

UNDERSTANDING YOUR CUSTOMER

In-depth psychological market research
on bio-based products



Tailor-made consumer research services for bio-based producers.
Gain from the combined expertise of two market leaders in their
respective fields!

FINDING ANSWERS TO YOUR QUESTIONS

- Which materials and products do consumers expect in their daily lives in the future?
- For which applications will they prefer bio-based products and when will consumers rather make use of things from recycled materials?
- What do consumers think about the biodegradation of plastics or the use of CO₂ for fuels and mattresses?
- Do consumers make a difference between first and second-generation biomass feedstock for bio-based products?

These and other questions keep industry and policy makers busy. Their answers will have great influence on how the European bioeconomy will be shaped in the next decades. Many quantitative and semi-quantitative studies have been carried out over the last few years, but the picture is still not quite clear.

This gap is being filled now by our novel approach. Instead of conducting the xth standard survey, we provide the combined expertise of two renowned specialists in their fields to supply you with the information you really need.

september
» Strategie & Forschung

“september Strategie & Forschung”, Cologne, is one of Germany's market leaders in deep psychological market research. Thanks to extensive in-depth interviews with consumers, it is possible to look behind the scenes of buying behaviour and find connections that remain hidden in online surveys.

september works along three guiding principles which are “professional naivety”, “open interviewing” and a “customer-centric approach”. The motto: “Insight into the Matryoshka: How in-depth market research helps you make the right decisions.”

september works for market leaders in the categories of food, fashion, retail, telecommunication and media (www.september-online.de).



“nova-Institute for Innovation and Ecology”, Hürth near Cologne, is one of the market leaders in the field of market and trend reports in the Bio-, CO₂- and Circular Economy, especially in B2B issues. Above all, nova's market analyses on biopolymers, building blocks and CO₂ use as well as GreenPremium research are known worldwide (www.bio-based.eu).

nova-Institute has worked for companies such as: BASF, BMW, Covestro, DuPont, Evonik, Ford, Honeywell, IKEA, Lego, Mercedes, Mondi, NESTE, Porsche, REWE, Teijin, Total, Velux, Volkswagen, WWF.

“Here at nova-Institute, we are convinced that by enriching our existing comprehensive market knowledge with in-depth psychological market research methods by september, we and the bio-based economy can gain completely new insights.”

Michael Carus
Managing Director, nova-Institute

THE METHOD

To create a tailor-made study for you, we will organise a workshop together with september to discuss the specific approach based on our comprehensive expertise of the specificities of bio-based products and markets. September will conduct in-depth interviews in the European countries of your choice. The results will be discussed in a final workshop.

Guiding principles of the in-depth interviews

Professional naivety

"Childlike curiosity" as a guideline for conversational leadership

- Interviewer adopts a benevolently neutral attitude: the participant is signalled neither satisfaction nor dissatisfaction with the answers in order to largely reduce (social) desirability.
- Moderator questions the supposed self-evident.
- In particular, clichés, stereotypes, generalisations or simplifications are deliberately broken up and their underlying motives and beliefs questioned.

Open interviewing

Interview remains open to results

- No closed questions.
- Moderator takes up impulses from respondents and flexibly expands the range of topics.
- This implies a certain dynamic of the duration with which a topic is discussed - depending on the respondent, it is necessary to focus more or less on a topic.

Customer centric approach

"Focus on the customer" no empty phrase

- The conversation takes its origin in the test person, i.e. his experiences, actions, knowledge, beliefs, feelings and thoughts.
- "Least contamination" - the test person always experiences only as much new information as is necessary for a meaningful discussion of the topic to be researched.
- Timing/order of stimuli (for example material and product samples) are important: e.g. in insight studies stimuli should be shown as late as possible, in communication tests as early as possible.
- Moderator always demands answers that are as realistic and clear as possible for all questions.
- No "why" questions to avoid rationalization - rather, the question arises as to the purpose: what (hidden) purpose does it serve?

The method and its potentials will be presented in a presentation and a dedicated workshop at the **Bio-Based Materials Conference 2019**.
15-16 May 2019, Maternushaus, Cologne (Germany)

Join us!

www.bio-based-conference.com



THE RESULT

Some highlight results of the first ever application of in-depth market research on bio-based products*

What are plastics made of? Consumers generally have no idea about mineral oil being the feedstock. It is a widespread perception that plastics are “bad” and kill animals in the sea.

When it comes to plastics, the interviewees mainly thought of negative aspects, but almost no one was aware that they are made from crude oil: “Something chemical, industrial, artificial ingredient, when it comes to ingredients I don’t really know”. The respondents were very surprised to learn that plastics are actually made from crude oil and can be made of plants.

Easy thinking: plant features are projected onto the product - chemistry is “toxic magic”

The knowledge of chemistry is very low and the transformation from liquid mineral oil to solid plastic works like a miracle. Chemistry is “toxic magic”. In this way, the properties of the raw materials are transferred directly to the end products in consumers’ minds. Wood is hard, resistant and durable; analogously it should only be used to make hard, resistant and long-living products.

First generation feedstock for single-use applications

For soft and single-use applications, interviewees prefer first generation feedstocks: “Food crops are a high-quality feedstock, but they are perceived less valuable than virgin lignocellulosics since food crops grow faster.” The understandable transfer of raw material properties to the product also works for these feedstocks: “This plastic product could be made of corn, because corn feels like plastic” - so it’s only logical you can make plastic out of it. Only very few respondents were aware of the discussions on food or non-food crops for industry, which seems to be mainly a discussion in the political area.

Nobody understands “bio-based” and all plant-derived products will be biodegradable

Products made from plants are biodegradable to consumers. Meaning: It will biodegrade if one throws it in the compost or in the forest. Thus: “Everything made out of plants is environment friendly”. The term “bio” is linked to “organic”, in contrast to “bio-based”, which was not understood or misunderstood. Consumers understand “plant-based”.

Consumers want to be educated by the politics

Consumers feel overwhelmed, not competent and not responsible for the decision which materials are good or bad. Respondents wanted a simple, official and trustworthy label to help them identify the good materials. This result calls into question the numerous consumer awareness projects currently underway. Perhaps the development of a labelling system would be more helpful.

* The results were obtained in the framework of the European research project “Bioforever” which has received funding from the Bio-Based Industries Joint Undertaking under the European Union’s Horizon 2020 research and innovation programme under grant agreement No. 720710. www.bioforever.org

Interested?

Directly contact nova’s Managing Director Michael Carus for a first talk about your needs and interests.



Managing Director
Michael Carus
+49 (0)2233 - 48 14 40
michael.carus@nova-institut.de



nova-Institut
für politische und ökologische Innovation GmbH
Chemiepark Knapsack
Industriestr. 300
50354 Hürth, Germany