“Performance and price dominate consumer considerations when it comes to shopping for household care products, with other factors, including environmental impact, falling by the wayside. A focus on the potential health benefits of eco-friendly formulations in addition to their minimal impact on the environment could help to drive consumer interest and engagement in this market.”
– Jack Duckett, Consumer Lifestyles Analyst

This report looks at the following areas:

- Engaging the senior market
- Transcending cost concerns
- Whose responsibility is the environment?

Consumers have increasingly embraced eco-friendly household care products in recent years, largely due to growing concerns over the toxicity of regular products and their consequential impact on both the environment and health. However, the typically higher price of eco-friendly products and concerns over how effective they are compared to regular products remain major obstacles for the market.

Mintel data shows that consumers are largely keen to pass the buck when it comes to the environment, preferring to hold brands and manufacturers responsible rather than taking responsibility themselves. On the flip side, only a very small proportion of consumers believe that they have no role to play in protecting the environment, highlighting the significant opportunity that remains open for eco-friendly brands.
The Green Household Consumer - UK - August 2015

Table of Contents

Overview
What you need to know
Products covered in this report

Executive Summary
Over two in five adults use an eco-friendly household care product
   Figure 1: Usage of eco-friendly cleaning products vs regular cleaning products, by cleaning task, April 2015
Price remains significant obstacle for the market
   Figure 2: Barriers to usage of eco-friendly cleaning products, April 2015
Low ranking for environmental considerations
   Figure 3: Factors considered when purchasing household care products, April 2015
Sharing responsibility for the environment
   Figure 4: Attitudes towards the environment and household care, April 2015
Tapping into healthy lifestyles trend
   Figure 5: Attitudes towards the environment and household care (cont.), April 2015

What we think

Issues and Insights
Engaging the senior market
The facts
The implications
Transcending cost concerns
The facts
The implications
Whose responsibility is the environment?
The facts
The implications

The Market – What You Need to Know
Recycling rates flatline
Consumer sentiment towards finances remains buoyant
Phosphates out
Steam cleaners pose threat to eco-friendly brands

Market Drivers
Recycling rates stall
   Figure 6: Household waste recycling rate in England, 2000/01-2013/14
Growing consumer confidence
   Figure 7: Trends in how respondents would describe their financial situation, March 2010-May 2015

Attitudes towards germs
**Key Players – What You Need to Know**

- Environmentally-friendly remains the top claim in household care market
- Repackaging reinforces USP
- Smart technology-inspired terminology moves into household care
- Refillable products on the increase
- Eco-friendly brands appeal to parents

**Launch Activity and Innovation**

- Half of all product launches carry environmentally-friendly claims
- New players in the eco-friendly market
- Ecover repackages product range
- Method taps into smart technology claims
- Refillable household care product launches rise in 2014
- Eco-friendly = child-friendly

**The Consumer – What You Need to Know**

- Eco-friendly vs regular cleaning products
- Young adults most engaged with eco-friendly household care market
- Opportunity to raise awareness of eco-friendly market
- Just one in five consider environmental impact of products
- Updating natural ingredient claims
- Sharing responsibility for the environment
- Emphasising the health benefits of going green

**Usage of Eco-friendly Household Care**

- Over two in five adults use an eco-friendly product when carrying out household chores
- The health benefits of going green appeal to parents
- Water contamination drives environmental concern
- Raising awareness of eco-friendly products in the specialist cleaning segment

**Buying Information**

**Report Price:** £1750.00 | $2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.
The Green Household Consumer - UK - August 2015

Barriers to Using Eco-friendly Household Care

- Price remains the main barrier for eco-friendly cleaning products market
  - Figure 18: Barriers to usage of eco-friendly cleaning products, April 2015

- Older adults prove most concerned over product efficacy
  - Figure 19: Selected barriers to usage of eco-friendly cleaning products, by age, April 2015

- Opportunity for more in-store engagement
  - Figure 20: Tesco eco-friendly section, February 2015

Purchasing Considerations

- Just one in five consider environmental impact of products
  - Figure 21: Factors considered when purchasing household care products, April 2015

- Eco-friendly product users swayed by well-known brands
  - Figure 22: Factors considered when purchasing household care products, by usage of eco-friendly/regular cleaning products, April 2015

Putting pets first

- Figure 23: Method "Pet Friendly" slogan, March 2015

Eco-friendly Product Indicators

- Natural ingredients the most common indicator of a green product
  - Figure 24: Eco-friendly product indicators, April 2015

- Packaging recyclability

- Not tested on animals important to nearly a third of shoppers

- Opportunity to expand skin-friendly claims

Environmental Attitudes

- Sharing responsibility for the environment
  - Figure 25: Attitudes towards the environment and household care, April 2015

- Just 15% agree that eco-cleaning products are worth the extra cost

- Over three in 10 worry about the impact of household cleaning products on the environment
  - Figure 26: Attitudes towards the environment and household care (cont.), April 2015

Appendix – Data Sources, Abbreviations and Supporting Information

- Data sources

- Abbreviations

Appendix – The Consumer

- Figure 27: Selected skin-related claims carried by household care products, 2014