BIOSWITCH

CONSUMERS AND BIO-BASED: A LOVE STORY

BBI JU

Bio-based Industries Consortium

Horizon 2020
European Union Funding
for Research & Innovation

This project 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 887727.

CONSUMERS AND BIO-BASED:
A LOVE STORY

The BIOSWITCH project carried out a research with two main goals:

1. To learn more on consumer acceptance towards bio-based products and brands.

2. To gain an understanding of the main incentives for consumers to choose bio-based products.

The research was carried out in three regional studies: a qualitative online focus group discussion with 50 consumers in Finland, and two quantitative consumer surveys in Ireland and the Netherlands, both including 500 consumers. This brochure presents some highlights from the survey findings, which are further detailed in BIOSWITCH deliverable D1.3, Report on brand owners' incentives and consumer drivers and motivations.

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HOW THE CONSUMER ACCEPTANCE SURVEYS WERE IMPLEMENTED?

The research was carried out by three of the BIOSWITCH consortium partners: VTT, from Finland, Munster Technological University (MTU), from Ireland, and Biomass Technology Group (BTG), from the Netherlands. For the survey in Finland, online focus group discussions (FGD) were organized. The qualitative FGD method provided an opportunity to interview several respondents systematically and simultaneously. The benefit of FGD is that discussions can spark off one another, suggesting different dimensions and nuances of the original problem that any single one participant might not have thought of. The FGD was implemented in the period 7-13 December 2020, using the Howspace collaboration platform and facilitated by two VTT researchers. In total 50 consumers aged 36-50 from different parts of Finland participated. The FGD framework included both survey polls and open-ended questions.

To complement the FGD two quantitative consumer studies were undertaken in Ireland and the Netherlands in the form of a short structured survey, designed to gain an understanding of consumers' drivers and motivations, paying specific attention to buying intentions, bio-based alternative products of most interest, willingness-to-pay and brand preferences. MTU and BTG focused on ensuring that the survey was product-specific so that consumer trends towards product areas of most interest (e.g. packaging, or disposable products) could be identified. The survey was implemented by MTU and BTG working with survey recruitment provider Bilendi in the period 14 – 23 December 2020. In total 1000 citizens (500 per country) from Ireland and the Netherlands, aged 18-75, were surveyed.

Although there was significant overlap not all questions were included in each of the studies. This explains why in some occasions country-specific information seems to be "missing" and why we indicated the country/countries from which citizens were surveyed. The limitations of the FGD software conditioned that the participants could not be forced to reply on the quantitative questions. This is why quantitative data of the FGD study are shown as fractions rather than as percentages.

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WHAT ARE THE FIRST SPECIFIC TYPES OF WORDS THAT COME TO YOUR MIND WHEN YOU THINK OF THE TERM 'BIO-BASED PRODUCT'?

As shown in the word cloud, organic, natural, ecological, recyclable and renewable were among the most often mentioned first words associated with the term 'bio-based product' for Finnish consumers.

ANSWERS FROM FINLAND

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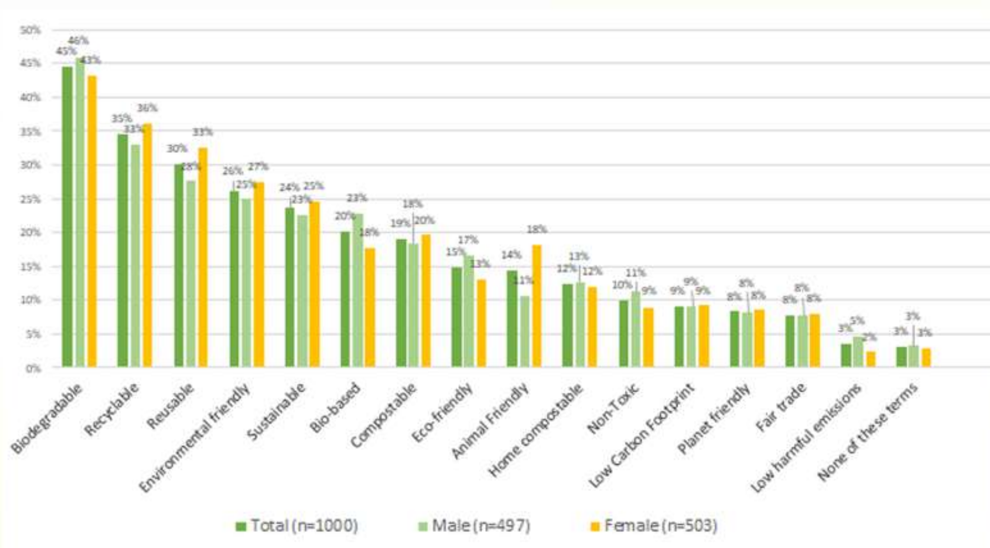
WHICH OF THE FOLLOWING TERMS WOULD MOTIVATE YOU WHEN CHOOSING A PRODUCT?

When Dutch and Irish consumers (total n=1000) were asked to indicate which sustainability terms could motivate them when choosing a product, the three top terms mentioned were:

BIODEGRADABLE (45%)
RECYCLABLE (35%)
REUSABLE (30%)



ANSWERS FROM IRELAND AND THE NETHERLANDS

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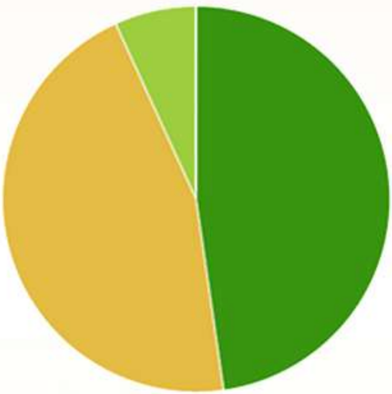
FUTURE EXPECTATIONS

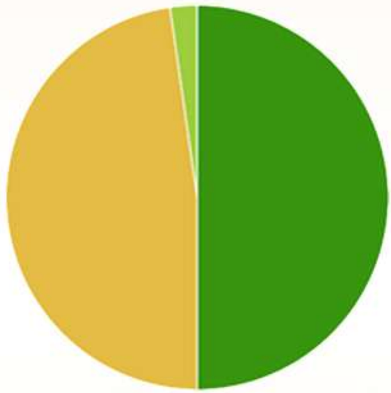
More than 9 out of 10 Finnish consumers expect to buy more bio-based products as well as products packaged in bio-based materials in the future.

Do you think that you are going to buy more bio-based products in the future?



N:
- Totally agree (21)
- Somehow agree (20)
- Not agree nor disagree (3)
- Somehow disagree (0)
- Totally disagree (0)

Do you think that you will buy more products packaged in bio-based materials in the future?



N:
- Totally agree (22)
- Somehow agree (21)
- Not agree nor disagree (1)
- Somehow disagree (0)
- Totally disagree (0)

ANSWERS FROM FINLAND

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FROM WHICH CATEGORY ARE YOU MOST LIKELY TO BUY BIO-BASED PRODUCTS?

Consumers were asked to select, from a list of product categories, the three that they considered more important to be bio-based when purchasing them. Using this method, respondents from Finland, Ireland and the Netherlands picked the same three categories they consider the most interesting. In each country (1) Cleaning, hygiene and sanitary products, (2) Disposable products, and (3) Packaging products were chosen by between 44% and 58% of the group of respondents.

PACKAGING PRODUCTS
(NL 52%, IRL 50%, FIN 51%)

DISPOSABLE PRODUCTS (E.G. DISHES, CUPS...) (NL 43%, IRL 48%, FIN 58%)

CLEANING, HYGIENE AND SANITARY PRODUCTS (NL 39%, IRL 50%, FIN 51%)

ANSWERS FROM FINLAND, IRELAND AND THE NETHERLANDS

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WHAT WOULD SPECIFICALLY MOTIVATE YOU TO BUY BIO-BASED PRODUCTS?

When considering buying bio-based products, at first sight there seem to be some differences between countries. Nevertheless, lower net prices and reliable information on the environmental impact, including end-of-life, are key in all three countries.

PRICE REDUCTION
(NL 62%, IRL 62%, FIN 40%)

FINANCIAL INCENTIVES (E.G. DISCOUNTS, TAX REDUCTION, ETC)
(FIN 53%)

CLEAR, RELIABLE INFORMATION ON PRODUCT'S END-LIFE
(NL 46%, IRL 58%, FIN 44%)

KNOWING MORE ABOUT THE INNOVATION BEHIND THE PRODUCT
(NL 30%, IRL 43%, FIN 16%)

CLEAR INFORMATION ON THE WHOLE VALUE CHAIN
(FIN 47%)

PRODUCTS BEING EASY TO RECOGNIZE AS BEING BIO-BASED
(NL 36%, IRL 57%, FIN 16%)

WIDE AVAILABILITY OF BRANDED PRODUCTS
(NL 36%, IRL 47%, FIN 29%)

SUPPORTING REGIONAL PRODUCTS AND BRANDS
(NL 22%, IRL 38%, FIN 18%)

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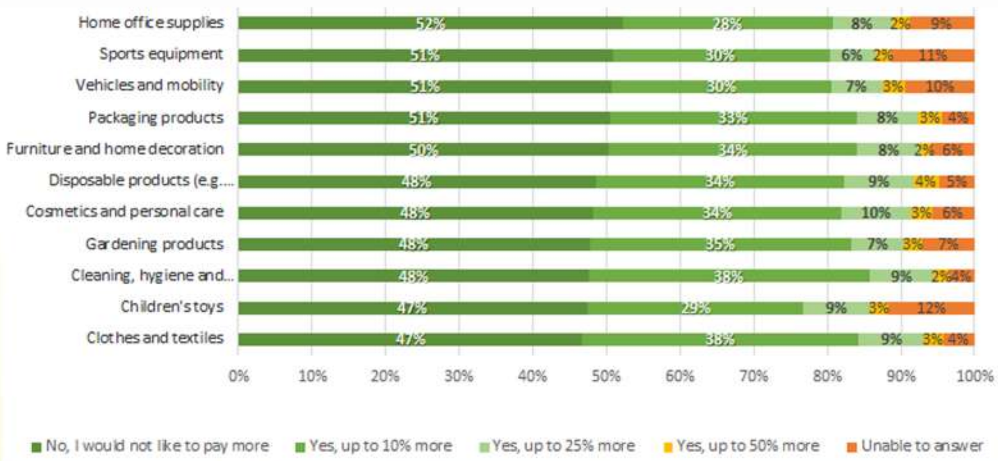
WOULD YOU CONSIDER TO PAY MORE FOR BIO-BASED PRODUCTS IN THE FOLLOWING CATEGORY/CATEGORIES?

When asked to indicate if they would consider to pay more for bio-based products for various applications, about half of the surveyed Dutch and Irish consumers replied they would not like to pay more. For all categories of products, a third of Dutch and Irish consumers (33%) are willing to pay up to 10% more for bio-based products, 6-10% of respondents indicated to be willing to pay up to 10-25% more and 2-4% indicated to be willing to pay 25-50% more. The willingness to pay 10-50% more was highest in the categories: disposable products, and cosmetics and personal care (13% of respondents) and lowest in the category sports equipment (8%).



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CONTACT INFORMATION

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