BARRIERS TO GREEN BUYING: HOUSEHOLD CHEMICALS

A REPORT FOR THE CLEAN WATER INITIATIVE

By Gillian Glegg, Jo Richards, Jess Heard and Julia Dawson
University of Plymouth

The Co-operative Bank
Customer led, ethically guided

THE CLEAN WATER INITIATIVE
THE EDUCATIONAL TRUST OF SURFERS AGAINST SEWAGE
REGISTERED CHARITY NO: 1027082

The UNIVERSITY of PLYMOUTH

Barriers to Green Buying: Household Chemicals

A report for the Clean Water Initiative

By

Gillian Glegg, Jonathan Richards, Jess Heard and Julia Dawson.

Marine and Coastal Policy Research Group
University of Plymouth
January 2005

Table of Contents **Page number**

Annex

Acknowledgements

The authors are grateful to the interviewees and to the participants in the focus groups for their time and their careful consideration of the issues discussed. Thanks are also due to the Clean Water Initiative and to the Co-operative Bank for funding this research.

.

1. Rationale

In conjunction with the Clean Water Initiative (the educational trust of Surfers Against Sewage) and funded by the Co-operative Bank, the University of Plymouth conducted research which explored the attitudes of the UK public to chemicals in household products and measured awareness of their environmental impacts.

Within the retail sector there are a multitude of products sold into a wide variety of applications, including cosmetics and personal hygiene and cleaning products. These products are commonly marketed on the basis of features such as price, performance and smell. However, some products focus on the 'low environmental impact' of their products (so-called 'low impact' products) using lack of toxic constituents as a selling point. This of course infers that other products must contain those toxic components, but this is not made explicit through labelling. After or during use, these products are typically disposed of through the sewerage system along with household sewage and other waste waters before being transported to the sewage treatment works. While treatment will undoubtedly remove some components, more persistent contaminants may not be broken down within sewage works and these compounds may subsequently be discharged into coastal waters or incorporated into sewage sludge. This may present a problem since little is known about the long term effects the majority of these products have in the wider environment.

This project focussed on public awareness of, and attitudes to, the environmental impact of using household products. Interviews (with retailers, manufacturers and other stakeholders), national polls and consumer focus groups were used to explore the factors that influence the purchasing of such items. In particular, the study explored the barriers to the purchase of low impact household products.

1.1. Aim and objectives:

The aim of the study was to investigate why people continue to purchase household products known to contain chemicals that may be harmful to themselves and which ultimately end up in the marine environment, impacting global ecosystems. This was achieved through the following objectives:

1. To assess the level of consumer awareness of the range of harmful chemicals in household products and their environmental impacts.
2. To identify the key factors influencing the purchase of household products.
3. To investigate the main barriers to purchasing 'green' products and how they may be overcome.

2. Literature Review

Published literature and internet web pages were collated and reviewed to explore the key issues associated with low impact products, especially those relating to public awareness and retailer and manufacturers' activity. The main focus of the project was the environmental, specifically coastal and marine, impacts of household products. A significant amount of information was collected regarding the possible human health effects of these products but there was less information concerning their wider environmental impacts.

Chemicals of particular concern for the marine environment and the products in which they can be found were identified (Annex 1). Each group of chemicals is distinct and different properties are exhibited, even within individual groups, but certain key characteristics justify concern about them:

- They are toxic to one or more organisms through various mechanisms.
- They have a tendency to bio-accumulate as a consequence of their persistence and lipophilic nature.
- They are capable of leaching out of, or being lost from, consumer products during normal use.
- They are reported to be contaminants in the human body over a range of concentrations.

2.1. Chemicals in household products

More than 72,000 synthetic chemicals have been introduced since the 1950s but less than 2% of these chemicals have been tested for toxicity and even fewer have been tested for long-term effects (Allanou *et al.,* 1999).

Synthetic chemicals of this sort can be found in most retail products including cosmetics, pharmaceutical drugs, cleaning products, toys and furniture. More and more cleaning products are available on supermarket shelves each year, promising greater cleanliness, ease of use, better smells and other properties. There is public awareness of the presence of synthetic chemicals in these products and newspaper reports discuss the numerous toxic chemicals to which we are exposed in the home (Guardian, 2004). This exposure to increasing numbers of chemicals may help explain why there has been a significant increase in childhood cancer (Zahm and Ward, 1998) and other conditions such as asthma (Anderson *et al*., 1994; Mannino *et al*., 1998). For example, a recent study has linked frequent use of chemical household products with persistent wheezing in pre-school children (Sherriff *et al*., 2005).

2.2. Ecological and Human Impacts of Chemicals

Widespread pollution of the environment by toxic and persistent organic contaminants, such as PCBs and DDT, has undoubtedly lead to a build up of pollutant chemicals in the tissues of animals, even in very remote environments (AMAP, 1998). These pollutants have then been shown to present a threat both to the health of those animals and to humans (Godduhn and Duffy, 2003). However, only a few of the most harmful chemicals have been studied in such detail although many others have been identified as of concern (RCEP, 2003).

Human epidemiology studies, to determine the possible effects of exposure to certain chemicals, are very difficult to undertake, costly and time-consuming. People are exposed to a very wide range of possible stresses throughout their lives which makes the isolation of individual causes of harm or ill health difficult. The effects of exposure to chemicals may not become apparent for many years and some individuals or groups (e.g. children, pregnant women) may be particularly sensitive to exposure (Damstra *et al*., 2002).

Chemicals with endocrine disrupting properties are of particular concern for both humans and the environment (Damstra *et al*., 2002; Jobling *et al*., 1998), and these chemicals are commonly found in household products. The UK Environment Agency is expected to publish shortly a scientific report which shows that sewage oestrogens have caused a significant decline in fish fertility (ENDS, 2004). The organisation is calling for new sewage treatment technologies to be tested.

2.3. Recent studies

There has been growing concern over the control and use of chemicals in products, given the extent of the problem and the resultant impacts on humans and wildlife, which are becoming increasingly recognized. The Royal Commission on Environmental Pollution (RCEP, 2003) highlighted the problem of chemicals in products and concluded that chemicals are poorly managed, there is a lack of adequate safety assessments, and there are major doubts over the protection of wildlife and humans from long-term effects of these chemicals. The RCEP recommended that a precautionary approach should be applied whereby hazardous man-made chemicals are substituted with safer alternatives and, that where synthetic chemicals are found in elevated concentrations in biological fluids and human tissues, regulatory steps should be taken to remove them from the market. These are merely recommendations but environmental NGOs such as WWF are also pushing for better regulations and enforced substitution through legislation.

In order to highlight the potential hazards of chemicals to human health, WWF commissioned a UK wide blood survey which found a range of toxic and persistent chemicals in each person tested (WWF-UK, 2004). Chemicals with known toxic effects, including DDT, were found at concentrations which were cause for concern. The survey tested the blood of 155 volunteers nationwide for 77 chemicals. It provides unique data on the concentrations of PCBs (Poly Chlorinated Biphenyls) and certain types of pesticides and flame retardants in the UK's population. PCBs and a breakdown product of the pesticide DDT were found in 99% of those tested. However, women were found to have lower levels of certain PCBs than men and the levels appear to reduce in relation to the number of children they have had. These differences are thought to be related to transfer of such chemicals from women to their children during gestation and breast feeding.

2.4. Consumer awareness and behaviour

Public opinion polls and numerous other surveys in the 1990s demonstrated that environmental consciousness among the British public had grown (Wong *et al.,* 1995). Over 82% of the citizens in the UK regarded the environment as an immediate and urgent problem. This proportion had been increasing since the 1980's (INRA, 1992). A MORI poll conducted in 1992 showed that 69% of British public agreed that pollution and environmental damage were affecting daily life, but 40% still did not fully understand environmental matters (Worcester, 1993). This current study serves to update these studies as public concern about environmental issues continues to grow (DEFRA, 2005).

Although public opinion suggests that a clean environment and 'green' technologies are valued, there is little evidence to suggest that these values and attitudes are congruent with action (Dembkowski & Hammer-Lloyd, 1994). Therefore, a gap exists between what people say they want and what they actually do to fulfil such wants (Aspinall, 1993) and this is demonstrated by the low level market share of 'green' products in the UK. Furthermore, an INCPEN survey (PWA, 1994) showed that while most people regarded packaging as bad for the environment, they still chose packaged goods over unpackaged alternatives. Environmental consciousness is therefore evident, but ecologically conscious decision-making is not.

A complicating factor in drawing conclusions from these surveys is that, when approached for views concerning the environment or green products, many will respond affirmatively because they wish to benefit from green consumerism indirectly through ameliorated environmental impacts (Wong *et al.,* 1995). These so called 'Free Riders' tend only to purchase green products if there is a net benefit in substituting away from conventional products, and their existence may help to explain discrepancy between polls (MORI) and actual environmental consumerism (INCPEN).

Another barrier to the purchase of green products is that they are often perceived as inferior in terms of performance. However, there is evidence to show that if a low impact product performs satisfactorily (meets requirements), it can lead to increased uptake of the product, although often it requires additional help such as government incentives or price reduction. Examples of such changes in public behaviour can be seen in for example the adoption of recycled paper in many spheres and the introduction of lead free petrol.

2.5. Drivers for 'green' products

According to Wong *et al.* (1995), legislation has been the dominant driver for new green or greener products as there are generally few commercial advantages to production of greener products. Indeed, demand from consumers has increased less rapidly than pressure from legislation and competition. It is thought that consumers select products based on the trade-off between the range of value attributes ('greenness' being only one). Even environmentally concerned consumers are less prepared to pay for green products at the expense of quality or performance. Product performance is a key factor for consumer adoption and continued use of green products and consumers have established perceptions about performance and quality of green products relative to their conventional counterparts. The importance of performance is highlighted by the fact that although approximately 20% of the UK market is thought to have tried green detergents, their market share has never exceeded 2%. This is a segment of the market where some companies have taken the initiative to turn public concern into a marketing opportunity e.g., washing detergents such as Ecover have established the 'green detergent niche'.

Despite green products having improved, the consumer perception of their inferior performance is stubbornly fixed and there is little high-profile marketing of green products to overturn this view. Mass advertising has not been used to any extent and so little progress has been achieved in creating brand awareness and brand identity, essential for promoting green products. This may be because a brand's success is usually built around what customer's value; mainly performance, quality, reliability and security but not greenness, which is not a major factor in consumer choice. Furthermore, consumers are often confused by products that appear 'green' but have no clear indication of their credentials, such as a well-defined standard. Clearer labelling of products to encourage consumers to select green products could help to drive demand and is recommended by the 1992 Earth Summit in Rio.

Other drivers for the development of green products are represented by government policy initiatives. EU and national governments have increased the pressure on manufacturers and retailers to provide more environmentally friendly goods and use more environmentally conscious processes.

2.6. Retailer Action

Retailers are often perceived as being neutral providers of information to consumers and so may have more credibility than producers or advertisers. They are a very important influence on consumer choice and therefore any strategies they have developed in the area of household products are likely to have a significant impact on the market for low impact products. Activity on this issue amongst retailers is varied, with some making positive steps towards removing notoriously hazardous chemicals from their products, while other retailers do not appear to be working on the issue (see Annex 2). This indicates that some retailers have identified the issue of chemicals in products as a future threat to their business and perceive a commercial opportunity by reformulating products. These retailers are currently focussing on their own-label products because their influence on the mainstream manufacturers, who produce branded products, is relatively limited.

3. Methods

A three stage methodology was employed to explore consumer awareness of and attitude to low impact products and their impact on the environment. These three stages consisted of an exploratory phase which included interviews, a questionnaire poll and explanatory focus groups.

3.1. Exploratory phase

The first step of this project was to assess the number and nature of chemicals found in consumer products and the controls placed upon them. This was done by exploring literature, websites and conducting interviews. In order to explore the current thinking on this topic, semi-structured interviews were carried out with senior representatives from retailers, manufacturers, NGOs, industry and policy makers (see Table 3.1). The structure of the interview was based around themes and was designed to bring out the key issues surrounding consumer buying and the market for low impact products. The data obtained were processed using a thematic framework analysis (Ritchie and Spencer, 1994; Holstein and Gubrium, 1995). The interviews were transcribed, coded, and quotes were extracted under the following thematic groups; Issues surrounding hazardous chemicals in household products (Annex 5); The market for low impact products (Annex 6); and Labels and legislation (Annex 7).

Table 3.1. The sample for the structured interviews.

Company	Position
Ecover	Product Manager
Friends of the Earth	Safer Chemicals Officer
Homebase	Environmental Manager
Co-operative	Environmental Project Manager
Marks & Spencer	Environmental Systems Manager
Greenpeace	Chief Scientist
Wessex Water	Divisional Scientist

3.2. Questionnaire

The second stage of the project examined consumer attitudes to the use and disposal of household products. Using a national poll, the public's awareness and their views on the presence of hazardous chemicals in household products were explored. The responses from the preliminary interviews were used to develop a series of questions that were incorporated into the questionnaire (Annex 3). A national opinion polling organisation (ICM) was contracted to collect data which was quantitative, representative and descriptive. The survey sample consisted of a total of 1008 individuals (494 male; 514 female). There was a broad spread of demographic variables within the sample, including age (Table 3.2), social class (Table 3.3) and region (Table 3.4).

Table 3.2. Summary of the age distribution of the questionnaire sample.

Age group	18-24	25-34	35-44	45-54	55-64	65+
Frequency	112	193	193	173	132	204

Table 3.3. Summary of the social class distribution of the questionnaire sample.

Social class	AB	C1	C2	DE
Frequency	239	279	210	280

Table 3.4. Summary of the geographical distribution of the questionnaire sample.

Region	South East	Midlands	North	Wales & SW	Scotland
Frequency	280	260	252	138	90

Results from the poll, including demographic information, were analysed using SPSS and cross tabulated to find patterns in the data.

3.3. Focus groups

Focus groups were employed to provide a deeper insight into what drives consumer decision-making and to expand and clarify issues that emerged from the poll. Key points of interest were extracted from the wealth of quantitative data obtained from the poll. These points were used as a basis for the design of the focus groups (see Annex 4 for a list of focus group questions). A total of eight focus groups were conducted and constituted to cover a broad spectrum of the population (see Table 3.5). However, in the nature of focus group research, they were not designed to be statistically representative.

Table 3.5. Summary of the focus group sample.

Group type
Parents of primary school children
University staff (technical & administrative)
Male (18 – 24)
Female (50 – 65)
Supermarket customers (urban)
Supermarket customers (rural)
Surfers Against Sewage members
Youth group (13 – 16)

The focus groups were tape-recorded, contemporaneous notes were taken by the moderator, the outputs were analysed and representative quotes were extracted.

4. Results

4.1. Interviews

Interviews with key stakeholders showed that there is a growing concern amongst NGOs and some retailers regarding the chemical content of household products and their resultant impacts on the environment, and subsequently on human health (thematic analysis can found in Annex 5-7). The NGOs have been working on this issue for some time but there is thought to be a very limited awareness of this issue amongst the general public. Some of the retailers interviewed identified the issue as a future threat which is motivating them to act. This was also evident from a search through companies' websites. However, there was some concern that the issue was not being addressed by the government and their agencies. As a water company representative explained:

"At the moment the government, that is the regulators and the water industry, do not have any direct concerns."

The public's awareness was perceived to be generally rather low and the issue was not seen as high up on their list of priorities. While it was accepted that public perception of the chemicals industry is rather poor, it was thought that few members of the public were concerned about possible exposure to the industry's products through the use of household goods. According to an NGO representative, public awareness is likely to be raised by environmental organisations:

"In part, it will be driven by NGO campaigning which is beginning to link chemicals with consumer products and not big smelly chemical plants."

The companies did recognise that previous scares, such as mad cow disease and the MMR vaccine, had made UK consumers very distrustful and in some cases precautionary. This probably explains the retailers' view of this issue as a threat.

There was a consensus that low impact products still represent a niche market that at present is dominated by the 'conventional' brands which are perceived to have a grip on the market. The companies also noted that branding was very important for consumers and that they would place considerable trust on certain brands or companies. The consumer is thought to harbour misconceptions about the inferior performance and excessive cost of low impact products and this represents a major barrier to their purchase. The public was said to believe the "green product legend" that you need to compromise to be green. However, a number of retailers and NGOs expressed the opinion that price was not necessarily the problem it was often perceived to be. Well-established buying habits have created an inertia which has, according to one retailer, presented a further obstacle to change:

“People stick with the brand they know – if it works and they do not see the need to change, so it’s about waking up the thought process.”

Another retailer noted that:

“broadly consumers care; they do not by and large want to pay any more for it or to go to any hassle or to have special knowledge and that is why they decide which store they want to shop.”

Furthermore, another retailer highlighted the need for a large and expensive advertising campaign to persuade people to start purchasing low impact products:

“If it’s cheaper people wonder why, if it’s more expensive, people cannot afford to buy it …..you have to educate them about what they are buying..”

The controls implemented through previous EU legislation were thought to be wholly inadequate and interviewees were uncertain about whether the new REACH legislation will do enough to close the gaps. Regulations governing the labelling of consumer products were also found to be weak. Information, if provided, lacks transparency and is often meaningless to the general public therefore doing little to assist consumers in making informed purchasing choices. One company noted that the government should encourage low impact products by rewarding companies that produce these. Meanwhile, another retailer suggested that the Government should be involved in setting standards for labels:

“Government has to take a lead in benchmarking the industrial sector; there has to be far more useful industrial benchmarking for consumers, to give them real choices.”

The lack of clear and accessible information available to the consumer was perceived to be a major obstacle in the purchase of low impact products. Alternative approaches will need to be explored, as explained by a major producer of low impact products:

“What we want to do is get a label that really stands for what environmental and sustainable really is.”

This eco-labelling approach was seen as a solution by some interviewees who also expressed concern about the proliferation of such schemes and the credibility of many labels. Both retailers and an NGO thought that the solution lay in the building of brands which were associated with strong ecological credentials.

4.2. Questionnaire survey

The introduction to the questionnaire noted that the participants were being questioned to determine their attitudes to the presence of chemicals in household products which may end up going “down the drain”, such as cleaning products and toiletries. The questions focussed on whether they were concerned about the effects of products discharged to the sewer, how they made purchasing decisions, what they considered were the barriers to the purchase of low environmental impact products, and what they knew about labels and the ingredients of these products.

Simple descriptive statistics were produced for the responses and are shown below. Cross-tabulations using the demographic data produced some interesting and significant results. The analysis showed that a large proportion of the respondents never consider the environmental impacts of cleaning products and even fewer consider the impacts of toiletries (see Figure 4.1). Within the sample, 50% of the 18-24 category never consider the environmental impacts of cleaning products compared with 35.7% of the older age category (55-64.) More men (47.2%) than women (40.6%) selected the ‘never’ category. A similar pattern emerged for the toiletry products.

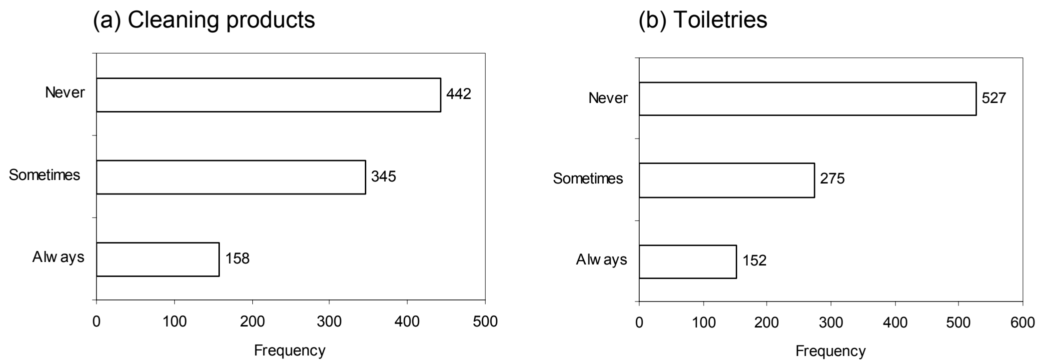

Figure 4.1. Survey Responses to the question ‘Is the environmental impact on rivers, lakes and seas something you consider when deciding which products to buy?’

Exploring in more detail the perception of the causal link between use and disposal of household products and their impact on the aquatic environment, respondents were asked about the removal of potentially harmful chemicals from the waste water stream. Results clearly indicated that they did not perceive that sewage treatment was fully effective in removing all harmful chemicals (see Figure 4.2).

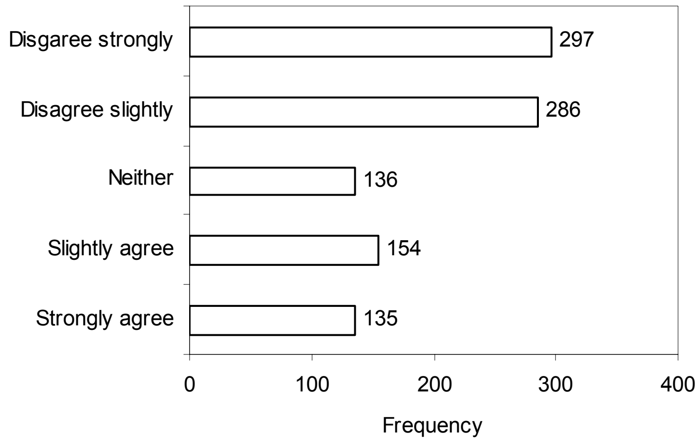

Figure 4.2. Responses to question 'When something goes down the drain to the sewage works all harmful chemicals are removed**.**

A significant proportion (22%) of respondents indicated that none of the harmful chemicals were removed during sewage treatment (see Figure 4.3) while 72% indicated that although some chemicals may be removed, other harmful chemicals are released into rivers and seas.

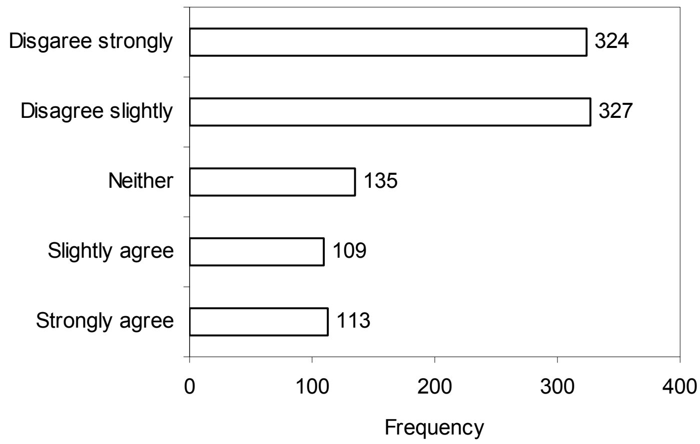

Figure 4.3. Responses to the question **'**When something goes down the drain to the sewage works none of the harmful chemicals are removed.'

Respondents were asked about their attitudes towards disposal of household products with waste water and over 60% indicated that they did not consider the fate of such waste after it had entered the drainage system (Figure 4.4).

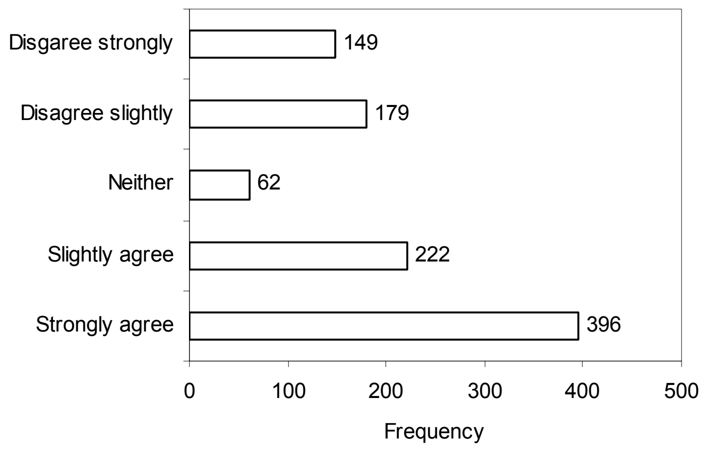

Figure 4.4. Responses to the statement ‘Once something has gone down the drain, I don’t ever think about it again’.

The buying behaviour and the importance of factors in determining buying were investigated and the survey indicated that 37% of respondents purchase products labelled as environmentally friendly (Figure 4.5). More respondents in the older age groups indicated that they bought low impact products whenever possible (47% of 55-64; 45% of 65+), compared to the younger respondents (37% of 25-34; 37% 18-24).

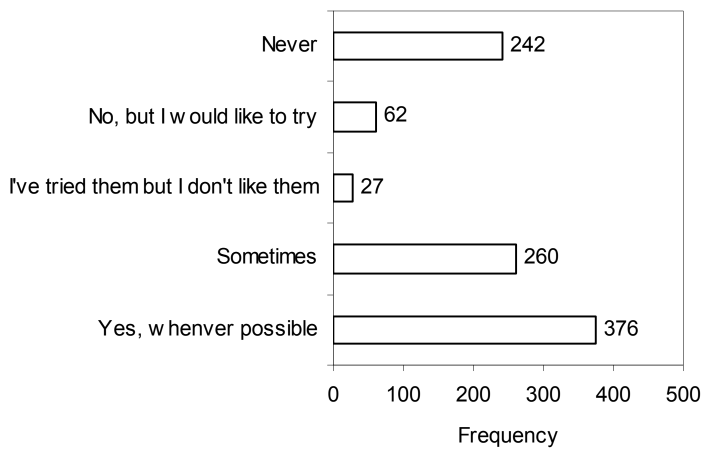

Figure 4.5. Responses to the question ‘In reference to cleaning products and toiletries, do you buy products that are labelled as being environmentally friendly or green?’

The purchasing decision was explored through a series of questions which asked respondents to indicate the most important factors which determined their choice of product. The results indicated that cost and performance were overwhelmingly the two most important factors accounting for approximately 70% of respondents’ first mention for both cleaning products and toiletries (Figure 4.6). The brand name was the third most important factor and environmental impact the fourth most important factor. Within the sample, cost was the most important factor cited by 18-24 age category, whereas environmental impact was most important to the 55-64 group. Performance was perceived as the most important factor to all other age categories.

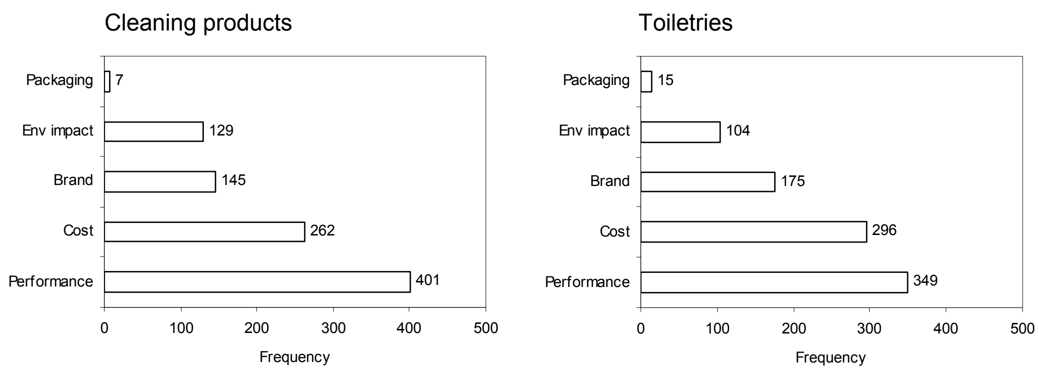

Figure 4.6. Responses indicating the most important factors in deciding which household products to buy.

The main barriers to buying low impact products were perceived by respondents to be firstly; the cost of the product, secondly; poor product information, and thirdly; product performance.

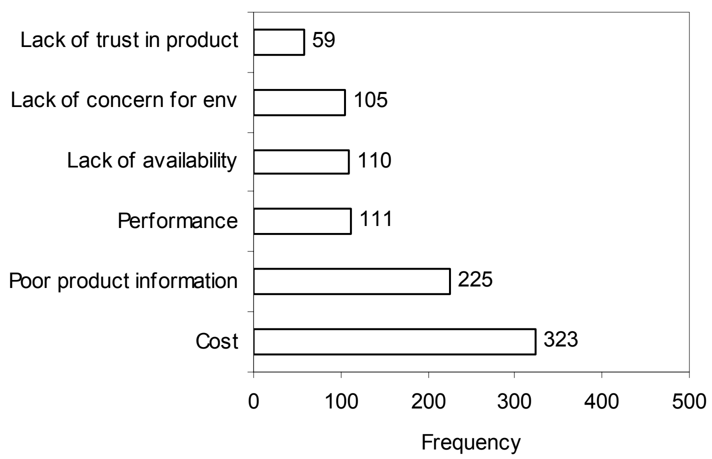

Figure 4.7. Responses to the question 'What are the main barriers to buying cleaning products and toiletries which have a low environmental impact?' (first mention)

The quality of product information was clearly a major factor in the decision-making process. The usefulness of information was investigated and a large proportion of respondents indicated that they never read product labels (Figure 4.8). The data showed that the respondents in the 18-24 category read labels less than any other age group, whilst the 55-64 read the most. Generally, women read labels more than men.

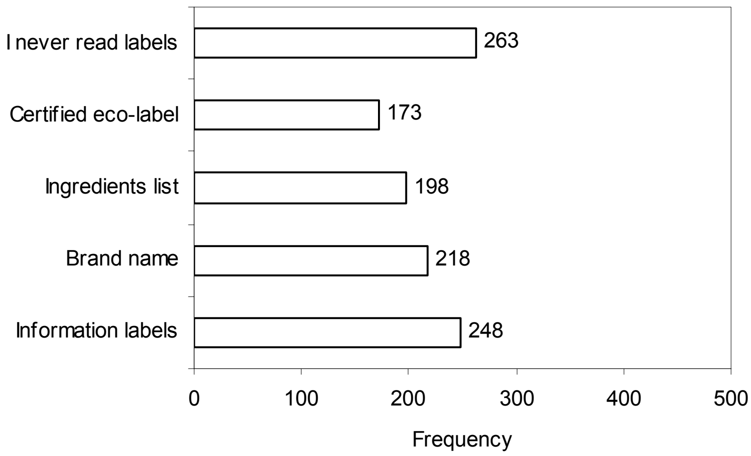

Figure 4.8. Responses to the question 'Which type of product information do you find most useful when deciding which cleaning products and toiletries to buy?

Approximately 50% of the respondents indicated that reading the labels did not help them decide which cleaning products and toiletries to buy. Furthermore, the listing of product ingredients did not appear to inform decision-making and the responses to the survey highlighted the level of confusion surrounding this issue (Figure 4.9). While 17% of respondents cited sodium lauryl/laureth sulphate as a chemical that would dissuade them from purchasing a product, 2% cited aqua (water), but 28% indicated that they didn't know. There was an indication of lack of concern illustrated by the fact that 39% of respondents were not put off by any of these chemicals which are toxic or potentially toxic. It is not clear why this is, but perhaps they believe that marketed products do not contain toxic chemicals or that they believe these particular chemicals are safe.

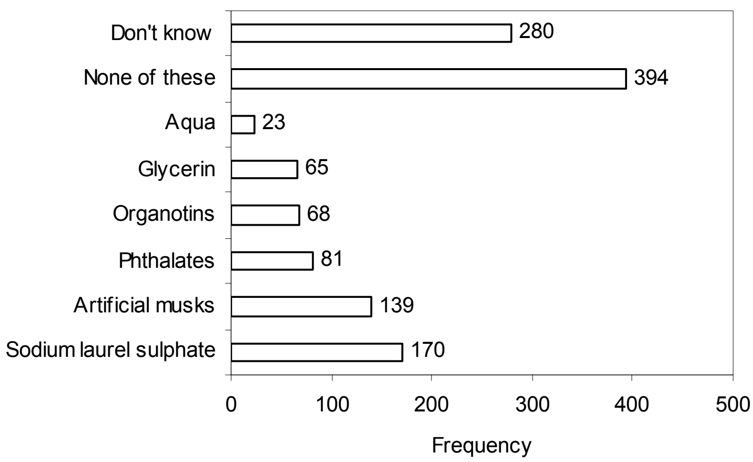

Figure 4.9. Responses to the question 'From the following list, are there any chemical ingredients that would put you off buying any cleaning products or toiletries that contain them?

4.3. Focus groups

Eight focus groups were conducted within the Devon and Cornwall region. A summary of the outputs from the focus groups is provided in Annex 8. The groups were identified using both known associations, such as the Woman's Rural Institute and a local school's parents group, and by advertising for participants in supermarkets. This ensured a broad range of participants comprising 17 males and 24 females with ages ranging from 16 to over 65. Information on income and occupation was not obtained as this may have deterred participation. However, a range was obtained from retired/not working through to above average household incomes. An unintentional bias towards environmentally aware participants may have been expected. However, this was not apparent as very few participants were active members of environmental groups. In one group, all were members of an environmental pressure group, but in the others there were only one or two who said they belonged to environmental groups. Almost all said they liked going to the beach, although some said they felt the water was too dirty to swim in.

Following the guidance notes (see Annex 4), participants were initially asked to classify products they used according to the options shown in Figure 4.10. The results from this exercise showed that apart from one or two key products such as nail varnish remover, oven cleaner and toilet cleaner, which were considered dangerous in most circumstances, there was little agreement about the safety or otherwise of other products. Personal hygiene products such as soaps and shampoos were mostly thought to be safe for health and for the environment, but not in every case. It is interesting to note that many products are bought and used even though there is a general acceptance that they may cause harm to health and the environment.

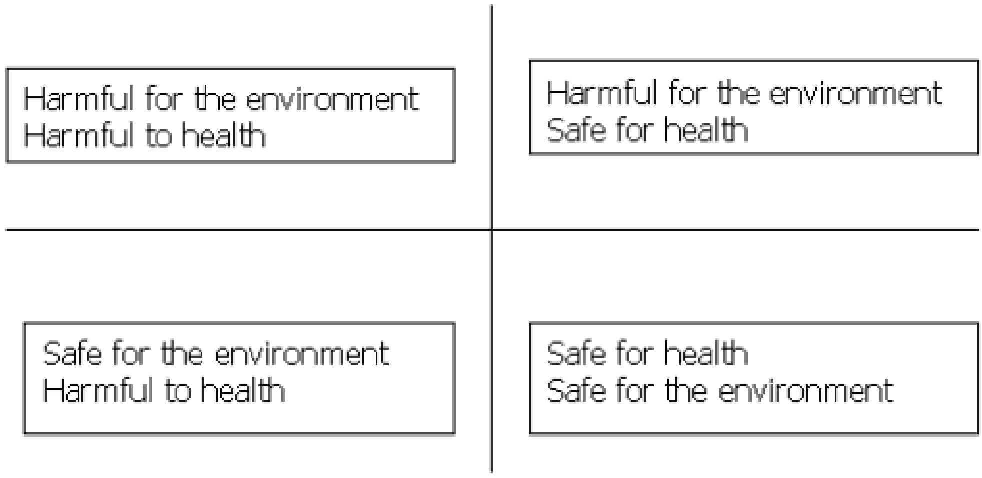

Figure 4.10. The chart on which the participants were asked to classify commonly used household cleaning products and toiletries.

Following this exercise the participants were asked to write down what they felt influenced their buying decisions. The responses from the focus group, shown in Table 4.11, demonstrate that cost, effectiveness and advertising were all of prime importance. Safety was also a principle concern, but this focused on health and was of special concern to those who had, or whose family had, allergies. While cost was often mentioned first, there was a clear consensus that if a product did not work (and some mentioned such products) it would not be purchased a second time. For example, more than once it was said that:

"It must do what it says on the tin."

Many participants noted that they did not often change their products, citing for example:

"When I find something I like and it's good, I stick to it", "You stick to what you know, people do" and "It's all habit isn't it".

Group type	**Top priorities**
Parents	Price; effectiveness; brand name; advertising
University staff	Cost; effectiveness; packaging; allergies
Young male	Cost; effectiveness; packaging (size)
WI	Effectiveness; price; allergies and safety for septic tanks
Supermarket rural	Quality; reputation; reliability; cost was not thought to be an issue but advertising was discussed as of importance
Supermarket urban	Cost; brand name and advertising; quality and packaging
Youth group	Cost/value for money; packaging and advertising; health, especially allergies; and animal testing were mentioned
Environmental pressure group	Ecological impact and safety; price; effectiveness; animal testing/organic

Table 4.11. Factors which were given in the focus groups as priorities when considering which cleaning products to purchase.

The factors influencing the buying decisions of those questioned in the poll, as shown in Figure 4.6, were then shown to the groups and their opinions sought. Generally, they felt that many of the opinions given were similar to their own. There was surprise that attractive packaging was given so much importance although in further discussion it was agreed that advertising, and by association packaging, was of significance.

When shown the following statistic from the survey, there was general disbelief.

"38% of those surveyed said they tried to buy environmentally friendly products when possible."

The comments ranged from "quite a lot of them are probably lying" to "it depends on your definition of tried." There were several comments concerning the poor availability of such products and the high cost of environmentally friendly products.

When asked if they bought or used environmentally friendly products, some reported that they knew about them and used them, while others said they never saw them. More than one participant said they had tried environmentally friendly products but found that they did not work, or had not worked, as well as other products, and so they had not bought them again. All agreed that these products were difficult to find in the shops and the only 'low environmental impact' brand mentioned regularly was Ecover.

Considering the likelihood of changing from one product to another, few felt that they would change brands frequently, as indicated by one woman:

"why change if you know something works."

A number of participants said that they might try a special offer, such as a 'buy one, get one free', but that they would judge the product on performance and if it did not work they would not buy the product again, even if the price remained low. Throughout this discussion, statements such as "really, it's all down to cost" and "it's all habit isn't it" were generally evenly balanced between groups. Only the environmental pressure group members agreed with the NGO interviewee that the premium people would pay for environmentally friendly products was generally underestimated. Mostly, they felt that people would not pay more.

The participants were asked about the qualities that they required in a cleaning product. In general, quality was judged by performance. A product must "cut through the grease" or "do its job", be economical and smell nice, but strong smelling products were not popular. Assessing performance was relatively easy for products such as washing powders (whiteness and smell were very important). It was notable that the focus group consisting of young people felt that brand names were associated with quality, and that "all the stuff that works properly is advertised on TV." Comments were made about the media hype which leads people to become obsessed with cleanliness. This was not considered to be a good thing as some participants felt that it left us overly clean, with inadequate resistance to germs. In contrast however, people also stated that they liked to know that their things were really clean.

Low cost was mentioned as one of the good qualities of a product. The high price of some environmentally friendly products was again mentioned as a barrier to their purchase, as was their low visibility in the market place. There was also uncertainty about what environmentally friendly really meant and this became apparent when a variety of products were given to the focus groups for inspection. The vast majority of participants had no understanding of the chemicals listed on labels, or the symbols used on the boxes for environmentally friendly products:

“It’s (the labelling) pointless – you don’t know what it means.”

“How can anyone read all the ingredients, it’s so small and no one has time.”

“They need to say what is and isn’t safe.”

A few participants were aware that there was concern about sodium lauryl/laureth sulphate. Indeed, most of the participants noticed with some irritation that ‘aqua’ was used on labels instead of water. Participants commented that they required a better explanation of the names, not greater complexity.

When the groups were shown results of the survey that revealed 56% of people did not read the label before they bought a variety household products, there was general surprise that this figure was not higher. Some participants revealed that they would expect this figure to have been as high as 90% or 95%. They also felt that this sort of statistic would be more relevant for food products than for cleaning products. However, those who suffered from allergies did say that they were likely to read labels more carefully.

Each of the groups discussed the possible improvements that could be applied to labelling. Colour coding systems, using green for safe and red for bad, were considered, as were explanatory lists. However, problems were foreseen with each of these methods. Accreditation, using a model such as that for organic foods, was considered to be a reasonable approach. However, concern was expressed about whom would police such a system, and some individuals suggested that this was not such a good idea as one said “I think organic is a rip-off.”

Whilst examining the product packaging, some of the groups noticed a small manufacturer’s label advertising that the product was environmentally friendly. This was used in a number of groups as an example of the possible problems associated with inadequate labelling. None of the participants had a clear idea of what it meant, and most had not noticed it (even when they had bought the product). One participant queried if this labelling indicated that the manufacturer’s other products were not good for the environment.

A number of individuals in the focus groups had particular concern about the contents of products because of their experience of allergies in themselves or their families. As one participant noted:

"The average guy in a terraced house in Leeds is not the slightest bit interested unless something personal happens."

These individuals were more likely to buy products, such as non-biological washing powder, which were perceived to be less harmful to the environment.

The final section of the discussion focussed on who has the responsibility for taking action in the future, and what sort of action should be taken. A wide range of interested parties were considered in this discussion including government, manufacturers and retailers, pressure groups, media, and consumers. There was no overall agreement on what action could, or should, be taken, although the education of both children and consumers was generally agreed to be important.

Businesses were considered to be overly concerned with profit-making and therefore unlikely to change without pressure from either consumers or through legislation. Some of the participants suggested that the Government had a responsibility for improving labelling and advice. The general consensus revealed that the government would need to introduce legislation to greater control industry, especially where non-ethical business practices were driven by a profit motive.

Participants were asked about the role of environmental groups in future action. In general, they felt that NGOs had little role to play. They were perceived to be too radical and sometimes untrustworthy. One participant commented; "If it's left to them, they could turn public opinion the wrong way" and another participant reflected; "Their intentions are right, but they get bad press and give a bad impression throughout." They felt that the media could raise greater awareness and this would eventually lead to change. This would also provide consumers with more accessible information upon which they could act.

The role of consumers was considered to be of the greatest importance. Quotes given included:

"It's down to us really" and "The consumer has the power at the end of the day, but they need to know the choices" and "If we were told our grandchildren's future will definitely be crap then we would do something."

To facilitate this change, education that begins in the schools at primary level was considered of real importance, even by the teenage participants.

5. Discussion

While the motivations underlying consumer behaviour are complex (Moisander and Pesonen, 2002) and have not been fully investigated in this study, some key factors have been identified in the context of the market for 'low environmental impact' products.

5.1. Individual concern

Perhaps the most fundamental factor relates to the personal values, understanding, and awareness of environmental issues. This factor is likely to influence receptivity to low impact product messages and create the motivation to seek out alternative products.

The awareness of potential causal links between the use and disposal of household products and environmental impacts is key to informing individual patterns of consumption (see Figure 5.1). The data from the questionnaire survey indicates that approximately 50% of respondents fail to make that link. Indeed, there is an overwhelming attitude of 'out-of-sight-out-of-mind' regarding environmental consequences as few respondents think about what they discharge to their drains, despite indicating that they do not believe that all harmful chemicals are removed by water treatment processes. The participants also showed very limited trust in the effectiveness of sewage treatment processes and concern about the reliability of the water companies. However, when questioned in detail about the products they purchased and used, they clearly indicated that they believed that these could be both harmful to health and harmful to the environment.

Thus link ② (see Fig 5.2), which is the focus of this study, is established in the public's awareness but not acted upon. The perception of the environment as common ground, which may be used by anyone, creates the belief that it is the responsibility of governments, firms and NGOs to ensure protection, rather than a personal obligation. Therefore, the personal benefits of acting to protect the environment are intangible to most individuals. Most of the respondents had clearly failed to internalise the environment into their thinking, but perhaps surprisingly it was the respondents from the higher age groups (particularly 55-64) which appeared to have the highest level of awareness of these issues, and the lowest age group (18-24) demonstrated the least awareness. This suggests a possible failure of the education system to inculcate environmental values that would create consumers who are aware of the effects of personal behaviour on the environment, but this could also be a result of other factors such as relative affluence. Even the teenagers involved in one focus group felt that there ought to be much better education at a younger age. Generally, more women than men indicated a tendency to consider the environmental impact of their behaviour.

There was concern about personal health impacts and this was often cited as a reason to purchase low impact products (along with the presence of septic tanks which are fairly common in rural areas of the South West). There has been a rapid and significant increase in cases of asthma and Multiple Chemical Sensitivity (MCS) which is thought to be linked with exposure to contaminants. Focus groups were often redirected to the environmental effects by the moderator, only to return to a discussion of health a minute or so later. The link ① is therefore the most clearly perceived.

This presents the challenge of increasing awareness and understanding of the interconnectedness of the impacts on the environment and human health. This could be achieved by initially highlighting the effects of a contaminated environment upon human health (link ③). This may create more eco-aware, if not eco-centric, perception amongst consumers.

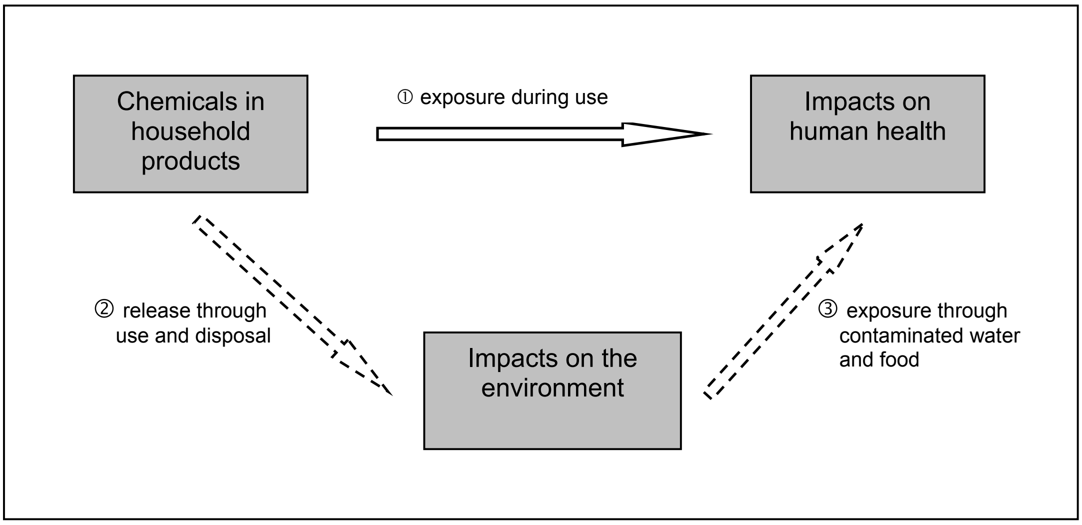

Figure 5.1. Diagram illustrating alternative pathways for chemicals in household products to impact human health.

5.2. Value For Money

This is the cost-performance equation or the public perception of value for money. Both the survey and the subsequent focus groups indicated that cost and performance were the most important factors in buying decisions, particularly amongst the lower age group. This is an area where perceptions are embedded and mythologized in the widely expressed opinion that low impact products are more expensive than mainstream alternatives, and that their level of performance is inferior. However, it is interesting to note that in the questionnaire, very few individuals (27) claimed to have tried low impact products and found them unsatisfactory. Although it was accepted as fact that they were more expensive and less effective within the focus groups, it was not clear how many individuals had recently tried low impact products.

In order to tackle the pricing issue, a number of short-term commercial tactics could be employed. However, perceptions of inferior performance are partly a legacy from the demonstrably inferior products first launched onto the market decades ago, and are more difficult to address. Respondents indicated a gap between manufacturers' claims and actual performance, and this has created the problem of a lack of trust in claims made about more recent products. In some cases, focus group respondents had trialled low impact products and found the performance inferior to their normal brand. This experience reinforces the perception regarding the low impact products and re-affirms consumer loyalty to their brands, creating a higher level of resistance to change. This is clearly a very important barrier to the purchase of low impact products.

Brand loyalty was seen to be very important, and for many individuals this sometimes followed their parent's product loyalties. There was a clear inertia such that once a choice of product had been made it would not be readily changed. This may bring into question the clear statement that price and performance are the main determinants, as it appears that if the price was to change by a few pence consumers may not wish to change to an unknown product.

5.3. Making selection

The practical difficulties of making an informed purchase also contribute to the barrier to 'green' buying. These issues cover availability of, and accessibility to the product and the quality and usefulness of product information.

A number of respondents explained that it was often difficult to find low impact products as they did not appear to be widely distributed and stocked by retail outlets. This is a merchandising problem but is more fundamentally related to the limited production capacity of the low impact product suppliers. The low impact product sector is characterised by small-scale, mostly independent producers who have difficulty in competing with the large multi-nationals who dominate the market.

The limited availability of raw material ingredients is also likely to be a problem as the entire supply chain is based upon the use of traditional chemical products, such as sodium lauryl/laureth sulphate (SLS). There is a sense that this chain is driven by the major chemical raw material producers and this ultimately determines the (lack of) choice of the consumer. This is an issue that will need to be addressed if the sales of these products are to grow significantly. Furthermore, the increased usage of natural raw materials could have direct ecological impacts on the health and viability of the biological sources.

Respondents bemoaned the inadequacy of current product labelling as incomprehensible and of no practical use in making informed decisions. Although over 50% of respondents perceived ingredients lists as unhelpful, more comprehensive labelling was not perceived as the solution, but rather a simpler accreditation ('eco-labelling') system. However, the recurrent issue of trust of product manufacturers' claims could make such schemes lack credibility unless a scheme could be developed which was sponsored by the government or some other national body. It is also unclear what the claims refer to – the product, the constituent chemicals, the packaging or the company? One area where consumer trust is apparent is with brands, and this offers an opportunity for retailers and manufacturers to develop low impact products or brands with strong ecological credentials. This is a potential area for mobilisation of consumer pressure – demanding wider choice, better availability and improved labelling and branding.

5.4. Removing barriers

There are many links in the supply chain which is presented in simplified form below (see Figure 5.2) and consequently there are numerous 'pressure points' where intervention can be targeted to tackle the issue of chemicals in household products.

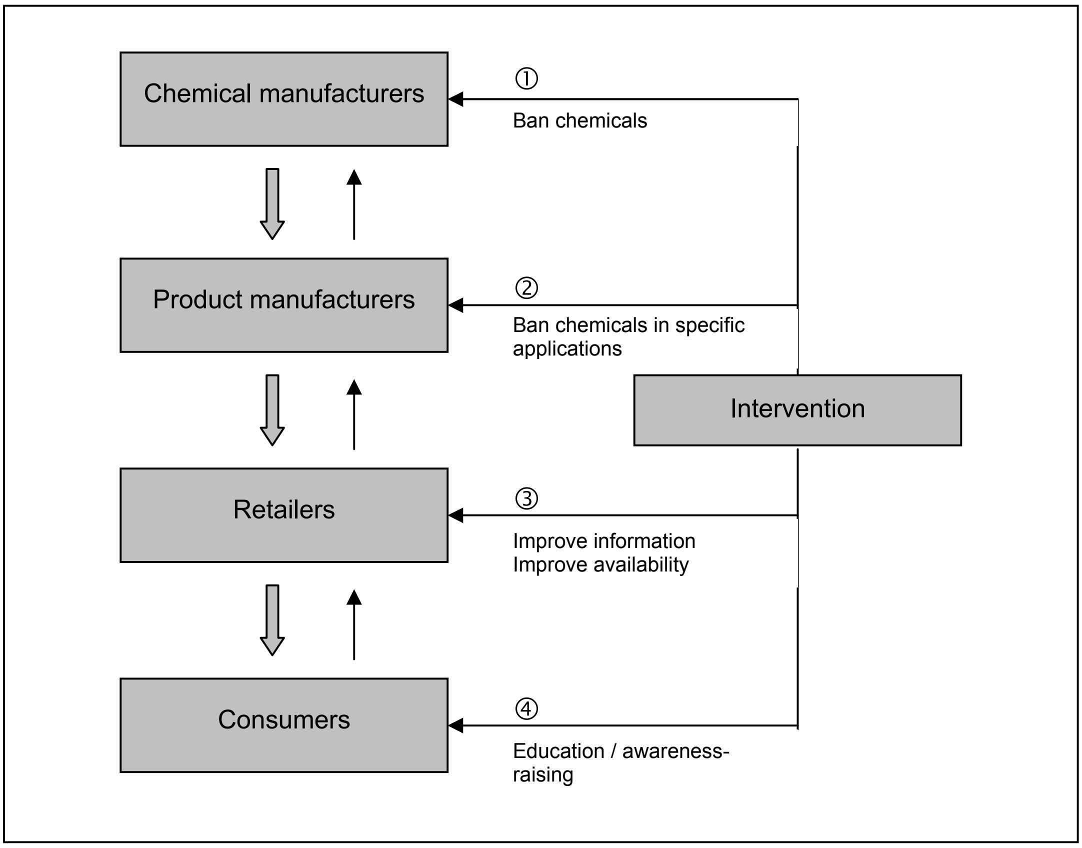

Figure 5.2. Simplified supply chain showing points of intervention and appropriate strategies ① - ④.

Clearly some of the strategies identified in Figure 5.2 may be more confrontational than participative, but this would largely be dependent on the mix of tactics used such as political lobbying for tighter regulation, provision of information to consumers and direct protest against chemical producers.

There is an emerging concern about chemicals in household products and the most effective strategies will be targeted at the most receptive point which is likely to be, in the first instance, consumers and retailers. Some retailers have already identified this issue on their ‘early warning radar’. Retailers are often perceived as being ‘neutral’ and are afforded more credibility than producers or advertisers and are in a strong position to influence their customers through the provision of information. Information has been described as the ‘third wave’ of environmentalism following the command-and-control paradigm and the use of market-based instruments. Although there has been a successful case of banning phthalates from children’s toys, the interventions to ban chemicals or their applications in the household products sector (where there are a very high number of chemicals used) are likely to be less effective than the mobilisation of consumer pressure through the retailers.

References

Allanou, R., Hansen, B.G. and van der Bilt, Y. (1999). *Public Availability of Data on EU High Production Volume Chemicals.* EC Joint Research Centre. Institute for Health and Consumer Protection. European Chemicals Bureau.

AMAP (1998) *Assessment report: Arctic pollution issues*. Arctic Monitoring and Assessment Programme, Oslo, Norway. 859pp.

Anderson, H R, Butland, BK and Strachan DP. (1994). Trends in prevalence and severity of childhood asthma *British Medical Journal,* 308:1600-1604.

Aspinall, D. (1993) Green Cleaning. *Home Economics and Technology*, November 1993.

Damstra, T, Barlow, S, Bergman, A, Kavlock, R and Van Der Kraak, R (Eds) (2002). *Global assessment of the State-of-the-Science of endocrine disruptors* (WHO/PCS/EDC/02.2). International Programme on Chemical Safety (http://www.who.int/pcs/).

DEFRA (2005). Survey of Public Attitudes to Quality of Life and to the Environment: 2001. Accessed on line at http://www.defra.gov.uk/environment/statistics/pubatt/ch4conc.htm Chapter 4

Dembkowski, S. and Hammer-Lloyd, S. (1994) The environmental value-attitude-system model: A framework to guide the understanding of environmentally-conscious consumer behaviour. *Journal of Marketing Management*, 10, October, 593-603.

Environmental Data Services (ENDS) Report (2004). Agency calls for action 'now' on sewage oestrogens. *ENDS Report*, 355, August, 3-5.

Godduhn, A and Duffy, L (2003) Multi-generational health risks of persistent organic pollution in the far north: use of precautionary approach in the Stockholm Convention. *Environmental Science and Policy*, 6, 341-353.

Guardian (2004). *Chemical World: Part 3: Home & Garden*. Guardian 27.05.2004, 32pp.

Holstein, J.A. and Gubrium, J.F. (1995). *The Active Interview.* Qualitative Research Methods Series 37, Sage Publications, Thousand Oaks, CA, 85pp.

INRA (1992). *Europeans and the Environment in 1992*. Report produced for the Commission of the European Communities Directorate General XVII Energy, Bruxells.

Jobling, S., Nolan, M., Tyler, C.R., Brighty, G. and Sumpter, J.P. (1998). Widespread sexual disruption in wild fish. *Environmental Science and Technology*, 32, 2498-2506.

Mannino, DM, Homa, DM, Pertowski, CA, Ashizawa, A, Nixon, L, Johnson, C, Ball, LB, Jack, E and Kang, DS. (1998) Surveillance for Asthma- United States, 1960-1995. In '*Center for Disease Control and prevention, Surveillance summaries*', April 24, 1998/ 47 (SS-1); 1-28.

Moisander, Johanna and Sinikka Pesonen (2002) "Narratives of Sustainable Ways of Living: Constructing the Self and the Other as a Green Consumer", *Management Decision*, 40(4), 329-342.

Pegram Walters Associates (PWA) (1994). *Consumer Attitudes to Packaging*. PWA 2769. Prepared for INCPEN.

Ritchie, J and Spencer, E. (1994). Qualitative data analysis for applied policy research. In: *Analysing Qualitative Data.* (Eds: A. Bryman and R.G. Burgess), Routledge, London., p173-194.

Royal Commission on Environmental Pollution (RCEP) (2003). *Chemicals in Products*. Twenty-Fourth Report. The Stationery Office. Norwich. 291pp.

Sherriff, A, Farrow, A, Golding, J, the ALSPAC Study Team and Henderson,J (2005) Frequent use of chemical household products is associated with persistent wheezing in pre-school age children. *Thorax*, 60, 45-49.

Wong, W., Turner, W. and Stoneman, P. (1995). *Marketing Strategies and Market Prospects for EnvironmentallyFriendly Consumer Products*. Warwick Business School Research Bureau, University of Warwick. 24pp.

Worcester, R. (1993) *Public and Elite Attitudes to Environmental Issues*, MORI, London.

WWF (2003). *Causes for Concern: Chemicals and Wildlife*. WWF, Brussels, 22pp.

WWF (2004). *WWF-UK National Biomonitoring Survey 2003*. WWF-UK, Godalming.

Zahm, S.H. and Ward, M.H. (1998). Pesticides and childhood cancer. *Environmental Health Perspectives*, 106, 893-908.

Annex 1. Hazardous Chemicals in Household Products

Main Compound Groups	Impacts	Products	Alternative Products
Artificial Musks Tonalide, Galoxolide, Musk xylene galaxolide (1,3,4,6,7,8-hexahydro-4,6,6,7,8,8-hexamethylcyclopenta-2-benzopyran) HHCB tonalide (7-acetyl-1,1,3,4,4,6-hexamethyl-1,2,3,4-tetrahydronaphthalene) AHTN musk ambrette (2,6-dinitro-3-methoxy-4-t.butyltoluene) MA musk ketone (4,6-dinitro-2-acetyl-5-t.butylxylene) MK musk tibetene (2,6-dinitro-3,4,5-trimethyl-1-t.butylbenzene) MT musk xylene (2,4,6-trinitro-5-t.butylxylene) MX	Absorbed through skin (found in breast milk, fatty tissue and blood) – thought to cause liver damage and interfere with brain messages. E.g. Tonalide – liver damage in animals. Galaxolide – mimics human chemical signaling messenger.	**Shampoos** (low concentration) Elvive Head and Shoulders Timotei Vidal Sasson Wash and Go Organics Pantene Pro V Johnson's baby shampoo **Shaving foam and Gels** Gillett Lynx Nivea Palmolive **Washing up liquids** Ariel Fairy **Washing powders** Ariel non-bio Fairy non-bio Bold non-bio Daz non-bio Persil non-bio Surf non-bio **Dishwasher Tablets** Fairy dishwasher tablets **Multi-surface Cleaners** Ajax Cif Oxygel kitchen cleaner Sainsbury citrus liquid cleaner (phasing out musks and phalates by 2005) Tesco's all purpose cleaner (phasing out musks and phalates by 2005) Waitrose all purpose cleaner – aqua (phasing out musks and phalates by 2005) **Fragrances** Poison – Christian Dior Eternity – Calvin Klein	**Shampoos** All Weleda products Body Shop tea tree shampoo **Shaving foams and gels** Body Shop Shaving gel **Washing up liquids** Ecover **Washing powders** Ecover **Dishwasher tablets** Ecover dishwasher tablets Co-op Citrus dishwasher tablets **Dishwasher Tablets** Asda Co-op fresh lemon cleaner Safeway Vecta all purpose cleaner Waitrose all-purpose cleaner – citrus and Forest
Phthalate esters DEP (diethyl phthalate)	An irritant and suspected hormone	**Shampoo (low)** Johnson's baby shampoo	**Deodorant** Certain Dri Anti-Perspirant

dimethyl phthalate DMP diethyl phthalate DEP di-iso-butyl phthalate DIBP di-n-butyl phthalate DBP benzylbutyl phthalate BBP dicyclohexyl phthalate DCHP di-(2-ethylhexyl) phthalate DEHP di-n-octylphthalate DOP di-iso-nonylphthalate DINP di-iso-decyl phthalate	disrupter that is absorbed through the skin and can accumulate in human fat tissue. DEHP & DBP classified as toxic to reproduction. (Consuming Chemicals p6)	Head and shoulders L'Oreal ASDA Blueberry shampoo **Paints** B&Q Colours, matt magnolia B&Q Colours, matt lemon **Fragrances (high)** Poison – Christian Dior Eternity – Calvin Klein **Nail polish** Max Factor (Diamond hard nail enamel) Maybelline Oil of Olay	Roll-On Dove Powder Anti-Perspirant Deodorant Lady Speed Stick Soft Solid Anti-Perspirant Secret Anti-Perspirant & Deodorant Platinum Protection Ambition Scent Soft & Dri Anti-Perspirant Deodorant Clear Gel **Hand and Body lotion** Curel Soothing Hands Moisturizing Hand Lotion Eucerin Dry Skin Therapy Original Moisturizing Lotion Lubriderm Skin Therapy Moisturizing Lotion Neutrogena Hand Cream Suave Naturals Sun Ripened Moisturizing Body Lotion Vaseline Intensive Care Dry Skin Lotion (Source: EWG site)
Bisphenol-A	Alter male reproductive organs and increase likelihood of genetic abnormalities.	**Skin Care** Clean and Clear Nivea Oil of Olay Plenitude Pure and Simple	**Skin Care** Green people (all moisturizers in the range)
Alkyphenols nonylphenol, nonylphenol ethoxylate, Alkyphenol, Alkyphenol ethoxylate.	Affect sperm production in mammals. Been shown to damage human lymphocytes. ***Pose high environmental risk***	**Paints** Crown Paint (committed to phase out use of chemical by 2005) Homebase C24 coloured emulsions *Also found in some personal care products*	**Paints** Crown 'minimal VOC' emulsion paints Most B&Q paints
Organotins monobutyltin MBT dibutyltin DBT tributyltin TBT tetrabutyltin TeBT monooctyltin MOT dioctyltin DOT triphenyltin TPT	Attack immune system and may cause birth defects.	**Shaving foams and gels** Gillett Lynx Nivea Palmolive	**Shaving gel** Body Shop Shaving gel
Sodium laurel Sulfate (SLS) **Sodium dodecylsulfate (SDS)** **Sodium laureth sulfate (SLES)**	SLS is systemic, can penetrate eyes, brain, liver - reacts with other ingredients to form NDELA – a	Found in the many personal care products, especially shampoos – found in most conventional brands	

	nitrosamine and carcinogen -mutagen.		

(Main Source: Greenpeace Chemical House
http://www.greenpeace.org.uk/Products/Toxics/index.cfm)

Annex 2. Retailers' strategy on hazardous chemicals in household products

Supermarket	Action/Goals	Progress
Sainsbury	Phase out all 27 OSPAR chemicals by 2005. Reduce the environmental impact of products.	Nearly there, only musk still used in quantity. Working to influence our suppliers to reduce their direct environmental impacts and improve the environmental quality of own-brand products through more sustainable sourcing.
ASDA	Compliance with National and International environmental legislation and treaties as a minimum operating standard.	No comment.
Boots plc	Precautionary Approach – phasing out all OSPAR chemicals and those of high public concern.	Formal stakeholder consultation. Formed Chemicals Working Group. Priority Substance List – detailing action and targets.
The Body Shop		
Waitrose	No mention of chemicals.	N/A
Safeway	**Targets 2002-03** In Non-Foods, a Chemicals Ingredients Code of Practice has been developed to ensure chemicals that are causing concern due to bioaccumulation, have links to carcinogenic responses, cause allergic reactions or accumulate in the environment are controlled. This Code is reviewed annually. **Targets 2003-04** Using objective information from reputable researchers and NGOs identify specific opportunities to reduce or eliminate chemicals from Safeway Brand products in instances where health or environmental concerns may exist.	▪ Musk Xylene, Musk Ketone, Musk Tibetene and other Nitromusks are not permitted for use in the manufacture of Safeway Brand products. ▪ Recognising importance of OSPAR Commission list of chemicals for priority action, Safeway will ensure these chemicals are excluded from any new Safeway Brand non-food products and are removed from existing Safeway Brand nonfood products by end 2002. ▪ Investigate, and where possible implement programmes to reduce or eliminate the use of specific pesticides which have been linked to specific health or environmental concerns. ▪ Pthalates – investigate possibility of extending policy to remove more pthalates than specified on OSPAR list. Priorities to expose and possibly reduce to one type only. ▪ Triclosan - use has gradually been reduced in business. ▪ Determine timed reduction plan.
Tesco	No mention of chemicals	N/A
Superdrug	Committed to Ensuring good environmental practices amongst our	No specific actions or targets mentioned.

	own-brand suppliers and including environmental issues in buying decisions.	
Somerfield	The Company will at all times comply with environmental laws and regulations, and will ensure that compliance through existing internal systems.	No specific actions.
Co-op	Phasing out phthalates from some products (Clingfilm and children's toys). Phasing out artificial musks. Phasing out Alkyphenols form paints.	Ongoing. Most Co-op products are already free from musks – to be phased out of remaining products during reformulation. Ongoing.
B&Q	Phase out chemicals of concern by 2005. QUEST assessment program for suppliers - helping suppliers become more aware of impacts in the supply chain and how to reduce them.	Toxic's strategy. Toolkit approach to clearly label, reformulate or substitute certain products. Used QUEST to deliver targets on VOCs in paints – managed to reduce VOC conc by 21% in 3 years, and developed widely used labelling system now considered as tool for in upcoming EU legislation.

Annex 3. Details for Poll questions – Barriers to Buying Green Products

Introduction
These questions are about your attitudes to the presence of chemicals in household products which may through use or disposal end up going down the drains. Examples of such household products include; cleaning products e.g., washing powders and spray cleaners and toiletries e.g., shampoo and shower gels.

1. Is the environmental impact on rivers, lakes and seas something you consider when deciding which household products to buy?

a). Cleaning Products e.g., toilet cleaner, washing up liquid
Always
Sometime
Never
Don't know/ not responsible for buying this product

b). Toiletries e.g., shampoo
Always
Sometime
Never
Don't know/ not responsible for buying this product

2. I am now going to read out a series of statements and I would like you to tell me if you agree or disagree with each one. *Please give me your answer using the following scale:*

Agree strongly
Agree slightly
Neither agree nor disagree
Disagree slightly
Disagree strongly

(READ and ROTATE)

a) *When something goes down the drain to the sewage works all harmful chemicals are removed*.

b) *When something goes down the drain to the sewage works some of the harmful chemicals will be removed, but some will be released into rivers and seas.*

c) *When something goes down the drain to the sewage works none of the harmful chemicals are removed..*

d) *Once something has gone down the drain I don't ever think about it again.*

3. In reference to cleaning products and toiletries do you buy products that are labelled as being environmentally friendly or 'green'? (tick one)

Yes, whenever possible
I've tried them but I don't like
No, but I would like to try them
Never
Sometimes
I was not aware such products existed

4. From the following list of options could you tell me which two are most important to you when deciding which household cleaning products to buy such as washing powder, washing up liquid?
(READ and ROTATE)
INTERVIEWER CODE TOP TWO ITEMS

Cost of product
Product performance
Environmental Impact of product
Brand name
Attractive packaging
Do not buy (do not read)

5. From the following list of options could you tell me which two are most important to you when deciding which toiletries to buy such as shampoos and shower gels?
(READ and ROTATE)

Cost of product
Product performance
Environmental Impact of product
Brand name
Attractive packaging
Do not buy (do not read)

6. Which of the following do you think is the main barrier to buying cleaning products and toiletries which have a low environmental impact*?*
READ and ROTATE, CODE ALL THAT APPLY
INTERVIEWER CODE TOP TWO ITEMS

Cost of product
Product performance
Lack of availability
Poor product information
Lack of trust in environmental products
Lack of concern for environment
None (do not read out)

7. Which of the following types of product information do you find most useful when deciding which cleaning products and toiletries to buy?

READ and ROTATE, CODE ALL THAT APPLY

Brand name
Certified Eco-label
Ingredients list (what's in it)
Product description (what it does)
Information labels (e.g. fragrance free)
I never read labels

8. I am now going to read out a series of statements and I would like you to tell me if you agree or disagree with each one. Please give me your answer using the following scale:

Agree strongly
Agree slightly
Neither agree nor disagree
Disagree slightly
Disagree strongly

READ and ROTATE

a) *I usually read the list of ingredients on the back of household products before I buy them*

b) *Reading the ingredients list on cleaning products and toiletries helps me to decide which products I want to buy*

c) *Reading the ingredients list on cleaning products and toiletries helps me to understand their impact on the marine environment...*

8. From the following list, are there any chemical ingredients that would put you off buying any cleaning products or toiletries that contain them?

READ and ROTATE, CODE ALL THAT APPLY

Aqua
Sodium laurel/laureth sulphate
Artificial musks
Phthalates
Organotins
Glycerin
Don't know (do not read out)
None of these (do not read out)

9. And now a few questions about home decorating paints.

Do you ever consider the environmental impact on rivers, lakes and seas when buying paints for example gloss and emulsion?

Always
Sometimes
Never
Don't buy paints

10. From the following list of options could you tell me which two are most important to you when deciding which home decorating paints to buy?
READ and ROTATE
INTERVIEWER CODE TOP TWO ITEMS

Cost of product
Product performance
Environmental Impact of product
Brand name
Colour of paint
Do not buy paints (do not read out)

Annex 4. Focus group outline – moderator guide

I. Introduction

- Introduce yourself and your assistant
- Briefly explain the purpose of the session – to discuss participants' attitudes to hazardous chemicals in household products and their attitudes and thoughts on household products which have a low environmental impact.
- Alert them to the recording equipment
- Assure them that confidentiality will be maintained
- Explain ground rules…..want to hear from everybody, no right or wrong answers, need to speak in turn.
- Ask to participants to introduce themselves

E.g. Introduction Guideline

- *Good evening and welcome to our session. Thanks for taking the time to talk to us about your attitudes to the chemicals in household products and their impact on the environment.*
- *My name is……. and work at….. We want to know about your attitudes to the presence of chemicals in household products and the effects they may have on the environment. We are particularly interested in your experience and attitude towards household products that are marketed as having a low environmental impact.*
- *There are no right or wrong answers but rather differing points of view. Please feel free to share your point even if it differs from what others have said. Keep in mind we are just interested in your opinions.*
- *You may have noticed the microphone. We are recording this session so as not to miss any of your comments, people often say very useful things in these sessions and we can't write fast enough to get it all down.*
- *Could I please ask you to turn off your mobile phones or pagers so there are no disturbances. We will be working on a first name basis tonight but will not be including any names in our report. You may be assured of complete confidentiality.*
- *My role of moderator in this session is to guide the session; name cards have been placed in front of you to help us remember each others names.*
- *OK lets begin, first lets find out a bit more about each other by going round the table and introducing ourselves, tell us your name and where you live.*

II. Warm-up

- Environmental interest
- Belong to any environmental groups
- Interest in marine life
- Go to beaches

III. Conceptual Mapping Exercise

Aim: Explore understanding of the environmental and health impacts of the cleaning products they use.

- Hand out blank map and ask them to place the brands they use for different products where they think appropriate
- Products under normal use
- Create same map on the flip chart – fill in their answers your map
- As writing up, get them to explain their choices/reasoning.

Points to cover:

- Do they believe household cleaning products and toiletries actually pose a threat to the environment especially rivers, estuaries and seas?
- Are you concerned about the state of the Britain's river and coastal environment?

IV. Buying Patterns

Qu1. Now I would like you to tell me which three things are most important to you when buying household products such as washing powder or shampoo?
Could you jot down the 3 things that you value the most.

- Write answers on flip chart
- Discussion of answers – try and come to a consensus as to what the most important factors are and why.

We asked that same question to our poll group and these were the results we received.
Put up pie chart (pass around individual copies) – brief discussion on any of the factors not brought out previously.

Points to cover:

- How much do you think people's choices are down to habit?
- Do people really test out a range of brands?
- How often do you try new brands?
- How do you assess the performance of a product?
- Buying patterns – what do they buy, what drives choices, what are they looking for, what trade-offs are people prepared to make.
- Who are what influences your decision to purchase washing powders, shampoos etc
- Do you generally buy on special offer?

Then say……
38% of those surveyed said that they ***tried*** *to buy environmentally friendly products when possible. (overhead)*

Qu2. Why do you think people do not buy environmentally friendly products?

Points to cover:

- Do you buy products labelled as environmentally products – what types of products?

- Have you found them to be effective?
- Do you think there is a need for environmentally friendly products?
- Do you expect any harmful chemicals to be removed by the sewage treatment?

The following statement was made by a leading supermarket chain
"I think that the degree to which people are willing to pay more for a low impact product is often underestimated." (overhead)

Qu.3 Do you agree with this statement, would you be prepared to pay more for an effective product that was environmentally friendly?

Points to cover:
- What qualities do you look for in a good cleaning product or toiletry?
- What trade-offs are people prepared to make for the sake of the environment.
- If the cost of environmental products was in line with that of mainstream brands, do you think more people would buy them?
- Do you think that people trust that such products really are less damaging to the environment?
- What would make you more inclined to buy environmentally friendly products?

If there is enough time ask them to *………Develop a campaign or slogan for promoting low impact (ecological) shower gel or bathroom cleaner*

V. Now we are going to move on to discuss labelling of products.

Pass around products.

Qu4. What kind of information would give you the most confidence when buying environmentally friendly products?

E.g. – More comprehensive ingredients list
Organic/environmental accreditation
Trusted brands
Ethical retailers

The following statement was made by a leading UK retailer;
"80% of consumers care when they leave their house about the world they live in, but by the time they have got to the shop, it's like where the hell do I start!"
Our survey showed that 56% do not read the labels on product before they buy them.

Qu.5 What do you think could be done to improve the labelling and in turn our knowledge of the chemical content and impact of the products we use in our homes?

Points to cover:
- Should environmental impact be represented in someway?
- Are trustworthy brands more useful to you than better labelling?

- Is ‘ethical’ branding something you would like to see i.e., no GMO products, removal of hazardous chemicals from products, reduced packaging etc.
- <u>Get them to talk about their views on ethical retailers!!!!!</u>

VI. The Future

<u>Qu.6 Now, looking to the future, how do you think consumer awareness of this issue could be raised?</u>

Points to cover:

- Who should do it e.g., government, retailers, NGOs, manufacturers etc.?
- Who do they trust to do it?
- Is it something that general consumers would be interested in?
- Faith in the campaigns of NGOs.

VII. Summary

Gives the participants an opportunity to share any information about the topic that they may have forgotten or omitted.

Summarise main points of session and confirm that everyone agrees.

Review the purpose of the session and ask if anything has been missed.

Thanks and closure.

Things we need
Stimuli material – chemical ingredients label
Examples of cleaning products
Food and drink
<u>Microphone</u> and recorder
Flip chart
Post-it notes
Name badges
Water
Clock
Pens and paper
Conceptual maps
Food and drinks

Annex 5. Thematic table of results from the interviews considering concern and awareness about chemicals in household products.

Issues surrounding chemicals in household products				
	Is this something we should be concerned about?	**Current public, retailer and stakeholder awareness**	**Raising awareness**	**Drivers for low impact products**
Ecover	"It is a really hard area, it's analogous to additives in food, it's just all very debatable. You are often acting on anecdotal evidence and I think often the problem with environmental impacts is that they are often viewed by the chemical industries, who like to have absolute answers, as a sort of half science. They want evidence that something is actually dying. They just work on a different level of proof to how consumers or even we see things."	"Environment is now on the agenda… research has shown us that we can create three general categories for consumers; deep greens who understand environmental issues and can relate their actions to the environment…they will compromise and make definite actions to ensure the long-term protection of the environment; then light green consumers …'conscious consumers' who want to be environmental but will not compromise their own lifestyle. i.e., they need cleaning products that perform on price and effectiveness that are ecological… it then becomes relevant to me, myself and my family. Then there are red consumers – these are consumers where the environment isn't an issue…"		"It's as with everything else things move on day by day, the environment is on the agenda now, people are talking about things that previously they weren't. People are now probably aware that there could be residues on your plate once you have washed them up, where as previously they weren't." "Ecover's own criteria have always been very strict and far reaching…and revolve around sustainability so we were already operating beyond OSPAR…"

Greenpeace		"We found actually that there was a fundamental barrier in people's minds to believing that there could be a problem with PVC in teething rings for example. Again there was a proportion of the population that were very willing to accept this, people who reacted against it – it's one of so many risks that they do not care, but there was a very big proportion of the population that said 'WHAT?..... this stuff is labelled as being tested, you must be joking, it can't possibly contain reproductive toxins' and yet it does."		"There is a huge diversity of levels of understanding I am sure. I think a very small proportion of the public are …. interested at this point in chemicals in products…its just I think that people have so much on their minds that chemicals in products is just one of many." "I think the interest is increasing and where it is, I think that what is increasing is a general awareness that we are surrounded by chemicals whatever their sources are. The idea that you could be exposed to chemicals in products, I suspect is a relatively new realisation for people." "I think it is growing and it is probably growing rather than from a specific concern about chemicals in products, but more from a concern that people want to be environmentally aware when they are buying things."
FoE		"For us, because we have worked on it, it seems really obvious….but with consumers the link is not well understood."	"Being realistic, most people will shop from big supermarkets and if they had the choice they may take it into account."	"You would hope that there would be a push for manufacturers to remove chemicals from their products if there was a demand."
Homebase				"Homebase…used the OSPAR

				list as one of the main indicators where high impact chemicals are concerned. Homebase are assessing a whole range of chemicals together with our corporate partners and will be identifying where, if at all, they appear in Homebase products.”
Boots plc (source: website)		As Boots moves towards becoming a sustainable business - where growth doesn't compromise the ability of future generations to meet their own needs - we have to consider any long-term effects of the chemicals used in our products. Some scientists and environmental groups are concerned that even low levels of certain chemicals may have an unacceptable long-term impact on human health and the environment - especially if they are slow to break down and remain in the environment for a long time.		This is a huge and ever-increasing task as new issues are constantly added to the agenda. We have developed our strategy on chemicals in consumer products to help us manage the complexities associated with our product range and our supply chains. Many of the issues remain unproven, but at Boots we take a precautionary approach: our experts carefully assess the nature and level of any threat before deciding what action needs to be taken. Chemicals identified for review are placed on our Priority Substances List, which details our action and any related targets.
B&Q (source: website)		In recent years, we have become aware of a growing concern amonst scientists and		We will concentrate on product-based, consumer-focussed issues rather than chemical-

		environmentalists that some chemicals that are used legitimately in consumer products for many years may be causing long-term damage to human health and the environment.		based issues, as these directly affect our operations.
The Co-op		"Well I do not think it is really seen as a very sexy subject. It depends if people are clued into what the issues are. At the moment it does not have that high a profile. I do not think people generally think about things like this." "I do not think the UK public is that clued into this issue, if you promote low impact products they will just think it is a new product on the market."	"I would like to think that retailers as a whole can make a difference even if it is only a drip-drip effect. Once one retailer does something it often spreads around because we often use the same suppliers, so I think retailers have a big responsibility and a big opportunity to change this." "It's about education and you have got to educate the consumers as to what the benefits of these products are. You have also got to do it in way that gives them real tangible benefits from the product and that's where the issue is." "It's back to the mass education, it's about the government potentially and major own brands labels going down the ecological	"Because we are on the sharp end, we have a direct interface with consumers. Manufacturers really do not seem to care in the same way that we do, and that's probably because they are not in direct contact with the consumers like we are. Retailers have realised that this could be an issue in the future and so they are acting on it now." "I would imagine most of the retailers have been working on this for a few years now, largely because of the NGO work that has been done on it. Retailers tend to be quite precautionary." "There is not a lot driving it at the moment, at the moment there are very, very little drivers out there. It is whether the retailers can get the message across." "People do not believe that putting sodium crystals into the

			route. If we went down the route of Ecover as own label, I strongly believe it could be a corner stone for our advertising. Whether that would have an impact on the overall UK market would have to remain to be seen." "But I do not think that the rest of the message is that easy to get across, if it's cheaper people wonder why, if it's more expensive people can't afford to buy it…you have got to educate them about what they are buying." "It's educating people to know what they really need, the market has been created for so many products."	toilet will keep it clean, although it will, people will not believe it because the marketing machine has told them they need this products to that and this one to do that…" "It is a critical path that is going to work over 10 or 15 years rather than 4 or 5 and that is why I do think it needs the government to step in and say well...we need to either reward companies that are prepared to… produce ecological products or we are going to set tariffs which means that other companies which are polluting will have to pay for it."
Marks and Spencer		"…members of society do not trust the chemical industry, but as soon as that member of society walks into a shop and becomes a consumer that same person assumes that the products they are picking up from the shelf are safe. That disconnect will not continue to [exist], in part it will be [broken]	"Government in particular has to take a lead in benchmarking the industrial sector; there has to be far more useful industrial benchmarking for consumers, to give them real choices." "No one makes it matter at	"In the late 80's the UK consumer was one of the most trusting in the world and then it got hit by mad cow disease, the MMR virus, foot and mouth… now they have got to the stage when they are extremely precautionary even as members of society…you have got a very distrustful consumer out there

		by NGO campaigning which is beginning to link chemicals with consumer products and not big smelly chemical plants.” “80% of them care, when they leave their house, about the world they live in, but by the time they have got to the shop, it’s like where the hell do I start…it’s that we are not presenting to people in a way that is actually useful for them. So until people can make a simple decision at a brand level, it is almost meaningless.”	this point in time. To an extent it should be government driving this, pressure groups have tried very hard, and certain parts of business are trying hard, but people like the Co-Op and M&S look at their competitors doing bugger all, some of the most profitable retailers are doing nothing in this area, so you begin to think why?”	and that’s basically where it has come from. I think there is also a convergence where the pressure groups have stopped campaigning against chemical companies and started campaigning against very visible retailers and products.“
Wessex Water	“Yes there is. There are quite a number of household products that do cause issues for the wider environment, not necessarily to waste water treatment…. Let me give you an example of some chemicals that cause concern. Endocrine disrupters, I do not know too much about their origin but they simply go straight through the plant – they are in low concentration when they arrive and in low concentration when they leave, they have no effect what so ever on waste water treatment, they are not	“I think the first problem was way back in the 1950’s with the first synthetic detergents, these were known as hard detergents. You will often see old photos of effluent discharge from sewage treatment works in the 50’s with big banks of foam…. that was when water treatment works was first aware of the problem from household products. Since the detergent issue a few things have cropped up, e.g. manganese in certain oils, but there have been relatively few and nothing on the scale of the detergents.”	“The last thing we had was a thing called the ‘Bag it and Bin it’ campaign (about 4 years ago)– this was to try and stop people putting sanitary products down the toilet, particularly cotton buds…The campaign was not particularly successful, it grabbed attention and the head lines for a few weeks and then its back to normal. In terms of effectiveness it is not really money well spent. Wessex water has adopted a fairly low profile on publicity.”	

	regulated so we do not analyse or measure them but when they go out into the wider environment they may create 3 eyed cat fish like you see in the Simpsons." "At the moment the government, that is the regulators and the water industry, do not have any direct concerns, I think the next one to come along will be something like VOCs."			

Annex 6. Thematic table of results from interviews considering the market for low impact products

The Market for Low Impact (LI) Products					
	Barriers to buying low impact products: cost, performance, availability	**Consumer misconceptions**	**A Niche Market?**	**Importance of low impact products**	**Marketing and other difficulties**
Ecover	"I called them the 'quick save' shopper who would believe in the DAZ doorstep challenge, if it's on special offer then they will buy it, they can't think any further than that." "One of the difficulties when you have a green brand is that we carry a green product legend with us. And unfortunately the green product legend is often that you have to compromise to use the product."	"They want their hands to be clean and being clean to them means smelling of bleach. They cannot get their minds around any other concepts." "The biggest barriers to trial is that people THINK the product does not work and that it is expensive, so if you can actually physically put the product in their hands and they can try it then you have got over that barrier."	"For a very traditional green product like ours, our heartland, if you like, is in the health food trade…only 5% of consumers shop in the health food trade so unless we had made the bridge and actually gone into the market pool we would not be offering the products to such a range of consumers …we wanted to make a brand accessible for everybody to use today." "It is only now with the new generation of cleaning products that we are able to provide the customers with a true ecological alternative that is effective. It is now time for us to prove ourselves and develop the market. This needs to be done so that standards are set and understood by	"It's not just about the products that we sell, it's about how we make them, our commitment to an environmental factory, it's about our commitment to the work force." "We are not just producing a product and saying you should use that, we are actually trying to ensure that in the processes we go through to make that product that we are standing up for the cause that we are promoting and actually making a difference."	"So within conscious consumers you really need to be talking to lots of different groups, which is what makes our marketing so complex."

			consumers and so prevent the muddying of the waters by larger companies who still base their products on petro chemicals…”		
Greenpeace	“Cost is clearly an important issue but costs are very much dependant on the degree of market penetration that a product has, and costs invariably come down the more interest there is in that product – it’s economies of scale, the more you produce the cheaper it is.” “I think that the degree to which people are willing to pay more for a low impact product is often underestimated.”	“There is bound to be unwillingness for a lot of people to admit that in fact we have been exposed to these things for a long time and we do not know the extent to which that exposure is responsible for some of the rising health concerns that people have. We probably won’t ever know, but let’s do something about it collectively.”	“You will always get people who do not give a toss and either for reasons that they cannot afford them or for reasons that they won’t ever buy something that’s environmentally friendly. In fact you will always get people who won’t buy that sort of thing as a sort of protest.”	“They are worthwhile from two perspectives because even if you are reducing and not eliminating an impact then that’s got to be good, even one small change in a certain product or a change in the number of people using the more harmful products is all contributing to the general reduction in the human impact on the environment and humans subsequently.” “They make sense from an economic point of view, because people increasingly want to have products that they can trust to be more sustainable and have lower impact, and it’s really up to retailers and to manufacturers to pick up that challenge.” “…ultimately you have got	“The difficulty is always for a company which is setting itself up as a market leader that if they make a mistake then their reputation is going to get more damaged than those who are not even making the effort. They also have to bear a lot of the leading costs of developing this stuff, whereas if it were a more wide spread thing then everyone would share the costs.” “I think that marketing products as low impact or environmentally friendly is always subject to the risk that it probably only takes one big scandal for peoples’ confidence to be destroyed, or at least undermined and can

				to protect people from themselves and you need to make sure that anything that people can buy has as low an impact as possible because if people can make things that are low impact then there is no reason to make things that aren't, ultimately."	take many years to rebuild, so that's always going to be difficult."
FoE			"I would say probably price, potentially it could be expensive. Lack of understanding of the issues – that it actually makes a difference, availability too."		
Homebase			"The use of low impact products historically was part of the niche market, but in today's market, customers are actively searching out these products and more shelf space is being given."		
Boots plc (source: website)			While safety will always be our first priority, we also recognise the importance that our customers attach to the availability and efficacy of our products for meeting human and social needs. We will always seek solutions that protect our	The health and safety of our customers is a priority in the development of our products. We are confident that Boots products present no significant risk either to our customers or to the environment. However, with the	

			customers without depriving them of the products they expect to purchase from us.	increasing concern over the potential for certain chemicals to adversely affect human health and the environment, we accept that issues such as bioaccumulation, persistence and endocrine disruption, may well present problems for future generations. For this reason we have identified the use of chemicals in our products as one of our key sustainable development indicators.	
B&Q (Source: website)					It would be dishonest to make binding commitments to OSPAR-listed chemicals, as a result of the inherent complexity in the supply chains of the 40,000 branded and unbranded products on our shelves, some issues are beyond our direct control. E.g., we could ensure that organotins are removed from products, but it would be unreasonable for us to guarantee that

					by 2006 the chemicals used to work metal components in a circuit board made in China and then used in battery charges supplied with cordless drills aren't on the OSPAR list.
The Co-op	"If we ask people if they want to buy products that do not have these chemicals in them, they all say yes we are concerned about this. But when you give them the option of buying them in the shop they just do not seem to choose them and I do not really know why that is." "conventional brands have a grip on the market and that is very hard for an ecological product to do." "I do not think cost is really a barrier because if you get the unit pricing right for certain products, then the actual price per wash of laundry from Ecover is actually cheaper than some mainstream products."	"There has been lots of research that tells us that consumers are not well educated towards what's actually in products." "Ecological issues are often simplified and not explained fully so the public cannot get a full picture of all the wider issues."	"If we can take them out I do not see why everyone else can't do it. There is a lot of work going on but its sort of a drip-drip effect." "I think the only way that you can do that is by mass marketing, but unfortunately for any own label, no one talks mass marketing. Now the likes of Proctor and Gamble, Lever Bros, who spend 10s of millions of pounds advertising their products each year, are not going down that route, if they did choose to go down that route, then they would spend all that money advertising their ecological stance." "we do not actively promote the products because they	"…for a full ecological product, then some technical advances have got to be made in the way the products perform, because they currently have products that out perform peoples expectations." "I think many manufacturers are looking at this now but it is not high enough up on their list of priorities. I think that many manufacturers see it as their next downfall, so they do not want to rush into it, they have to get their research right first."	"Sometimes we do get left behind because when all the other retailers were selling loads of antibacterial hand wash with tryclosan in it, we were way behind because we still had to do research because we would not use tryclosan." "What we really need to do is to ensure that the manufacturers' products hit customer's expectations and that we also make sure there is a significant difference between ecological products and the other products on the market place." "I think it is going to have to take one of the

	"Conventional brands have a grip on the market and that is very hard for an ecological product break it." "People stick with the brand they know, if it works and they do not see the need to change, so it's about waking up the thought processes." "When it comes to ecological issues people often just do not understand. People think about what is the best value for money, not what's best for the environment."		are such a small part of the market, like all retailers we have customers out there who want to purchase and want to purchase on promotion and it's them that are driving our sales." "I think people do not understand it completely, there is a lot of scepticism about how well the product will work, a lot of scepticism about how good it actually is for the environment. People see it as a marketing twist – these are all things that we could probably work on. The thing with ecological products is that people do not know how ecological they are…are they just slightly better, and that's where people's scepticism starts." "All the evidence is there of how to build a brand, but it is whether the finances are there to get the brand going in the first place."		big manufacturers to either bring out a soft brand of one of the major brands which will undoubtedly damage them, or bring out a whole new product which they are prepared to spend millions promoting, or Ecover to get some miraculous European grant to help them."

Marks & Spencer	"…broadly consumers care, they do not by and large want to pay any more for it, or to go to any hassle or have any special knowledge and again that's why they want to decide which store they want to shop."				
Wessex Water				"For the marine environment the next thing the water companies have to do is address the nitrogen issue, excess nitrogen promotes excess algal growth which gives you a fairly poor coastal environment. I think that is the next big area for us rather than household products."	

Annex 7. Thematic table of results from interviews considering issues of labelling and legislation

Labels and Legislation				
	Labelling	**Eco-label**	**REACH**	**Current legislation**
Ecover	"We very much take the stance that we will always declare all of our ingredients all of the time. I think the big issues are not so much about the packaging but more about the communication." "So it is not just a matter of interpretation but also how you are allowed to communicate tomorrow. There is no real regulation as long as you've got it in it , you can say it." "I think it is more about the communication and the implication of the communication that is perhaps where more questions should be asked."	"What we want to do is get a label that really stands for what environmental and sustainable really is."		
Greenpeace	"It's difficult, where do you stop…you could potentially provide so much information that the label would be 100 times bigger than the product. It would be information which would not really be useful because it would not really be accessible to most people." "Firstly the label has to be simple and informative so that people can	"Eco-labelling is I think certainly a system that has a lot of merits, the eco-label though is only ever going to be as good as the criteria under which its written, and what we have seen with the development of the European eco-label scheme is a willingness over and over to compromise in order to get something which the industry and manufacturers are willing to sign up	"Well, as it turned out at the moment, we have still got some fundamental difficulties with it… the key thing for us is the authorisation process, there are many other things which need to be tightened up." "However you select your substances, how ever many	

	look at stuff and make choices. We feel that at a minimum, products containing those chemicals should be labelled very clearly that they contain those substances...and underlying that, you could have some way of accessing more information if they wanted. But I think ultimately there is going to be the need for consumers to be able to trust in certain brands or stores or products, and I think that really that's were the solution has to lie. Labelling is only going to address part of the problem because you are only going to get part of the population who are interested to look, and then even it's going to cause so much confusion because people are going to have so much difficulty comparing it all."	to and it ends up so weak as to be almost meaningless." "We have said to the Commission repeatedly that yes we do support the idea of an eco-label, but unless you are going to have criteria that really justify it, we are not interested,"	you are going to put in the process, unless you have something at the top end which is going to be effective in controlling those substances, then there is no value in any sophisticated system for identifying the problem. It will lead to a protracted system of continuous repeated assessment of risks, disagreement from industry adequate control – it does not move us anywhere."	
FoE	"Some products have detailed contents but others do not. But if you just give a list of chemicals, which is commonly done, then it would only help people who had some awareness, but for those that do not – just a list of chemicals will not help them."		"At the moment the wording 'adequate control' is too vague so we wanted some tightening of that, but it's a start."	
Homebase	"Homebase have been involved in a pilot project along with other DIY retailers where better customer information has been provided to help in the safe disposal of garden			

	chemicals." "With regards to our paints, we have ensured that all are clearly marked with their Volatile Organic Content (VOC) which is clearly indicated by a percentage figure."			
Boots plc (source: website)	We use our existing supply chain partnerships to make suppliers aware of the chemicals issues affecting our business and our approach to managing them. We involve suppliers in our discussions, challenge them to identify which of their products are affected, and encourage them to take appropriate action. By creating a greater awareness of these issues throughout the supply chain and the industry, we seek to extend our influence for the benefit of a much wider audience.			
B&Q (source: website)	It is vitally important that we continue to nurture the goodwill that exists with suppliers, since they are ultimately repsonsible for delivering what will be, in many cases, very difficult objectives. Many are not comfortable about disclosing information that may be commercially or reputationally sensitive, by giving detailed information on the contents of			

	some products we would seriously risk undermining that trust. We have to adopt the precautionary principle to what are extremely sensitive issues by respecting our suppliers concerns. The extremely complex nature of many synthetic materials and the lack of available space on packaging means that the more realistic approach may be to provide clear and understandable information about those chemicals or risks that we believe our customers will want to know about.			
The Co-op	"We are really hot on labelling in relation to food, and we try the same with our household and cosmetic range, but if you put too much information on labels people do not want to read it. It's a horrible balancing act and in some sense you are even more restricted with products like cleaning ones and cosmetics because you have got to put the mandatory agreed ingredients list, and with cosmetics most of the packaging is so small that you cannot then provide much more." "I really question whether 90% would even know if a cosmetic	"We have looked at all the eco-label criteria, we have had eco-labels in the past but it costs to license the eco-label and most manufacturers seem to think it's not really worth the bother. I think the argument is that many governments have not really gotten behind the eco-labels and it could be said that it is for the government to educate consumers to buy eco-label products." "I think that at the moment the EU mark is just a 'this will do' stop gap. What we have to do, is to say we do not devalue one end by automatically supporting the EU	"I was quite excited about REACH, but I was also quite nervous as to how it is going to actually work and whether it will, and one of our major issues is the proliferation of animal testing that could potentially come out of it."	"The current situation is complicated really and does not do the job that people want it to. It moves too slowly, there are too many unregistered chemicals out there etc." "Government pressure is about as big as it will get, because all the individual retailers will not be able to get governments worldwide to change overnight to an ecological product, a) they cannot do it, and b) is there enough natural resources left to be able to product the volume of products we would need?"

	product had an ingredients list on the back of it. I guess the best way is through trust worthy brands and that's kind of what we are trying to achieve." "We are trying to investigate ways of making our labels more transparent, we have kind of drawn a bit of a blank because we just cannot think of anyways of taking it forward."	mark because it is not what people perceive it to be." "The EU stamp in the middle which is only slightly better does not really help any body, it just causes confusion. We need to have a clear distinction."		
Marks & Spencer	"The fact that M&S overall is better on chemicals is what they want to hear. They do not want to walk through our store looking to see which products have tryclosan in them and which do not." "We want to demonstrate that overall we are the most responsible, most trusted on the high street without going down into this madness of micro managing every product and chemical. It just can't be done." "I am a chemist and it's [labelling] is just not comprehensible. It's got to be through brands."		"The only way to manage it is to have a trusted central system. There is the big black loop hole in REACH and that's imports. Retailers now import a huge amount from outside the EU, so the EU chemical industry will get its act together under REACH but then all these retailers will continue to take in crap from china full of dodgy chemicals that British consumers are exposed to."	
Wessex Water				"With regards to legislation on household activity on waste disposal it is more or less exempted. You can put what you

				like in your rubbish, as long as it is on a household scale, and you can put down your drains what you like.“

Annex 8

Main points of University of Plymouth Focus Groups 2004

This report summarise the results from all of the focus groups held. Transcripts of the focus groups have been prepared (although not word for word, as it is very difficult to follow a discussion in that way) but it was not considered helpful to include all of these.

I. Introduction
Eight focus groups were conducted, all within the Devon and Cornwall region. The participants could generally be categorised into three groups; those who use environmentally friendly (EF) products and who are aware of the possible dangers, but admit they don't know what the impact of these products might be; those who have tried environmentally friendly products but found they do not work as well and are expensive, and so have returned to their normal brands; and those (mostly the younger people) whose awareness is low. The latter group are interested in the environment but lack information and have not considered the possibility of impacts on the environment as a result of using domestic products.

II. Warm-up
To warm participants to thinking about environmental issues, particularly the marine environment, their personal interests were discussed.

Very few were members of pressure groups. Seven were members of SAS (all those in the SAS focus group) and three were members of Greenpeace. Two were members of DWT and one the RSPB. A few men liked fishing and most people said they watched wildlife documentaries on TV.

Almost all the participants said they visited beaches and some swam, but others said that the beaches and the sea were too dirty to swim in. There was a general awareness of the pollution issues on public beaches.

III. Conceptual mapping exercise
The writing exercises got everyone focussed on domestic products and what factors influenced their buying decisions. A pie chart of the results of a survey was shown to them. Four groups thought the results were inline with what they had said in the exercises. The other groups were surprised by the high number who said they were concerned for the environment:

"I don't believe them, I'm so surprised."

Some people said they were surprised health issues were not on the chart.

IV. Buying Patterns

The attractive packaging stimulated discussion in most groups. Some were surprised to see that it was something people would consider when buying products, while others felt that the numbers influenced by attractive packaging were actually lower than they would have expected. This was especially notable in the groups who thought that TV advertising was a big influence in people's buying patterns:

"I thought that people would be influenced by what looked good."

They all agreed that people do tend to stick to their own brands:

"Its all habit isn't it."

"You do stick to what you know. People do."

"When I find something I like and it's good I stick to it."

"Mother used it before me."

"Why change if you know something works."

Most felt that people would try out new products if they were on special offer or were cheap. Special offers were considered a good way of experimenting:

"Really it's all down to cost."

Some admitted to trying new brands, finding they were not as good as their usual brand and so changing back.

"You can buy cheaper ones but Fairy seems to last forever."

Advertising, peer pressure (recommendations) and fashion were all given as possible influences on people's buying choices:

"Advertising might make you try something, but if it's no good you won't buy it again."

Assessment of product performance can best be explained through the following quotes:

"If I take whites out and there's still marks on it then, I know it's no good."

"It's got to work."

"People associate brand names with good performance."

"Cuts through the grease."

"It must do what it says on the tin."

The participants were shown the statement: "*38% of those surveyed said they tried to buy environmentally friendly products when possible."*

Their comments on this included:

"Quite a lot of them are probably lying"

"I think it's high as they are more expensive."

While others who were also sceptical about the statement said:

"I'd love to say that I do that but at the end of the day I don't."

Some felt that the situation was to blame:

"I'm sure if it was more readily available and it was easy to get then yes."

One group wondered about people's definition of 'tried'.

The participants were asked: *"Why do you think people do not buy environmentally friendly products?"*

Asking people about their knowledge of and use of EF products raised a variety of responses. Some knew and used EF products while others claimed they had never even seen any. Quotes from those who had used the products were:

“I have tried some but only on special offer.”

“Years ago I tried some and it was no better (than their normal brand).”

“They don’t clean the dishes, you have to wash them again.”

“Mum’s a hippy, so she buy’s that sort of stuff.”

“It gets the dishes clean.”

“They are becoming the norm instead of in a tiny little corner of the shop.”

Some reasons that were given for not using EF products were:

“It’s also down to time, I want to be in and out of the supermarket in an hour, if I had to look at every product to see if its EF I would be there all morning.”

“If they had advertisements on telly for Ecover saying it does this or that then yes, I might buy it.”

“By the time you get to do the rest of the shopping it just goes in the trolley.”

“I buy what I want to buy, I don’t go looking for it.”

“It’s for posh gypsies!”

One participant who did not buy EF products said:

“I would like to feel everything is EF.”

Most felt that there was a need for EF products in the shops and some wanted to see more of them:

“I think it’s important to give people a choice.”

The packaging of EF products was clearly an issue with some feeling that it was designed for ‘alternative’ types of people:

“Packaging needs to catch the eye.”

For a number of groups, the idea of giving out free samples was the best way of getting people to try new product.

The participants were asked: *“Do you expect any harmful chemicals to be removed by the sewage treatment?”*

This question produced an array of results, mostly sceptical ones. Some felt that the process just diluted the chemicals but did not fully remove them:

“They add more to it, I would have thought, before they pump it out.”

“I know a lot of it goes straight out to sea.”

“It’s treated first”

One of the fishermen who throws back his catch commented:

“I guess I don’t trust them.”

The SAS members simply said:

“We hope.”

Others said that they liked to assume that if it meets guidelines, then it’s safe:

“We don’t seem to mind drinking the water that comes out of it afterwards.”

The participants were shown the following statement that was made by a leading supermarket chain: *“I think that the degree to which people are willing to pay more for a low impact product is often underestimated.”*

Generally this statement was considered confusing:

"I would have to disagree with that, as I said, I would not pay more."

"I think it's over estimated, people will say that they will pay more but the truth is that they do not."
"An up market way of saying pay more for something you think is good"

"If it was proved that it really did make a difference (to the environment) I think people would (pay more), but I don't think you can see the real difference."

"If you don't feel washing up liquid is a danger to the environment, why would you pay more?"

"Very few (will pay more), because of the low level of awareness."

Some felt that looking after the environment was a luxury, while others thought that some people would pay more:

"I think that's probably right."

Quality was generally judged by how well the product works:

"That it does its job."

"That it gets it clean."

However, a couple of people mentioned the smell. Some liked nice smelling products, while others preferred:

"Nothing too strong smelling"

The high cost of EF products was seen as the main barrier:

"Economical"

"People in our financial position can't afford it, but if I could afford it I think I would. It's always in the back of my mind."

“A lot depends on your income.”

Some comments were made about the media hype which has led us to be obsessed with hygiene and cleanliness, pushing us to use a wider variety of products and more of them, which makes matters worse. We are “too clean” as a country. There is “no resistance to germs.” Other points which were mentioned included the fact that some products used to say ‘concentrated’ so we used less, now they don’t but it maybe the same strength and we use more of it. They also enlarge the hole in the bottle so more comes out.

Most thought that people don’t think about domestic products and their impact on the environment. Raising awareness of the availability of products and the consequences of using non EF products was seen by almost all participants as the key:

“TV programmes discussing the issues, the pros and cons.”

“It’s not enough just to put the product in the shops.”

“Should be more specific about what it does, it all seems very airy fairy.”

“Education would have to go alongside.”

“Got to make people more aware.”

“You got to get the products out there, it’s awareness, people need to know there’s an alternative.”

A few participants say they do not trust products which claim to have low impact:

“It’s all relative……..less damaging than what?”

“Some people may try it.”

Participants were asked whether or not they would trust an EF product made by their own brand. Most said they would. One sceptic said that it probably contained the same chemicals but they just changed the label. Others felt that people might try it because they knew the brand. People have to trust the manufacturers, they have no choice:

"If it was very expensive you would say no, but if it was on a par price wise, naturally you would try it."

"I would be prepared to give this a go but it must compare to what I'm using."

"It must do what it says on the tin!"

V. Labelling

Products were passed round to the groups for examination. Almost all including the biological scientists and most of the SAS group admitted that they didn't understand the ingredients label. Most also admitted that they did not read the labels when buying the domestic products. However, most group members said that they did read labels on food products:

"Even if I read this, it means nothing, I don't know what any of them are– it might be a big name for bleach or something."

"It's pointless – you don't know what they mean."

"It's such an effort to read through labels."

"How can you read all the ingredients and it's so small and no one has the time."

"Labels are doing nothing – manufacturers are just covering themselves."

"A busy Mum with a baby has no time to read the ingredients, they want to buy their stuff and get out of there."

"Labels are too damn small."

"They need to say what is and isn't safe. Some things are more dangerous than others."

"There should be more control on what they are putting into the product."

"The label should say that it will damage the environment and costs so much a year to clean up."

One label says "no Sodium Laureth Sulphate, as if that's a great bonus."

“Sodium Laureth Sulphate strips grease from the hair by corrosion.”

“What about cigarettes, they say ‘Smoking Kills’ but people still smoke?”

Most groups noticed that manufacturers put aqua not water:

“It irritates me when they say aqua.”

Possible solutions were considered and several put forward. A colour coding impact indicator system was mentioned by two groups. One said red = bad, green = good while another suggested a red, amber and green system. Others suggested that the supermarkets should print lists of the chemicals with explanations, or make a leaflet available to take away. Symbols or ‘kite marks’ on products was also a suggestion. Accreditation was generally met with favour:

“You could see it easily and knew what it meant.”

The main debate was who would police it. The Government might not be trusted and it would be yet another quango. Some felt that an independent body such as the soil association which does the organic accreditation would be good:

“I think it should be more independently monitored.”

However, not everyone agreed with this:

“I think organic is a rip off.”

The participants were shown the following statement that was made by a leading UK retailer:
“80% of consumers care when the leave their house about the world they live in, but by the time they have got to the shop, it’s like where the hell do I start!”

Some saw this as a marketing slogan. Two groups said they were not surprised. However, most groups felt the figure was high:

“You think about it at the time if you read an article or see it on television.”

The participants were shown the statement: *Our survey showed that 56% do not read the labels on product before they buy them.*

This statistic surprised them all:

“Expected that to be higher.”
“I thought it would be as high as 95%.”

Someone suggested 90% while another in the same group said 70% and added that those with allergies have to read labels. Those who considered themselves to be educated said they didn’t read the labels so they found it hard to believe that 44% of those in the survey did:

“I just read the price.”

“I never read the label.”

“They must be the people in Asda who you can’t get past!”

One group agreed that they could understand this figure if it was about food products but not domestic products:

“I take more interest in food rather than washing products, it’s a personal thing.”

Some people suffer because some ingredients cause allergies. Most participants admitted knowing people who have some type of allergy or skin complaint:

“You don’t know what the long term effects are, look at deodorant for example, people use it every day all their lives.”

“People think ‘it’s not going to happen to me.’”

“The average guy in a terraced house in Leeds is not the slightest bit interested unless something personal happens, for example people, won’t believe in global warming until perhaps the Gulf Stream ceases to work.”

Sainsbury’s washing powder became a talking point for many groups. It has a symbol which denotes that it contains a reduced number of chemicals and they are in partnership with FOE.

One group thought that FOE might put some people off buying it, another wondered what was in the product to start with and how damaging was it? One lady said that she had even used the product and never even noticed the label:

“I would have thought it was some drying procedure.”

Almost all participants suggested they make the label bigger:

“The symbol is too small, it should be bigger.”

They thought that it needed a higher profile. A special stand in the supermarket was one suggestion among others:

“It should have national media promoting this so we know what it was.”

Some were curious as to why they produced it but did not promote it.

V. The future

The participants were asked: *“Now, looking to the future, how do you think consumer awareness of this issue could be raised?”*

Some people felt that retailers had an ethical responsibility while others thought that manufacturers should be responsible. It was suggested that business cannot be ethical because there is too much competition. Some considered certain industries to be comparable to the tobacco industry in that they have “too much influence.” However, the consensus of most participants was that some kind of legislation was needed to control the industry and make changes happen.

<u>Government</u>

“Government should make manufacturers provide labelling information.”

“Onus should be on the Government.”

2If Government did general advertisements on the environment saying ‘be aware when you buy washing up liquid’ about such and such and such and such, or an add in newspapers, I think that would make you think.”

Education was seen as important, and one method was to embed environmental issues into the curriculum.

Retailers

Retailers are “only worried about their profits.”

“They are big companies so it will take a lot of pressure to change the thinking.”

“Retailers should have a conscience.”

“These things have to start from the top.”

Manufacturers

“They are there to make money.”

“Legislation to stop the use of certain chemicals and the use of certain packaging. I think that’s the only way it could happen.”

Most groups agreed that manufacturers do have a responsibility to inform consumers about the contents of their products:

“If it contains something harmful to the environment, I thought they had to say that it was harmful.”

Pressure Groups

Pressure groups were seen as too radical even by those who were members of one:

“I don’t think people trust them.”

“Their intentions are right but they get bad press and give a bad impression throughout.”

”If it’s left to them, they could turn public opinion the wrong way.”

“Whenever you hear about Greenpeace its always seems they are obstructing something, it’s always negative. You don’t hear about it in a good way, but it might just be the way the media portrays it.”

“Some pressure groups can be quite extreme.”

Consumers
“It’s down to us really.”

“The consumer has the power at the end of the day, but they need to know the choices.”
“Personally I don’t think it’s the manufacturers’ responsibility. I think it’s more the consumer who should read the back (of the product).”

“If we were told that our grandchildren’s future will definitely be crap, then we would do something.”

“People are changing– look at roadside collection – recycling bottles.There is an under current bubbling.”

“In a country like this one, it’s made easy for us. We don’t have to worry about the waste problem, we just buy it and it’s taken away for us. We don’t have to worry, it’s out of sight, like meat in a supermarket…how many people relate it to the animal?”

Media
“’A bogey man’ needs to be created to raise the profile like they did with CFC’s, asbestos and GM ingredients. How was it raised for GM? That’s had a lot of media coverage.”

The general feeling was that if awareness was raised things would have to change:

“TV needs to do blanket coverage on programmes such as Question Time.”

“The information needs to be more readily accessible.”

“The trouble is most educated people realise how biased the press is!”

The SAS group were very keen on the Guardian who publish environmental articles

Education
The need to teach environmental awareness in schools was considered:

“They are supposed to be bringing children into today’s world.”

“They teach children about real food.”

“Kids need to know, if they are not aware they can’t make informed choices.”

“It’s primary level you need to look at.”

“I think youngsters are more aware than we are.”

Further comments which emerged:

“20 years ago we only bathed once a week and had a hair wash on Sunday night.”

“Now they clean their teeth under a running tap. We never used to.”

“We had small baths, only a few inches deep, which was perfectly adequate.”

“Back in the old days Lux was the washing powder, Black Boy was the soap and Ajax was the cleanser, that’s all there was.”

A lady quotes Emerson:

“No greater mistake was made by the man who did nothing because he could only do a little.”

THE CLEAN WATER INITIATIVE
THE EDUCATIONAL TRUST OF SURFERS AGAINST SEWAGE
REGISTERED CHARITY NO: 1027082

The Clean Water Initiative is the Educational Trust of Surfers Against Sewage (SAS). Registered Charity No 1027082
c/o SAS, Wheal Kitty Workshops, St Agnes, Cornwall, TR5 0RD
Tel: **0845 4583001** Fax: **01872 552615**

The Clean Water Initiative would like to thank the University of Plymouth for compiling this report and the Co-operative Bank for its generous funding to this study.

The University of Plymouth

The Co-operative Bank
Customer led, ethically guided

Printed on Cyclus Offset (100% post consumer waste recycled paper) using vegetable based inks which minimise the impact on the environment.