



# 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!



# Verstehen Sie Ihre Kunden tiefen-psychologische Marktforschung



- Machen die Verbraucher einen Unterschied zwischen Biomasse der ersten und zweiten Generation für bio-basierte Produkte?
- Welche Materialien und Produkte erwarten die Verbraucher in ihrem Alltag in der Zukunft?
- Für welche Anwendungen werden sie bio-basierte Produkte bevorzugen und wann werden die Verbraucher lieber Dinge aus recycelten Materialien verwenden?
- Zur Beantwortung dieser Fragen wurden in den letzten Jahren viele quantitative und semi-quantitative Studien durchgeführt, aber das Bild ist noch nicht ganz klar.
- Diese Lücke wird nun durch unseren neuartigen Ansatz in Zusammenarbeit mit den B2C-Forschungsexperten vom "september" geschlossen.





# Marktstudie Zweite Generation Biomasse Endverbraucherstudie



- Interviewdauer: 1,5 Stunden
- 25 Minuten Warm-Up und Erkenntnisgewinnung
- 45 min Tiefeneinstieg in Biomasse-Rohstoffe
- 20 min Suche nach dem Schlüssel zum Verkauf von 2. Generation-Rohstoffen

**100% B2C**

**60 Tiefeninterviews in  
Deutschland, Polen und  
Italien**



**10x In-depths-  
interviews in Köln**

**10x In-depths-  
interviews in Berlin**



**20x In-depths-  
interviews in Warschau**



**20x In-depths-  
interviews in Mailand**



# Geprüfte Stimuli:

## Die Bedeutung verschiedener biobasierter Rohstoffe in verschiedenen Produktkategorien



Food/Drink-Packaging (partly bio-based)



Biocomposite Body care containers and comb



Bio-based polymer Baby Toys by bioseries



T-Shirt made of lignocellulosic



Biocomposite Plastic cutlery



“Xugar”: Only the product itself was shown. The packaging (wood origin) wasn't revealed



Biodegradable garbage bags



Bio-based polymer tupperware



Bio-based Bottle opener and Shoe-horn



## Wichtige Ergebnisse der ersten tiefenpsychologischen Marktforschung für bio- basierte Produkte



- **Woraus bestehen Kunststoffe?** Die Verbraucher haben in der Regel keine Ahnung, dass Mineralöl der Rohstoff ist.
- Es ist eine weit verbreitete Auffassung, dass **Kunststoffe "schlecht" sind und Tiere im Meer töten.**
- **Einfaches Denken:** Biomassemerkmale werden auf das Produkt projiziert.
- **Chemie ist "giftige Magie".**
- Ausgangsmaterial der ersten Generation bevorzugt für **Einweganwendungen.** Holz ist hierfür zu schade.
- Niemand versteht "**bio-basiert**" und alle pflanzlichen Produkte werden als biologisch abbaubar angenommen.
- Die Verbraucher wollen von der Politik geschult werden, **welche Materialien gut oder schlecht** sind. Vertrauenswürdiges Label gefordert.



**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.



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# Renewable Energy and Renewable Carbon for a Sustainable Future

