

Consumer Perception and Behavior Towards Hygiene Tissue Products Containing Conventional and Alternative Fibers



Keren A. Vivas M.¹, Sudipta Dasmohapatra², Ronalds Gonzalez¹
¹Department of Forest Biomaterials, North Carolina State University, USA,
²McDonough School of Business, Georgetown University, USA

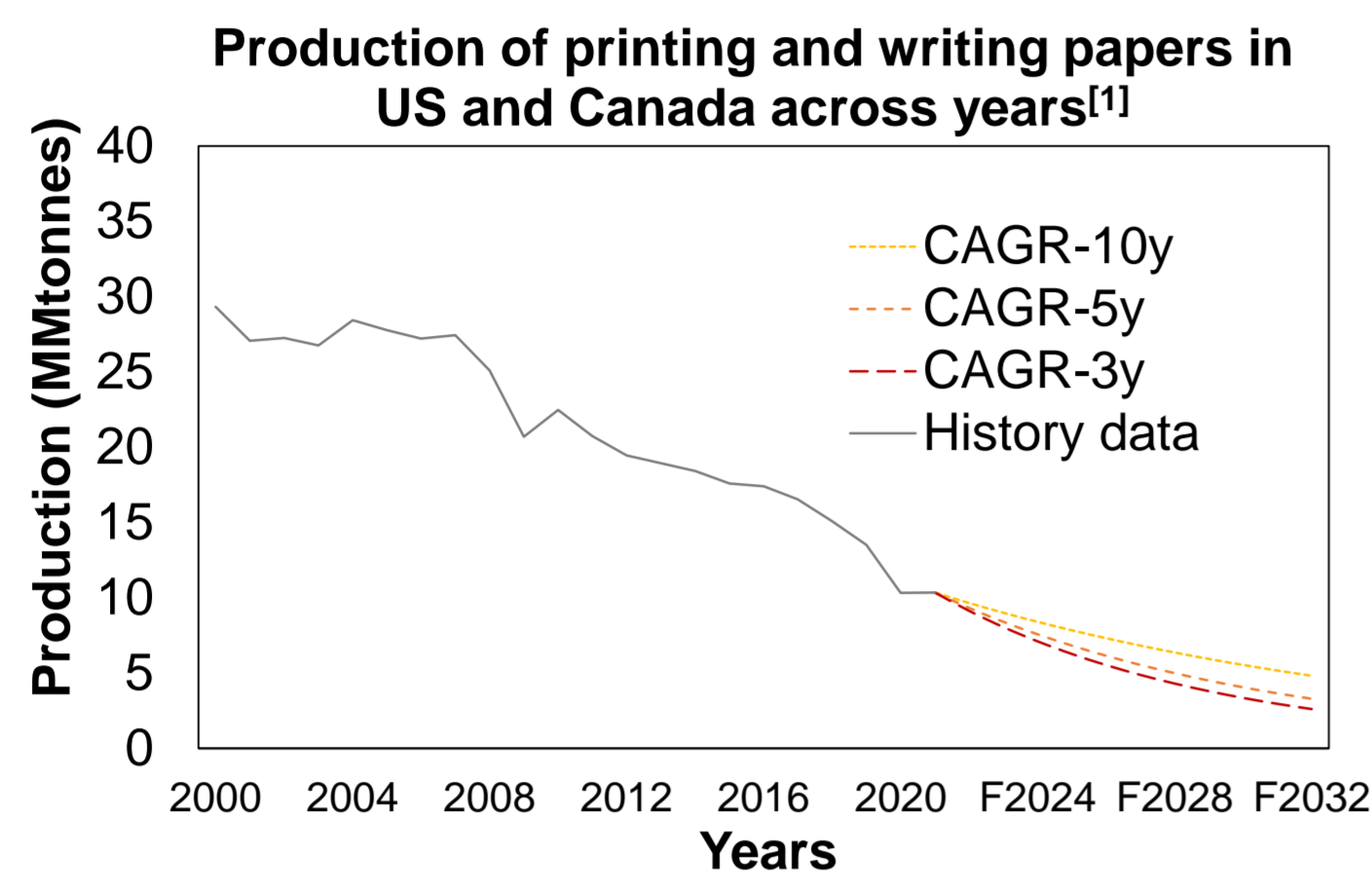
SAFI Consortium sustainable & alternative fibers initiative

1 Motivation

The hygiene tissue industry is being disrupted by:

1. Digitalization megatrend

It will keep declining by 50-75% from 2021, prompting the use of OCC and alternative fibers.



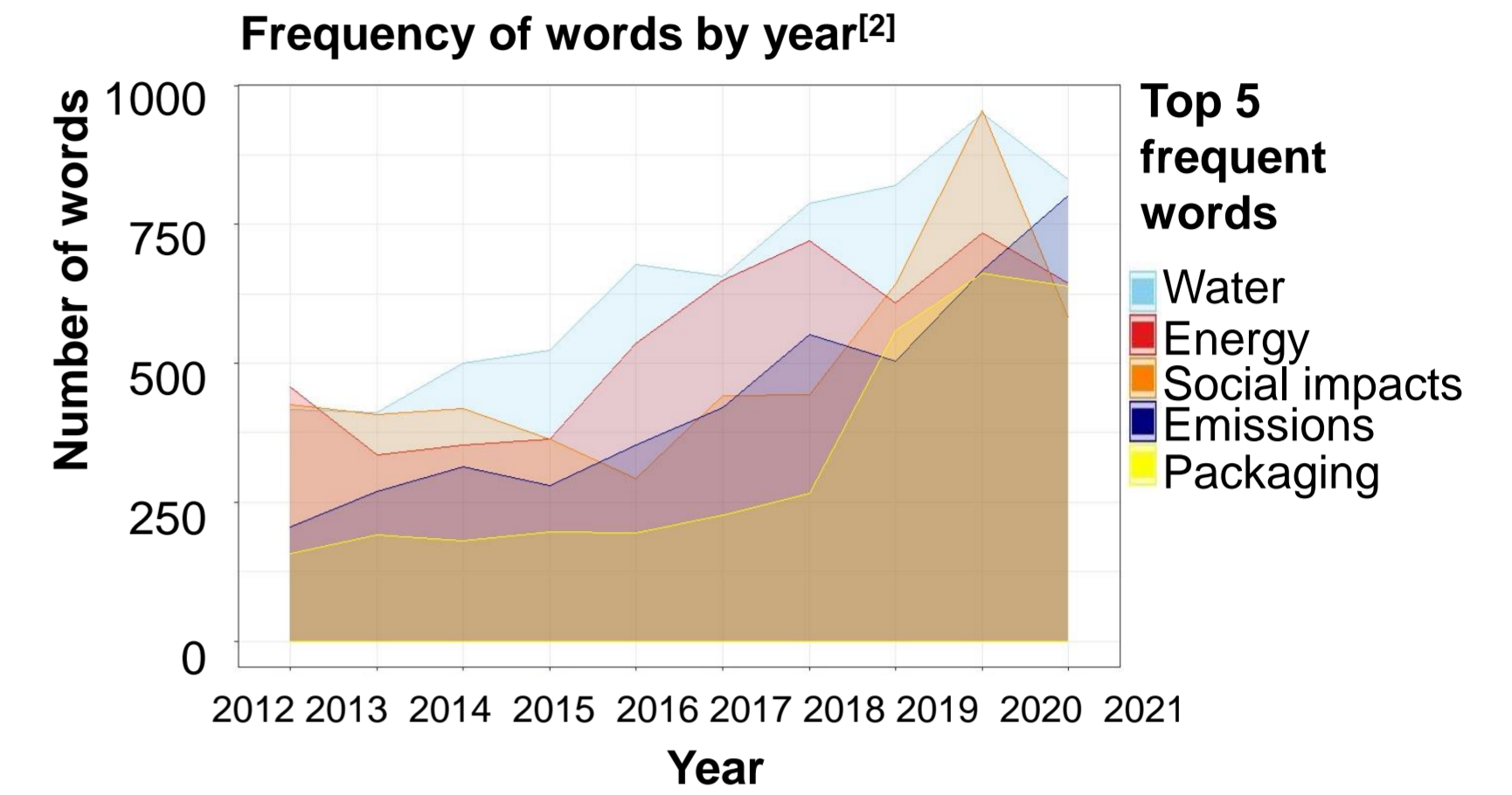
2. Social behavior change megatrend

To meet the sustainability demands of the younger generation, hygiene tissue companies need to deliver transparent, data-driven sustainability metrics



3. Sustainability megatrend

The future will prioritize carbon reduction and innovative packaging.



2 Objectives

Understanding consumer perception and behavior towards products containing conventional and alternative fibers.



Develop data-based communication strategies to connect with sustainable-oriented consumers.

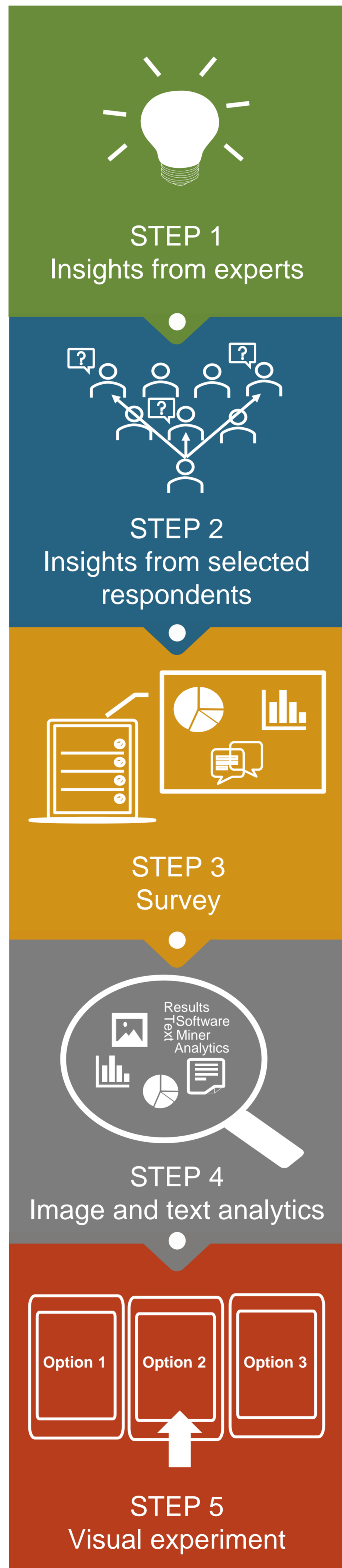
Design programs to better educate consumers on the sustainability aspects of consumer goods.

Targeted products: Toilet paper, paper towels, facial tissue.

4 Impact and Outcomes

- Identify and rank sustainability attributes encouraging the purchase of sustainable products based on consumer perception.
- Identify and rank barriers/challenges preventing the increase in the offering of sustainable products based on consumer perception.
- Identify the family of products where the adoption of sustainable products is likely to occur first.
- Difference between message sent by shareholder to consumers and message perceived by consumers.
- Develop trade-off models (performance, pricing, sustainability).
- Explain current consumer behaviors based on demographics and psychographics with the aim of modeling the evolution of consumer behaviors (demand) for the next 5-10 years.

3 Methodology



Participants: 20 SAFI members and industrial partners who research, innovate, manage and develop strategies for sustainable products such as P, VP, senior managers, and directors [3-5].

Rounds of the Delphi Method [6-8]

1st Round	2nd Round	3rd Round
Answer open-ended questions. Analysis: Thematic analysis.	Rate findings generated in the first round. Analysis: Descriptive statistics.	Re-rate the findings from second round. Analysis: Descriptive statistics.

77% Consensus between participants about the following topics:

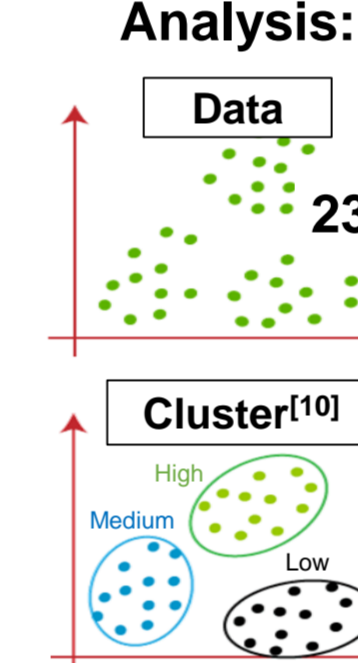
- Sustainability definition.
- Attributes and visual characteristics.
- Barriers.
- Type of fibers.
- Color of finished products.
- Perception of stages of the life cycle of sustainable products.

2.1 Selection of participants

Technique: qualtricsSM
Online screening survey [9]

Sampling Method: Voluntary and convenience [10].

Responses: 737 out of 4,071 student, staff and faculty



Level of interest of sustainability

Low
Medium
High

People/cluster: 15
Total: 45 participants

2.2 Interviews with selected respondents

Technique: Focus groups [9].

1. Interviews [9]
- Open-ended questions about:
- Shopping behavior.
 - Sustainable attributes.
 - Barriers.



Targeted responses: 1,000 across US.



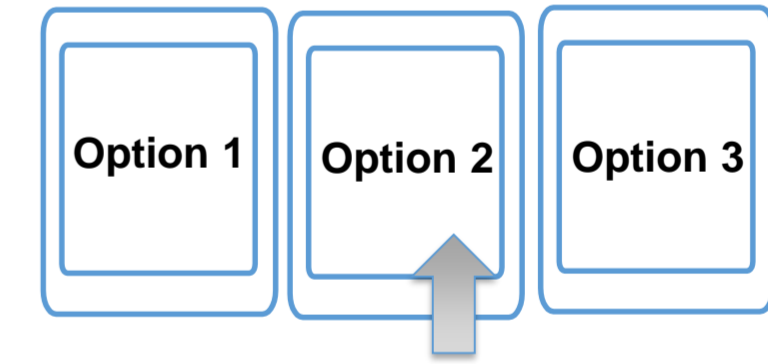
Market research panel: qualtricsSM

Technique:

1. Online questionnaire (with screening questions) [12]

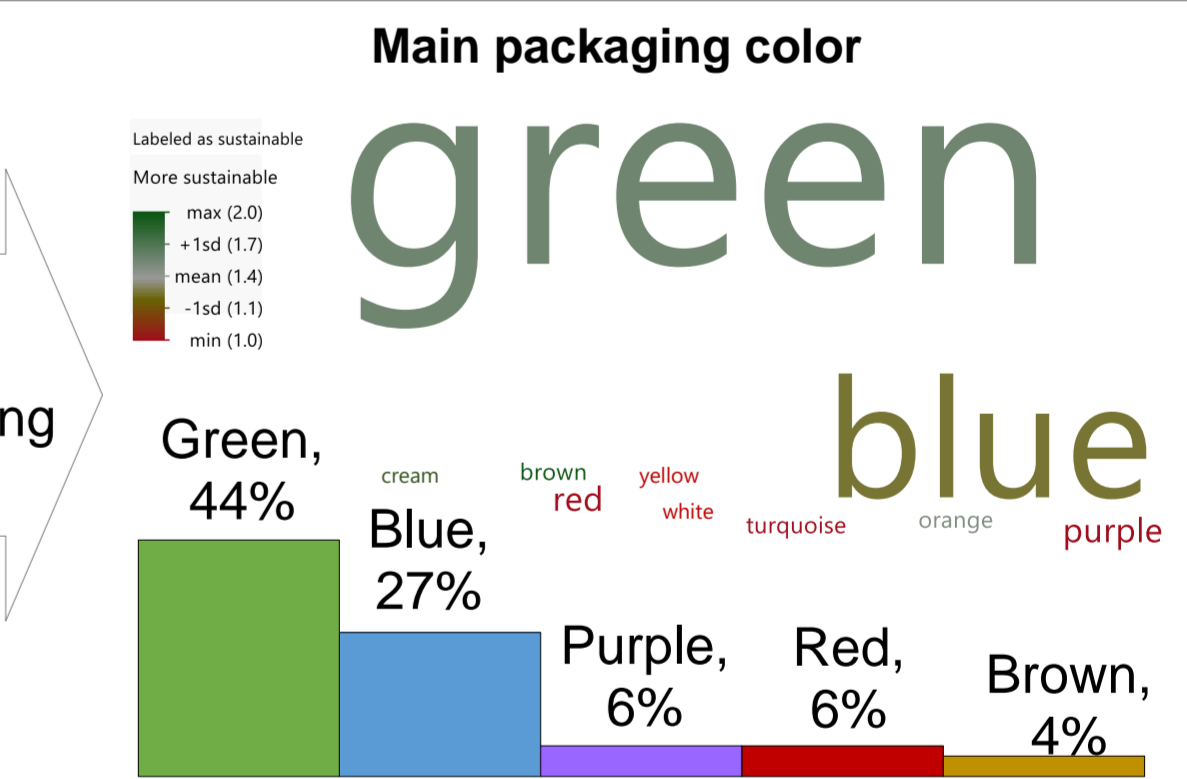
- Closed/open-ended questions about consumer knowledge towards:
- Sustainability and alternative fiber.
 - Preference attributes.
 - Barriers.

2. Conjoint choice task [11]



Attributes

- Product color.
- Main label color.
- Illustration on label.
- Sustainability marketing communication.
- Name.
- Packaging material.
- Certifications.



Data Collection: Interviews in stores [11].
Sampling Method: Random [10].



Data Collection: Focus Group and Survey [13].
Sampling method: Random [10].

Technique: Best-worst scaling (BWS) [14]

Rating products based on sustainability display.

Likert scale: The most/The least sustainable



5 Acknowledge

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6 References

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