Consumer Perceptions and Market Potential for Circular Economy Laundry Detergents: Insights from UK Focus Groups

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Interdisciplinary Centre for Circular Chemical Economy

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Executive Summary

This study is carried out by the UKRI Interdisciplinary Centre for the Circular Chemical Economy ("CircularChem"), and explores UK consumer attitudes toward circular economy laundry detergents. The aim is to identify barriers to adoption and potential motivators for switching to sustainable alternatives.

Key Findings

- **Price remains the biggest barrier** – Whilst consumers express interest in sustainability, they are highly price-sensitive and unwilling to pay a significant premium for eco-friendly alternatives. Cost competitiveness is crucial for mass adoption.
- **Performance and brand trust drive purchasing decisions** – Consumers expect circular detergents to match or exceed conventional products in cleaning effectiveness, scent, and packaging. Established brands hold a strong advantage in influencing behaviour.
- **Low awareness and widespread scepticism hinder adoption** – Many consumers are unfamiliar with circular detergents, and concerns about "greenwashing" lead to distrust of environmental claims.
- **Retail visibility is a major obstacle** – Limited availability and poor shelf positioning reduce consumer exposure to sustainable detergents, making them an afterthought rather than a viable option.
- **Sustainability alone is not a compelling motivator** – Whilst some consumers express environmental concerns, most prioritise cost, cleaning power, and convenience, suggesting that circular products need to align with existing shopping habits.

Opportunities for Change

- Lower prices or incentives could drive adoption.
- Mainstream brands should lead to build trust and credibility.
- Stronger retail presence and marketing are needed to improve visibility.
- Clearer messaging is essential to address scepticism and highlight benefits beyond sustainability.

Conclusion

Circular detergents remain a niche choice due to price concerns, low awareness, and trust issues. Adoption will require competitive pricing, brand endorsement, and improved communication to shift consumer habits toward sustainable choices.

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1 Background

The **UKRI Interdisciplinary Centre for the Circular Chemical Economy** (“**CircularChem**”) is a collaborative initiative uniting expert from academia, industry, government, NGOs, and the public. Its mission is to transform the UK’s £32 billion chemical industry into a future-proof, fossil-independent, and environmentally sustainable sector by developing innovative solutions for the efficient recycling and recovery of olefins and their complementary feedstocks (CircularChem, 2025a).

1.1 The Role of Olefins in the Chemical Industry

Olefins, such as ethylene and propylene, constitute over 70% of global organic chemical production and serve as fundamental building blocks for various industries. These compounds are essential for manufacturing *polymers* (e.g., plastics, synthetic fibres), *solvents*, *synthetic rubber* and *high-value specialty chemicals* (CircularChem, 2025b).

Despite their widespread use, the end-of-life recovery of olefins remains extremely limited, with only a few selected chemical products undergoing mechanical recycling. This lack of resource recovery contributes to significant environmental waste, reinforcing the need for circular economy (CE) solutions.

1.2 Research Themes of CircularChem

CircularChem’s interdisciplinary team, comprising researchers from eight UK universities and over **200** industrial and international partners[1], operates under three key themes:

1) **Enabling Technologies for the Circular Chemical Economy**—Developing advanced technologies for recovering olefins and complementary feedstocks from post-consumer and industrial waste.
2) **Process Integration and Whole-System Optimisation**—Enhancing the efficiency and scalability of circular processes by integrating recycling technologies into existing chemical production systems.
3) **Policy, Society, and Finance**—Addressing the economic, regulatory, and social barriers to circular chemical adoption, including business models, financial incentives, and public perception.

[1] The partners are Cardiff University, Heriot-Watt University, Imperial College London, Loughborough University, Newcastle University, University of Liverpool, University of Sheffield, leading by the University of Surrey.

1.3 Why Laundry Detergents?

As part of its commitment to advancing circular solutions, CircularChem commissioned IBP Strategy & Research[2] to study consumer attitudes and purchasing behaviours related to laundry detergents. This product category was chosen because:

- Laundry detergents are household essentials, meaning consumer choices directly influence demand for chemical production.
- They contain surfactants, polymers, and packaging materials derived from fossil feedstocks.
- Recycling and reuse options are limited, making them an ideal candidate for circular innovation.
- Shifting to circular detergents requires consumer behaviour change, making it essential to understand motivations and barriers.

By analysing consumer motivations, purchasing habits, and potential barriers, this study aims to provide actionable insights that inform industry and policymakers on strategies to promote circular consumer products.

Figure 1: Focus Group Discussion at Newcastle University, 10th December 2024

[2] IBP Strategy & Research is a Scotland-based consultancy specialising in quantitative research, focus groups, strategic analysis, and market evaluations. It serves public sector organisations and private consultancies, with a strong reputation for high-quality research and data-driven insights.

2 Objectives

This study aims to explore consumer knowledge, motivations, and purchasing behaviours related to laundry detergents, with a particular focus on the potential for transitioning to CE products. To achieve this, a structured Topic Guide was developed by CircularChem and IBP Strategy & Research, and with input from WRAP – see Appendix A. The guide was designed to address key research themes across four areas:

1) **Consumer Purchasing Habits and Influencing Factors**
    - Understanding where, how, and why consumers buy certain laundry detergent.
    - Identifying brand loyalty patterns and the role of habitual purchasing in consumer decisions.
2) **Motivations Behind Purchase Decisions**
    - Exploring key factors driving the purchase choice.
    - Investigating perceptions of environmental sustainability and whether they influence decision-making.
3) **Pricing Sensitivity and Consumer Perception of Value**
    - Identifying the thresholds at which consumers perceive detergent products as too expensive or too cheap.
    - Assessing consumer attitudes toward circular detergents at different price points.
4) **Barriers and Enablers to CE Adoption**
    - Examining consumer resistance to switching from conventional to circular detergents.
    - Identifying potential incentives that could encourage behaviour change.
    - Assessing the role of brand trust, product performance, and marketing in shifting consumer preferences.

The study employed a combination of discussion prompts and self-completion exercises to capture both stated preferences and implicit attitudes. Insights from this research will inform strategies for improving consumer engagement with CE products, supporting industry innovation and policy development.

3 Key Insights on Consumer Behaviour and Circular Economy Adoption

3.1 Consumer Behaviour: Theoretical Foundations

Consumer behaviour is a multifaceted field that explores how individuals select, purchase, use, and dispose of products and services. It encompasses both rational and emotional decision-making, influenced by a variety of psychological, social, cultural, and situational factors. Traditionally, models such as the *Theory of Planned Behaviour* (Ajzen, 2011) and the *Consumer Decision-Making Model* (Stankevich, 2017), highlight the importance of *attitudes*, *subjective norms*, *perceived behavioural control*, and *external cues* in shaping consumer actions.

Price sensitivity and ***value perception*** are particularly relevant constructs in consumer behaviour literature. Consumers typically do not respond to price in isolation, instead, they interpret it as an indicator of quality and value. The *price-quality heuristic* suggests that higher prices may signal superior quality or performance, but only within acceptable thresholds (Rao, 2005). Beyond pricing, habitual purchasing — or the automatic re-purchasing of ***familiar brands*** without conscious deliberation — has been identified as a dominant pattern in low-involvement product categories (Wood, 2009).

Further complicating the picture is the "***attitude–behaviour gap***", a well-documented phenomenon in consumer research (Boulstridge & Carrigan, 2000). Whilst consumers express concern for sustainability, these attitudes often fail to translate into action due to factors such as lack of awareness, perceived inconvenience, cost barriers, and scepticism toward green claims (De Freitas Netto et al., 2020). Social identity and stereotypes play additional roles in influencing sustainable consumption (Costa Pinto et al., 2014), with consumers often associate 'eco-friendly' products with particular social groups, reinforcing exclusionary stereotypes and hindering broader adoption (Pirani & Secondi, 2011).

3.2 Consumer Behavioural Patterns: Complexity and Contradictions

The focus group data revealed that UK consumers exhibit a blend of rational and habit-driven purchasing behaviours. Despite **price** remains the dominant determinant, consumers do not simply seek the lowest cost. Instead, they aim for perceived value, balancing considerations such as ***brand trust***, ***promotional opportunities***, and the potential benefits of ***bulk purchasing***.

Functional attributes, notably cleaning performance and scent, are critical to product choice. Interestingly, environmental considerations were typically secondary, with consumers primarily concerned about packaging rather than formulation. This gap between stated environmental concern and actual behaviour reflects the well-documented "attitude-behaviour gap" in sustainable consumption.

Additionally, consumers tend to rely on passive sources of information such as packaging, brand familiarity, and inherited habits from family influence decisions more than active research or digital engagement. This points to a low-engagement nature of purchases in the commodity household product category.

The most common concerns voiced by UK consumers during the focus group discussions are captured in the "Word Cloud" in **Figure 2**, which highlights the key factors driving their choices and hesitations regarding laundry detergent products.

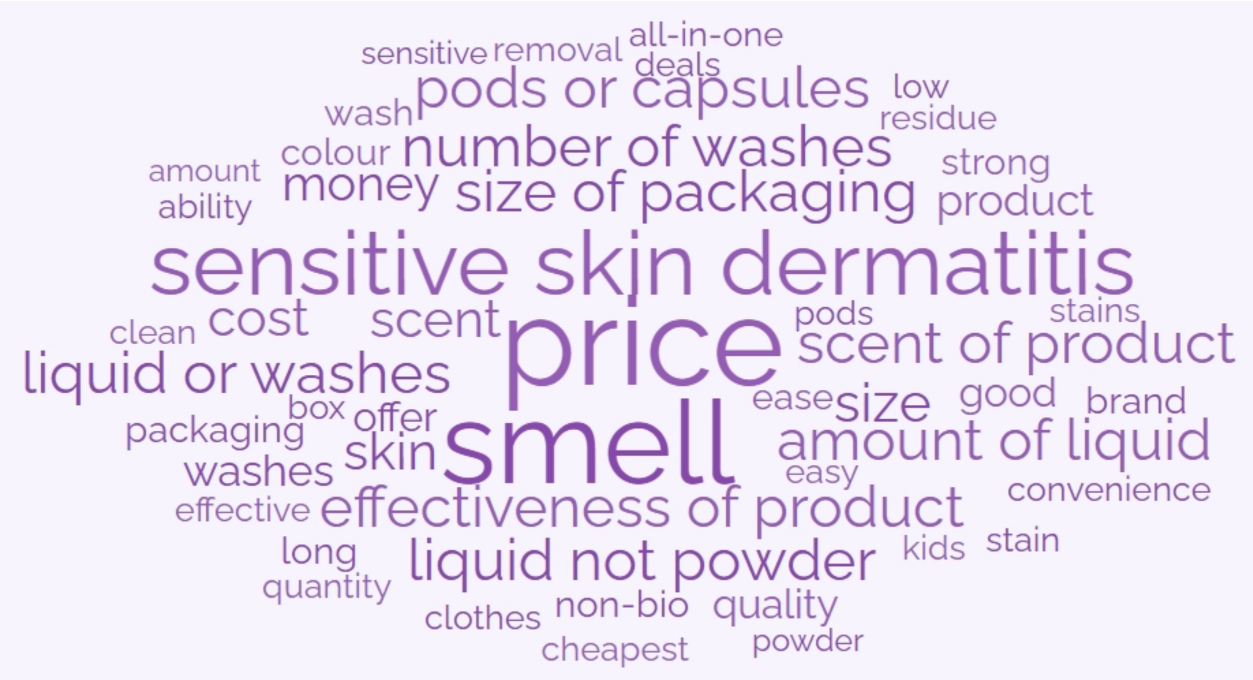

Figure 2: "Word Cloud" Illustrating Popular Concerns about Laundry Detergent Products

3.3 Key Insights for Building a CE in Laundry Detergent Products

The focus group discussions provided valuable insights into consumer attitudes towards laundry detergent products, their purchasing behaviours, and potential motivations for switching to circular alternatives. The findings are summarised under four key themes:

1) Consumer Purchasing Behaviour and Key Decision Factors
2) Barriers to Adoption of Environmentally Friendly and Circular Products
3) Potential Drivers of Behavioural Change
4) Role of Business and Policy in Encouraging Circular Consumption

The detailed categories, focus group insights and implications/strategic recommendations are provided in **Table 1**.

Table 1: The Category, Key Insights and Implications/Strategic Recommendations from the Focus Group Participants

Category	Key Insights	Implications/ Strategic Recommendations
Consumer Purchasing Behaviour and Key Decision Factors	• Consumers are highly **price-sensitive**, but also **seek value** through bulk buying, promotions, brand trust. • **Functional attributes** (e.g., scent, cleaning effectiveness, convenience, and skin safety) dominate purchasing decisions. • Environmental considerations are **rarely prioritised** & limited to packaging concerns. • Decisions are influenced by packaging, brand reputation, and family recommendations, with minimal reliance on online research.	• Position circular detergents as **cost-effective** & **functional**, with sustainability as a secondary selling point. • Highlight product performance & safety credentials to **build trust**. • Leverage **well-established brands** to introduce circular products. • Focus on **clear**, **on-pack messaging** & **in-store visibility** over digital marketing.
Barriers to Adoption of Environmentally Friendly and Circular Products	• **Limited shelf availability** & **poor visibility** of eco-friendly products. • Widespread **scepticism** about sustainability claims, with concerns about "***greenwashing***". • **Lack of understanding** about environmental impact and CE principles. • Perceived **price premium** makes circular products feel like luxury items. • Circular products seen as **niche** (for affluent consumers or “eco” stereotypes).	• Improve **distribution channels** & ensure prominent shelf placement. • Provide **verifiable proof** (e.g., certifications, third-party endorsements) to counter scepticism. • Close the price gap with **incentives** or **economies of scale** to make circular products more accessible. • Launch **educational campaigns** to increase consumer understanding & mainstream its relevance.
Potential Drivers of Behavioural Change	• Consumers are willing to switch to circular products if the price **difference is minimal** (e.g., 2–3p per wash). • Strong interest in circular products if they **outperform** conventional products in cleaning. • **Safety improvements,** especially for families, serves as a strong motivator. • Familiar brands are trusted more than niche eco-brands. • Improved packaging quality & **clearer benefit** communication could drive adoption.	• Focus on **price competitiveness** & highlight **long-term value**. • Promote **cleaning** & **skin safety** through robust testing and endorsements. • Encourage **leading brands** to integrate circular lines. • Invest in premium product design & messaging that aligns with mainstream consumer expectations.
Role of Business and Policy in Encouraging Circular Consumption	• Business should integrate sustainability into mainstream product lines rather than relegating it to a niche. • Consumers are resistant to government-mandated restrictions but respond positively to incentives. • Lack of education about circularity remains a key market barrier.	• Mainstream brands should **lead by example**, combining sustainability with strong performance & affordability. • Government should focus on **incentives** (e.g., VAT reductions, retailer rewards). • Launch **public education campaigns** highlighting environmental impact, health benefits, & product advantages of circular products.

The following chapters provide the details of the focus group discussion and corresponding result analysis.

4 Research Methodology

4.1 Research Design

This study employed a qualitative research design using focus groups to explore consumer perceptions, motivations, and barriers to adopting CE laundry detergents. Focus groups were chosen as they enable interactive discussions, allowing participants to express individual preferences whilst also reacting to and building upon the perspectives of others. This approach provides rich insights into consumer attitudes and behavioural patterns, which are essential for understanding the challenges associated with transitioning to sustainable and CE products.

4.2 Participant Recruitment and Sampling Strategy

A purposive sampling strategy was implemented to ensure diversity in age, gender, household income, and family structure whilst maintaining relevance to the research objectives. Participants were required to have purchased laundry detergent within the past three months to ensure engagement with the subject matter.

Six focus groups were conducted across three locations in the UK — **Edinburgh**, **Guildford**, and **Newcastle**. The intention was to ensure as broad a range of regional perspectives as possible, ensuring that findings were not focused on a narrow geographical perspective. Each location hosted two focus groups, leading to a total of 54 participants. To ensure diversity, participant recruitment followed the criteria below:

- **Age distribution:** At least 3 participants aged 16-24, 3 participants aged 25-44, and 4 participants aged 45+ per group.
- **Gender balance:** At least 4 participants identifying as female and 4 as male per group.
- **Household income:** At least 4 participants per group with a monthly income after Income Tax, National Insurance and Council Tax under £3,000, and at least 4 participants earning above £3,000.
- **Parental status:** At least 5 participants with children under 16 in the household.

Despite last-minute dropouts and non-attendance, slight variations in participant demographics occurred, the final sample maintained a reasonable balance across the intended quotas (**Table 2**).

Table 2: The Distribution of Focus Group Participants

Age		
16-24	**25-44**	**45+**
12 participants	19 participants	23 participants
Gender		
Female	**Male**	
36 participants	18 participants	
Children Under 16 in Household		
Yes	**No**	
25 participants	29 participants	
Household's monthly income after Income Tax, National Insurance and Council Tax		
Under £3,000	**Over £3,000**	
23 participants	31 participants	

4.3 Focus Group Discussions and Analysis

4.3.1 Structure of Focus Group Discussions

Each focus group session lasted approximately two hours and was facilitated by an experienced moderator. Each focus group followed a four-phase structure, as described in **Table 3**:

Table 3: The Four-Phase Structure of Focus Group Discussions

Phase	Description
Introductory Discussion	Understanding participants' current detergent purchasing habits, decision-making factors, and general attitudes towards laundry care.
Purchase Motivation Analysis	Deep dive into key factors influencing detergent choices, including brand loyalty, price sensitivity, environmental considerations, and sensory attributes (e.g., scent, texture).
Pricing Perception & Value Assessment	Evaluation of consumer pricing thresholds for conventional, sustainable, and circular laundry detergents, using price comparison exercises.
Barriers & Enablers for CE Adoption	Identifying factors that encourage or discourage the shift towards circular laundry detergents, including trust in brands, awareness of sustainability benefits, and willingness to pay price premiums.

To supplement qualitative insights, participants were required to submit photographs of their current laundry detergent products before the sessions, allowing researchers to classify them by product format and brand category; Also, participants are asked to complete self-assessment exercises during and after the discussions to quantify their attitudes toward price sensitivity, environmental impact awareness, and likelihood of switching to circular detergents.

The summary of participants' choice of laundry detergent by brand category is provided in **Table 4**.

Table 4: Participants' Choice of Laundry Detergent by Brand Category

Brand Category			
Leading brand[3]	**Other brand**[4]	**Retailer brand**[5]	**Tertiary brand**[6]
26 participants	13 participants	8 participants	7 participants

4.3.2 Data Analysis Approach

All discussions were audio-recorded and transcribed verbatim to ensure accurate analysis. A thematic analysis approach was applied, involving:

1) Classifying participant responses into key themes related to purchasing motivations, price sensitivity, and sustainability awareness.
2) Comparing responses across demographics to identify patterns in consumer behaviour.
3) Examining variations across regions to assess whether local market conditions influence attitudes.

Whilst qualitative data is not statistically generalisable, the relatively large sample allows for meaningful insights. Numerical feedback from self-completion materials offers indicative trends but does not include margins of error. Findings reflect consumer perceptions at a specific time and may shift with evolving economic or environmental awareness. Additionally, responses may be influenced by social-desirability bias (Chung & Monroe, 2003).

4.3.3 Ethical Considerations

All participants provided informed consent before participation. Discussions were conducted in accordance with ethical guidelines for qualitative research, ensuring confidentiality, voluntary participation, and the right to withdraw at any time. Participants received a £50 incentive for their time and input.

[3] Either Ariel or Fairy, being the two leading manufacturer's brands.
[4] Other manufacturer's brands, including Bold, Daz, Smol and Surf.
[5] Included Asda, Lakeland and Tesco.
[6] Brands created by retailers, in this case including Almat (Aldi), Formil (Lidl) and Kirkland (Costco).

5 Focus Group Findings

5.1 Part A: Introductory Discussion

The initial focus group discussions served as an ice-breaker, helping participants familiarise themselves with the group environment whilst providing preliminary insights into their detergent purchasing habits. Paired participants discussed their most recent purchase, covering product choice, retailer selection, and decision-making factors. Key themes emerging from these discussions, include **price sensitivity**, **sensory preferences**, **convenience**, **environmental awareness**, and **brand loyalty**.

5.1.1 Price Sensitivity: The Dominant Purchasing Factor

Most participants identified price as a key influence, but not necessarily by choosing the cheapest option. Instead, they employed value-seeking strategies, such as:

- Bulk purchasing when discounts were available.
- Seeking promotional offers across retailers.
- Comparing price per wash rather than absolute price.
- Preferring major brands when on discount but otherwise opting for alternatives.

These findings suggest that participants perceive price as an indicator of quality but actively seek affordability within their preferred brands.

5.1.2 Sensory Preferences: Scent and Skin Sensitivity as Key Factors

Beyond cost, scent and skin sensitivity were critical in purchase decisions. Participants preferred detergents with long-lasting fragrances, associating them with cleanliness. Common descriptors included “fresh”, “relaxed”, and “summery”. Skin sensitivity was another key concern, particularly among those with children or allergies, leading many to opt for non-bio detergents to avoid irritation.

5.1.3 Convenience Considerations: Packaging, Storage, and Portion Control

A notable finding was that convenience played a significant role in determining detergent choice, as three key elements were frequently mentioned:

- Ease of use: Pre-measured pods were preferred for simplicity and portion control, reducing excess detergent usage.
- Storage considerations: Liquid and pod formats were favoured over powder due to spillages and bulkier packaging.
- Household safety: Participants with young children or pets expressed concerns about detergent packaging, preferring products with secure, tamper-proof lids.

5.1.4 Environmental Awareness: A Largely Ignored Consideration

Sustainability and environmental impact were rarely mentioned as primary purchase motivators. Only one participant cited using “Smol”, a detergent brand marketed for its eco-friendly credentials. However, this decision was attributed more to convenience of home deliveries during the COVID-19 pandemic than to environmental concerns.

The lack of spontaneous references to sustainability does not necessarily indicate indifference; instead, it suggests:

- Limited awareness of the environmental impact of detergents.
- Perceptions that eco-friendly products are more expensive or less effective.
- Lack of visibility and accessibility of sustainable alternatives in mainstream retail.

Research on consumer behaviour towards sustainable products highlights that knowledge gaps and cost concerns are primary barriers to sustainable purchasing decisions.

5.1.5 Brand Loyalty and Habitual Purchasing

Most participants displayed habitual purchasing behaviour, frequently repurchasing the same brand or product format over extended periods. Brand loyalty was often linked to prior positive experiences, trust in product quality, and perceived reliability. However, a smaller subset of less experienced shoppers (particularly younger participants) exhibited greater willingness to experiment with different brands and formulations.

5.2 Part B: Purchase Motivation

This section explores the key factors influencing consumer purchasing decisions for laundry detergents, based on a structured “Post-It” note exercise, follow-up discussions, and a ranking prioritisation activity. The analysis identifies dominant motivators, including cost considerations, sensory preferences, product effectiveness, convenience, safety, brand trust, and environmental concerns, providing insights into consumer behaviour and decision-making processes.

Figure 3: Focus Group Discussion in Edinburgh, 25th November 2024

5.2.1 Key Purchasing Factors: Post-It Exercise Summary

Participants individually listed factors influencing their detergent choices, generating 223 responses, categorised as follows (**Table 5**):

Table 5: Key Factors Influencing Laundry Detergent Purchasing Decisions

Theme	Number of References	Notes
Cost	74	This includes words and phrases such as price, value for money, offers and propensity to bulk buy.
Touch and smell	45	Although classified here as “touch and smell” these comments almost always related specifically to smell.
Cleaning effectiveness	24	This includes comments referring to effectiveness generally and to specific issues such as stain removal.
Convenience	24	Convenience factors generally related to product type and ease of storage.
Safety	22	Issues included here most related to safety and kindness to skin as well as occasional references to packaging.
Presentation and merchandising	19	Several comments here are general comments on size of packaging and participants may have been referring to various things here, including bulk buying. Other comments were about presentation and location issues.
Trust in product or brand	9	This includes general references to brand and reliability, as well as recommendations.
Environmental factors	6	Comments on low temperature washes, on reducing waste and landfill and on “eco” generally have been included here.
Total	**223**	-

This initial exploration confirms that cost is the dominant factor in purchasing decisions, followed closely by sensory preferences and cleaning effectiveness. Notably, environmental considerations were mentioned infrequently, suggesting that sustainability does not currently play a significant role in consumer decision-making.

5.2.2 Prioritisation of Motivational Factors

Following the Post-It note exercise, participants ranked the importance of various product attributes in their purchasing decisions[7]. **Table 6** presents the mean ranking assigned to each factor (lower scores indicate higher priority):

Table 6: Ranked Importance of Laundry Detergent Attributes

Attribute	Rank	Mean
How well the product works in cleaning items	1	2.6
Cost of the product	2	2.7
Touch and smell of product / cleaned items	3	3.0
Convenience of using the product	4	3.9
Trust in product / brand	5	3.9
Safety of the product	6	5.1
Environmental benefits of the product	7	6.4
Presentation and merchandising of the product in store	8	6.6

These rankings reinforce the idea that participants primarily prioritise cleaning performance and cost, with touch and smell also playing a significant role. Environmental factors were consistently ranked among the lowest priorities, suggesting a low level of engagement with sustainability concerns in detergent purchasing.

5.2.3 Price Sensitivity and Perceptions of Value

A significant proportion of participants emphasised **cost** as a primary factor in their detergent purchasing decisions. However, price sensitivity does not necessarily translate to always choosing the cheapest product available. Instead, participants described a variety of strategies to maximise value whilst maintaining product quality and effectiveness, including:

- **Seeking promotional offers**: Many participants indicated that they had a preferred brand but would only purchase it when it was on offer in supermarkets.
- **Bulk purchasing**: Consumers frequently bought larger packs when available at discounted rates, either as part of supermarket reward schemes or standalone promotions.
- **Comparing price per wash**: Rather than focusing on the total price, participants actively compared the cost per wash to assess which detergent offered the best value.
- **Shopping at discount retailers**: Stores such as Aldi, Lidl, Costco, Home Bargains, and

[7] Participants were asked to rank the importance of laundry detergent product attributes from 1 to 8, with attribute assigning 1 represents the most important, and attribute assigning 8 represents the least important.

B&M were frequently mentioned as places where consumers could access cheaper alternatives to major brands.

However, certain product choices remained non-negotiable. Many participants exclusively purchased non-bio detergents due to skin sensitivity concerns, even if cheaper bio alternatives were available. Past negative experiences with budget brands (e.g., residue, poor cleaning performance, or overpowering fragrances) also deterred some from experimenting with lower-cost options.

The cost-of-living crisis was a recurring theme, with consumers are more cautious about spending. Even among those who were financially comfortable, budget-conscious shopping habits had intensified, demonstrating that affordability is a key driver of behaviour.

5.2.4 Sensory Preferences: Scent and Skin Sensitivity

Scent was a highly influential factor in detergent selection, with many participants associating fragrance with cleanliness and freshness. Consumers frequently used descriptors such as “Fresh”, “Relaxing” and “Summery”. For some, specific scents had personal significance (e.g., lavender for calming children with learning difficulties). However, a smaller group actively avoided strong artificial fragrances, citing:

- **Allergies or respiratory sensitivities**: Some participants found strong fragrances overpowering or irritating, leading them to seek milder or fragrance-free alternatives.
- **A preference for natural scents**: A few individuals expressed a dislike for harsh chemical smells, opting instead for subtler or naturally derived fragrances.

In addition, **skin sensitivity** emerged as another key factor, with many participants—especially parents—choosing non-bio detergents to prevent irritation.

5.2.5 Cleaning Effectiveness: Assumptions vs. Performance

Cleaning effectiveness was ranked as the top priority by participants, but it was rarely discussed in depth. Most consumers assumed all detergents worked adequately, with scent, skin sensitivity, and convenience playing a larger role in purchase decisions.

For many participants, **washing machine settings** and **habits** were perceived as playing a larger role in cleaning performance than the detergent itself. Some participants washed clothes at lower temperatures to save on energy costs, but very few reported choosing a specific detergent tailored for lower-temperature washes. However, a few concerns about cleaning performance did emerge, particularly regarding:

- **Stain removal for heavily soiled items**: Some participants mentioned tough stains as a challenge, but rather than switching detergents, they typically used pre-treatments or stain removers to address the issue.
- **Residue left on clothes or in machines:** A small number of participants noted occasional detergent buildup, particularly with powders or pods, which influenced their product choices.

Despite cleaning ability being a priority on paper, participants demonstrated a habitual reliance on their preferred detergent brands, often complementing their washing routine with additional products rather than changing their detergent entirely.

5.2.6 Convenience: Packaging, Storage, and Portion Control

Convenience was a significant factor for many participants, particularly in relation to packaging format, storage space, and portion control. Consumers valued products that were easy to use, transport, and store, with pods and tablets emerging as the preferred options for these reasons.
Key convenience-related preferences included:

- **Preference for pods and tablets:** Many participants found pods and tablets to be the most user-friendly due to their pre-measured format, which helped with portion control and prevented excess detergent use.
- **Avoidance of powders:** Powders were seen as less convenient due to spillages and residue issues, both in washing machines and during handling.
- **Storage considerations**: Some participants, particularly those in smaller households or with limited storage space, expressed a preference for compact packaging. Pods and tablets were generally perceived as easier to store than bulky powder boxes or large liquid bottles.

5.2.7 Safety Concerns

A few participants raised concerns about safety, particularly regarding packaging security. Tamper-proof packaging was considered important, especially for households with young children. Additionally, some participants linked safety concerns to skin sensitivity, reinforcing their preference for non-bio detergents to avoid potential irritation.

5.2.8 Presentation and Merchandising

Whilst product appearance was not a primary motivator, a small number of participants stated that they were drawn to colourful packaging. However, most noted that in-store promotions, rather than packaging design, had a stronger influence on purchasing decisions.

Some participants also observed that leading brands were positioned at eye level in supermarkets, making them more visible compared to lower-cost or niche eco-friendly alternatives, which were often placed in less prominent areas. This retail shelf placement strategy may contribute to limited awareness and adoption of alternative detergent brands.

5.2.9 Brand Loyalty and Reluctance to Switch

Brand trust played a significant role in consumer decision-making, with many participants demonstrating strong loyalty to products they had used for years. This reluctance to switch was often driven by familiarity and perceived risk avoidance, as reflected in comments such as:

"I like to stick with what works."

"I don't want to be a guinea pig."

Many participants had previously tried lower-cost alternatives but returned to their preferred brands due to negative experiences around *"**Overpowering artificial fragrances**"*, *"**Poor cleaning performance**"*, and ***"Skin irritation"*.**

However, a minority were open to switching—provided an alternative matched or exceeded expectations in terms of cleaning power, fragrance, and skin sensitivity.

5.2.10 Environmental Considerations

Environmental concerns were rarely mentioned spontaneously during discussions, highlighting the low priority of sustainability in detergent purchasing decisions. Even when prompted, many participants still expressed little to no consideration for the environmental impact of their choices:

"I don't think about it at all."

"You just want to get your clothes clean."

Among the small group of participants who did take environmental factors into account, the focus was primarily on packaging waste reduction rather than the detergent formulation itself. Their eco-conscious behaviours included:

- **Recycling packaging**—Preference for cardboard over plastic.
- **Bulk buying**—To reduce packaging waste.
- **Short cycle washes**—Though primarily for cost savings, not sustainability.

However, the biggest barrier to purchasing environmentally friendly products was cost. Many participants recognised that eco-friendly detergents tended to be more expensive and felt that affordability took precedence over sustainability:

"You pay more for these."

"I can't afford to be choosy."

Whilst participants theoretically support sustainability, price and convenience remain the dominant decision-making factors.

5.2.11 Consumer Information Sources and Decision-Making

Participants relied on a limited range of information sources when selecting laundry detergents, with most decisions driven by habit, in-store cues, and word-of-mouth influence rather than active research. The most commonly referenced sources are summarised in **Table 7**:

Table 7: Consumer Information Sources and Decision Influences

Source	Common Themes
Word-of-mouth	Influence from family members, particularly parents and siblings. Many participants had inherited their detergent choices from their households growing up.
Advertising	Brand recall from TV and print ads, even if the impact was subconscious.
Packaging	In-store decision-making based on bottle labels and branding. The most commonly reviewed feature was the wash count claim, although some were sceptical of its accuracy.
Online Research	Rarely used. A few participants Googled products for price comparisons, but online reviews (e.g., Amazon, eBay) were seldom referenced. Social media influence was minimal in this product category.

The reliance on habitual purchasing and in-store cues suggests that low-engagement, routine products like laundry detergents are primarily driven by brand familiarity and convenience, rather than extensive research or active comparison. Consumers typically default to what they know and trust, unless presented with compelling reasons to switch.

5.3 Part C: Pricing

This section examines consumer price perceptions and willingness to pay for conventional, sustainable, and circular laundry detergents, based on two structured pricing exercises. The findings provide insights into price sensitivity, branding influences, and the barriers to adopting circular products.

5.3.1 Pricing Exercise 1: Consumer Price Perceptions of Different Detergent Brands

5.3.1.1 Methodology

Participants were presented with three different detergent brands—Ariel Original (leading brand), Ecover Non-Bio (eco-friendly brand), and Tesco Non-Bio (retailer own-label) (**Figure 4**). For each product, they were asked to determine:

- The price they consider “expensive” but still acceptable.
- The price they consider “cheap” but still a good buy.
- The threshold at which the product is “too expensive” and they would not purchase it.
- The price at which it is “too cheap”, leading them to doubt its quality.

Ariel Original	Ecover Non-Bio	Tesco Non-Bio
1.15 Litres	1.43 Litres	1.5 Litres
35 washes	40 washes	60 washes

Figure 4 Laundry Detergent Products Presented to the Participants (Ariel, Ecover, Tesco)

This approach was derived from the Van Westendorp Price Sensitivity Meter which is a commonly used tool in determining consumer price preferences (Ceylana et al., 2014). The results are summarised in **Table 8**[8].

Table 8: Consumer Price Perceptions of Laundry Detergent Brands

Product	Category	Mean	Median
Ariel Original 1.15 Litres 35 washes	Expensive	£10.40	£9
	Cheap	£5.90	£5
	Mid-point[9]	£8.15	£7
	Too expensive	£12.90	£12
	Too cheap	£3.10	£3
Ecover Non-Bio 1.43 Litres 40 washes	Expensive	£11.30	£10
	Cheap	£6.10	£6
	Mid-point	£8.70	£8
	Too expensive	£14.40	£12
	Too cheap	£3.80	£4
Tesco Non-Bio 1.5 Litres 60 washes	Expensive	£10.40	£9
	Cheap	£5.60	£5
	Mid-point	£8	£7
	Too expensive	£13.10	£12
	Too cheap	£3.50	£3

[8] Participants were asked to respond for the products "as shown" and not on the basis of a "cost per wash".
[9] Expressed as the mid-point of the "expensive" and "cheap" responses.

5.3.1.2 Analysis and Key Findings

A. Price Anchoring and Brand Perceptions

Price perceptions were heavily influenced by brand reputation, with Ariel and Tesco representing two ends of the pricing spectrum:

- Ariel was perceived as a premium, trusted brand, justifying a higher price point based on brand recognition and quality assurance.
- Tesco's own-label detergent was seen as a budget-friendly alternative, with participants expecting it to be significantly cheaper than branded options. On a per-wash basis, Tesco was expected to be at least 40% cheaper than Ariel.

B. The Eco-Friendly Pricing Paradox

The perception of Ecover — a detergent positioned as an eco-friendly alternative — did not align with standard price expectations:

- Participants anticipated a high price for eco-friendly products, aligning with the price-quality heuristic, which suggests that higher prices are often associated with better quality and sustainability (Jeong et al., 2019).
- However, Ecover's packaging and branding undermined its premium positioning, leading to confusion about its actual value. Instead of appearing high-end, the product was perceived by some as cheap or industrial:

"Looks like a car shampoo."

"Like a commercial laundry product."

- This disconnects between expected pricing and perceived quality highlights a branding weakness.

C. The Role of Cost Per Wash in Decision-Making

Participants often performed cost-per-wash calculations rather than evaluating the absolute price of a detergent bottle:

- Ecover (40 washes) was seen as comparable to Ariel (35 washes), which reduced perceptions of a sustainability price premium.
- This demonstrates that consumers weigh long-term value rather than just shelf price, reinforcing the importance of clear pricing communication on packaging.

D. Availability and Perceived Demand

A lack of shelf visibility for eco-friendly products was another factor limiting consumer adoption:

- Few participants recalled seeing Ecover or similar products in stores, and when they did, there was doubt about demand.

- This suggests that eco-friendly detergents may be facing distribution and retail placement challenges.

5.3.2 Pricing Exercise 2: Willingness to Pay for Sustainable and Circular Products

5.3.2.1 Methodology

Participants were introduced to three categories of laundry detergent products (**Figure 5**):

1) **Conventional detergent:** No environmental claims, representing the standard market offering.
2) **Sustainable detergent:** A product with some eco-friendly attributes, but not fully circular.
3) **Circular detergent**: A fully circular product designed to minimise waste and environmental impact.

This is an example of a **"conventional"** product whose manufacturing process uses petrochemical feedstocks that are derived from fossil fuels

This is an example of a **"sustainable"** product that uses biodegradable plant-based ingredients in its manufacturing process

This is an example of a **"circular"** product made from recycled carbon dioxide from industrial uses which, once used, biodegrades back into carbon dioxide. This product has been tested in some international markets and is in development stage in the UK.

Figure 5 Laundry Detergent Products Presented to the Participants (Conventional, Sustainable, Circular)

Participants were asked to select their preferred option across six pricing scenarios, where the cost per wash increased for sustainable and circular products. The results of price sensitivity and switching patterns are summarised in **Table 9**.

Table 9: Participants' Willingness to Pay for Sustainable and Circular Laundry Detergents

Scenario	Summary	Conventional	Sustainable	Circular	Base
1	Conventional – 17p per wash Sustainable – 25p per wash Circular – 28p per wash	43	11	0	54
2	Conventional – 17p per wash Sustainable – 23p per wash Circular – 25p per wash	38	11	5	54
3	Conventional – 17p per wash Sustainable – 21p per wash Circular – 22.5p per wash	28	11	15	54
4	Conventional – 17p per wash Sustainable – 19p per wash Circular – 20p per wash	19	14	21	54
5	Conventional – 17p per wash Sustainable – 17p per wash Circular – 17p per wash	7	13	34	54
6	Conventional – 17p per wash Sustainable – 15p per wash Circular – 15p per wash	6	13	35	54

5.3.2.2 Analysis and Key Findings

A. Price Sensitivity and Willingness to Switch

- The majority of participants were unwilling to pay a significant premium for sustainable options. When the price gap was 8p per wash, 80% opted for conventional detergents.
- A turning point emerged when the price premium was 2-3p per wash, where a considerable shift towards circular products occurred.

The findings suggest that participants are more resistant to price increases than they are motivated by potential gains, meaning only modest price differences encourage behavioural change.

B. Confusion Around Circular Products

- Many participants lacked a clear understanding of what "**circular**" meant, which created hesitation in choosing these products.
- Instead of transitioning from conventional → sustainable → circular, some participants skipped the sustainable option entirely once price differences were negligible. This suggests that sustainable and circular products compete within the same decision-making space, potentially reducing the sustainable category's effectiveness as a stepping stone.

C. Barriers to CE Adoption

- **Lack of Awareness** – Many participants were unaware that conventional detergents rely on fossil fuel-derived ingredients.

- **Low Perceived Personal Benefit** – Unlike factors such as cost or cleaning effectiveness, the environmental impact of detergents felt less clear and less urgent.
- **Retail Visibility Issues** – Few participants recalled seeing circular products in stores, which suggests either limited availability or poor merchandising strategies.

5.4 Part D: Potential Motivations for Switching

This section examines the key factors influencing consumer willingness to switch to circular laundry detergents and the barriers preventing adoption. Insights from the focus groups suggest that whilst there is a degree of openness to environmentally friendly alternatives, widespread adoption remains hindered by low awareness, scepticism, and entrenched shopping habits.

5.4.1 Motivations for Switching to Circular Products

Whilst cost remains a primary concern (as explored in the pricing section), participants identified several non-price factors that could encourage them to switch to circular laundry detergents.

5.4.1.1 Existing Sustainable Behaviours as a Starting Point

Many participants already engage in sustainability-related behaviours, such as:

- Recycling and composting.
- Choosing recyclable or reduced-plastic packaging.
- Using short wash cycles to save energy.

However, these behaviours do not always translate into purchasing decisions, particularly when it comes to laundry detergents. The disconnection between environmental awareness and purchasing habits suggests a cognitive dissonance effect, where individuals hold pro-environmental values but continue to buy conventional products due to habit, lack of knowledge, or perceived inconvenience.

"I recycle all my plastic, but I've never really thought about what my detergent is made of."

5.4.1.2 Role of Established Brands in Driving Adoption

Brand familiarity was a significant factor influencing willingness to switch. Many participants expressed reluctance to try lesser-known eco-friendly brands but indicated they would be more open to circular products if they were offered by established brands:

"If 'Persil' or 'Fairy' had a circular version, I'd definitely try it."

This suggests that consumers are more likely to trust and adopt new products if they come from brands they already associate with quality and reliability.

5.4.1.3 Performance and Packaging Expectations

For most participants, switching to a circular detergent was conditional on its ability to match conventional products in three key areas:

- **Cleaning effectiveness** – Must perform equally well in stain removal.
- **Scent and feel** – Should have a pleasant fragrance without residue.
- **Packaging quality** – Must not appear cheap or industrial.

Negative perceptions of eco-branded packaging were a concern:

“It would need to be packaged well

— not like the eco one (‘Ecover’) you showed us.”

These insights indicate that aesthetics and perceived product quality are critical in encouraging adoption, where consumers associate premium pricing with better quality, but only if the packaging aligns with their expectations.

5.4.2 Barriers to Adoption of Circular Products

Despite some openness to circular detergents, multiple barriers hinder adoption, including low awareness, scepticism, and resistance to change.

5.4.2.1 Lack of Awareness and Understanding

One of the most significant barriers was the low level of awareness regarding circular products and the CE as a whole.

“What does it really mean?”

“What are the benefits?”

Even after explanations, many struggled to understand the circular production process. Without clear messaging, circular detergents remain an unclear concept rather than a compelling choice.

5.4.2.2 Scepticism Towards Environmental Claims

Many participants expressed doubt about the legitimacy of sustainability claims, with some comparing the situation to early electric vehicle adoption:

“People bought electric cars thinking they were better,

but now some are going back to petrol.”

This reflects consumer concerns about “greenwashing”, where brands use sustainability as a marketing tool without genuine environmental benefits. Some participants also referenced broader concerns about the waste management industry, such as:

“We hear all this talk about recycling,

but then they send plastic waste to other countries.”

Without transparency and verifiable proof, many remain sceptical of sustainability claims.

5.4.2.3 Circular Products Perceived as a “Luxury”

Eco-friendly and circular products were widely seen as expensive and exclusive:

“Middle-class people can afford this.”

“People with money who don’t have to worry about price.”

This affordability barrier reinforces the need for competitive pricing strategies to make circular products more accessible.

5.4.3 Consumer Stereotypes and Social Influences

5.4.3.1 The “Eco-Friendly Consumer” Stereotype

Participants had strong preconceived notions about who buys sustainable products. Common stereotypes included:

- **Students** – Seen as open-minded and experimental, willing to try new products and engage with innovative ideas. Often price-sensitive but receptive to ethical consumption.
- **“Hippies”** – Associated with alternative lifestyles, strong environmental values, and a preference for organic or handmade products. Perceived as niche or countercultural.
- **Vegans** – Viewed as highly conscious consumers with strong ethical frameworks, often extending concern for animal welfare to environmental responsibility.
- **“Waitrose shoppers”** – Considered affluent, well-educated, and able to afford premium-priced products, often associated with higher social status and conscientious consumer choices.

This perception hinders mainstream adoption, as sustainability is not yet seen as a universal behaviour.

5.4.3.2 Virtue Signalling Concerns

Some participants viewed buying sustainable products as performative rather than genuine:

“People buy these products just for the kudos.”

This suggests that sustainability messaging should be framed in a way that emphasises practical benefits rather than virtue signalling.

5.5 Post-group Question: Likelihood of Switching to Circular Products

Following the focus group discussions, participants completed a survey assessing their likelihood of switching from a conventional to a circular laundry detergent under different conditions. The aim was to quantify the key drivers of behaviour change.

Figure 6: Focus Group Discussion in Edinburgh, 25th November 2024

5.5.1.1 Methodology

Participants were asked the following question:

"ALL OTHER THINGS BEING EQUAL (that is, assuming no change in the situation with regard to all the other attributes), how likely or otherwise do you think it would be that you personally would switch from a 'conventional' to an environmentally friendly 'circular' laundry detergent product in each of the following circumstances?"

Responses were recorded using a seven-point likelihood scale, with percentage ranges assigned to each category:

- Extremely unlikely (0%-5% likelihood of switching)
- Very unlikely (6%-15% likelihood)
- Unlikely (16%-30% likelihood)
- Neutral (31%-50% likelihood)
- Likely (51%-70% likelihood)
- Very likely (71-85% likelihood)
- Extremely likely (86%-100% likelihood).

To facilitate analysis, responses were converted to mean percentage scores, summarised in the **Table 10**.

Table 10: Factors Influencing Consumer Likelihood of Switching to Circular Laundry Detergents

Condition	Mean % Likelihood of Switching	Base
If the price difference between the "circular" and "conventional" product reduced by half.	71.0%	54
If you felt that the "circular" laundry detergent product had a significantly better cleaning performance than the "conventional" product.	66.7%	54
If you felt that the "circular" laundry detergent product was significantly safer than the "conventional" product.	61.6%	54
If you felt that the environmental harm of the "conventional" laundry detergent product as compared to the circular product outweighed any other considerations	54.6%	54
If it became significantly less socially acceptable to purchase the "conventional" laundry detergent product as compared to the environmentally friendly "circular" product.	48.0%	54

5.5.1.2 Analysis and Insights

A. Price Reduction as the Strongest Driver of Behaviour Change

The most significant motivator was price reduction, with 71% of participants indicating they would switch if the price gap between circular and conventional products halved.

This reinforces previous findings that price is the primary barrier to sustainable choices, where consumers prioritise avoiding financial loss over potential environmental benefits.

"I'd switch if it were more affordable — right now, it's just too expensive compared to what I normally buy."

B. Cleaning Performance as a Crucial Secondary Factor

Around 67% of participants stated they would switch if circular detergents provided superior cleaning performance. This highlights that whilst sustainability is desirable, it remains secondary to effectiveness.

"If it cleaned better, I'd definitely give it a try. But I'm not paying extra for something that doesn't work as well."

C. Safety Concerns as a Significant Motivator

Consumer concern over product safety emerged as a strong influencing factor, with around 62% of participants indicating they would switch if a circular product was proven to be significantly safer than conventional options.

This aligns with earlier discussions around skin sensitivity and harsh chemicals, which were frequently cited as concerns by participants. Consumers who had children or sensitive skin were particularly receptive to switching if safety benefits were clearly demonstrated.

"If it's better for my skin and my kids, I'd be happy to switch

— but only if I knew for sure."

D. Environmental Considerations: Important but Less Convincing

Although environmental harm was identified as a factor in switching decisions, it was notably less influential than price, performance, or safety. Only around 55% of participants stated they would switch if they felt conventional detergents caused significant environmental harm.

"I care about the environment, but I still need to think about my budget."

This highlights a key challenge for circular brands: environmental messaging alone is insufficient to drive consumer adoption.

E. Social Pressure Is the Weakest Motivator

The least influential driver of behaviour change was social acceptability, with only around 48% of participants indicating they would switch if conventional detergents became socially unacceptable.

This suggests that social norms around sustainable consumption are not yet strong enough to drive mass behavioural shifts in laundry detergent purchasing. Furthermore, some participants expressed resistance to perceived external pressures, particularly from government or corporate mandates.

"Why should the government tell me what to buy?"

6 Conclusion: The Path to Circular Product Adoption

The findings from this study reveal that whilst sustainability is a desirable attribute, it remains secondary to core purchase drivers such as value for money, product performance, and convenience. Consumers prioritise affordability and effectiveness when selecting laundry detergents, with little awareness of circular products and limited consideration of their environmental impact. This suggests that a purely eco-focused marketing approach alone is unlikely to drive mass adoption without first addressing these primary concerns.

Several barriers hinder the adoption of circular products, including low availability of circular products, consumer scepticism about green claims, and the perception that sustainable options cater to niche consumer groups rather than mainstream shoppers. Additionally, some participants expressed resistance to perceived external pressure, particularly from government or regulatory interventions, further complicating efforts to shift consumer behaviour.

However, the research also highlights clear opportunities for encouraging the transition to circular detergents. Price reductions were identified as the strongest motivator for switching, alongside improved product quality — particularly in terms of cleaning effectiveness and safety. Consumers also demonstrated greater willingness to try circular products if endorsed by mainstream, trusted brands, reinforcing the importance of brand trust in driving behavioural change.

To accelerate the shift towards circular consumption, a collaborative effort between businesses, policymakers, and consumer advocates is essential. Strategies should focus on enhancing affordability, ensuring product quality, and building consumer trust through clearer communication of benefits and transparent environmental claims. By addressing these factors holistically, circular laundry detergents have the potential to transition from a niche sustainability product to a widely accepted mainstream choice, ultimately driving more sustainable consumer behaviour at scale.

7 References

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8 Appendix: Focus Group Topic Guide

Part A: Introductory Discussions

I am going to ask you in pairs to have a brief chat about the last time you purchased laundry detergent. Please think about what you bought, where you bought it and why you bought this specific product and share this you're your partner. I will then ask you to share your findings with the full group.

Part B: Purchase Motivation

I am now going to ask you to think individually about the things that you take into account when you purchase a laundry detergent. Please write down each factor on a separate Post-It note and place it on the wall where shown.

Group discussion: Having looked at their own and others' points, what role do participants consider each of the following factors to play in the decision on which laundry detergent to purchase?

- Convenience of using the product
- Cost of the product
- Environmental benefits of the product
- How well the product works
- Touch and smell of product / cleaned items
- Safety of the product
- Presentation and merchandising factors
- Trust in product / brand
- Other factors identified in Post-It exercise.

Before we move on, I am going to ask you to complete a short question that asks you to prioritise seven of the themes that we have discussed here, from 1 to 7. I will gather these in to look at them later.

Before we move on, can I ask you to tell me how you go about getting information about the different attributes of a laundry detergent product that we have been discussing?

Part C: Pricing

I am now going to ask you about the pricing of different laundry detergent products and we will do this in a couple of different ways.

PRICING EXERCISE 1: Firstly, I am going to show you three different products and for each in turn, I would like you to complete the sheet provided that asks you to insert a figure for "expensive", "cheap", "too expensive", "too cheap".

What was your rationale for choosing the various prices that you suggested for these products?

PRICING EXERCISE 2: Now, I am now going to show you three different products that represent different levels and types of environmental credentials:

As you can see, the “sustainable” product typically costs 8p per wash more than the “conventional” product and the “circular” product typically costs 11p per wash more than the “conventional” product.

What was your rationale for choosing the various products at the price points suggested?

Part D: Potential Motivations for Switching

Putting price to the side, what other factors do you think would encourage you or other people to switch to the “circular” product?

Again, other than price, what barriers, if any, would you say prevent you buying “circular” laundry detergent products?

Are there any examples of you buying “circular” or other environmentally products? If so, why have you / do you purchase those products?

How would you describe the sort of person that prefers to buy “circular” or environmentally friendly products generally?

Thank you for your time and your contribution to the discussion. In a moment, I am going to ask you to complete a very short final questionnaire but before I do that, I am going to give the observers the chance to ask any questions about the discussion we have had.

- **IN-GROUP PRIORITISATION QUESTION**

Please rank the relative importance of each of the following attributes of a laundry detergent by placing a 1 next to the most important attribute, a 2 next to the second most important attribute, and so on	
Convenience of using the product	
Cost of the product	
Environmental benefits of the product	
How well the product works in cleaning items	
Touch and smell of product / cleaned items	
Safety of the product	
Presentation and merchandising of the product in store	
Trust in product / brand	

- **POST-GROUP QUESTION**

ALL OTHER THINGS BEING EQUAL (that is, assuming no change in the situation with regard to all the other attributes), how likely or otherwise do you think it would be that you personally would switch from a “conventional” to an environmentally friendly “circular” laundry detergent product in each of the following circumstances?							
Please select one option in each row	**Extremely unlikely (0%-5% likelihood)**	**Very unlikely (6%-15% likelihood)**	**Unlikely (16%-30% likelihood)**	**Neutral (31%-50% likelihood)**	**Likely (51%-70% likelihood)**	**Very likely (71-85% likelihood)**	**Extremely likely (86%-100% likelihood)**
If you felt that the environmental harm of the “conventional” laundry detergent product as compared to the circular product outweighed any other considerations							
If you felt that the “circular” laundry detergent product was significantly safer than the “conventional” product.							
If you felt that the “circular” laundry detergent product had a significantly better cleaning performance than the “conventional” product.							
If it became significantly less socially acceptable to purchase the “conventional” laundry detergent product as compared to the environmentally friendly “circular” product.							
If the price difference between the “circular” and “conventional” product reduced by half.							