



# **Wet Wipes: Call for Evidence**

## ***Exploring customer thoughts on wet wipes***

February 2022

Prepared by



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# Background

## Objectives

The Government is currently running a call for evidence on single use plastics, which includes a section on wet wipes.

The main issues under consideration are:

- A ban on wet wipes containing plastics
- The effectiveness of the 'Fine to Flush' standard
- The possibility of extended producer responsibility scheme for wet wipes containing plastics
- Evidence on alternatives to wet wipes containing plastics

Yorkshire Water are in the process of drawing evidence together. As there is a lot to consider, YW are looking for the support of customers to shape the position on this.

The areas which need customer steer include:

- The impact of the policy position on vulnerable customers
- 'Fine to Flush' standard – including whether we should move away from this sentiment and have a 'do not flush any wipe' approach
- Thoughts on manufacturer responsibility (e.g. responsibility for labelling, funding behaviour change campaigns, paying for clean-up operations).

## Methodology

1. Online survey on the Your Water community with panel boost  
**N=570**  
20<sup>th</sup> – 27<sup>th</sup> January 2022
2. Online forum discussion on Yorkshire Water's draft paper  
**N=45**  
27<sup>th</sup> January – 2<sup>nd</sup> February 2022
3. 2 x online video focus groups with **10** customers
  - Older customers using for personal and HH use
  - Mixed-age customers, using for family use and HH. *NB. All customers in this discussion were more engaged with YW than the average consumer may be*
 9<sup>th</sup> February



*Icon denotes feedback from the qual groups*

Please see appendix for sample details.



# Key insights

## Current behaviour

- 1 in 5 view wipes as essential; and these are typically under 35's, vulnerable customers, those with 4+ people in their household, and more likely to have children under 5.
- Customers tend to not have any particularly strong feelings about using wipes; they're an accepted convenient solution.
- 85% purchase or use at least one type of wipe, with household and antibacterial cleaning wipes the most commonly purchased and used.
- Those who use wipes claim to primarily dispose of them in a bin, though unsurprisingly, moist toilet wipes are the main culprit for flushing, with 44% of those who use moist toilet wipes disposing of them in this way.
- Moist toilet wipes and toddler wipes (whilst not the most used overall), are the types of wipes which are more likely to be used at least once a day, and are most likely to be flushed.

## Flushing awareness

- Overall, people claim to know that all types of wipes are best binned, but there's clearly some confusion about product labelling/messaging about the best disposal methods. Younger customers are most likely to think flushing is ok (although aren't necessarily doing it themselves).
- Around half are aware of the 'Fine to Flush' logo, and of those, a third actively choose these over other types of wipes. Awareness of the logo decreases with age though.
- The meaning of 'Fine to Flush' can be a source of confusion – whilst many are of the view that it means just that, it's ok to flush these wipes, there's a sense of distrust for the logo and many would prefer to dispose of them in a bin. Even for wipes that do have the logo, over half believe they should be binned. Furthermore, 1 in 5 think that toilet wipes without the logo can be flushed. The messaging is not cutting through as well as it could.
- Of those who are aware of the 'Fine to Flush' message, only half think that flushing only one wipe at a time is true. More needs to be done to land this message.
- There's also a confusion around wipes labelled as 'biodegradable'. Whilst there's a belief that these will break down more quickly than wipes containing plastic, some aren't clear on whether 'biodegradable' equates to 'flushable'. Around a quarter of under 35's believe 'biodegradable' to mean the same as 'fine to flush'.

# Key insights

## Solutions

- The major advantage of wipes is their convenience and ease of use – something that alternatives can't always match. Whilst around 1 in 3 have tried alternatives, these tend to be in place of household wipes and for beauty/skincare. There aren't many alternatives to moist toilet wipes or out of home/on the go usage, so a ban would leave some customers without.
- Responsibility for change is seen to be firmly shared by manufacturers. Ultimately, customers believe that those who are making a profit from the sale of wipes should be contributing to any repercussions from use. The Government should be a key player in enforcing these responsibilities, and YW should be working with others, through a joined-up approach.
- Customers prefer solutions which won't impact directly on their behaviour – supporting increased messaging about 'Fine to flush', and better education around the correct way to dispose of products.
- Opinion is divided on a total ban on single-use wipes, with acknowledgement that it would be the best solution for the environment, but not necessarily for individuals. Customers share Yorkshire Water's concerns that a group of the population do genuinely rely on wipes – such as those with young children, those with disabilities and other vulnerable customers, and for these groups, a ban would be impractical.

## Next Steps

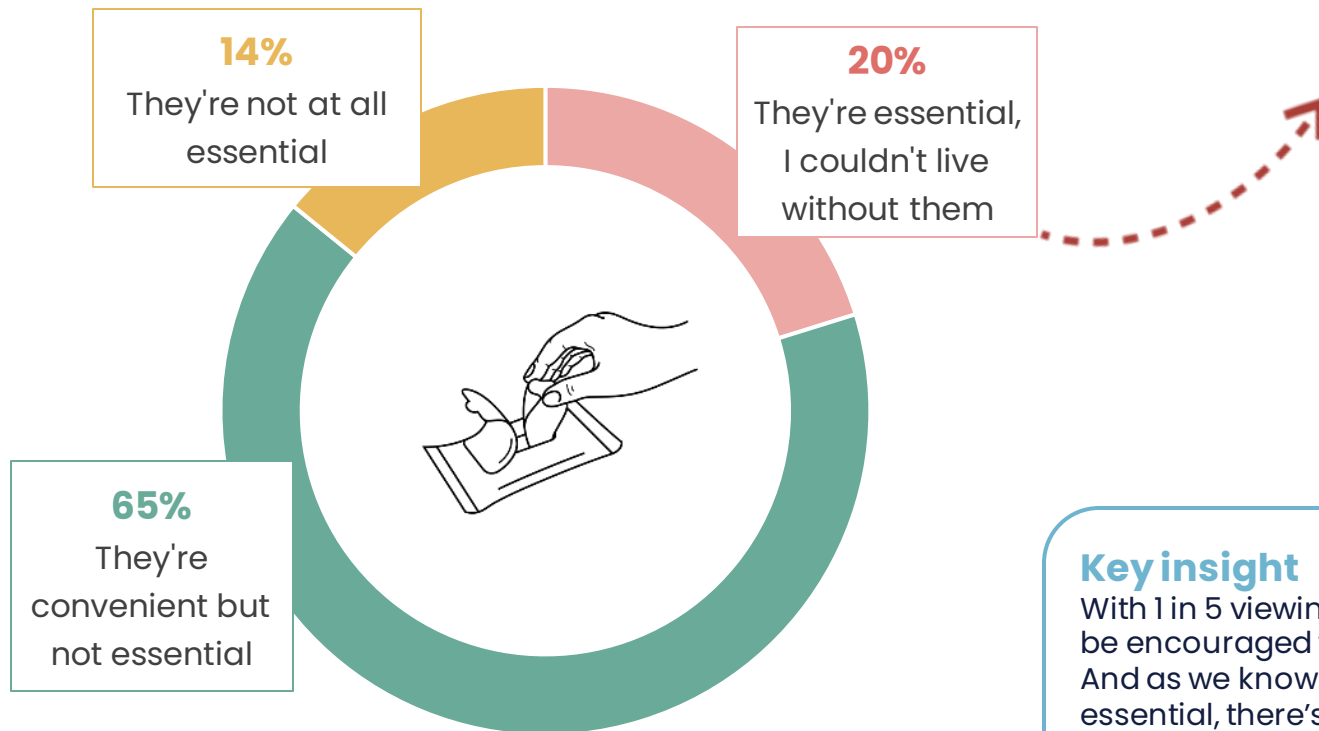
- Customers are in agreement with the views put forward by Yorkshire Water; so these can be presented with confidence
  - Greater clarity in labelling and a clear 'Do not flush' message across all products
  - Discontinuation of the Fine to Flush certification
  - A ban on products containing plastic
- Whilst manufacturers can be encouraged to shoulder some of the cost of clean up, Yorkshire Water should seek a shared approach; rather than passing on all responsibility to others.
- Alongside campaigning for change, education is key
  - Highlighting the impact of blockages in the local area and the wider impact on the environment
  - Continuing to educate on correct disposal of wipes, and ways to make this as easy as possible
- Whilst there's a lack of awareness across all age groups, younger customers are the heaviest wipe users so should be the target to influence behaviour change, and help educate children as they start to use wipes.

## Current usage



# Wipes aren't 'essential' for the majority, but they are convenient, which will be the biggest hurdle to overcome

## General attitudes towards wipes



### WHO ARE THEY? WHO SHOULD WE TARGET?



- More likely to be younger, aged 18-34 (38%)
- More likely to be vulnerable customers (27%)
- More likely to have 4+ people in household (32%)
- More likely to be those who have children than not, but namely children aged 0-2 (55%) and 3-5 (39%)
- Those who flush are no more likely to view wipes as essential (23%) compared to those who don't flush (21%).

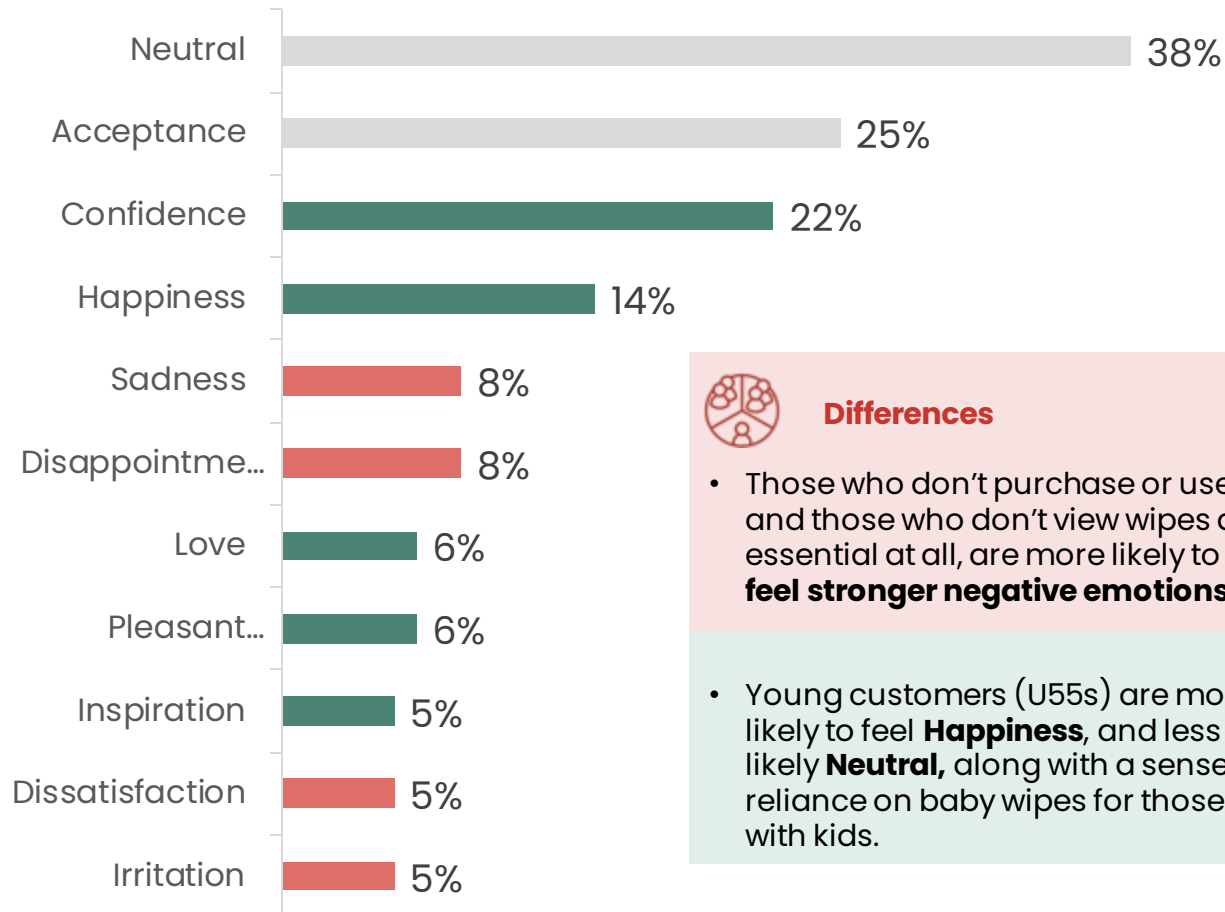
### Key insight

With 1 in 5 viewing wipes as essential, 80% of the population could in theory be encouraged to make a change without too much impact. And as we know that those who flush are no more likely to view wipes as essential, there's a good opportunity that behaviour change could be encouraged, particularly amongst those more inclined to view them as a 'nice to have'.



# People tend not to have any particularly strong emotions towards wipes; they're an accepted necessity

## Emotions about using wet wipes



### Differences

- Those who don't purchase or use, and those who don't view wipes as essential at all, are more likely to **feel stronger negative emotions**
- Young customers (U55s) are more likely to feel **Happiness**, and less likely **Neutral**, along with a sense of reliance on baby wipes for those with kids.

### Educating customers on the alternatives will be key...

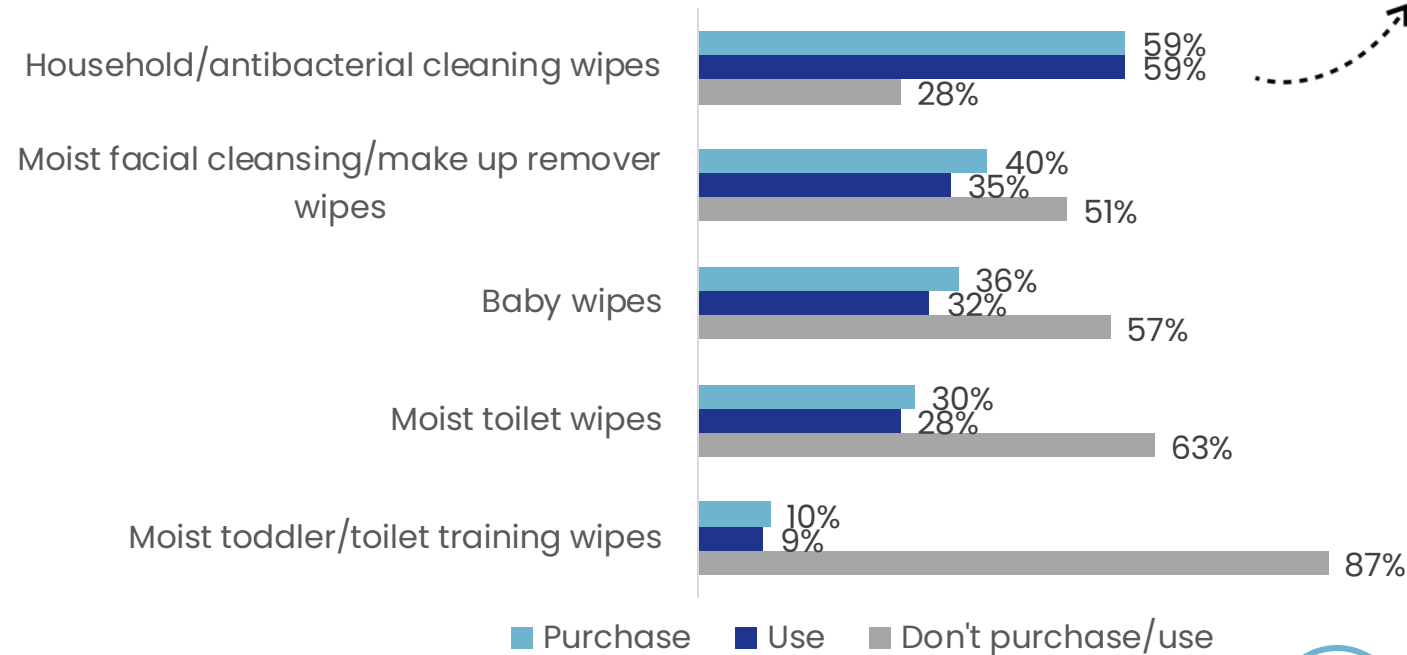
- With the most common feeling being '**neutral**', this lack of strong feeling means there's an opportunity to make a change – but the biggest barrier will be habitual, and that's something that will take time.
- A quarter feel a sense of **acceptance** – they know that wipes aren't the best, but what alternatives do they have?
- With nearly a quarter feeling **confident** when using wipes – to encourage use of any alternative solutions, this confidence, along with the convenience of wipes, would need to be matched.



# The purchase and use of wipes is an entrenched behaviour, particularly amongst younger customers

**85%**  
purchase or use at  
least one type of  
wipe

## Purchase and use of different types of wipes



The most commonly purchased and used, but these primarily are binned (slide 10).

## Differences

- Those aged 18-34 are more likely to purchase and use all types of wipes
- 35-54 year olds are more likely to buy moist toilet and toddler wipes than customers aged 55+, but less likely than younger aged 18-34.
- Whereas those aged 55+ are less likely to buy each type of wipe
- Vulnerable customers are also more likely to purchase baby wipes (46%)

See appendix for breakdown by age and respondent source.

## Key insight

High purchase and use rates, particularly amongst the younger customers, shows how habitual wipes have become in our lives. As usage declines with age however, younger groups should be the target for campaigns in the first instance.



# Convenience, practicality and ease are the main reasons for purchasing and using wipes

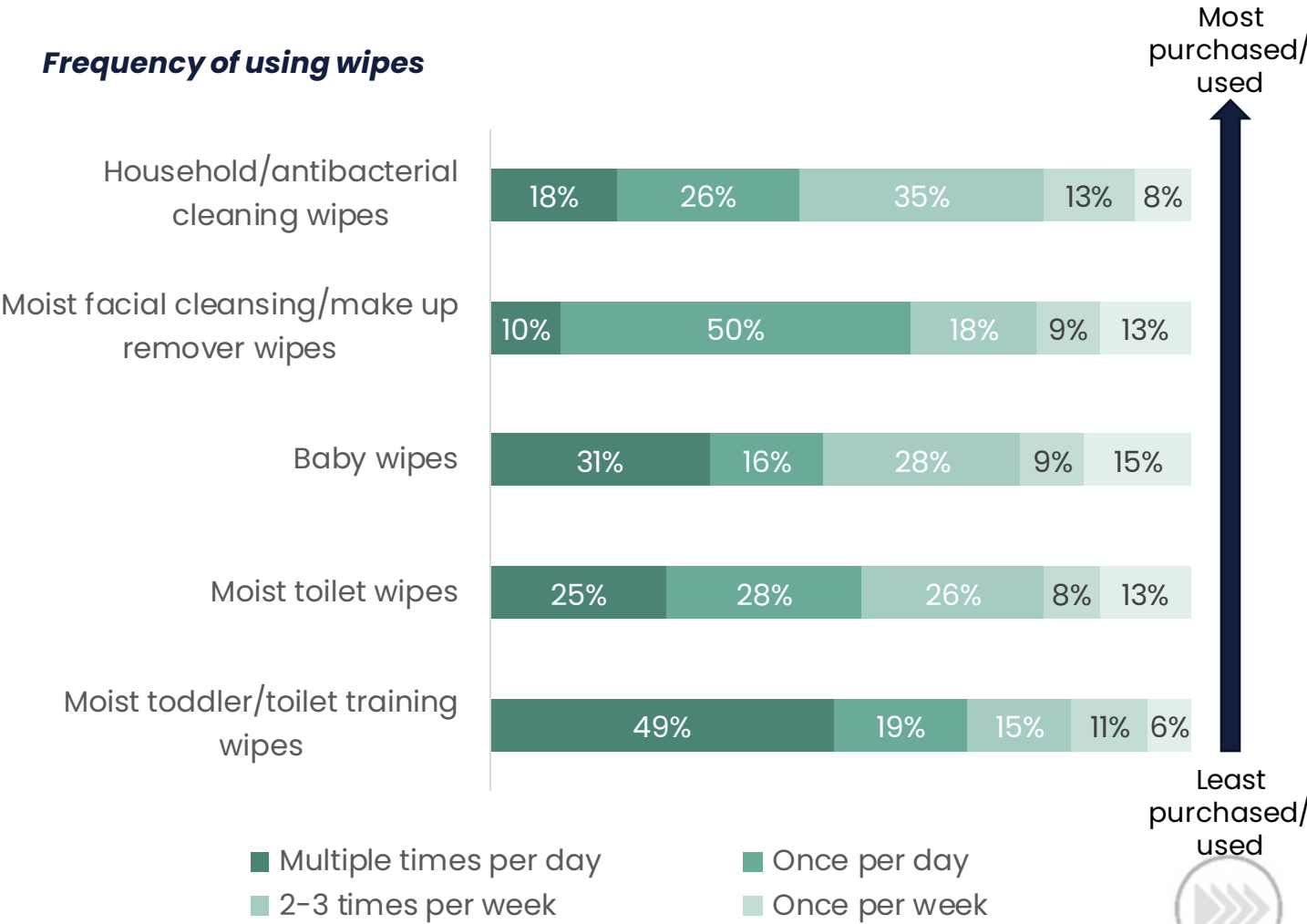


## Most are used at least once a day

### Reasons for purchasing and using these wipes

- Household / antibacterial cleaning wipes**  
Used most often to save time cleaning, whilst also having the desired effect of hygiene and cleanliness, especially since Covid. Portable, so can be used in public spaces. Used and then binned, meaning germs are disposed of, rather than sitting on a cloth.
- Moist facial cleansing / make up wipes**  
Convenience. They are quicker and easier to use than alternatives. Plus the packaging is convenient for nights out, holidays etc. Part of a routine (both in terms of a skincare routine, but also people purchasing on behalf of wives/daughters).
- Baby wipes**  
Seen as a 'one-stop-shop' of cleanliness. Practical and portable for all types of needs (not just for babies).
- Moist toilet wipes**  
Perception of heightened hygiene. Used when toilet paper is inadequate (disabilities, those with bowel issues, when on their period). Sense of helping to alleviate social anxiety. Seen as a more desirable / luxury product than toilet paper.
- Toddler training wipes**  
Perception that children prefer this product and will 'do a better job' with these than with toilet roll whilst potty training. Familiarity for little ones when potty training; the step between nappies and wipes, and toilet and toilet paper.

### Frequency of using wipes



# There's sense for some that widespread availability of wipes makes them hard to avoid



**Whilst not particularly heavy wipe users, those spoken to acknowledged the amount of wipes available is continuing to grow and it's hard to avoid them in the supermarket**

They're sold with a myriad of benefits...

- ✓ Quicker and can be more hygienic for general household cleaning
- ✓ Superior clean for specific items – bathroom, kitchen, glass, screen, outdoors etc.
- ✓ Promote skin benefits for make up/cleansing wipes
- ✓ Addressing specific healthcare concerns

**In addition, the pandemic has heightened focus on cleaning – personal and household, which has increased a reliance on wipes and introducing the habit to those that perhaps didn't use before**

*"Since the pandemic, I became a bit paranoid and my anxiety superseded my desire to be environmentally responsible.... Now it's a habit"*

## Key insight

As manufacturers continue to develop wipes for convenience and previously unconsidered uses, the scale of the problem is only likely to continue to grow, and those disposing incorrectly will have even more opportunity to do so.



“

***There's a wipe for everything these days.”***

One customer mentioned having recently purchased new hay fever wipes 'just because they looked interesting'.



# A couple of notable groups rely more on wipes

**And there's an acceptance from others, that they would be harder to replace in these instances**

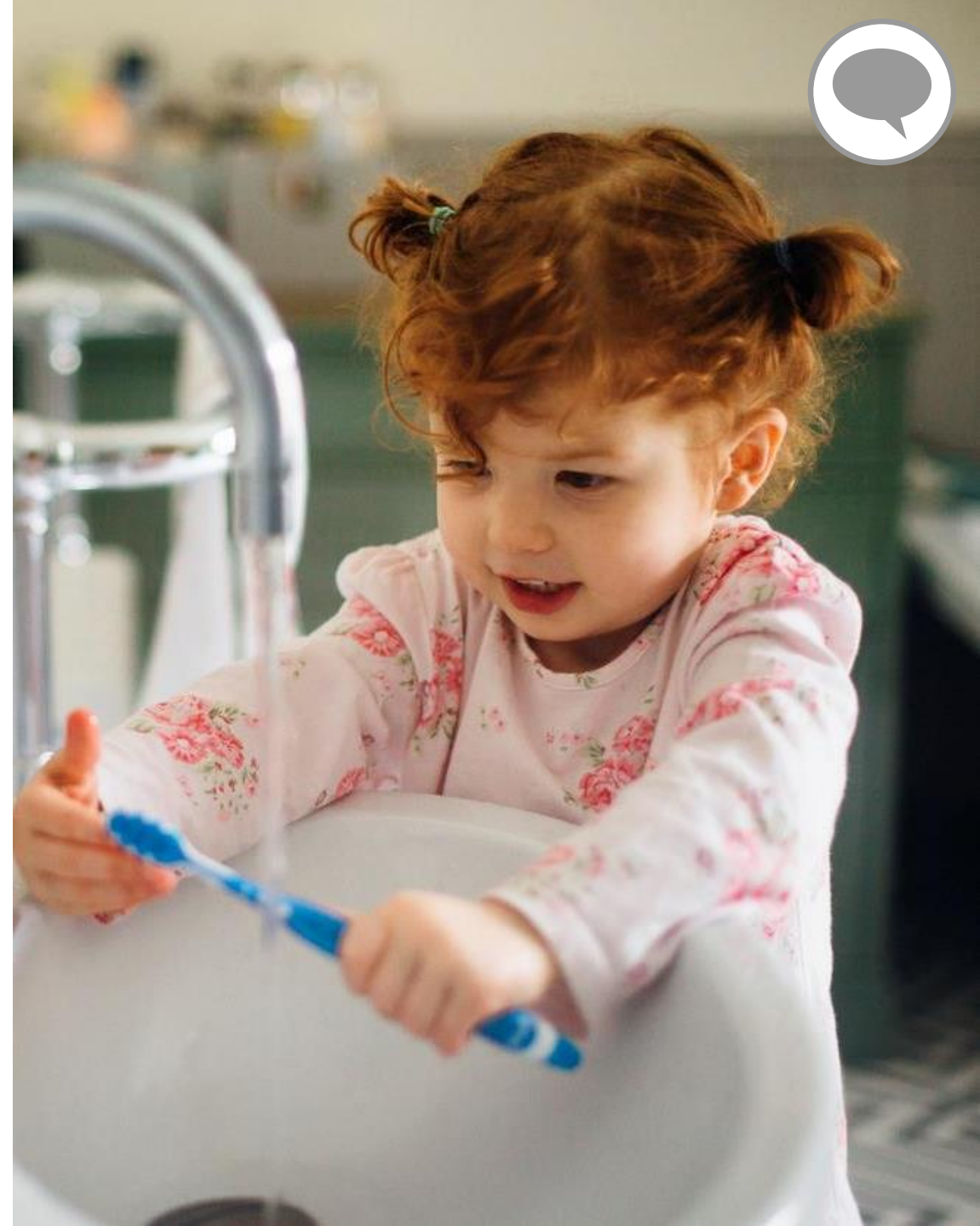
▶ For those with young children, wipes are seen as more of a necessity – and not easily replaceable with anything else as convenient. And it's not just the younger generation, those with grandkids also rely on wipes for ease, even if using less frequently.

*"Baby bums need wiping"*

▶ Medical needs – although we didn't speak to many directly impacted, it's acknowledged wipes would again be hard to replace here

*"Due to my disability, I dispose of them using my yellow waste medical collection that the council collect every week for hazardous waste."*

▶ For most other uses, customers spoken to can see that it could be possible to adapt to alternatives (albeit a bit less convenient). However these are those already motivated and engaged... there will undoubtedly be harder groups to convert.







*Used correctly and disposed of correctly single use wipes are very useful in certain circumstances. I'm thinking in particular around COVID sanitising procedures and personal hygiene (babies, children and adults).*

*It's sometimes more hygienic to use single use wipes than to use cloths which may breed bacteria etc. while waiting to be washed (put in washing machine). It would have some impact on my household, but I could adapt fairly easily."*




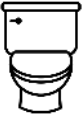





# Those who use wipes claim to primarily dispose of them in a waste bin



As suspected, moist toilet wipes are the main culprit for flushing

	 Waste bin	 Recycling bin	 Compost bin	 Flush down the toilet	 Other
Household cleaning	90%	9%	3%	2%	1%
Baby wipes	89%	6%	3%	3%	1%
Face	87%	10%	4%	3%	2%
Toddler	72%	19%	4%	19%	2%
Toilet wipes	51%	10%	3%	44%	1%

Of those who flush, most claim to flush one at a time, but there’s still a third flushing 2 or 3.

- 63% Flush 1 at a time
- 33% 2 or 3 at a time
- 4% 4 or 5 at a time

Is it a case of people just flushing as many as they’ve used – behaviour change comms and education should focus on encouraging people, if they have to use them, to only use one wipe at a time, or if they do end up using more than one, clearly state to flush only one at a time.. – N.B. Low base size.



### Differences

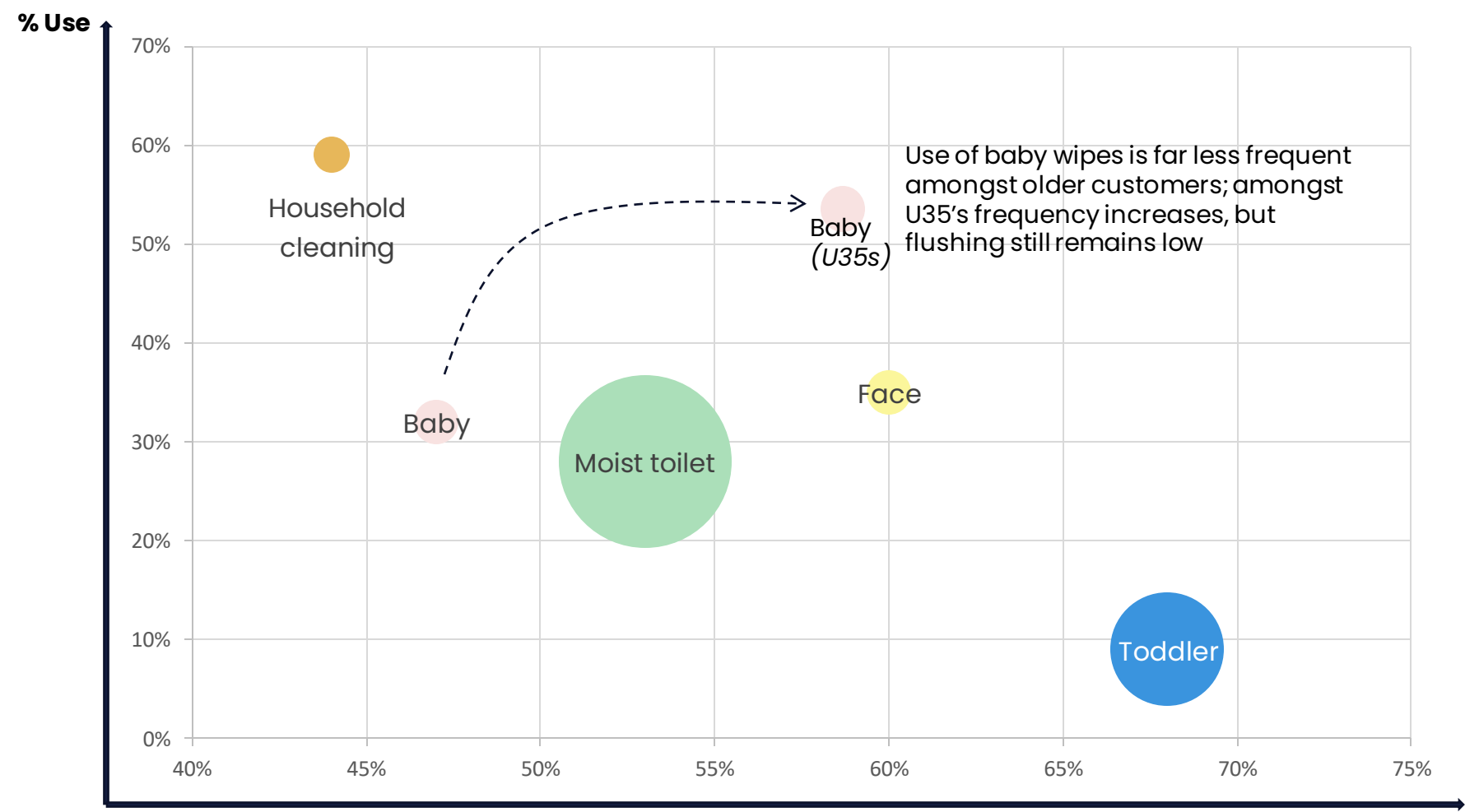
- 18-34 year olds are more likely to put cleaning wipes in the recycling bin (17%), baby wipes in the recycling bin (10%) or compost (8%), and moist toilet wipes in the compost (7%).
- Those aged 55+ are more likely to put cleaning wipes (93%) and baby wipes (96%) in the waste bin.
- Those aged 34-54 are slightly more likely to flush moist toilet wipes (49%) – N.B. Low base size.

### Key insight

Binning wipes is the dominant behaviour, but there will be an element of overclaim here. Whilst younger customers are more likely to purchase and use wipes, they are also more likely to dispose of them in the compost or recycling bin, perhaps due to the fact that younger people are typically more likely to know about environmental issues and the impacts of our actions. This group should be the main focus for education on correct disposal, along with 34-54s, who are likely to purchase and use moist toilet wipes and toddler wipes, and dispose of them by flushing.



# Moist toilet and toddler wipes are the most flushed and also the type of wipes which are used multiple times a day



The size of bubble indicates level of flushing – the bigger the bubble, the more they are flushed. **% Use at least once a day**

**Key insight**  
With potential multiple cases of flushing of moist toilet and toddler wipes per day in a household, these highlight a key area of concern. Household, and baby wipes are the most commonly used, but are less likely flushed. Keeping messaging consistent with these will help avoid confusion.

# Whilst some may choose to flush, they're not always doing so happily

- **For some, flushing wipes, even when labelled as Fine to Flush, comes with a sense of guilt**

- Environmental concerns – an acknowledgement they can't really be good for the environment and quick to decompose
- Distrust over claims – but assuming as it's on the pack it's true

*"I don't want to flush them"*

- **If products are created for the toilet, it's assumed flushing is inevitable and the only intended disposal method**

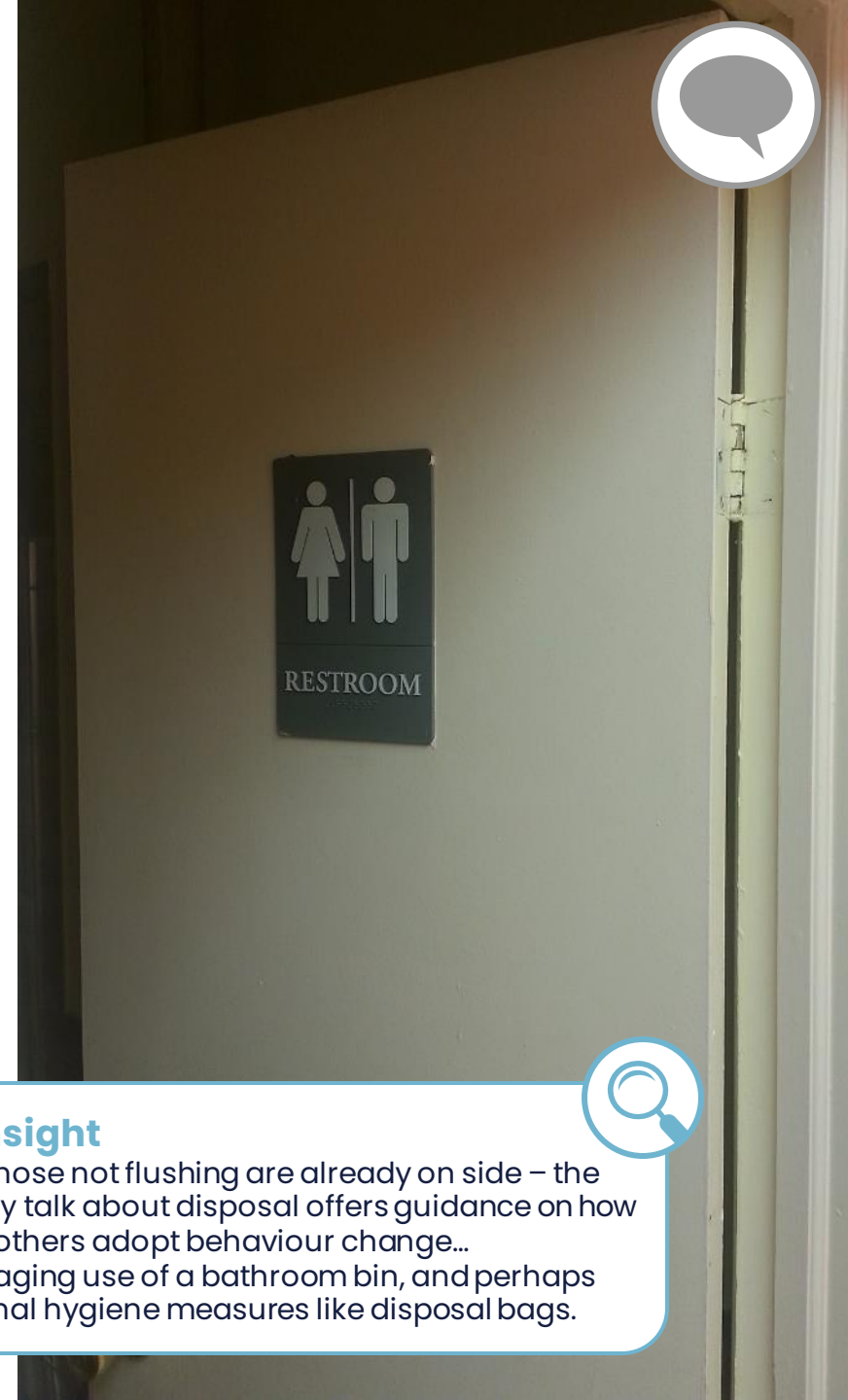
- Toilet wipes in particular are often used in toilet training for children, to encourage good hygiene – but in doing so are these encouraging bad disposal habits?
- If being used from a young age this behaviour will stick with this generation through their life

*"What else are you supposed to do?"*

- **But for those who don't flush, there's frustration as it's not considered hard to find alternative disposal methods**

- Most of those spoken to actively avoid flushing even toilet wipes and believe the alternatives to be easy (just use a bin) – but for this group, this is the norm, so it seems like the obvious choice.

*"It's easy to buy a little plastic bin"*



## Key insight

Whilst those not flushing are already on side – the way they talk about disposal offers guidance on how to help others adopt behaviour change... encouraging use of a bathroom bin, and perhaps additional hygiene measures like disposal bags.



# Usage summary – who's using wipes?

## Age 18–34

Most likely to have children under 5

The most likely to purchase and use all types of wipes

Most likely to view wipes as being 'essential'

More likely than others to put wipes in recycling or compost bins (cleaning wipes, baby wipes, and moist toilet wipes). Yet whilst claiming to not flush themselves, are the most likely group to think wipes can be flushed – perhaps an idealistic view on environmental claims.



**Target group for education  
and purchase  
behaviour change**

## Age 35–54

Most likely to have children aged 11–17 living at home

Still likely to purchase all types of wipes (though not as much as 18–34 year olds)

More likely to view wipes as being 'essential' compared to those aged 55+, but not as much as 18–34 year olds

But they are slightly more likely to be flushing moist toilet and toddler wipes compared to other age groups.



**Target group for education  
& disposal  
behaviour change**

## Age 55+

The least likely to purchase any wipes out of all age groups

Most likely to put wipes in the standard waste bin

Most likely age group to agree on a total ban on all single-use wipes so that they can no longer be bought.

The least likely to be aware of the 'Fine to flush' logo, but also most likely age group to agree to a ban on 'Fine to flush' messaging so that they all must be binned.



**Confident in their own  
behaviour, but could  
advocate change**

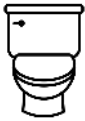



## Unprompted understanding



# Overall, people claim that all wipes should be binned, but there's some confusion about product messaging



	 Flush it	 Bin it
Moist toilet/toddler training wipes <b>with</b> the 'Fine to flush' logo	47%	53%
Biodegradable wipes	38%	62%
Moist toilet/toddler training wipes <b>without</b> the 'Fine to flush' logo	19%	81%
Baby wipes	6%	94%
Moist facial cleansing/make up remover wipes	5%	95%
Household/antibacterial cleaning wipes	4%	96%

Even with the Fine to Flush logo, over half say you should bin it

38% think it's ok to flush biodegradable wipes – is 'biodegradable' being confused with 'flushable'?

1 in 5 think **toilet** wipes **without** the fine to flush logo can be flushed



### Differences

- Despite not actually claiming to flush wipes often themselves, the younger age group are significantly more likely to think that all types of wipes *can* be flushed. (peaking at 66% for FtF wipes)

### Key insight

It's clear there is confusion about fine to flush – if the logo says it's ok to flush but over half are saying that they should be binned, it's not cutting through as well as it could. Especially as 1 in 5 think wipes without the logo are ok to be flushed.

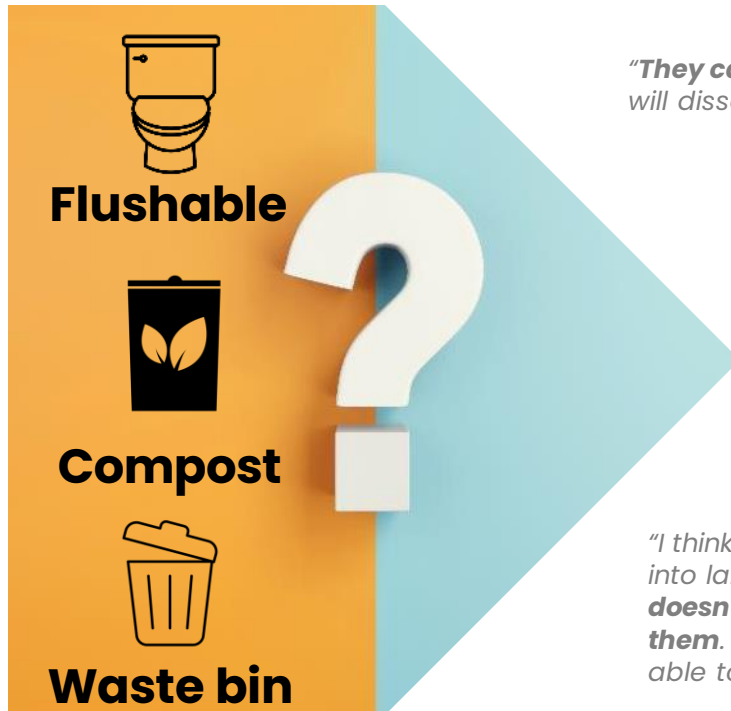
**41%** think all wipes should be binned  
Less than **2%** think all types can be flushed

# Most believe that biodegradable wipes will break down more quickly than wipes containing plastic

But there's a notable confusion as to whether 'biodegradable' equates to 'flushable'

There's consensus that biodegradable = quicker to decompose, and is not necessarily the same as 'flushable'; but beyond that, correct disposal methods are not clear.

Some suggest they can still be flushed, whilst others are torn over normal bin or compost.



*"They can be flushed as they will dissolve over time."*

*"It suggests that **you can flush them down the toilet** but I would still bin them. I think biodegradable in this situation means that they will degrade over time. However, if they were flushed down the toilet I would imagine they would still cause problems."*

*"I don't think any wipes should be disposed of down the toilet, **they are better for the environment but still not flushable.**"*

*"I think it means that when they go into landfill they will disintegrate. **It doesn't mean that you can flush them.** I'm unsure whether you are able to put them in compost bins."*

*"They will breakdown faster than conventional wipes."*

## Key insight

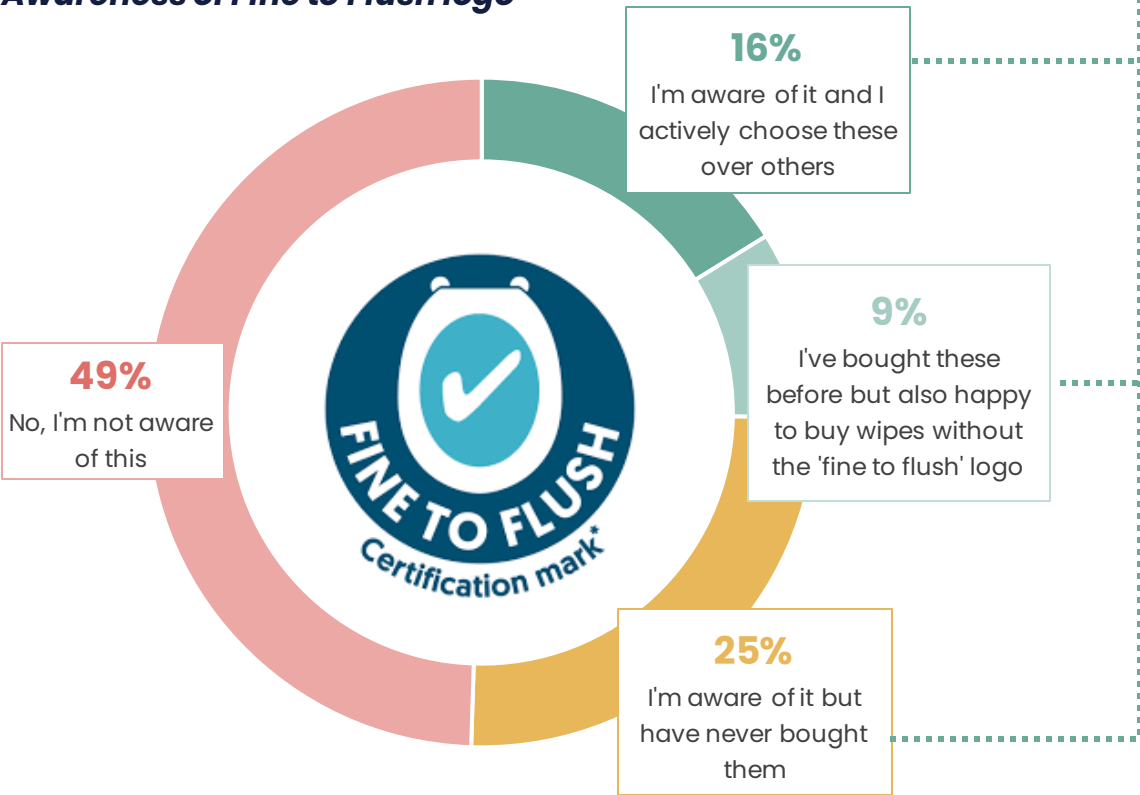
It's clear terminology used across the category causes confusion – keeping to one simple message would help encourage correct disposal by dispelling any myths around what can/can't be flushed.



# Half aren't aware of the Fine to Flush logo



## Awareness of Fine to Flush logo



**Of those who are aware of Fine to Flush (n=290)...**

- 32%** actively choose these over others
- 19%** have bought these before but also happy to buy wipes without the 'fine to flush' logo
- 50%** have never bought them

**What does 'Fine to Flush' mean in terms of disposal?**

- The vast majority believe that the 'Fine to Flush' logo means just that, that it is ok to flush these wipes.
- But there's a sense of distrust for this logo, and many would prefer to dispose of them in a bin.
- Some spontaneous recall of messaging about flushing one or two at a time as instructions on the packaging.

*"They will break up (like toilet paper) when they are flushed."*

*"It's claimed that they are fine to flush as they won't block drains, but I never flush them anyway."*

*"Fine to flush but usually says on pack how many at a time."*

**Differences**

- 29% of under 34's actively choose 'Fine to flush' wipes
- Awareness decreases with age; 67% of under 35's are aware vs. just 36% of over 55's.

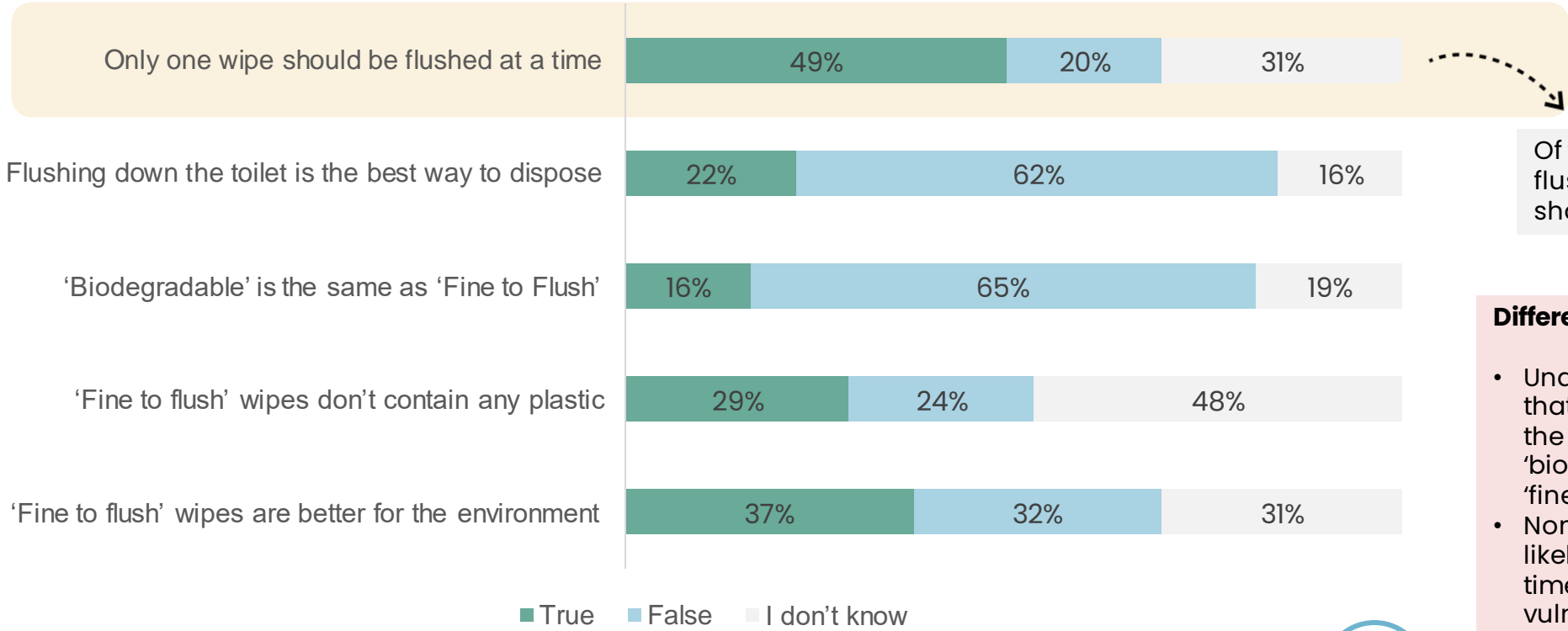
**Key insight**

If Fine to Flush is going to continue, it needs to be shouted about and clearly explained what it means. A 'back to basic' / FAQ information space would be good to point customers to.



# Only half think it's true that only one wipe should be flushed at a time


If the certification continues, more needs to be done to land this message



Of those who are aware of 'Fine to flush', only 52% said only one wipe should be flushed at a time is **true**.


### Differences

- Under 35's are more likely to think that 'fine to flush' wipes are better for the environment (46%), but also that 'biodegradable' means the same as 'fine to flush' (23%).
- Non-vulnerable customers are more likely to say only flushing one wipe at a time is true (57%) compared to vulnerable customers (44%).



### Key insight

The 'one wipe only' message makes sense, but is not really cutting through to everyone – which is no surprise given it's often not clear, or not included at all, on packaging. Younger customers are the most confused... more attuned to environmental messaging, but perhaps wanting to hope for the best from products being chosen.



# When it comes to the details, little is known about how Fine to Flush has come about



**There's confusion as to who certifies it, and whether it's simply a sales tool**

**Concerns shared by customers spoken to –**



**If flushing can still cause problems, how legitimate is the Fine to Flush claim?**

- In reality, customers aren't going to seek out information on the logo, so additional support is wanted on pack if it's going to be used –
  - What's different about these wipes... why are they better?
  - Who's agreed it?
  - Reassurance it's not just greenwashing by manufacturers

*"The manufacturers are misleading us.... We need the correct information"*



**If they really are completely safe to flush, why is this not enforced for all wipes?**

- Even though the majority of those spoken to didn't flush wipes, they can see why there's confusion, and why labelling is trusted when it's the easiest option.

**As a result of distrust, this group feel strongly that not flushing wipes is a better solution than making alternatives that allow people to flush.**



***The wording 'fine to flush' is sending out the wrong message; that it's ok to do that."***



## Awareness & impact



# Over three quarters claim they are aware of the impact that wipes can have on the sewerage network

## The information we shared in the survey...

Nationally, there is a big problem with sewer blockages caused by items being flushed down the toilet that shouldn't be. Only pee, paper and poo should go down the loo, but many other items such as nappies, sanitary items, and cotton buds (to name just a few!), are often disposed of in this way.

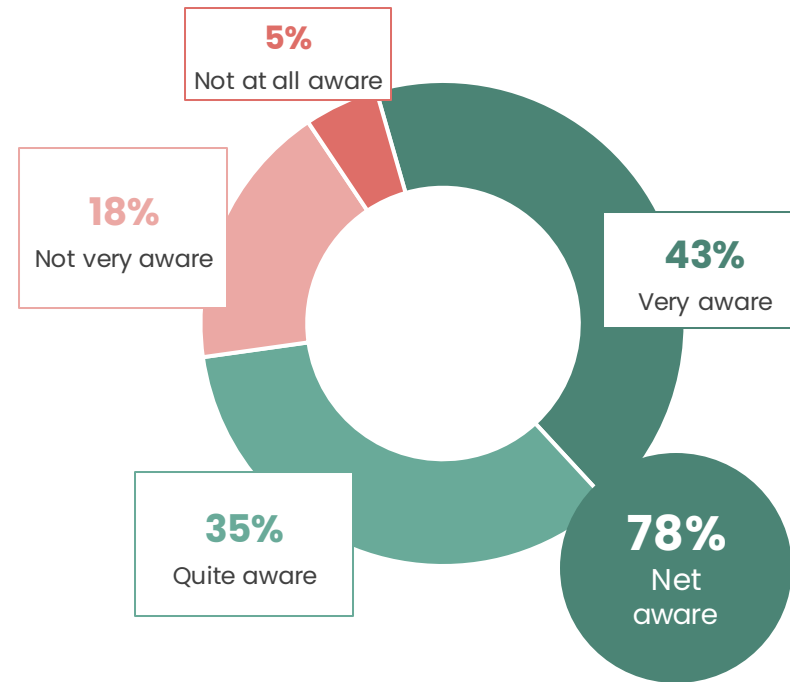
But the main offender is wet wipes. Every year in Yorkshire, wet wipes cause **40%** of sewer blockages.

The 'Fine to Flush' logo is a major development in the fight against blockages, and is now an official standard of certification identifying which wet wipes can be flushed down the toilets safely. Even then, they advise that only **one wipe** should be flushed at a time, to help stop the build up in the pipes.

Some wipes may be labelled as 'flushable', but do not meet the standard for 'Fine to Flush', because they don't break down when they enter the sewer system.

The build up of these wipes (and others which aren't labelled as 'flushable') can cause so called 'fatbergs'. Fatbergs block the sewers and increase the risk of sewer flooding within your home and local area and sewage spillages can even cause pollution of rivers and streams, because the sewerage is unable to pass through the pipes due to the blockage. They can also cause damage to the pipe network, meaning more money and time has to be spent on maintenance.

## Awareness of the impact that wet wipes can have on the sewerage network in your area



### Differences

Those aged 55+ are more likely to be aware of the impact (82%), vs. under 55's who are more likely to be unaware (26%).

Your Water community members are more likely to be aware (86%), whilst panel members are more likely to be unaware (29%).

### Key insight

This lack of awareness amongst under 55's of the impact that wipes can have on the network further evidences the need to focus of this group (as we know they're likely to buy moist toilet / toddler wipes and dispose of them by flushing).





# Some have had direct experience with blockages, which leaves a lasting impression and impact on behaviour



**Louise, a female customer aged 45-54, living in West Yorkshire. Louise is married, with adult children, and has her first grandchild on the way.**

*Our old neighbours used to flush EVERYTHING down the toilet. But their drain comes into our garden. The wipes kept blocking up the drains and then it would come into our garden so we had to get it fixed. We kept asking them not to do it, but they never seemed to take it seriously and defaulted to telling us that their children went to the toilet by themselves and there wasn't anything they could do about it. Education needs to go down generations.*



**Mags, a female customer aged 65+, living in East Riding of Yorkshire. Mags is retired and enjoys wildlife.**

*My son and daughter-in-law bought a new house. My daughter-in-law bought cleaning wipes labelled as 'flushable'. After months of using them and flushing them, the toilet blocked up and they learnt the hard way that you shouldn't flush wipes. There was a big cost for getting a plumber in to repair the bathroom.*

## Key insight

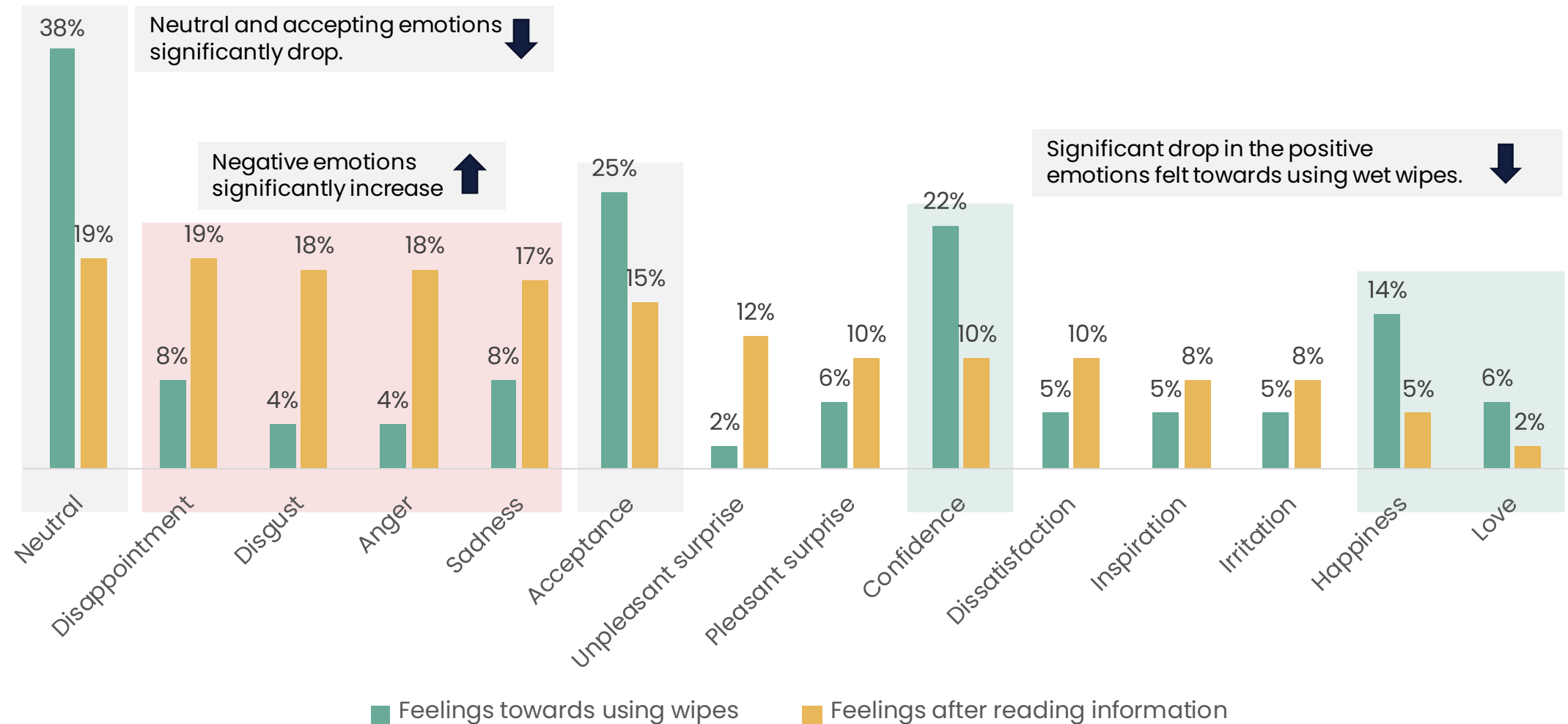
Can real life examples be shared more widely to highlight the scale of the problem and educate people? Accompanying with stats on the real cost to the homeowner when things go wrong will help messages resonate.



# After reading this information, customers feel more negatively compared to initial feelings about using wipes

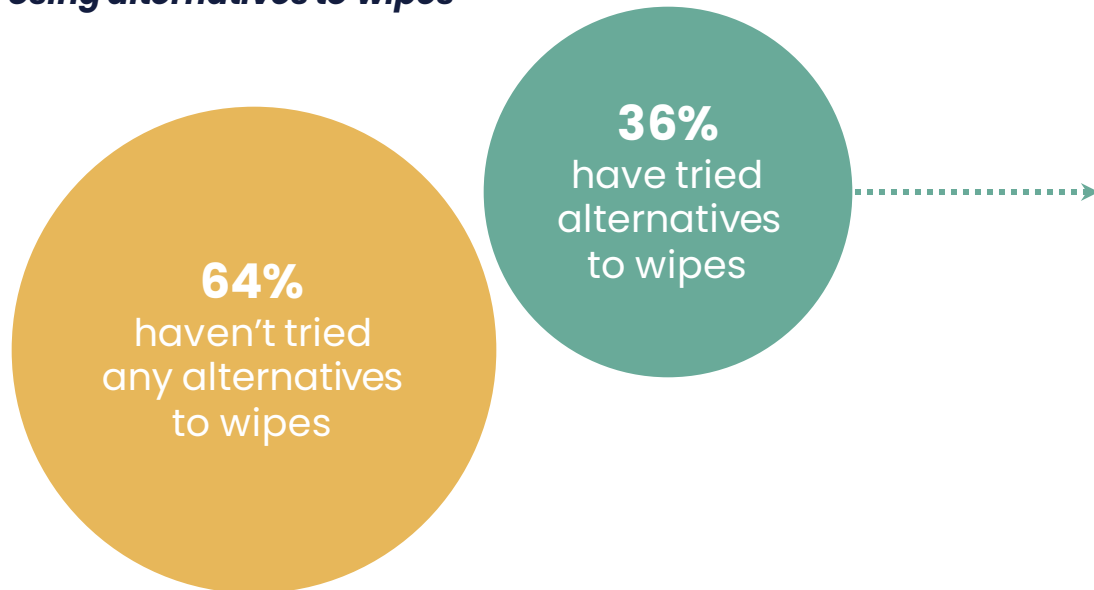


Feelings towards using wet wipes vs. after reading impact of wipes information



# Over a third have tried alternatives to wipes; they can work as well and offer benefits, but aren't as convenient

## Using alternatives to wipes



## Differences

- Over 55's (39%) are more likely to have tried alternatives, where as 18-34 year olds are more likely to not have (72%).
- Females (39%) are more likely to have tried alternatives
- Those with children aged 15+ (44%) and those who don't have children (38%) are more likely to have tried alternatives.



## Alternatives which people have tried...

- Spray and cloth (household)
- Cleanser and cotton wool (make up)
- Soap and water (make up/general hygiene)
- Washable bamboo wipes (household)
- Flannels and muslin cloths (make up/ hygiene)

There's a general acceptance that alternatives are good or better than their single-use, plastic wipe equivalent. But there's still a sentiment that wipes offer more convenience than alternatives.

*"Antibacterial spray and kitchen roll, face cleansing cream. I use the above as frequently as (and probably more) than wipes. Wipes are used for convenience but not essential."*

*"Flannels and muslin. Reusable and environmentally friendly, but inconvenient."*

*"They are a better alternative for the environment. Not always as quick and convenient to use and you need to wash cloths."*

## Key insight

Most alternatives mentioned are household or beauty wipes. There aren't many alternatives to moist toilet wipes for those wanting additional benefits to toilet paper.



## Recommendation

Convenience will always be the key barrier to overcome when trying to instigate behaviour change.

Whilst there are products to help avoid blockages available through the YW website (e.g. the disposal bags), could more be done to provide information and access to alternatives.? In particular, prioritise encouraging alternatives that require no extra effort, such as use of hygienic and easily disposable bins nearby the loo.

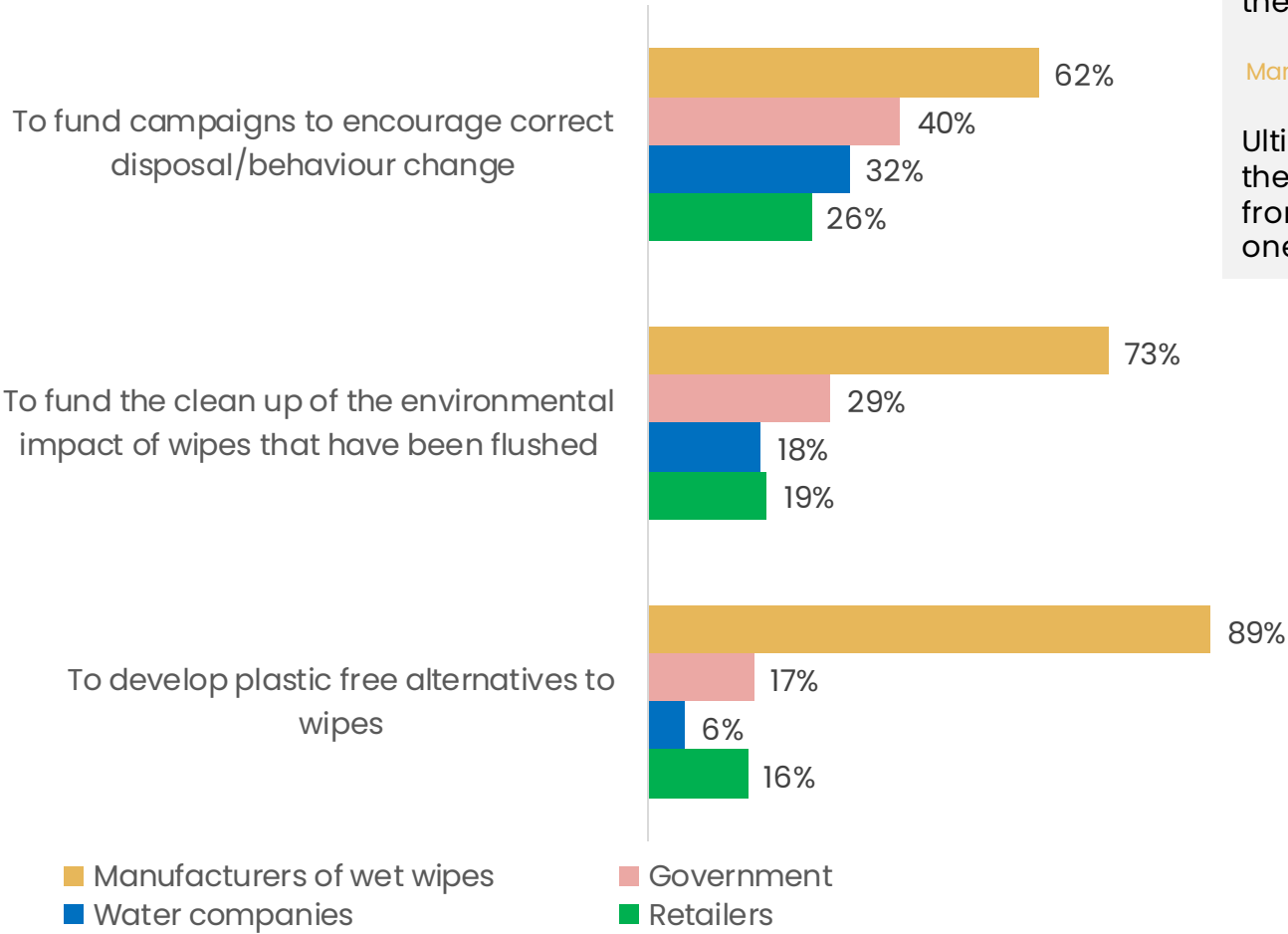


# Responsibility about making changes is primarily seen to lie with manufacturers



With more of a collective effort for encouraging correct disposal and behaviour change

Who should responsibility lie with for making changes?  
% selecting



When explaining why responsibility should lie with certain organisations, there was a general sense of hierarchy of responsibility

Manufacturers > Government > Water companies > Consumers > Retailers

Ultimately, customers believe that those who are making a profit from the sale of a product should be the ones to pay for any repercussions from the sale of the product. There were calls for Government to be the ones that bring about this change through regulatory intervention.

*"If an organisation produces these items they ultimately hold responsibility of ensuring safe disposal. If customers are unclear of the suitability of items that can be flushed because of the liberal use of 'flushable' wording (that doesn't necessarily reflect the suitability of these items for actual flushing) then the manufacturer is deceiving customers and hindering safe disposal."*

*"If the government banned non-flushing wipes in this country the manufacturers would have to start making only flushable ones."*

*"The manufacturers and retailers ultimately have a responsibility for the types of products they're creating and putting out into society, and the environmental impact they will have."*

*"They produce the wipes and they should not use confusing language. If the consumer sees 'flushable' and bio-degradable then they assume that they can be flushed. It should be clearer on the packaging and in red so it shows how important this is."*



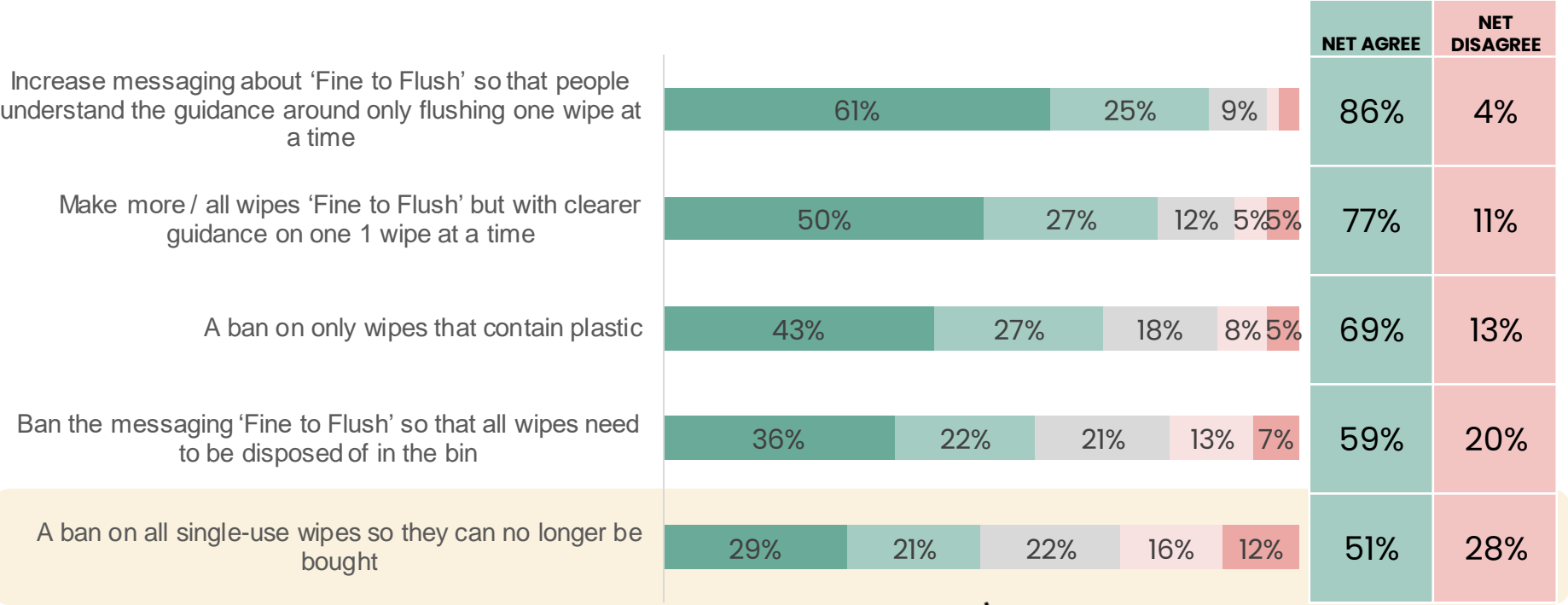


# Customers prefer solutions which don't impact directly on their behaviour, with calls for more education



But, there's not too much resistance to a total ban on wipes

Going forwards, how do you feel about the following options?



### Differences

- Over 55's are more likely to agree on a total ban on all single-use wipes (56%), and on banning the 'Fine to Flush' messaging so that wipes need to be disposed of in the bin (64%) – however we know this is the group using them the least so impact would be limited.
- Males are more likely to agree with a total ban on all wipes (57%)
- Whereas females are more likely to agree to a ban on 'Fine to Flush' messaging so all wipes need to be binned (64%)

- Strongly agree

Slightly agree

Neither agree nor disagree

Slightly disagree

Strongly disagree

Despite 20% of the sample viewing wipes as essential, only 12% strongly disagree on a total ban. Furthermore, 36% of those who say wipes are essential agree with a total ban on single use wipes.



*I firmly believe that the vast majority of people need education on this topic.”*

#### Key insight

It's clear from customers that there is a desire for education. Many wish to be informed about proper disposal practice so they can do better. There's a sense that wipes will inevitably be produced (at least for now), so greater emphasis should be on manufacturers to inform customers of the best way to dispose, led by Government intervention.



# Whilst people do agree that a total ban would stop the issue, there are concerns for those who rely on wipes

FOR

## Why customers agree there should be a total ban on all single use wipes

- For most people (admittedly not those with young children or disabled or vulnerable people), wipes are more a 'nice to have' product; not essential. They are convenient, but there are plenty of suitable alternatives to most types of wipes.
- A total ban would force people to look to alternatives.
- When incorrectly disposed of, they cause many problems including blockages, sewer maintenance and flooding.
- Plus, they are bad for the environment, particularly those which contain plastic.
- Awareness of the impact flushing wipes can have is perhaps not that well known. Alternatively, do those who flush know but just don't care? Banning the products is the most effective way to make change.
- If a total ban isn't possible or feasible, more education and increasing awareness should be priority.

*"This is the only way that we will end up with no wet wipes in the sewerage system. Too many people are either unaware or just don't care."*

*"I think it would force people to use alternatives. I personally could use alternatives but opt for convenience."*

AGAINST

## Why customers disagree there should be a total ban on all single use wipes

- They're often necessary, particularly for those with young children or those who are disabled or vulnerable.
  - And there's a sense that those who do really need them *should* be allowed to use them.
- Instead of a total ban, there could perhaps be a phasing out of less essential wipes.
- But teaching people how to dispose of them correctly is the ideal, rather than banning.

*"My wife has dementia and double incontinence, we need them for personal hygiene reasons."*

*"I would only let baby wipes be bought. This is essential to families with babies. Other than that you do not need."*

*"I use one wet wipe per week and wouldn't dream of flushing it down the loo. Nothing else I have tried is as cheap & easy for my mascara removal. Just have a ban on flushing ANY type of wipe! That way there are no excuses."*

# As a result, those most engaged and concerned over the issue consider some key steps to help...



## Changes to wipes : Manufacturers

**Remove the Fine to Flush logo and 'flushable' from all wipes**

*Remove any false claims or misinformation that can confuse or mislead customers*

**Accompany with clear & consistent 'do not flush' message on pack**

*"DO NOT FLUSH should be clearly put on all wipes"*

*"Make it personal"*

*"A plastics ban would be a step forwards"*

## Education: Manufacturers + water companies

**Education about the damage caused by flushing wipes, and what the correct disposal should be**

*Take a firmer approach, with stats and graphics to shock people into behaviour change*

**Highlight the cost of clean up at an individual level (i.e. Incorrect disposal added £xx to your bill)**

*It's hard to comprehend the impact when general stats are shared*

*In addition -*

**Consider passing costs to individuals if repeat offenders of blockages**

**Education, starting with young children in schools**

## The Government and media

**A levy or tax for manufacturers of wipes**

*Use this pot to help fund clear ups as a result of blockages*

**A complete ban on plastics in wipes**

*A step forwards but acceptance that products wouldn't be quite the same*

**Serious media campaigns funded by multiple stakeholders**

*Not a light-hearted, comical campaign – but a serious one to hit home*

## Views on the draft Positioning Paper





# On the whole, the draft plan is thought to clearly communicate Yorkshire Water's position

Customers are largely in agreement – they can see the issues caused by wipes, and that action is needed



## Customers can understand the issues caused by wipes, and some have had first-hand experience

- Some have experience of floods/blockages themselves or in the local area
- TV shows, and graphic reports of fatbergs in the news have highlighted the issues
- Even if not previously aware, there's a sense the stats are quiet shocking, and something that should be addressed

## There's a sense of resignation that costs incurred from the clean up will be passed back to customers in the end

- For this reason, customers are very supportive of Yorkshire Water taking a stand, and presenting a clear argument to help reduce the problems caused by wipes.
- There's a sense that it's for the greater good – both to benefit the environment, but also individuals in the long-run.

*"Being a new home owner in Yorkshire I can see the effect of flushing wipes down the toilet as done by previous owners!"*

*"I expect that eventually the costs will be passed to the customer in higher water bills, and home insurance premiums"*

# There's strong support for a ban on single use wipes containing plastic

**100%** agree

**Making wipes themselves more environmentally friendly is seen as a great step in the right direction...**

- Better for the environment
- Cost benefits – costs saved by reducing blockages could be passed back to customers/used to benefit the environment

**Many feel wipes are purely a convenience luxury, that has grown in use over time**

- Older customers recall how these have become a modern luxury, but that people 'coped' without them before so could adapt again
- There's acceptance that widespread availability drives demand – having them available in so many categories in the supermarket makes it hard to avoid them

**Some call for Yorkshire Water to go a step further and support an outright ban on wipes; but it's acknowledged that for others they're more essential, so a complete ban could be detrimental**

- Whilst there are alternatives for some, not all types can be easily replaced, e.g. medical wipes, and these products are more likely to have better disposal methods in place
- Use in home is thought less essential, whereas out of home may be harder to adjust without wipes – but obviously this isn't practical to police

*"I agree completely with all of it and this is a very clear and easy to understand document. I am shocked at some of the impact costs and confusion the Fine to Flush is causing and it's the reason it should be discontinued"*

*"There are other products that can be used for babies and also for makeup removal. We have become lazy as the wet wipes are convenient for carrying in a bag. We have managed without them before.( most ladies toilets have bags supplied to dispose of sanitary products}"*

# The call for clearer labelling is supported as a step in the right direction

## Customers are in support of greater clarity and consistency in labelling

- It's acknowledged the current terminology in labelling can cause confusion, and it's no wonder wipes aren't always disposed of in the right way
- Once highlighted, 'Fine to Flush' is seen to add to the confusion as it's easy to treat all wipes the same

**Whilst some can see the benefits in discontinuing 'fine to flush', people are realistic that this behaviour may already be habitual so some are unlikely to change without further intervention.**

- As a result, greater efforts should be given to education. Making people aware of the risks and implications to encourage behaviour change
- It's suggested putting a cost on impact to the individual, or fines should blockages occur, may be the one way to 'shock' households into correct disposal

*"I agree with all of it. The argument you have put forward is achievable and easy to understand. The main thing is educating the public as at this moment in time we are all confused over what some of the wording on products mean, especially wipes."*

*"Explaining that this labelling can cause both confusion and a laissez faire attitude in customers is so, so valid. YW proposes a far more vigorous approach with a clear message that no wipes are ok to flush."*



Did you check  
if they were  
Fine to Flush?



*"Fine To Flush sends mixed messages, the products aren't flushable in real world usage and it relies on users knowing which type of wipe they have used. Do Not Flush is clear."*



So after all that, you can be sure that if it's got the logo,  
it's definitely Fine to Flush.



Fully flushable certified  
with Fine to Flush



# Customers agree manufacturers should take greater responsibility, but YW still have a role to play

**Many of those reading the draft paper do feel manufacturers should be held more accountable for the problems caused by their products**

- Some suggest a tax or levy on all products sold which could be put towards clean up efforts

**But ultimately, a joined up approach between all responsible parties is thought by many to be the best approach.**

- YW should avoid passing all blame on to others in the paper, as this seems to some an avoidance of taking further action themselves



*"All interested parties should put up a united front with an ongoing national campaign to stop this practice through education and graphic examples of the results"*

*"I'm not sure about passing the buck on clearing the blockages to the people who are creating the problem. Is it really the manufacturers who are to blame? I would have thought it was down to poor consumer behaviour. So maybe introducing a specific pollution tax onto these products would be the way to go"*





*I agree with about 90% of it but I don't think water companies can entirely wash their hands (pun unintentional) of responsibility for educating the public simply by citing the polluter pays principle. If YW got its way it would benefit financially from fewer blockages to sort out. Would those benefits go back to customers, shareholders or what? Rather than have that argument why not accept that YW has a role in public education on these matters?*

*The other issue I have a slight disagreement with is requiring the manufacturing process of wet wipes to change – the eliminate plastic point. This would seem likely to push up production costs and those costs may well be passed on in higher prices. I, for one, could do with a few things not increasing in price right now”*

# A few questions remain for customers, which could be addressed to further strengthen the case

## Some voice concerns over cost implications of the change – something which could be better clarified in the paper

- If savings can be made through reduced cost to water companies in cleaning up the problem, would this be returned to customers?
- Can a cost to the customer when things go wrong be provided, along with tangible examples? (I.e. cost of fixing blocked drains on your own property)
- If manufacturers are required to develop plastic free alternatives, or even just to contribute to the clean up or campaigns, will this push up the price of wipes to the consumer?

## And a few call for clarity over 'single use plastic' and what this covers

- Whilst wipes are the focus, it's not clear if the calls for a ban on plastic in products covers all sanitary products. If so, could this risk pushing up the price in a category vulnerable customers may already struggle to access?

*"An inclusion of how much it will cost Yorkshire Water to clear these blockages and prevent future blockages if these recommendations are not introduced, and how this will impact on people's water bills, compared with the customer impacts of other proposed solutions."*







## About your community

With over 2,000 members, Your Water is an online research resource giving you easy access to consumers.

The community offers a wide range of conventional and innovative research techniques and approaches.

Our aim is to approach every project with fresh thinking and apply methodologies that we truly believe will get you tangible, actionable results.

## Any questions?

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Head of Insight

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# Sample Profile (n=570)

- 270 from Your Water community

- 300 from 3<sup>rd</sup> party panel boost

## GENDER



Male: **40%**



Female: **60%**

## AGE



18-24 years: **6%**



25 - 34 years: **15%**



35 - 44 years: **15%**



45 - 54 years: **19%**



55 - 64 years: **23%**



Over 65: **22%**

## HOUSEHOLD SIZE



1 person household: **22%**



2 person household: **40%**



3 person household: **18%**



4 person household: **14%**



5 or more person household: **6%**

## SEG



ABC1: **60%**



C2DE: **40%**

## AREA OF YORKSHIRE



South Yorkshire: **26%**



West Yorkshire: **50%**



East Riding of Yorkshire: **13%**



North Yorkshire: **12%**

## WATER METER



Have water meter: **62%**



Don't have a water meter: **36%**

## VULNERABILITY



Vulnerable customer: **40%**

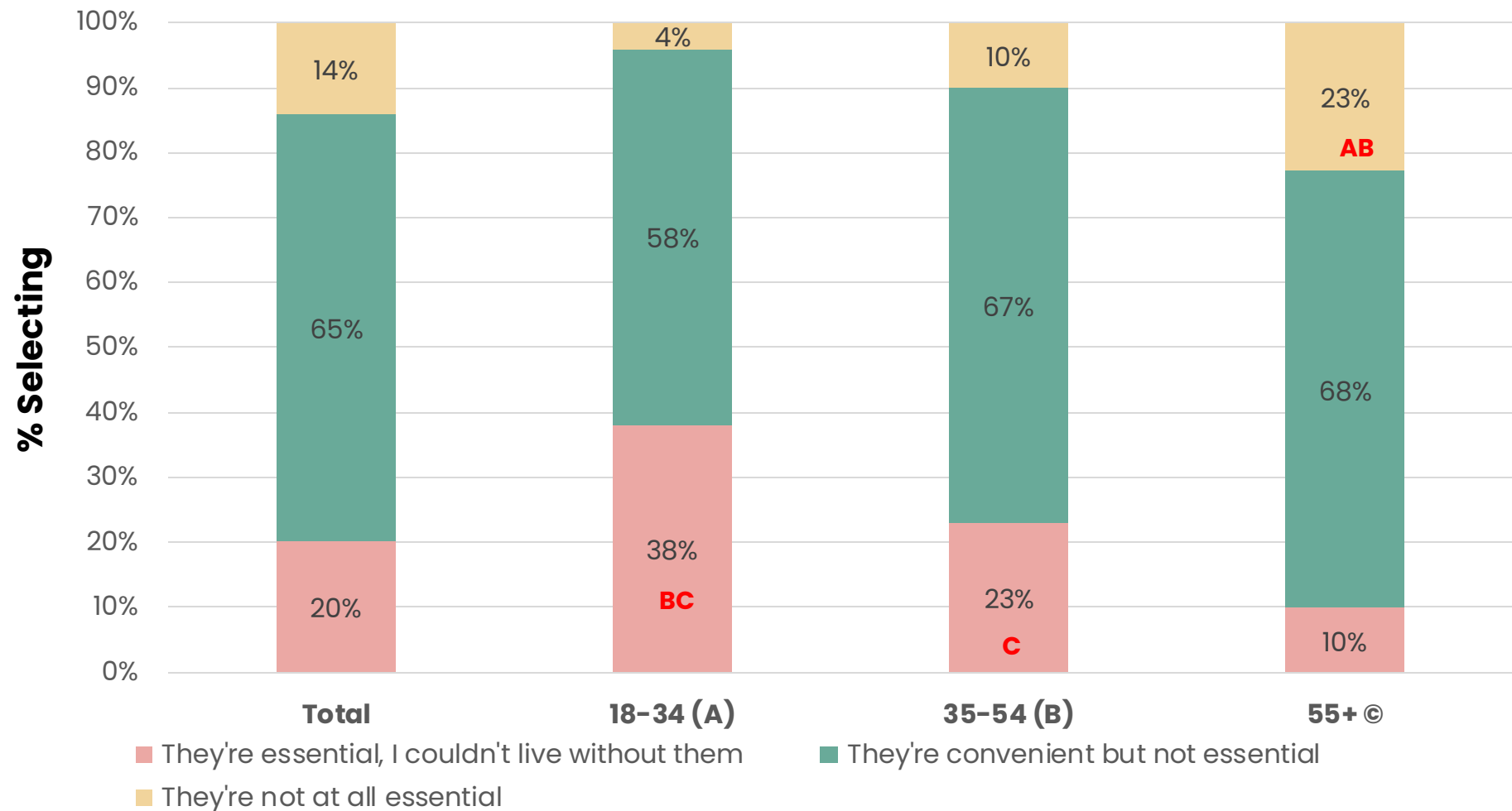


Non-vulnerable customer: **60%**

# Attitude towards wipes – by age



What are your general attitudes towards wipes? (Base: All respondents, 570)



**X = significantly higher than denoted category**  
e.g. 38% of 18-34 year olds (A) view wipes as essential, which is significantly higher than 35-54 year olds (B) and over 55's (C).

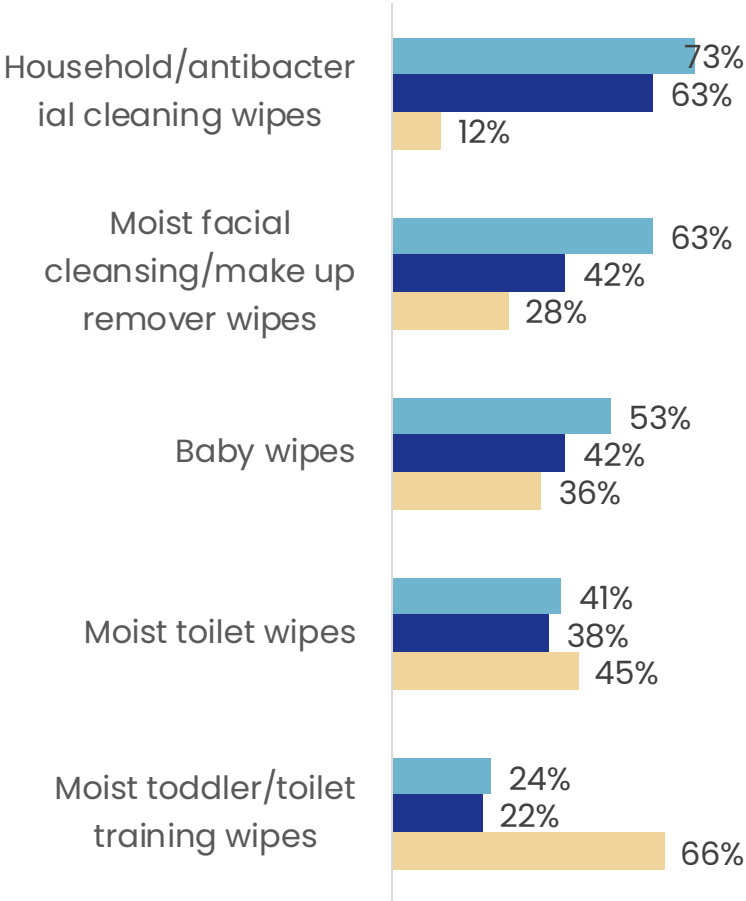




# Purchase/use breakdown - by age

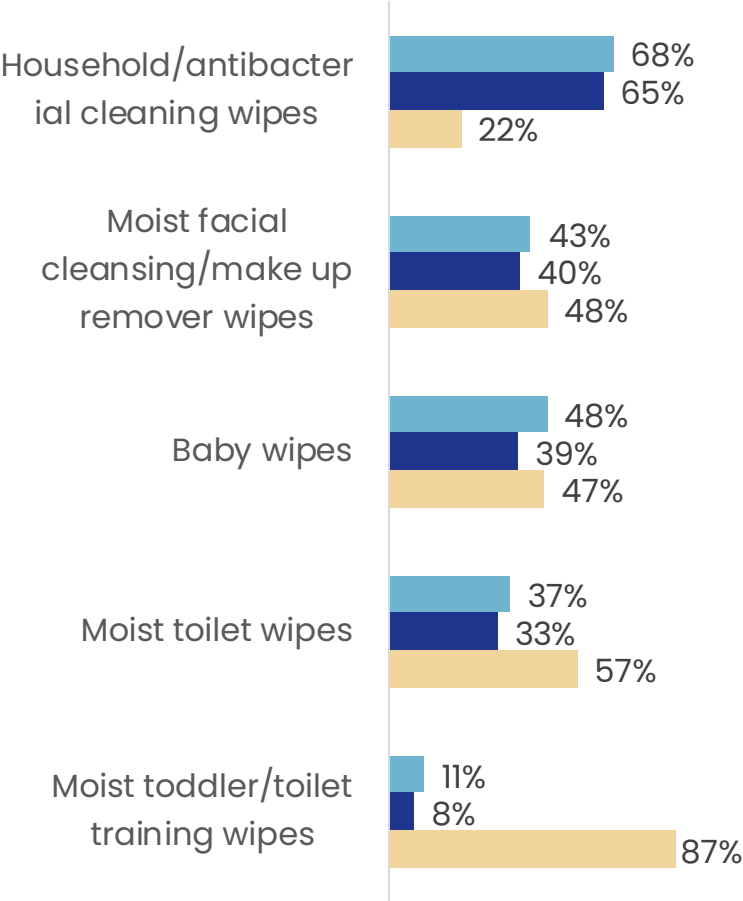


18-34



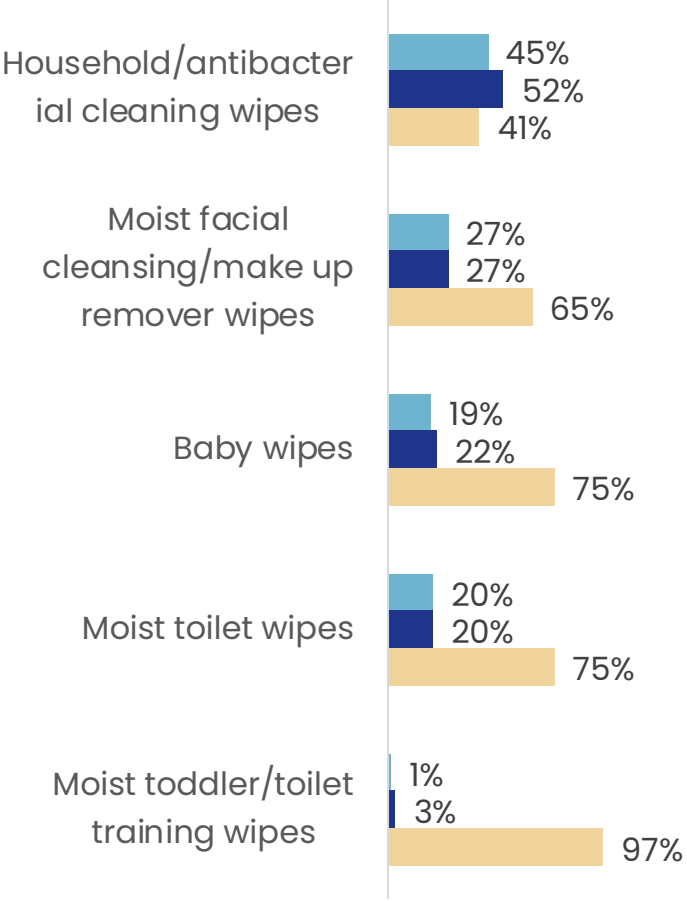
Purchase Use Don't purchase or use

35-54



Purchase Use Don't purchase or use

55+



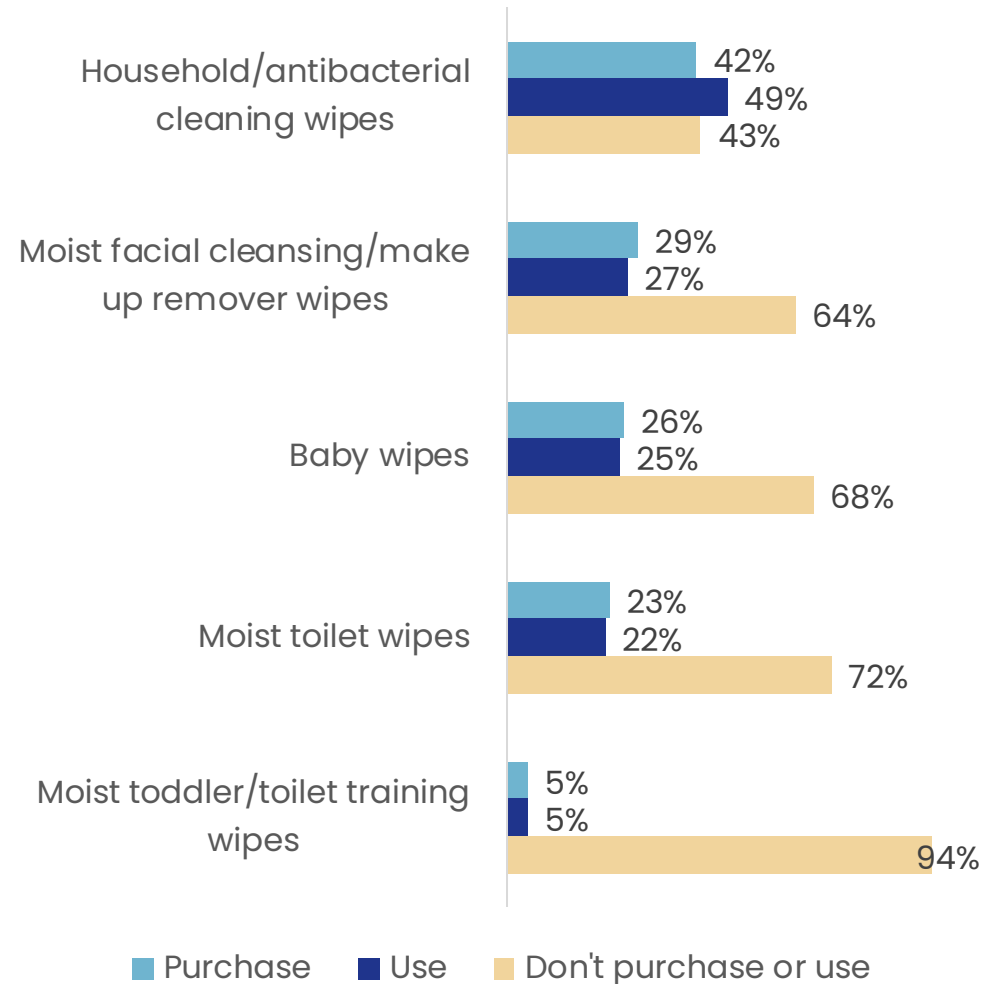
Purchase Use Don't purchase or use



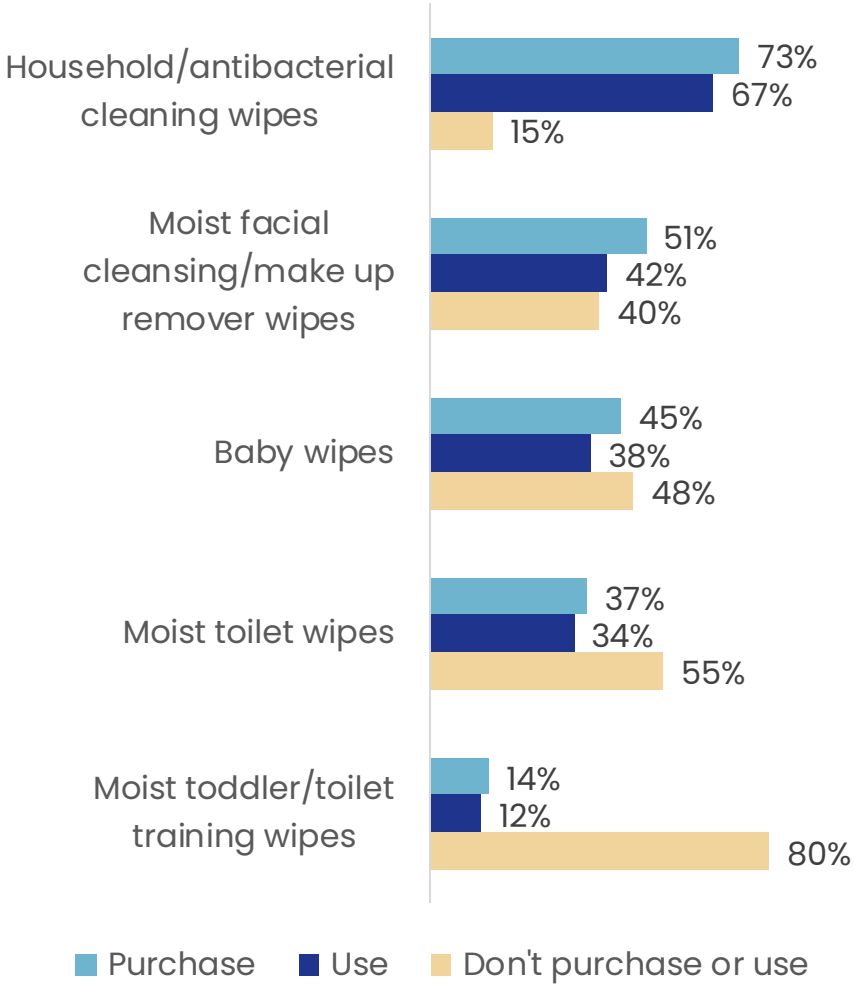
# Purchase/use breakdown - by participant source



Community



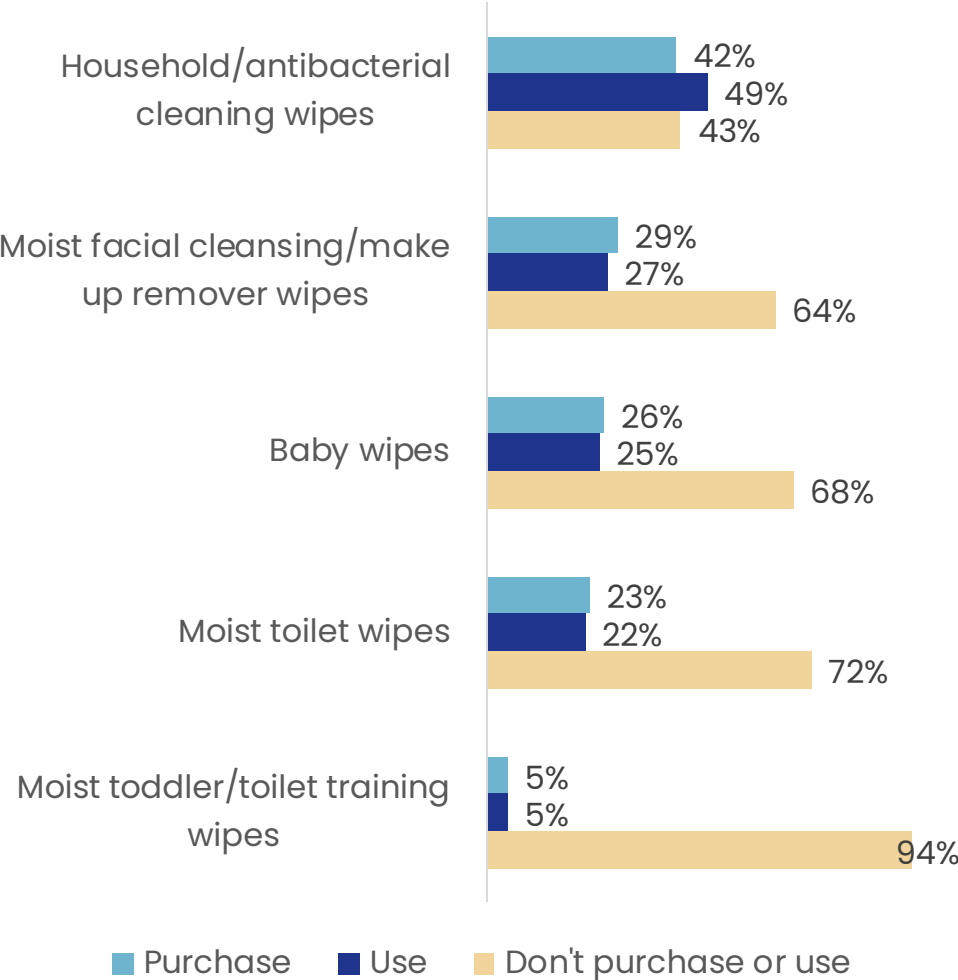
Panel



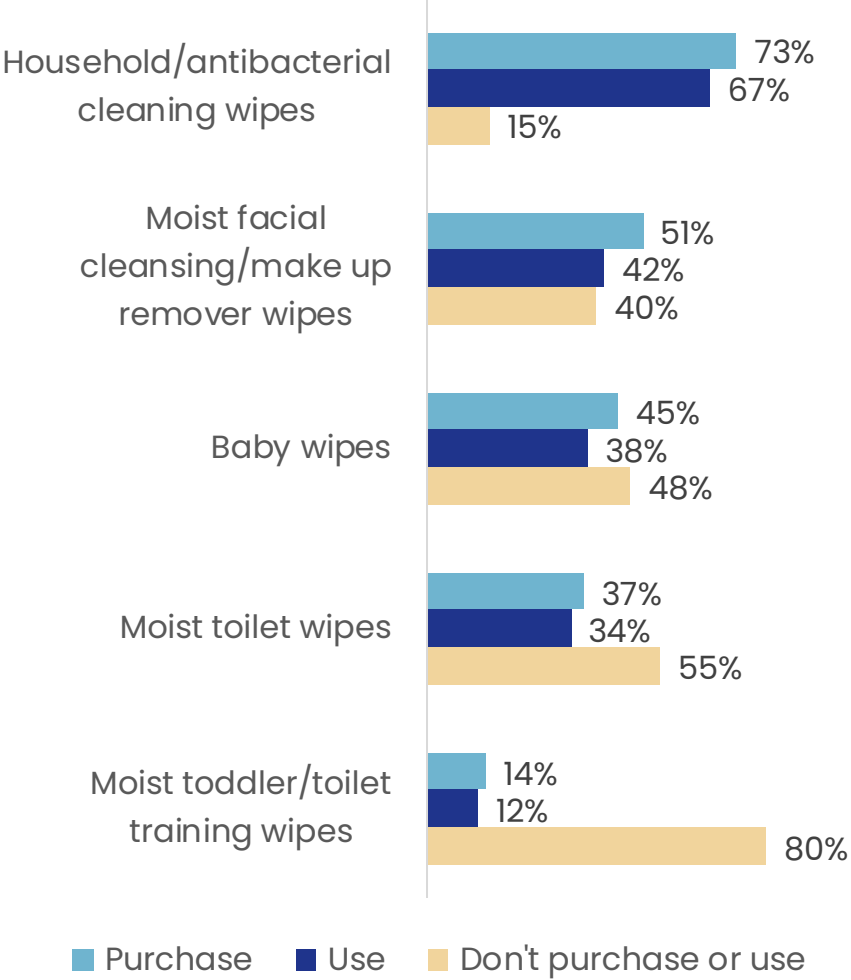
# Purchase/use breakdown - by participant source



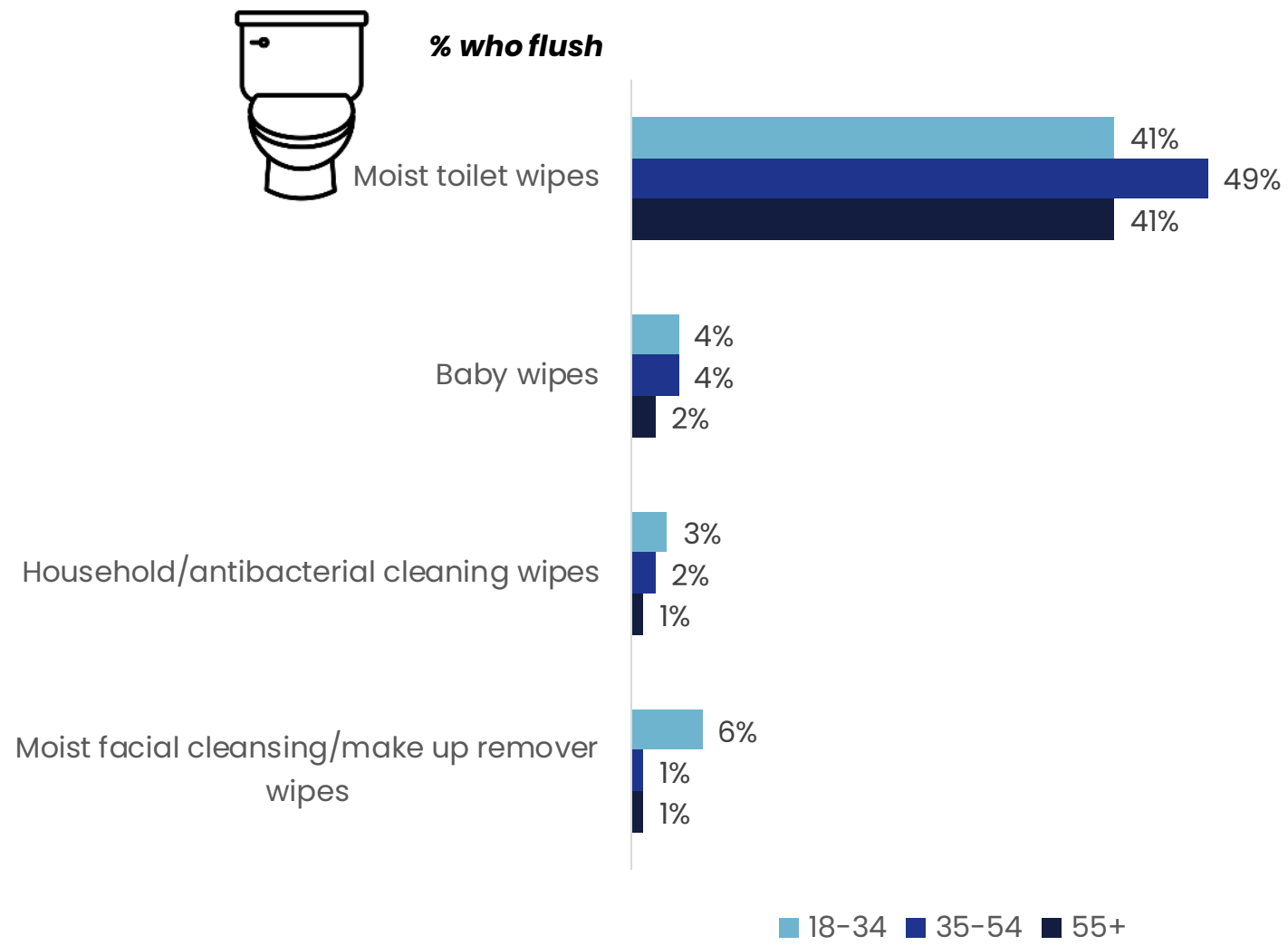
Community



Panel



# Flushing behaviour – by age

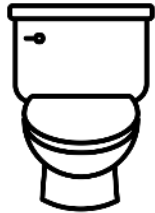


No significant differences





# Which wipes can be flushed? – by age



% think can be flushed

	Total	18-34 (A)	35-54 (B)	55+ (C)
Moist toilet/toddler training wipes <b>with</b> the 'Fine to flush' logo	47%	66% <b>BC</b>	51% <b>C</b>	36%
Biodegradable wipes	38%	50% <b>BC</b>	37%	32%
Moist toilet/toddler training wipes <b>without</b> the 'Fine to flush' logo	19%	28% <b>C</b>	23% <b>C</b>	13%
Baby wipes	6%	15% <b>BC</b>	4%	2%
Moist facial cleansing/make up remover wipes	5%	13% <b>BC</b>	4%	4%
Household/antibacterial cleaning wipes	4%	11% <b>BC</b>	3%	1%

**X = significantly higher than denoted category**

e.g. 66% of 18-34 year olds (A) think moist toilet wipes with the 'Fine to flush' logo can be flushed, which is significantly higher than 35-54 year olds (B) and over 55's (C).