
AWARDS powered by QUIRK'S

Winner: Market research supplier (rev <\$10 mil) 2020
Advertising research (with Twitter) 2020

Global MR project Award (with Microsoft) 2019

Making behavioral insights accessible



Behavioral
+ conventional
methods

1/2
of top 30 CPG

2x
more
accessible

90%
consider us in
top 25%

Unique approach

Thanks to our unique platform, we are able to leverage both state-of-the-art behavioral and conventional methods to deliver actionable insights.

Industry expertise

EyeSee is the fastest growing behavioral research company in the world. We work with 1/2 of the top 30 CPGs brands, conducting over studies 400 annually in over 10 countries.

Fast & cost-effective

Compared to in-person behavioral methods, EyeSee's solutions are 2 times faster and 2 times more cost effective.

Best in class insights

In our client satisfaction survey, more than 90% of our clients rate EyeSee as their top 25% insights supplier; over 40% put us in their top 10%.

Ghent (BE) | London (UK) | Paris (FR) | New York (USA) | Belgrade (SB) | Mexico DF (MX) | Singapore (SG)



Closing the immunity gap:
**How to nail COVID-19
vaccination messaging?**

**EyeSee's focus in
Semester 1, 2021**

Now, at the end of
2021, we are here

A united green front:
**Making sustainable
products mainstream**

Finalist: Nonprofit project Quirk's Awards 2021

The challenge



Learn more about **how consumers see plastic pollution and sustainable products**

in order to **adjust** communication tone, claims, campaigns

and, consequentially,
make sustainable options mainstream.



But first, we must expand
the narrative because



**Sustainability is
more than just
packaging**

Thinking about the product, its **advertising, claims, your supply chain** and above all, understanding **who your consumers** are and **how they relate** to it, is the only way to do sustainability right.

Reframing what sustainability means



There is a general misconception that sustainability is about how much of our existing quality of life we are willing to sacrifice in order to become sustainable... Sustainability can't be some kind of a moral sacrifice, a political dilemma, or a philanthropic cause. It has to be a design challenge.



“Sustainable design should be fun, vibrant and improve the quality of life & individuals.”

Bjarke Ingels
Danish architect



Behavioral research offers a framework to:



1st step

**Understand
your
consumers**

2nd step

**Inspire with
emotions**

3rd step

**Clarify
impact**

4th step

**Think big
about
change**

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1st step

Understand your consumers

We identified three key segments of shoppers, based on their behavior in the study, as well as their stated attitudes.

True ECO buyers

- Motivated to make a difference and change how they shop
- Female shoppers, younger than 40, with a higher education and higher personal income (+60k)
- They are more influenced by anti-pollution posts on social media
- Care more about the design and attractiveness of ECO products



Talk is cheap

- They say they care, but they need incentives to join in
- Older than ECO buyers (40+), but no other clear demographic features
- The price and availability as top concerns about sustainable products
- They would prefer sustainable products by famous brands

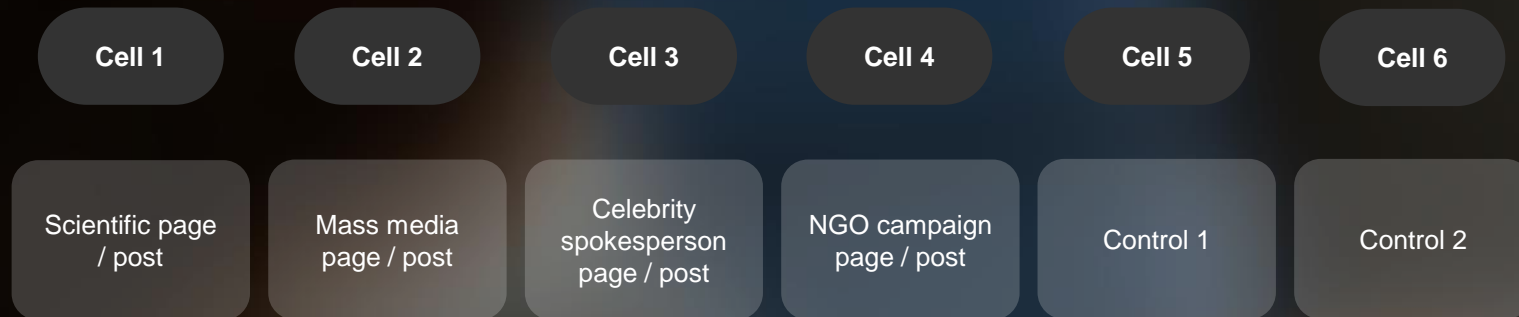


Uninterested

- They are not aware or do not care about pollution and sustainability
- No particular incentives for them to purchase more sustainable products



Methodology



Each cell had 4 post variants (to balance the impact of particular post, image or page)

No timeline exposure shelf with ECO sticker

No timeline exposure shelf with ECO sticker

All shelves with sticker, marking eco-friendly products

Neutral timeline exposure (w/o plastic pollution related posts)



United States



General population 18+



Shopping in 4 categories:

- Energy bars
- Body wash
- Toothpaste
- Toothbrushes



6 cells per 200 respondents (4 test cells and 2 control cells)



Methods used:

- Eye Tracking on FB timeline
- Facial Coding on FB timeline
- Virtual Shopping
- MaxDiff for claim testing
- Survey

Voice of the consumer

Our consumers are very aware of pollution, yet don't think they can make a big difference – this is where brands can play a part



88%

of shoppers believe that the pollution of air, water and soil is one of the most relevant threats to preserving our environment

However, only

34%

of shoppers think they personally contribute to a certain extent to solving the problem

Voice of the consumer

Our consumers are very aware of pollution, yet don't think they can make a big difference – this is where brands can play a part



However, only

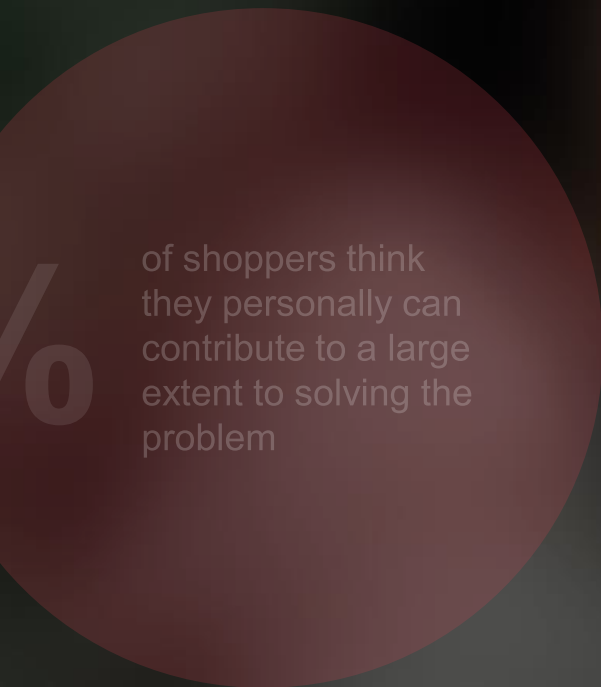
34%

of shoppers think they personally can contribute to a large extent to solving the problem



Voice of the consumer

Our consumers are very aware of pollution, yet don't think they can make a big difference – this is where brands can play a part



46%



Sustainable should not become a synonym for premium if we want to create widespread change



A reality check: Keep the prices competitive
~80% of shoppers are not willing to pay more for sustainable products!

Good practice examples

Price and availability are a must for reaching all consumer segments with sustainable options



Colgate Bamboo Charcoal Soft
Toothbrush 2Pk

★★★★☆ ~ 15

£4⁹⁹ (£2.50/count)



Colgate Toothbrushes 360 Degrees
Compact Head Soft

★★★★★ ~ 199

£3⁵⁶ (£3.56/count)

Save 10% with voucher

✓prime FREE delivery



A close-up photograph of a woman with dark hair smiling warmly at a young child. The image is overlaid with a semi-transparent red filter.

1st step

Understand
your
consumers



2nd step

Inspire with
emotions

A photograph of a woman with long dark hair looking down at a smartphone. The image is overlaid with a semi-transparent red filter.

3rd step

Clarify
impact

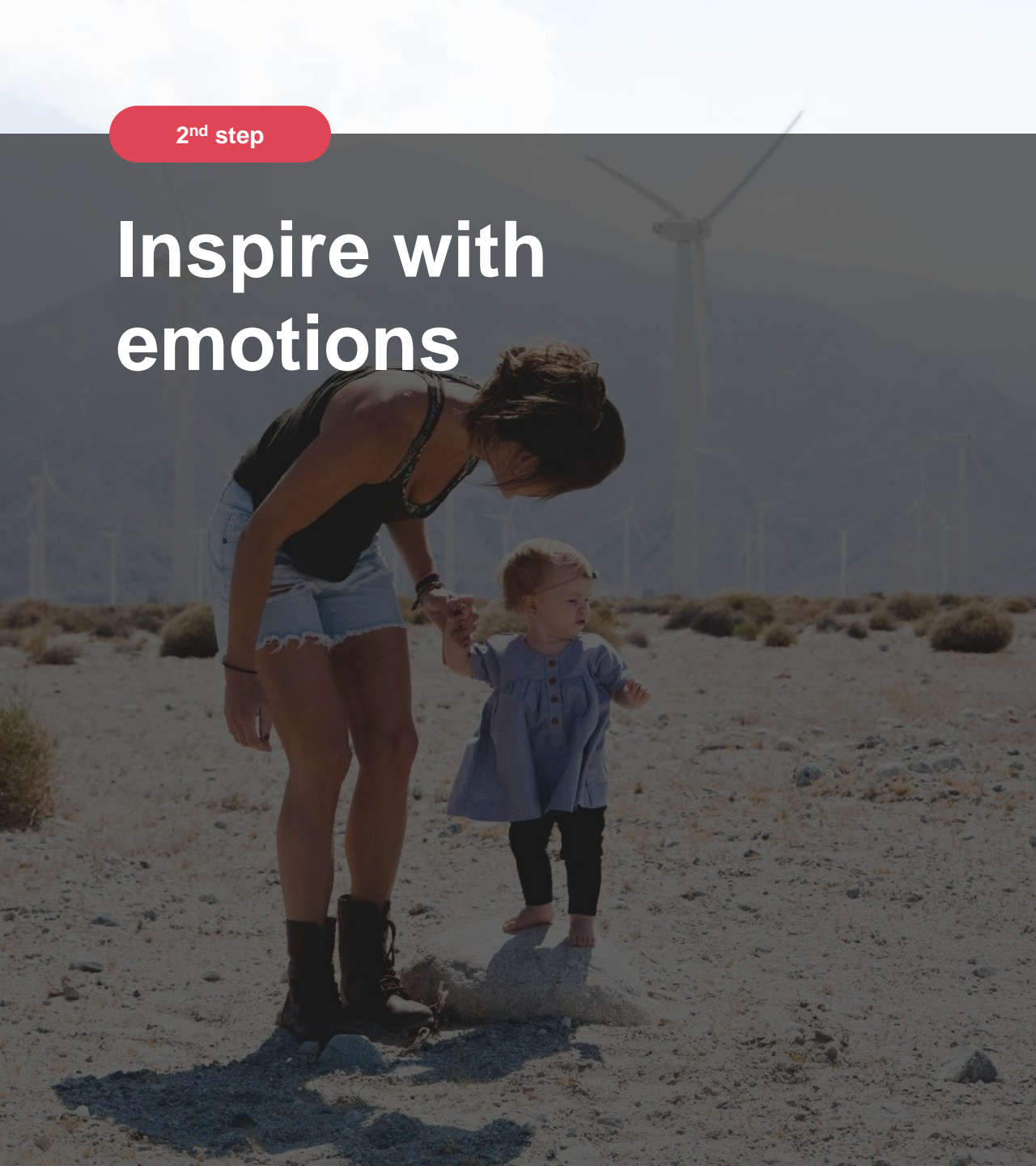
A photograph of a woman holding a large, light-colored tote bag. The bag has a circular logo on it. The image is overlaid with a semi-transparent red filter.

4th step

Think big
about
change

2nd step

Inspire with emotions



1

Posts that evoke emotions (especially **negative** ones, such as sadness, disgust or guilt) are **not necessarily effective** in generating action i.e. influencing change in shopper behavior.

2

Posts that come from **credible source**, that are factual and clear have most chances of generating impact.

3

Posts with **celebrities and NGO posts** had a significantly **higher emotional reach** than scientific and mass media posts.

Facial coding results by media sources

The posts in our study mainly evoked interest, yet, facial coding has also detected negative emotions, such as disgust and fear.

	N	happy	surprised	interested	disgusted	afraid	pe	ne	ER
scientific	57	0%	2%	2%	0%	0%	2%	0%	2%
mass media	61	0%	0%	0%	2%	0%	0%	2%	2%
celebrity	61	2%	2%	11%	2%	0%	13%	2%	15%
NGO	63	2%	0%	8%	3%	2%	8%	5%	13%

Ad exposure in our experiments significantly increased sales of sustainable products by up to 9%. Highest impact was seen for scientific posts.

Posts with highest emotional engagement



ER=29%

No negative emotions,
all 29% (interest)



ER=24%

12% negative (disgust,
fear), 12% positive (interest)



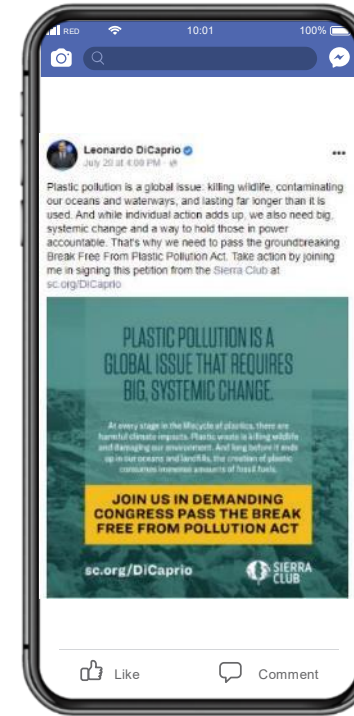
ER=15%

Positive-negative
(interest-disgust)



ER=14%

Positive-negative
(interest-disgust)



ER=13%

(interest,
surprise)



Emotions don't always translate into actions – build a communication funnel



Although emotionally captivating, only with a combination with other methods we can see how well these emotions translate into action. Seek to inspire, not to shock.



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Clarify impact

1

Product claims are the best area for describing your impact, quickly.

2

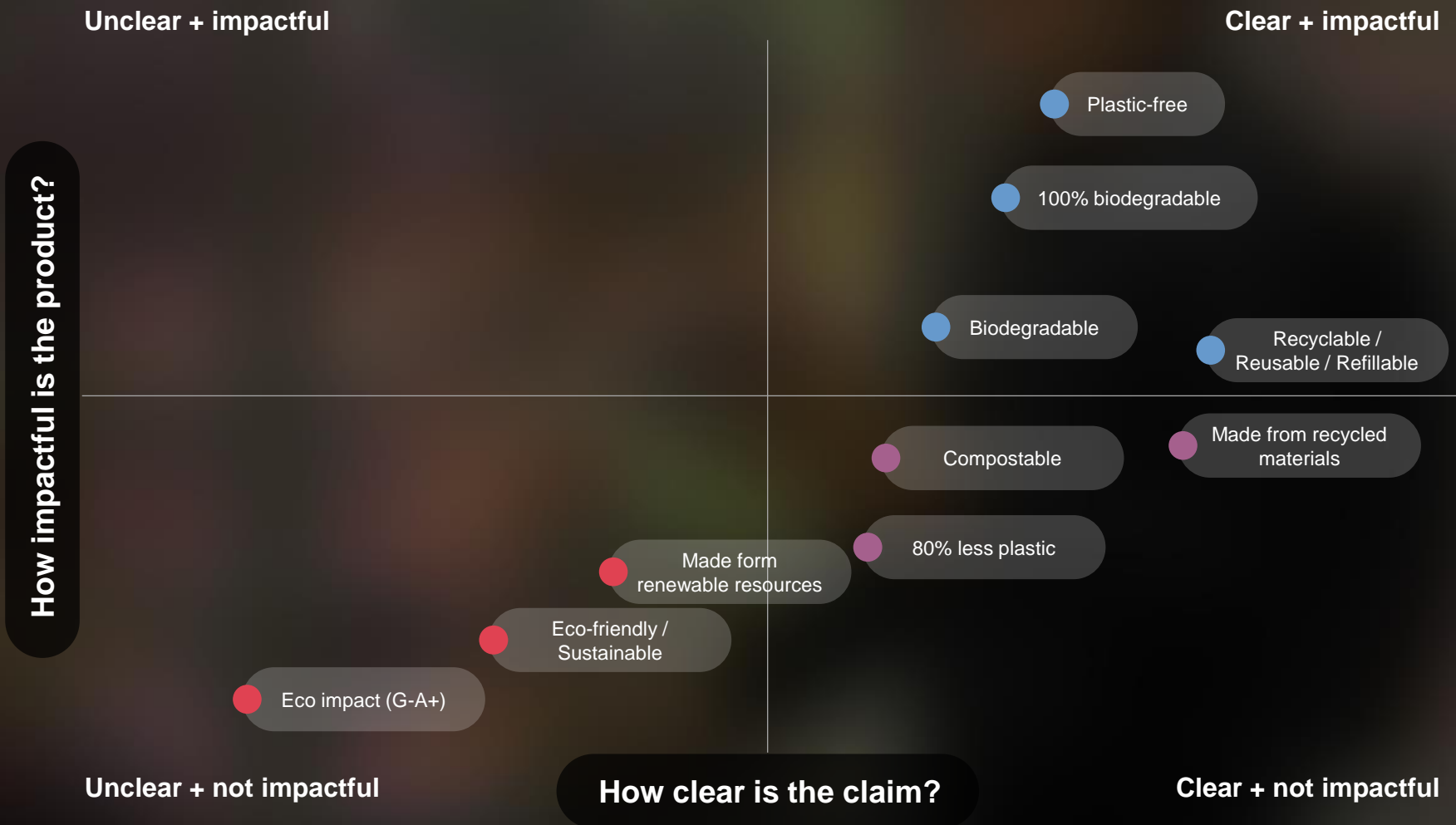
Clarity is a must!

Be specific; explain **how** you are contributing to solving a specific problem ('plastic-free'/'reusable'). Avoid being vague (such as writing only 'sustainable').

3

Avoid using **longer copy** instead of a claim ('good for the environment') and **overused phrases** ('eco-friendly').

Educate your consumers – sometimes what they find clear is not the most sustainable option. Position yourself as a trustworthy source of information.



Top 5 eco claims

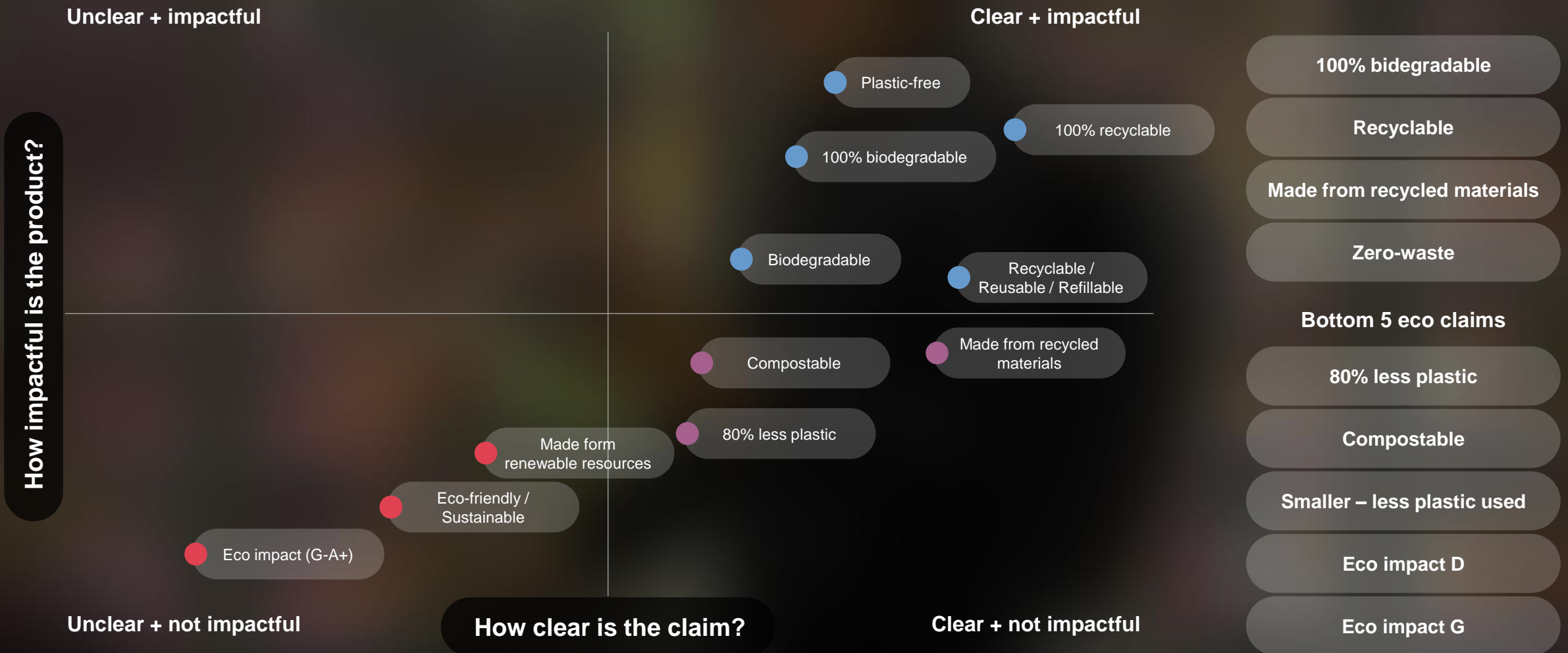
- 100% recyclable
- 100% biodegradable
- Recyclable
- Made from recycled materials
- Zero-waste

Bottom 5 eco claims

- 80% less plastic
- Compostable
- Smaller – less plastic used
- Eco impact D
- Eco impact G

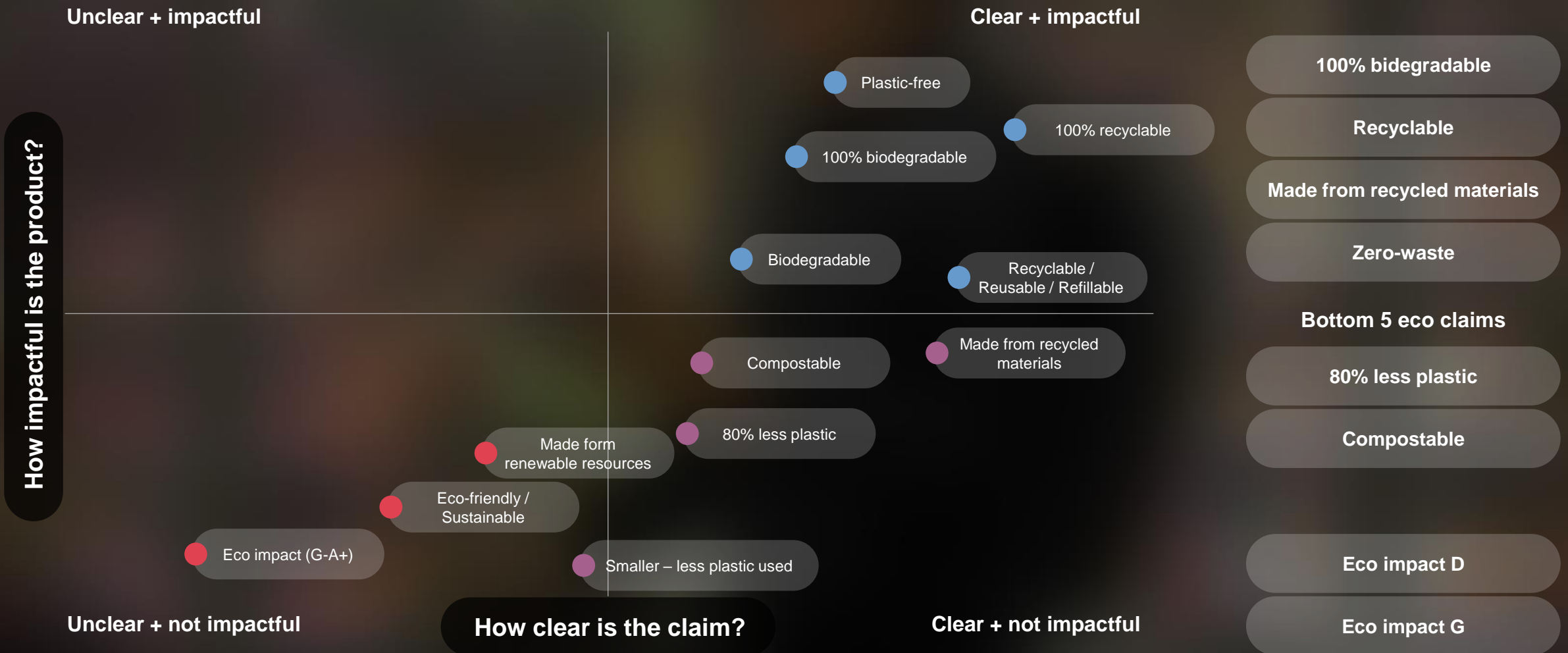
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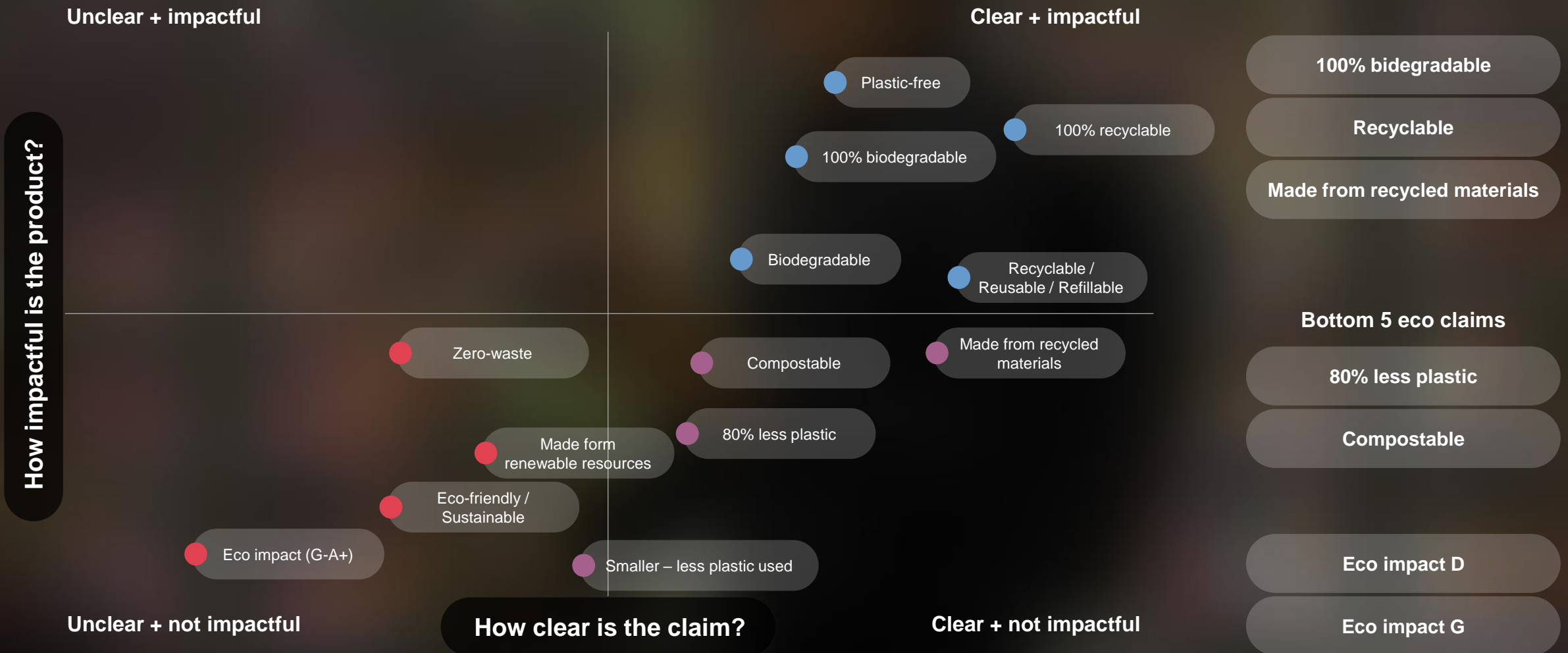
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Top 5 eco claims



Claim communication examples



“Smile for good” logo Cardboard: brown/ green colors “Smile for good” explicit

99.7% Natural ingredients Recyclable New Colgate smile for good Good for you. Better for the planet.

Iconography

Ingredients demystified

L'ORÉAL MEN EXPERT XL 300ml HYDRA ENERGETIC WAKE UP EFFECT SHOWER GEL WITH TAURINE 100MG BODY | FACE | HAIR BOTTLE MADE OF 100% RECYCLED PLASTIC

Eco-friendly Communication



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Think big about change

1

Key challenge and opportunity lie in this fact: 27% of shoppers would buy more eco-products if they were from **well-known brands**.

2

This means that **bigger brands can make a bigger change**. If there are no current sustainable solutions in your category – you are staring at space for innovation. If something doesn't exist, find ways to create and test it.

3

Being **brave and bold** in developing new products can have a much higher impact and **reinvent** entire categories.

Aim to improve quality of the experience with sustainability



Hedonistic sustainability: 1 concept – 4 steps

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What's next?




What's next?



**Sustainability
moves from a hot
topic to a must-do
for both
businesses and
people.**



**Sustainability
should be
affordable for
everyone.**



**We are in for a
lifelong work –being
boldly innovative, can
make us not just
greener – but also
happier.**



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