



EASTMAN | **bellomy**
MARKET INTELLIGENCE

Green Light

Accelerating Innovation Through
A Sustainable Community



Green Light

Accelerating
Innovation
Through A
Sustainable
Community



**Community
Collaboration**



**Sustainable
Stories**



**Innovation
Impact**

Community Collaboration





- Fortune 500 specialty materials company with 2018 revenue of ~\$10B
- Global manufacturer and marketer of advanced materials and specialty additives
- Operates four business segments
- Global team of ~14,500
- Serving customers in >100 countries

A global industry leader

Innovation Dilemmas

The case for a novel consumer insights investment within Eastman



Green Portfolio

Multiple innovation projects with a sustainability focus



Discovery

Challenges engaging with customers on complex topics



Insight Needs

Challenges getting educated insights on complex topics



Market Activation

Demonstrate unmet needs for & value of a new material

- Headquartered in Winston-Salem, NC
- Expertise in energy, healthcare, financial services, consumers goods, and retail
- 2018 AMA Gold Top 50 Report, US Market Research and Analytics Companies
- Fully-integrated, in-house services
- Stringent data security
- Woman-Owned Business (WOB)



A full-service market intelligence firm

Bellomy Solutions

Solutions designed to meet the demands of today's rapidly-changing market research environment



Social Research

A “must-have” input to understand today’s consumers



Brand Renovation

Core brand improvement for today—breakthrough improvement for tomorrow



Shopper Insights

Understand shopper motivations and how purchase decisions are made

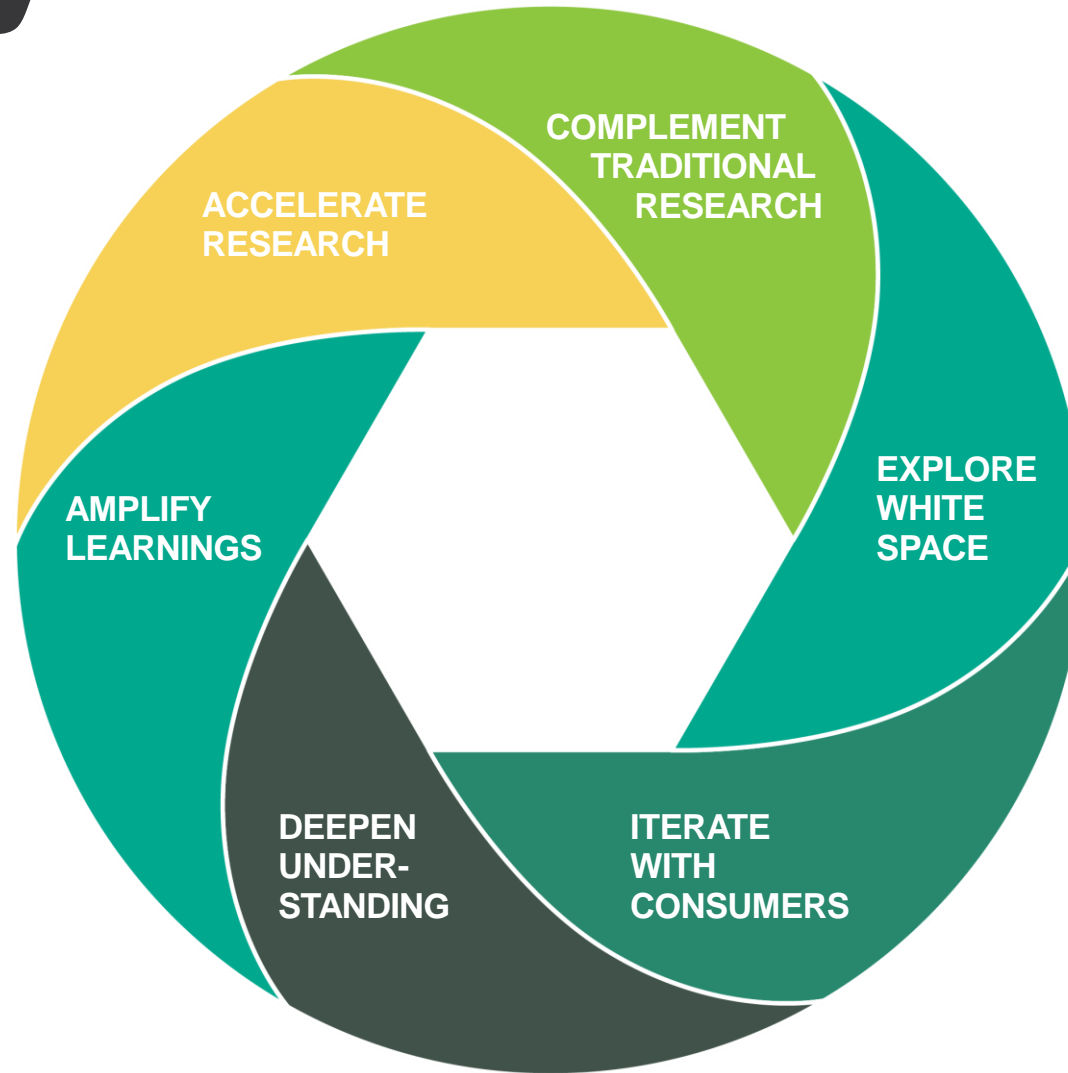


Customer Experience

Put greater agility and precision into your customer experience solution

Community Research

A proprietary community is a dedicated group of consumers, on tap, ready to share their experiences and provide feedback



Faster Insights
Lower cost per study
Better quality responses
Higher response rates

Sustainable Community

- ▶ **Community Demographics**
500 U.S. men + women | ages 18-60 | nationally representative
- ▶ **Sustainable Leaders**
environmental + social issues crucial to them | take action at home and at retail to live more sustainable lives | 28% of the U.S. population
- ▶ **Community Functionality**
continuous poll + discussion questions | monthly quantitative and qualitative engagements

Sustainable Community

Topics covered within the community in the past year



Color Cosmetics



Electronics



Sustainable Fibers



Canned Food



Straws



Plant Pots



Flex Food Packaging



Canned Beverages



Reusable Sport Bottles

Sustainable Community

Topics
covered within
the community
in the past
year



Indoor Air Quality

Online discussion



Materials of Concern

Digital focus group



Shampoo

Mobile shopping mission

Sustainable Stories



Purchasing Priorities

Factors very important to sustainably-minded U.S. consumers when purchasing the following

Brands must recognize that sustainability on its own cannot sell a product



Electronics

Quality
Performance
Price



Apparel

Fit
Comfort
Quality



Color Cosmetics

Color/shade
Performance
Safety



Plants

Growing needs
Appearance
Fit for home



Canned Food

Expiration
Nutrition
Flavors



Prepared Meals

Taste
Nutrition
No additives

#Materials Matter

Sustainably-minded U.S. consumers' opinions on what makes the following products sustainable



Materials selection is a core consideration to a brand's evolution in becoming a leader in sustainability



Color Cosmetics

“A makeup that is free of GMOs, parabens, silicone, and synthetic ingredients. Recyclable packaging.”



Sport Bottles

“That it can be recycled, is made with recycled materials, is not made with chemistries that are harmful to health.”



Electronics

“The materials used in the production of the device are extremely important to make the product sustainable.”

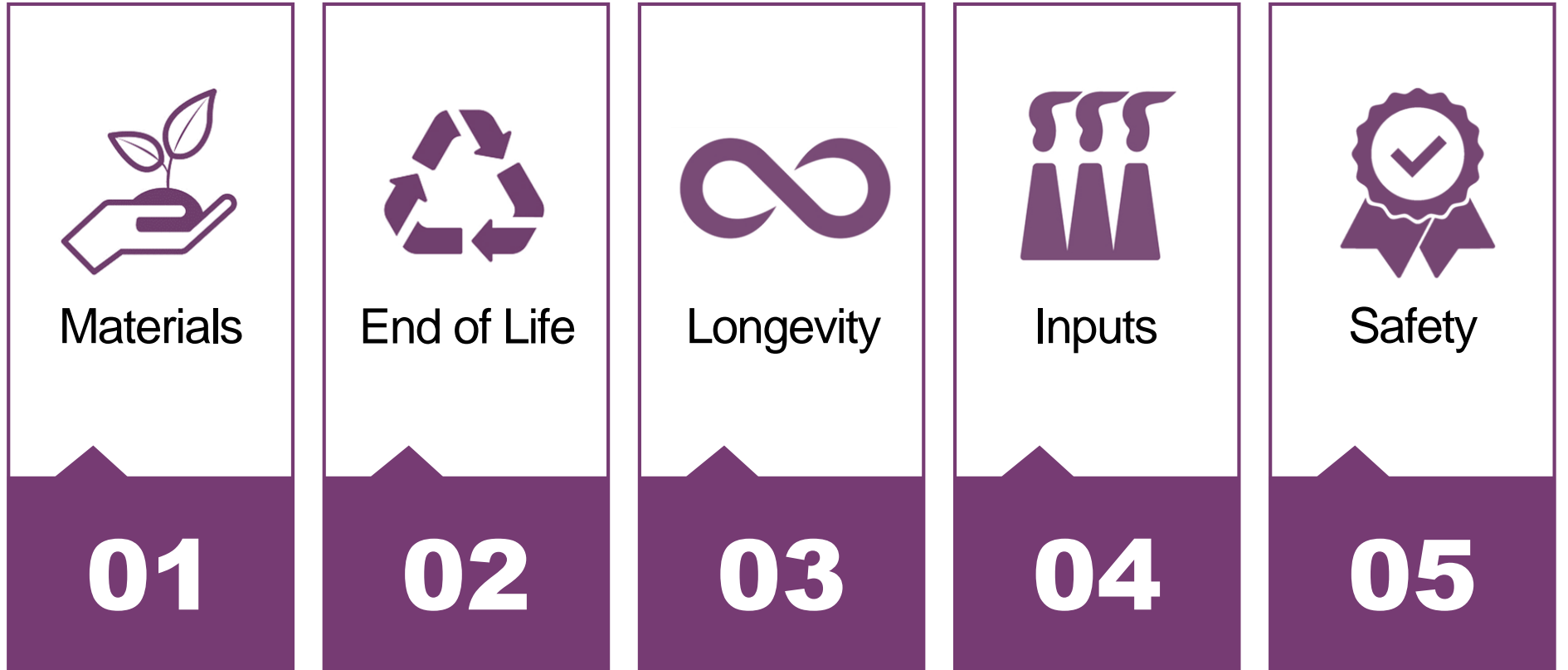


Apparel

“Clothing sourced from sustainable, quality materials and designed to last as long as possible.”

#Materials Matter

Sustainably-minded U.S. consumers' opinions on what makes the products sustainable

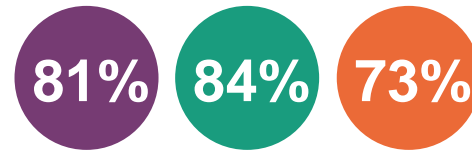


Brand Building

Brands offering more sustainable materials in the following products:



Care more about the environment



Are brands I would be more loyal to



Are more trustworthy than other brands

 Color Cosmetics

 Electronics

 Sport Bottles

Guidance Gap

Where sustainably-minded U.S. consumers want brands to provide sustainability or safety information

Opportunities exist for brands to market their sustainability information in more of a 360-degree manner



Cosmetics



Electronics



Canned Food



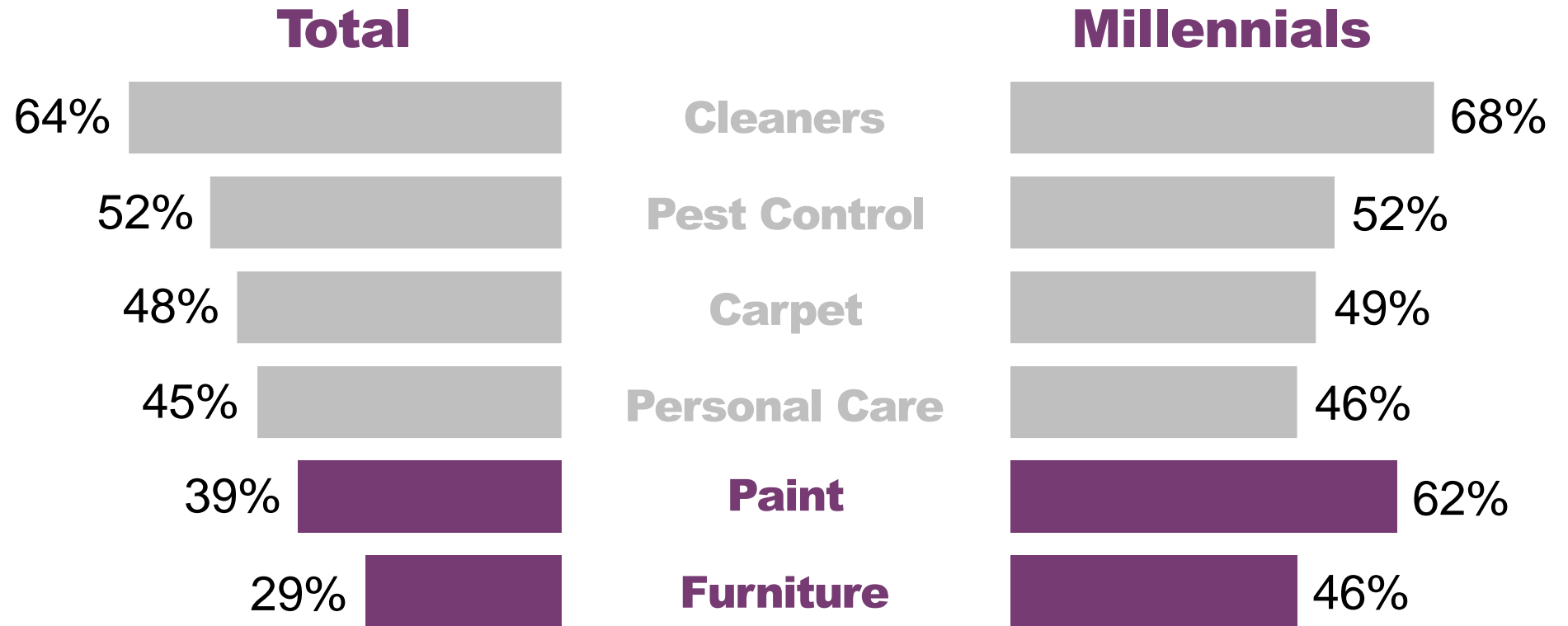
Apparel

Packaging	85%	80%	77%	73%
Brand Sites	64%	66%	38%	55%
Social Media	46%	35%	24%	29%
TV/Digital Ads	40%	42%	29%	32%
Sales Team	33%	42%	35%	35%

Millennial Mayhem

Products sustainably-minded U.S. consumers view as harming the quality of the air inside their homes

We continue to see that millennials behave differently than other consumers

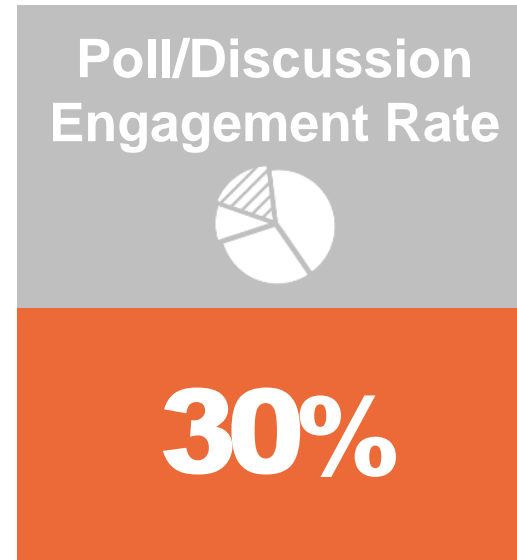
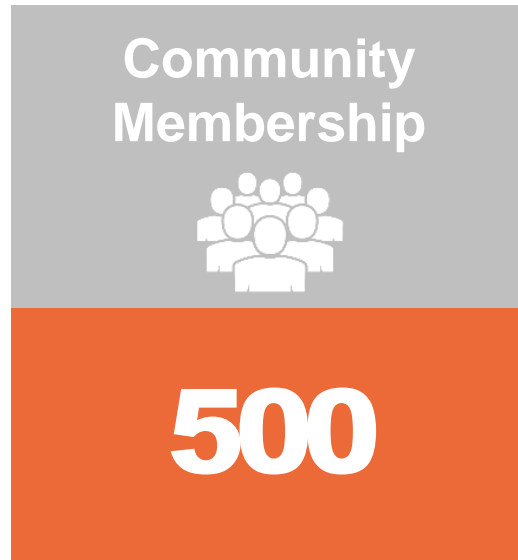


Innovation Impact



Community Health

Bellomy consistently refreshes the community to capture unique perspectives and maintain engagement rates



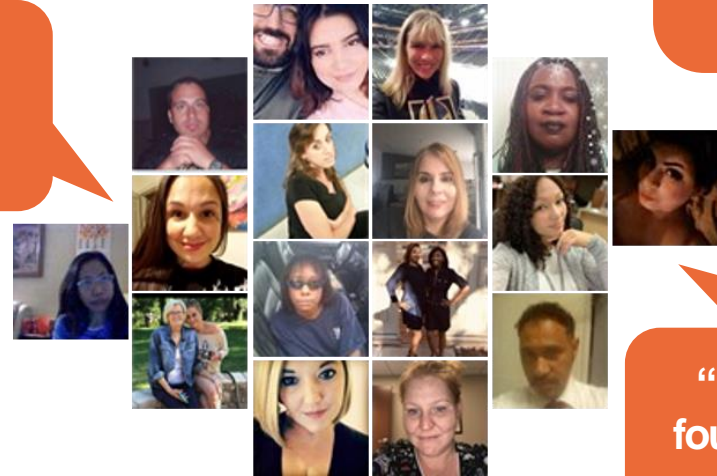
Community Health

Intrinsic value like learning from others and a sense of community nurtures the community and increases engagement

“I think it’s great and like to voice my opinion and see what others think as well.”

“It’s fun participating in this great community. I like that besides giving my opinions, I feel like I learn a lot from this community too.”

“It’s nice being on there with so many people that care about the planet.”



“I enjoy participating and have found the activities to be relevant and interesting.”

“I feel as though my opinion is being heard, and it may make a difference. It also makes me think about things.”

“This is the kind of place everyone should be a part of.”

Community Impact

The
community
allowed
Bellomy to:

- ▶ **Demonstrate the value of a consumer community to a B2B client**
By understanding their clients' customers, Eastman was able to position itself as a thought partner
- ▶ **Gain deeper understanding of a key demographic**
Bellomy has been able to leverage insights about sustainably-minded consumers across categories, including healthcare, retail, financial services, energy, and consumer products
- ▶ **See how insights impacted business decisions at Eastman**
This allowed Bellomy to better understand Eastman's business and become more consultative
- ▶ **Cultivate a strong partnership with Eastman**
A dedicated team and frequent communication allowed for knowledge sharing, built trust, and created an efficient research process

Community Impact

The insights from the community helped accelerate innovation at Eastman and led to:



900+
Customer interactions



13
Innovation projects supported



01
Product adoption



03
New consumer insights projects

Community Impact

As an insights professional, remember:

- **You are the voice of the consumer.** Don't be afraid to advocate for what the consumer wants—even if it defies existing strategies
- **Find people who believe in your work** and leverage them to be your acolytes across your company
- **Invest in projects** that can support multiple business priorities to expand your influence more rapidly
- **Position yourself as a thought leader** and thought partner within and outside your company

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