



Is “doing good” good for business?

Measuring the impact of sustainability and social efforts on brand and sales performance

Morgan Molnar

Director of Product Marketing, Momentive
September 2021



A little bit about me

- Hi, I'm Morgan!
- I lead product marketing for Momentive
- I've been with Momentive for 6 ½ years
- I'm a researcher-turned-marketer



Momentive is a leader in agile insights and experience management



Our AI-powered solutions:



**Market
Insights**



**Brand
Insights**



**Customer
Experience**



**Product
Experience**



**Employee
Experience**

Insights at immense scale

98%
Of the
Fortune 500

2.2M
Daily
responses

55B+
Answered
questions

144M+
Global
panelists

One platform for all of your quantitative insights



Market Insights Solutions

Market Sizing
Industry Tracking
Competitive Intelligence
Market Segmentation
Usage & Attitudes
Shopper Insights



Product Experience Solutions

Concept Testing
Product Optimization (Conjoint)
Feature Importance (MaxDiff)
Price Sensitivity (Van Westendorp)
Package Testing
Claims Testing



Brand Insights Solutions

Brand Health Tracking
Brand Lift Analysis
Ad / Creative Testing
Message Testing
Name Testing
Crisis Management



AI-powered insights platform

- Flexible research design
- Data security/ compliance
- 100+ integrations
- Built-in methodologies
- AI engine
- Automated insights
- Statistical analysis
- Industry benchmarks
- Custom dashboards

Global panel network

144M+ People

130+ Countries

60 Languages



Louise
25-34 years old
NYC metro area

Brand Health Tracker

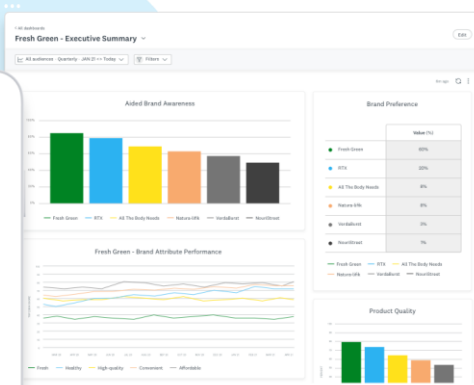
6. How would you describe your overall opinion of our brand?

- ☐ Extremely favorable
- ☐ Very favorable
- ☐ Somewhat favorable
- ☐ Not so favorable
- ☐ Not at all favorable
- ☐ I have not heard of this brand

5.0 100%

Prev

Next



Agenda



01

Top trends: sustainability and social values

- What's hot right now
- How preferences have changed
- How shopping has changed
- Companies doing this well

02

Research tips: incorporating social topics into your studies

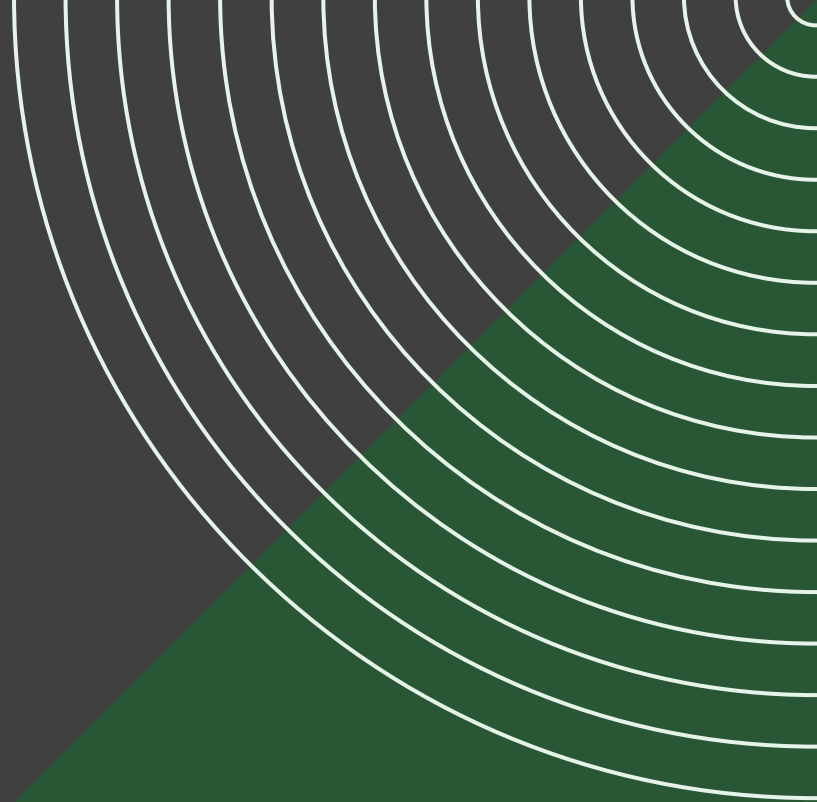
- Understanding buyers
- Claims testing
- Concept/package testing
- Brand health tracking





TOP TRENDS

Sustainability and social values



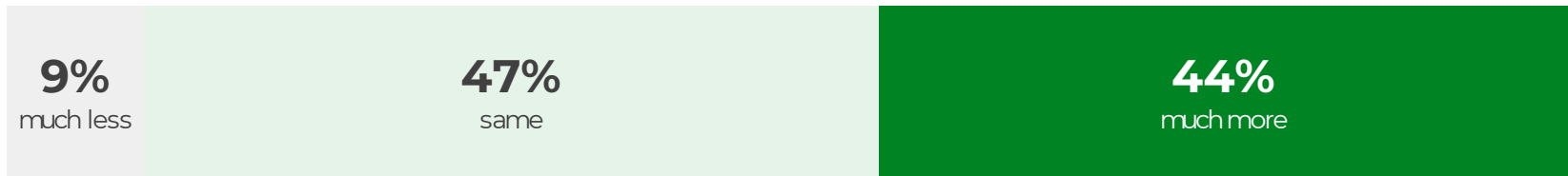
01

Consumers care more about
the environment





44% of consumers say they care about environmental issues ***much more*** today than they did a year ago.



N= 1,097 US consumers; March 2021

Q: Would you say you care about environmental issues much more, much less, or about the same amount as you did a year ago?

02

Consumer habits and preferences are evolving





2 in 5

are reducing their use of single-use plastics
(e.g. straws, disposable bags)

N = 873 US adults 18+

Q: Which of the following lifestyle practices do you or your household observe? (Select all that apply)



1 in 5

are regularly composting waste

N = 873 US adults 18+

Q: Which of the following lifestyle practices do you or your household observe? (Select all that apply)



1 in 10

are using alternative power sources
(solar, wind, etc)

N = 873 US adults 18+

Q: Which of the following lifestyle practices do you or your household observe? (Select all that apply)



2 in 5

are at least somewhat likely to consider an electric
vehicle for their next car purchase



1 in 5

consumers have tried plant-based
meat alternatives



03

Consumers are opening their
wallets for social values



4 in 5

consumers have made purchase decisions
based on their values in the past year.

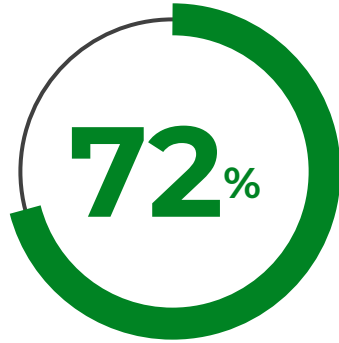


77%

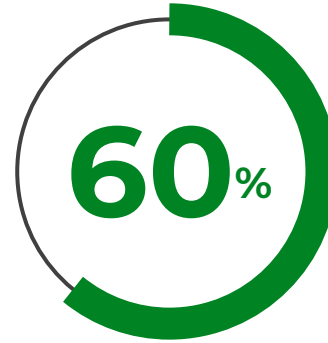
of consumers said it's worth it to pay more
for environmentally-friendly products



Consumers are willing to pay more
for **food** that is...

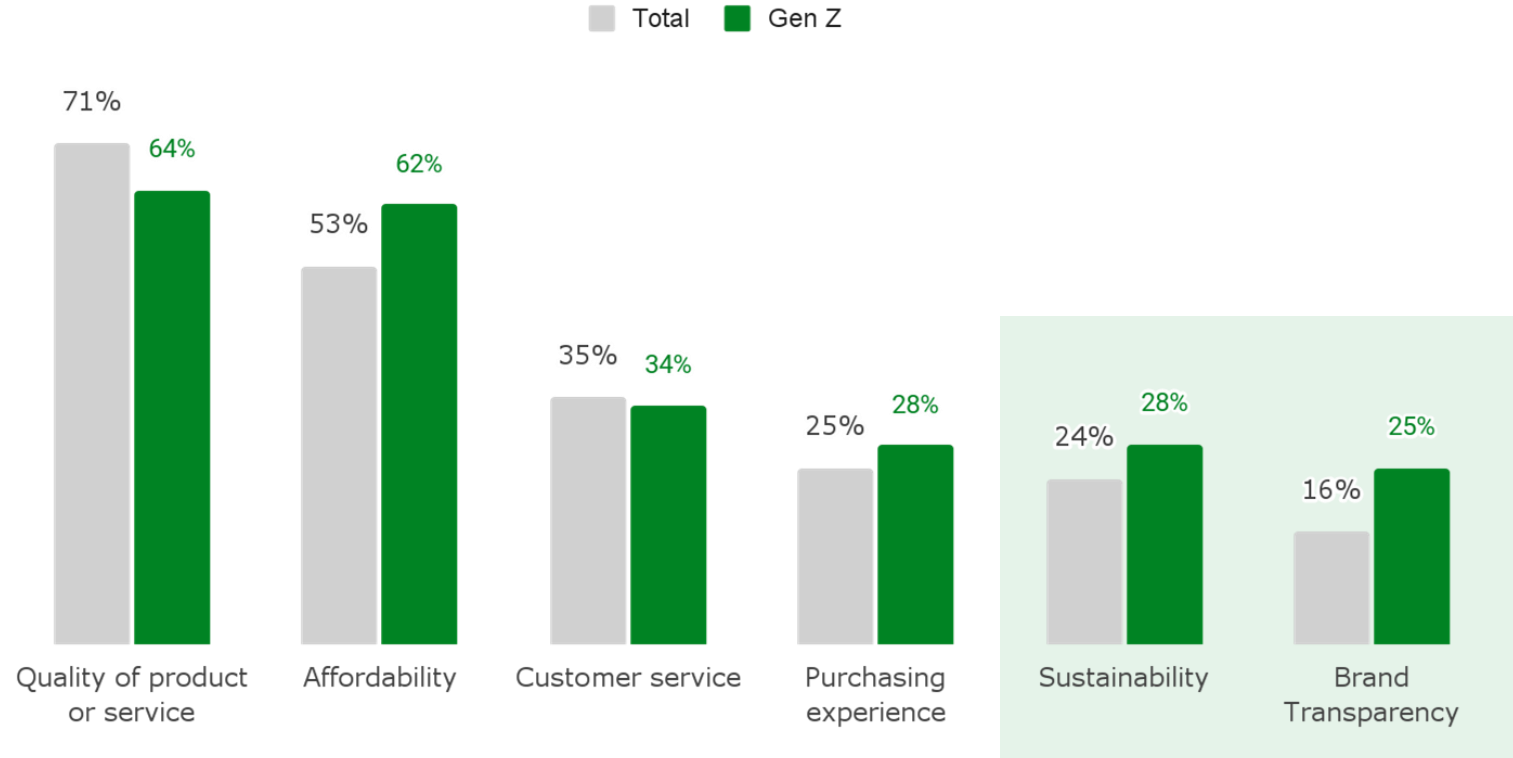


Produced
sustainably



Produced by brands
committed to social and
environmental justice

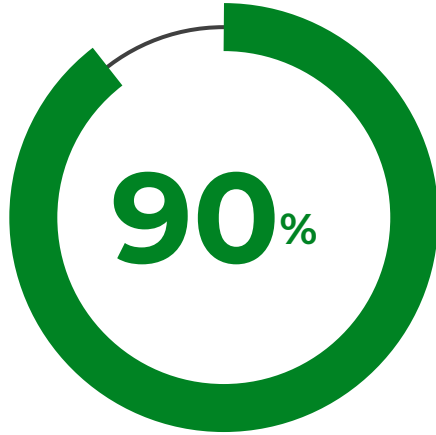
Top purchase drivers: General population vs Gen Z



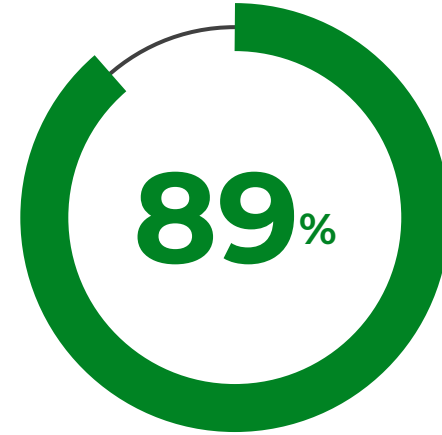
Social justice is also central to the B2B buying process



IT Decision Makers care too...



90% of IT decision makers say Corporate Social Responsibility is important in their purchasing decisions



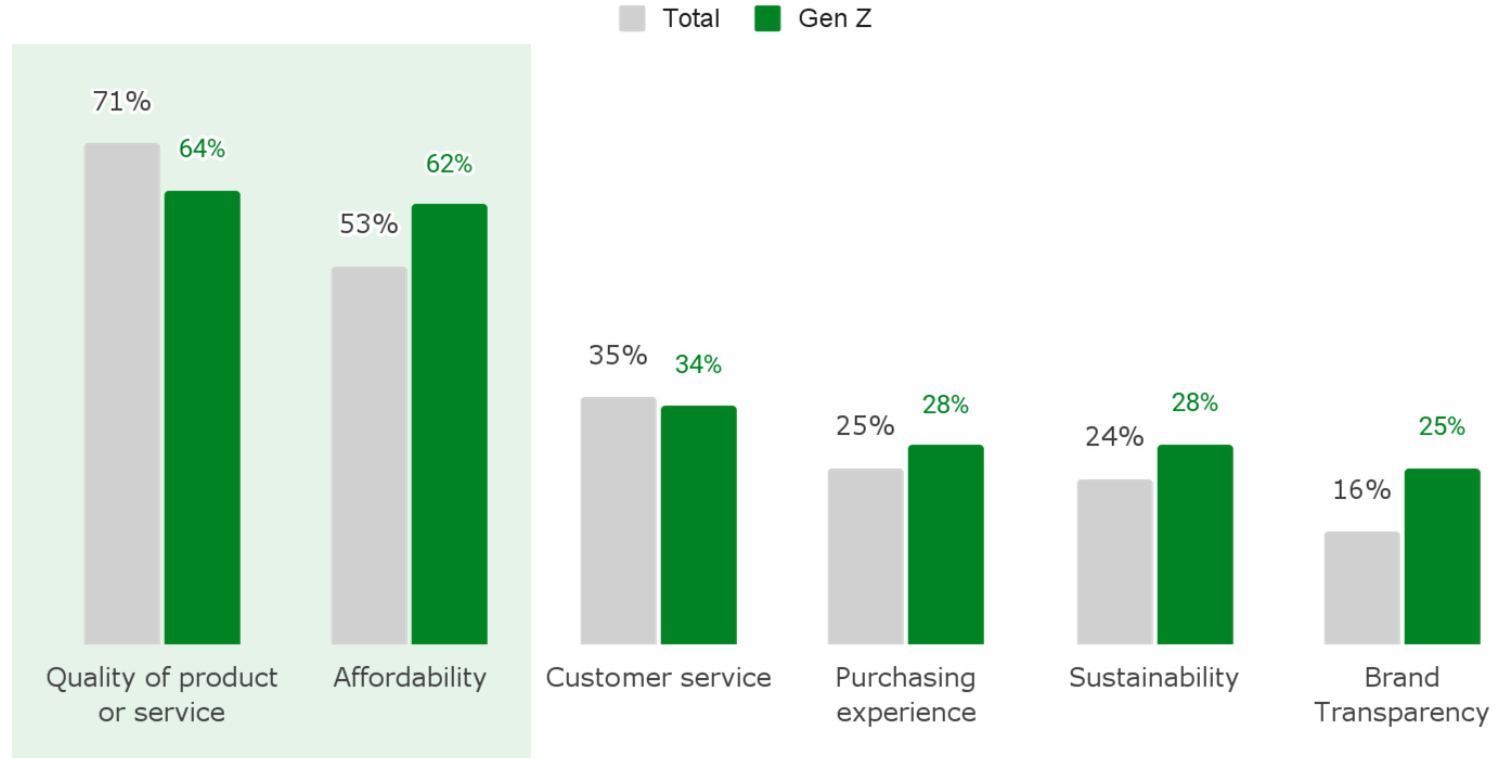
89% of IT decision makers say they are likely to **stop purchasing** from a vendor whose business decisions conflict with their organization's values

05

But quality and price still
reign supreme



Top purchase drivers: General population vs Gen Z



06

Consumer brands are
committed to sustainability



Pledging their commitment:



- The 25 largest consumer goods companies have made commitment to increase recyclable content, minimize packaging or reuse material
- 80% of those companies are working toward **fully recyclable packaging** for all of their products by 2030 at the latest



100%

recyclable or reusable
packaging by 2025



Johnnie Walker
created the
world's first ever
100% plastic free
paper-based
spirits bottle



L'Oréal innovates
for a sustainable
beauty routine
**with an exclusive
paper bottle**
developed hand
in hand with
Paboco®, the Paper
Bottle Company



L'ORÉAL

Secret and Old Spice rolled out cardboard deodorant tubes





Product Environmental Report

13-inch MacBook Air

Made with better materials

100%

recycled aluminum enclosure

100%

recycled tin in the solder of the main logic board

Energy efficient

71%

less energy consumed than the ENERGY STAR® energy efficiency requirement



Responsible packaging

100%

of the wood fiber comes from recycled and responsible sources

94%

of the packaging is fiber based, due to our work to use less plastic in packaging

Tackling climate change

100%

We're committed to transitioning our entire manufacturing supply chain to 100 percent renewable electricity by 2030.

Smarter chemistry¹

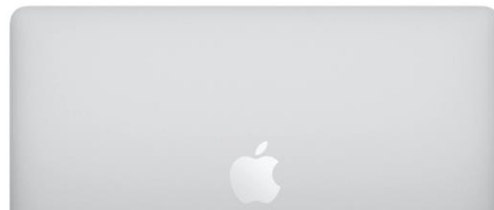
- Arsenic-free display glass
- Mercury-free
- Brominated flame retardant-free
- PVC-free
- Beryllium-free

Apple Trade In

Return your device through Apple Trade In and we'll give it a new life or recycle it for free.

100%
recycled
aluminum.
1000%
here for it.

Using recycled aluminum in device enclosures lowers their overall carbon impact.



07

Sustainability-first brands are becoming popular





N=981 US adults 18+

Q: When you think of companies that take positive actions to protect the environment, which ones come to mind?



allbirds



BURT'S BEES



with Peppermint Oil
Eucalyptus Leaf Extract

BURT'S
BEES

Thoroughly
Therapeutic

Hand & Cracked
HAND CREAM



2.6oz (74g)

100% NATURAL

BURT'S
BEES



Chemical-Free
SUNSCREEN
with hemp seed oil

SPF
15

1.7oz (48g)

100% NATURAL

BURT'S
BEES
Green Tea
& Lemongrass
HAND SOAP



1.7oz (48g)

100% NATURAL

BURT'S
BEES

Baby's Butt
CREAM

BURT'S
BEES

Baby's Butt
CREAM





EVERLANE





So...

How do you measure the impact of sustainability and social efforts on brand and sales performance?

In-market distribution tests

Understand the impact of sustainable products on-shelf to optimize assortment

PnP & attribution studies

Measure actual price sensitivity and sales impact of launching sustainable products

Pre-testing w/ survey methods

Know what product features, claims, and creative will resonate most with your buyers

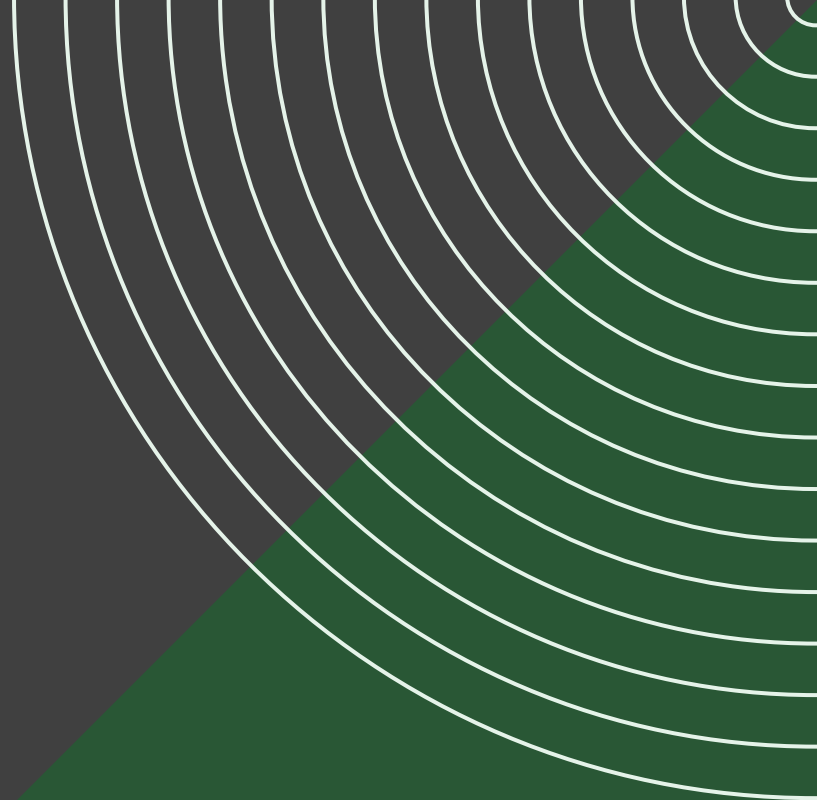
Brand health tracking

Measure the impact of your social responsibility efforts on brand health and perception



RESEARCH TIPS

Incorporating social topics into your studies



01

Understand what your buyers care about



Measure shifting attitudes and behaviors

Usage & Attitudes studies can help you dig into specific social and environmental topics to learn what people prefer and how that drives action.

Get category-specific insights vs relying on broad trends

What's true for paper products might not be the case for beauty or electronics. Get insights specific to your category to develop a product marketing strategy.

Understand tradeoffs with choice-based methods

Techniques like Conjoint and MaxDiff help you understand the relative importance of product attributes & know how consumers weigh options.



Why MaxDiff?



Traditional Rating Scale

Thinking about buying software for your company, **how important** are each of the following criteria to you?

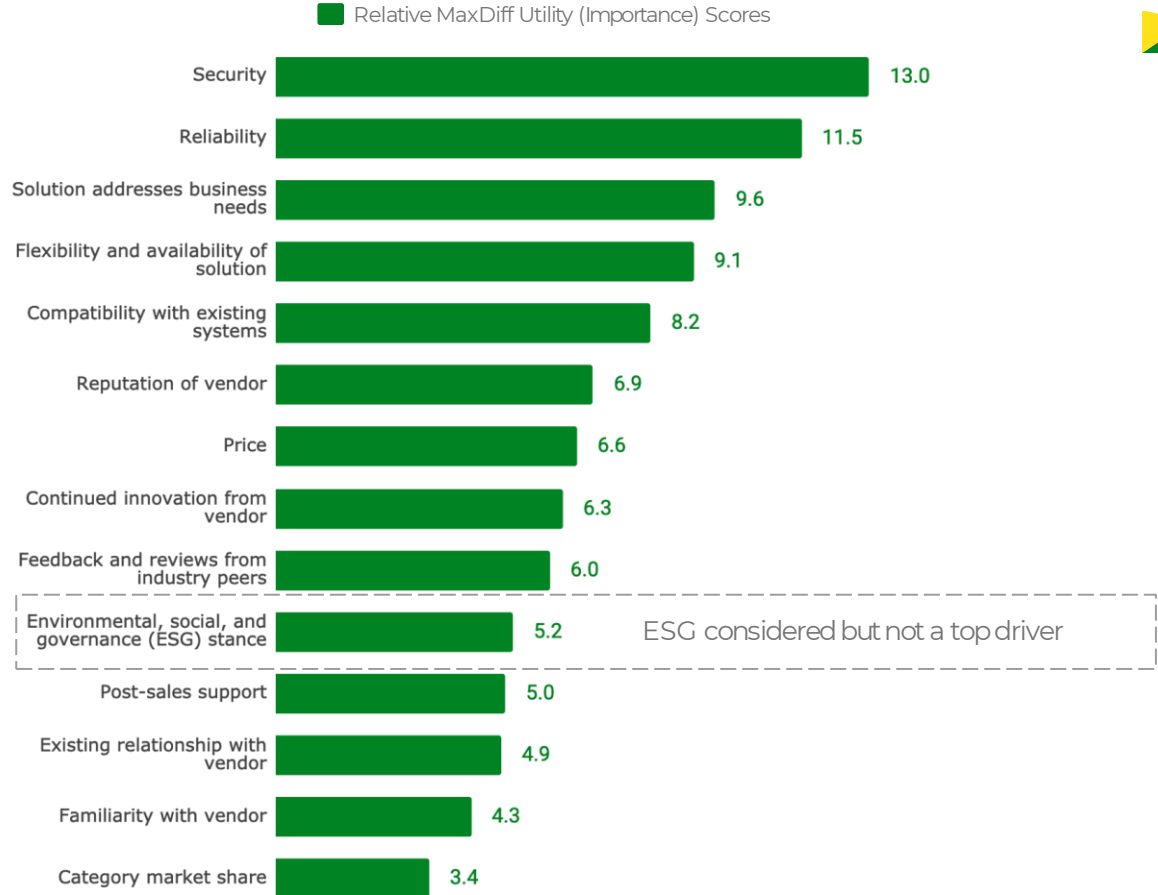
	Not at all important	Not very important	Somewhat important	Very important	Extremely important
Reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Reliability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ESG stance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

MaxDiff Best-Worst Scaling

Which of the following purchase criteria are **most** and **least** important to you?

Least important	Criteria	Most important
<input type="radio"/>	Reputation	<input type="radio"/>
<input type="radio"/>	Security	<input checked="" type="radio"/>
<input type="radio"/>	Reliability	<input type="radio"/>
<input type="radio"/>	Price	<input type="radio"/>
<input checked="" type="radio"/>	ESG stance	<input type="radio"/>

MaxDiff analysis: Security and reliability most important for ITDMs when selecting a vendor



“

For some products, sustainability is the main event. For some, it's an “*and*.”

Ann Meitz

Vice President, Sustainability & Packaging Innovation, Consumer Business Group at 3M





Office Products › Office & School Supplies › Paper › Notebooks & Writing Pads › Self-Stick Notes



Roll over image to zoom in

Post-it Super Sticky Full Stick Notes, 3x3 in, 12 Pads, 2x the Sticking Power, Rio de Janeiro Collection, Bright Colors (Orange, Pink, Blue, Green), Recyclable (F330-12SSAU)

Visit the Post-it Store
★★★★★ 902 ratings | 4 answered questions
Amazon's Choice in Self-Stick Note Pads by Post-it

List Price: \$17.99 Details
Price: \$9.83 Get Fast, Free Shipping with Amazon Prime & FREE Returns
You Save: \$8.16 (45%)

Available at a lower price from other sellers that may not offer free Prime shipping.

Color	Rio De Janerio Collection
Size	12 Pads
Brand	Post-it
Unit Count	12 Sheets
Shape	Square

- About this item
- 3 in x 3 in, Rio de Janeiro Collection

\$9.83

Get Fast, Free Shipping with Amazon Prime & FREE Returns

FREE delivery Monday, October 4 if you spend \$25 on items shipped by Amazon

Or fastest delivery Thursday, September 30. Order within 10 hrs 18 mins

Select delivery location

In Stock.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from and sold by Amazon.com



Post-it Notes
Original



Post-it Super
Sticky Notes



Post-it Recycled
Super Sticky Notes



Post-it Super
Sticky Pop-up
Notes



Post-it Super
Sticky Full Stick
Notes



Post-it Extreme
Notes



Stick and re-stick	✓	✓	✓	✓	✓	✓
Removes cleanly	✓	✓	✓	✓	✓	✓
Made with unique adhesive designed for paper	✓					
Super Sticky: 2X the sticking power		✓	✓	✓	✓	
Recyclable	✓	✓	✓	✓	✓	
For Pop-up Note dispensers				✓		
Made with 30% postconsumer content			✓			
Water resistant						✓
Extreme: 100X the holding power						✓
Holds in hot & cold environments						✓

02

Know what claims will resonate most

We tested the following claims:

1. Sustainably made
2. Non-toxic
3. Made from 100% recycled materials
4. 100% recyclable
5. 100% compostable
6. 100% biodegradable

Against these attributes:

- Appeal
- Unique
- Believable
- Relevant
- Innovative
- Quality
- Purchase intent
- Environmentally friendly
- Safe for my family



Sustainability Claims Test

Confidence level 95%	A	B	C	D	E	F
	Sustainably Made	Non-toxic	Recycled	Recyclable	Compostable	Biodegradable
Overall appeal	67%	75% A	78% A	82% ABE	73%	80% AE
Unique	36%	37%	39%	42%	50% ABCD	44% AB
Believable	39%	42%	50% AB	50% AB	54% AB	52% AB
Relevant	45%	56% A	53% A	58% A	53% A	56% A
Innovative	41%	38%	49% AB	48% AB	54% AB	49% AB
Quality	54%	60%	58%	65% AC	64% A	61% A
Purchase intent	48%	53%	60% AB	61% AB	57% A	57% A
Environmentally friendly	55%	56%	67% AB	75% ABC	76% ABC	75% ABC
Safe for my family	58%	68% A	68% A	72% A	73% A	69% A

03

Get consumer feedback on new packaging concepts

We tested the new paper-based Johnnie Walker bottle against the original

Current Packaging Design



Johnnie Walker Black Label is the world's best-selling Scotch whisky brand, enjoyed in more than 180 countries worldwide.

New Packaging Design





Johnnie Walker Black Label is the world's best-selling Scotch whisky brand, enjoyed in more than 180 countries worldwide. Now available in the world's first ever 100% plastic free paper-based spirits bottle, made entirely from sustainably sourced wood.



Johnnie Walker's new packaging performed significantly better than the current on visual attributes, but was on par for purchase intent



General Population

	A	B
		
	Black Label - Current	Black Label - New
Purchase intent	47%	49%
Unique	40%	74% A
Overall appeal	64%	65%
Meets your needs	51%	56%
Visually appealing	68%	64%
Stands out	52%	65% A
Eye-catching	48%	63% A
Innovative	30%	69% A
Quality	68%	71%
Affordable	27%	34% A
Clear	77%	76%

Packaging Test; May 24th 2021

n=730; United States (USA); Gender Balancing: Census; Age: 21-99; Income: \$0-200k+;

Created by and for the use of Momentive for marketing purposes. This study was not commissioned or endorsed by Diageo® or any other companies displayed.

Among existing consumers, purchase intent for the new packaging was on par with current, indicating low risk of alienation



Johnnie Walker
consumers

Confidence level 95%	A	B
	Black Label - Current	Black Label - New
Purchase intent	78%	78%
Unique	64%	83% A
Overall appeal	93%	86%
Meets your needs	77%	79%
Visually appealing	91% B	72%
Stands out	84%	80%
Eye-catching	72%	79%
Innovative	55%	79% A
Quality	84%	86%
Affordable	39%	51%
Clear	87%	95%

Packaging Test; May 24th 2021

n=730; United States (USA); Gender Balancing: Census; Age: 21-99; Income: \$0-200k+;

Created by and for the use of Momentive for marketing purposes. This study was not commissioned or endorsed by Diageo® or any other companies displayed.

04

Incorporate social values into your brand trackers



Measure trends in social and environmental topics over time

Track how consumers are paying attention to social issues related to your product category, and get ahead of behavioral changes.

Capture social values with your brand associations

Add key social values to the list of brand attributes you are tracking over time, to understand the tie to your brand identity.

Measure brand lift from social-centric campaigns

As soon as you start incorporating social messages in your packaging and campaigns, track the impact to brand perception and health.



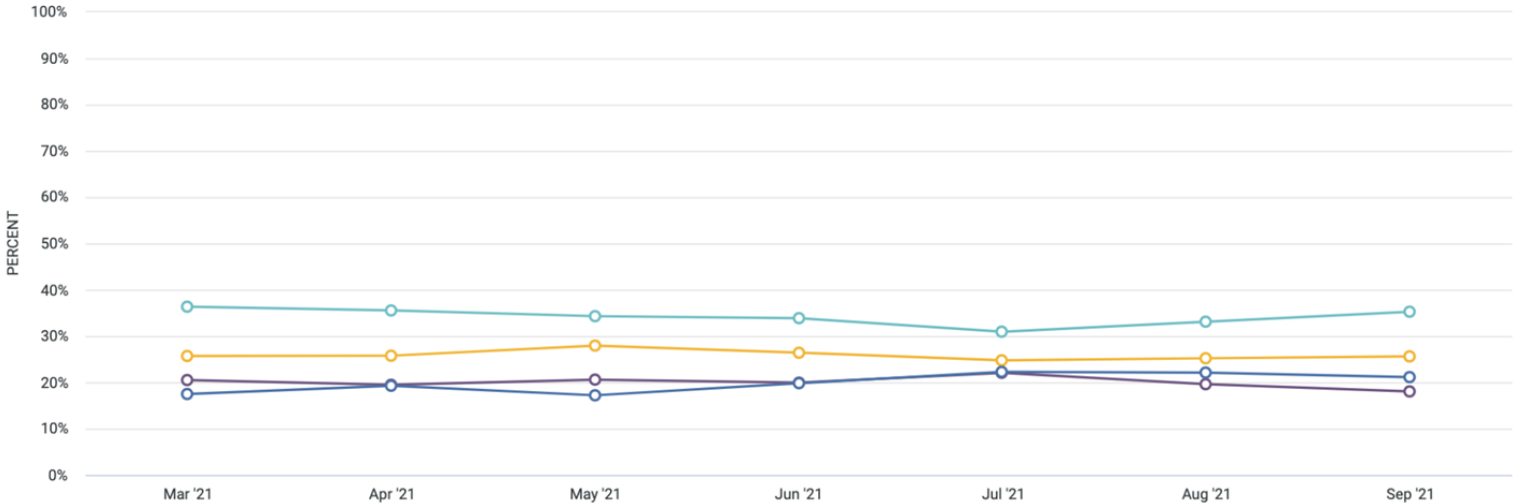
Example: electric vehicles



Q5: Likely to purchase electric



Assuming it is in your price range, how likely will your next vehicle lease or purchase be an electric vehicle (one run solely on electric power)?



- ☒ Very likely
- ☒ Somewhat likely
- ☒ Not too likely
- ☒ Not likely at all



Brand Health Tracker

Which of the following best describes our brand?

- ☐ Innovative
- ☐ Trustworthy
- ☐ Safe
- ☐ Sustainable
- ☐ Family-friendly
- ☐ Premium quality
- ☐ Unique
- ☐ Exciting
- ☐ Fun
- ☐ Helpful

Next



In summary...

01

Consumers care more about the environment

02

Consumer behaviors are evolving

03

Spending is becoming more aligned to values

04

Function still matters more than values

05

Brands are pledging commitments

06

Study how these trends impact your category

07

Test packaging and claims before launch

08

Track the impact of your efforts over time

Thank you!



Fill out our
survey for a
chance to win
a gift box!



momentive™