



# Wype Product Trial

Final Summary Report

# Research background

With the rise in wet wipe products on the market and the significant number of blockages caused by these products, The Water Research Centre and Water UK collaborated with Water Companies to develop the Fine To flush certification (Water Industry Specification (WIS) 4-02-06' ). These products must be proven to be plastic free and fully break down, in order to minimise environmental damage from sewage pollution caused by a blockage or pump failure linked to their use.

There are around 100 products on the market which have been tested and labelled as Fine to Flush. But while these products become established, research shows that consumers are confused by packaging labelling, such as biodegradable/plastic free/plant-based, which can lead to wipes which have not passed the testing process being flushed.

Whilst Fine to Flush toilet tissue is better than wet wipes that are not certified, even moist toilet tissue that has passed the Fine to Flush certification requirements may still cause problems when multiple tissues are flushed at once as this can impede disintegration.

As part of its efforts to educate customers and prevent sewer blockages due to 'unflushables', United Utilities is considering a partnership with Wype. Wype is an innovative new gel-based product which, when applied onto toilet paper, is designed to work as a sustainable alternative to moist toilet tissue and wet wipes.



# Definitions: for context



## Fine to Flush

Water Industry Specification (WIS) 4-02-06, a certification developed by Water UK in partnership with water companies. Wet wipes/Moist toilet tissues labelled 'Fine to Flush' are ok to be flushed down the toilet, but only 1-2 at a time.

## 'Flushable' / 'biodegradable' / 'plastic free'

Wipes that have these claims but do not have the Fine to Flush certification are not considered safe to flush, and should be binned instead. However, this can be misleading for many customers

## Moist toilet tissues (MTT)

Products that are specifically designed to provide an extra level of clean and hygiene during trips to the toilet. These may or may not be 'Fine to Flush.' All other forms of wipes will be referred to under the umbrella term '**wet wipes**'

# Research objectives

Ultimately, establish whether a partnership with Wype might reduce the number of wipes / MTT put down the toilet:

# 1

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## Understand current wet wipe usage and evaluation of the Wype product over time

- Inc. use cases and channel/purchase habits
  - Current methods of disposal & awareness of issues around disposal
  - Attitudes towards minimising the harm from flushing wet wipes
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# 2

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## Evaluate Wype usage & behaviour change over time

- Experience of their journey with Wype & how it performs as a replacement for MTT
  - Do usage, disposal and purchase habits change over time?
  - Do attitudes towards flushing change over time?
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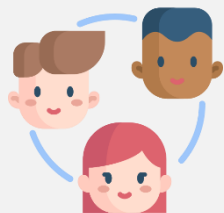
# 3

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## Understand barriers and enablers to use

- To Wype as a product: does it deliver a satisfactory alternative to current use of wipes / MTT?
  - To Wype as a purchase: (i.e. do current shopping habits get in the way?)
  - In terms of price
  - As a way of reducing impact on the environment
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# Methodology & Approach



## Initial Briefing groups

- **4 x 30 minute discussion groups** with a total of **31 participants** were conducted via Zoom, between **20-25<sup>th</sup> June 2022**
- Briefing groups delved into participant's wet wipe usage and habits, explaining current issues United Utilities are facing with flushed wet wipes
- As part of the discussion group, we also talked through expectations for the trial & walked participants through how to order their free Wype products (1x Starter Kit + 1x Wype Mini), from the Wype website
- All recruited from the WaterTalk panel: Mix of genders, ages, locations were selected but all participants reported flushing and using some form of wet wipe (mostly MTT)



## 3-month product trial community

- After the briefing groups, all participants ordered their products & proceeded to complete the product trial
- **3-month product trial community** between **27 June-23 September 2022**, to measure behaviour change surrounding Wype & wet wipe / MTT habits
- The community involved weekly and bi-weekly tasks, alongside a diary where they could report interesting occurrences



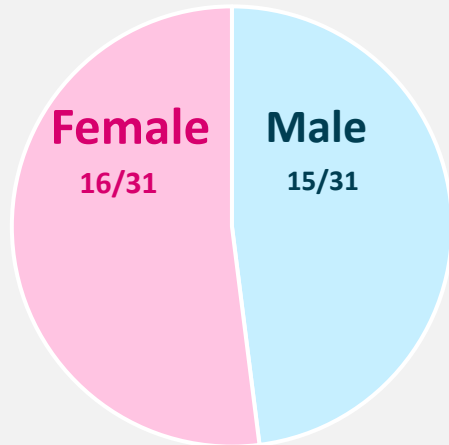
## 2x wrap up groups

- **2 x 1 hour discussion groups** were conducted via Zoom, between **27-28<sup>th</sup> September 2022**
- An opportunity to reflect on the Wype experience, and give participants a chance to discuss the idea of a United Utilities partnership with Wype in more detail
- **6 participants per group (12 participants total)**, selected from the community pool. Per group:
  - 50/50 M/F
  - 2x Wype converters, 2x Mixed, 2x Wype Rejectors
- United Utilities representative was on hand to discuss current certification standards & answer participant questions

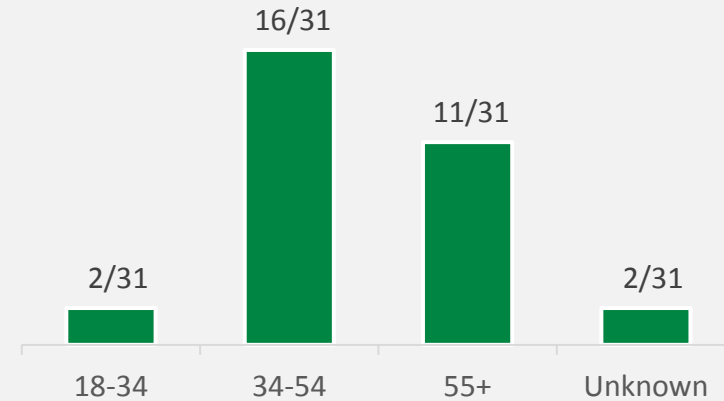
# Who we spoke to:

We spoke to 31 United Utilities customers from the WaterTalk panel who reported that they flush some form of wet wipe (predominantly MTT) down the toilet. A mix of demographics was achieved:

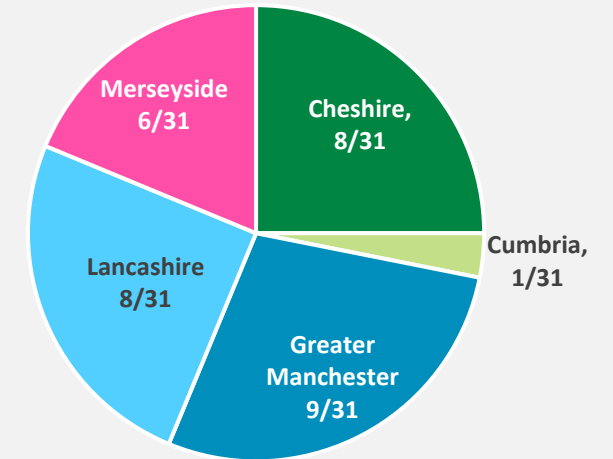
## Gender



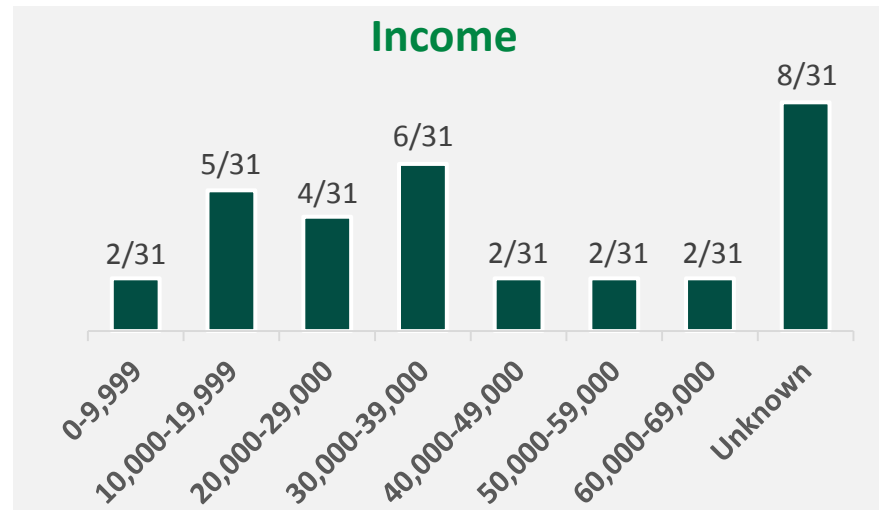
## Age



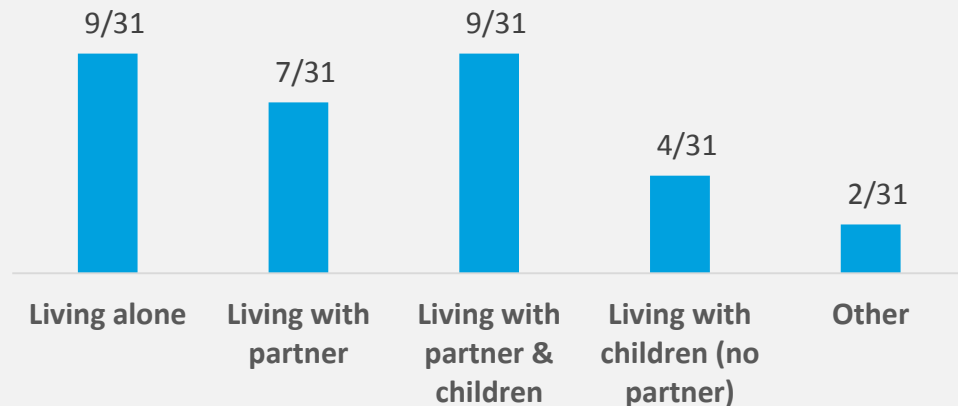
## Location



## Income



## Household



# The relationship with Wype

Throughout this three-month product trial, we worked closely with Wype and United Utilities, to provide:

- **Free samples:** triallists given a **discount code**, so they could order their product for free from the Wype website – also allowing us to track who bought more
- **Consistent updates:** weekly, followed by fortnightly **check-ins with Wype & United Utilities to discuss the recent insights from the community**
- **Iterative research design:** **Discussion guides for each month of the community** were designed based upon previous insights from the community, as they arose.
- **Customer support:** participant issues with the product were **reported in real time & often swiftly resolved** e.g. replacing broken bottles: the ordering of the product, marketing & customer care they received were controlled, so triallists had the best possible experience of the brand.



# Ofwat standards for high-quality research

Ofwat have set out requirements for High Quality Research in their [Customer Engagement Policy](#). All water company research and engagement should follow best practice and lead to a meaningful understanding of what is important to customers and wider stakeholders.

## Useful and contextualised

The insight used from this research was used to build evidence of customer flushing habits, evaluate the Wype product and assess whether a partnership with United Utilities would be viable and effective.

## Fit for purpose

This research was designed to ensure robust insight was gained. A sequence of research activities were undertaken to gain accurate and honest views of the product. The sample was carefully considered to ensure sub group analysis and understand differences of these groups and recruit a mix of engagement levels with water and the environment.

## Ethical

This research was conducted by Verve, which is a member of the Market Research Society. Participants were informed that they could be open and honest in their views due to anonymity and Verve and United Utilities were subject to strict data protection protocols.

## Continual

The outputs of this research were contextualised using a wide evidence base including research that followed on flushing habits, Stop the Block campaigns and sewer flooding.

## Neutrally designed

Every effort has been made to ensure that the research is neutral and free from bias. Where there is the potential for bias, this has been acknowledged in the report. Participants were encouraged to give their open and honest views and reassurances were given throughout the research that United Utilities were open to hearing their honest opinions and experiences.

## Inclusive

Quotas were set to ensure as broad as possible a mix of United Utilities customers that reported flushing wet wipes at various frequencies. This included those with medical conditions necessitating the use of wet wipes/moist toilet tissues.

## Shared in full with others

The research is published and shared on our website and through our industry customer insight newsletter, The Source.

## Independently assured

All research was conducted by Verve, an independent market research agency. United Utilities collaborated with Your Voice, the Independent Challenge Group, who reviewed all research materials and provided a check and challenge approach on the method and findings



# Executive summary



# Executive overview: Wype uptake & behaviour change

## 1 Pre-trial, there was a lack of awareness around 'flushable' wipes / MTT

- Before starting the trial, **non-toilet wipes were usually binned**, & most **only flushed moist toilet tissues (MTT)**; this was thought to be the norm
- Customers were **surprised that 'fine to flush' moist toilet tissues could cause blockages in certain circumstances** – they initially blamed this on manufacturers, and were **not prepared to bin them**
- An alternative to MTT was **an intriguing prospect** and one that was thought to potentially solve the issue of blockages

*"I use whichever wet wipes that seem either a reliable brand or the supermarket's own if they're particularly good value - I've done this for about ten years.  
 ... Didn't realise until relatively recently that they block the sewers! Am horrified"  
 Male, 55+, Greater Manchester, Mixed*

## 2 Wype required significant behaviour change, but 61% (18/31) ultimately converted, & flushing behaviour shifted for most regardless of Wype attitudes

Wype usage	Key Drivers / Barriers	Wipe flushing
<b>Converters 61% (18/31)</b>	A strong environmental mindset, less brand loyal & more open to changing habits. Tend to live in smaller households (alone or with a partner) – easier to convert the entire house.	<b>Flushing all wipes is eliminated, including MTT</b> MTT: not used or flushed at all (change from before) – <b>strong guilt</b> with flushing anything but 3Ps Other wipes: binned
<b>Mixed 16% (6/31)</b>	Wype plays a significant role in the house, but MTT still used, either because they live in larger households where others haven't switched or have specific wipe needs.	<b>MTT flushing significantly reduced; other wipes binned</b> MTT: occasionally flushed (only when needed, other household members use wipes) – <b>some guilt</b> when flushing Other wipes: binned
<b>Rejectors 23% (7/31)</b>	Unable to change habits & do not consider Wype to clean as well as MTT. Tend to be most brand loyal to Andrex, both for wipe quality & buy in to 'fine to flush' claims.	<b>More conscious MTT flushing; other wipes binned</b> Moist toilet tissue: flushed, but for some less frequently, 1-2 max per trip – <b>no guilt but more conscious</b> of which products to flush (due to increased awareness) Other wipes: binned

## 3 Value perceptions increased over 3 months and 5x triallists claim to have re-purchased Wype, but cost & accessibility remain a key barrier to uptake for all

# Executive overview: a Wype partnership

## 4 Regardless of feelings towards Wype, most triallists feel that a partnership between Wype and United Utilities could create positive change

- **Raises awareness of the little-known problem of what can / can't be flushed** (some already use Wype to discuss this issue with others) & shows UU **cares about the environment**
- **Highlights the existence of a MTT alternative** for those who are already conscious of this
- Even some that aren't Wype converts themselves can appreciate that it **could potentially work well for others**

*"I think this would be an amazing partnership with United Utilities. To partner up with someone that will **reduce the amount of non toilet paper items being flushed** would only be a good thing. United Utilities **should send out sample packs to all households, get people aware of Wype**"*  
Female, 18-34, Merseyside, Late Rejector

*"Yes, it makes sense because for toilet use, Wype was great. **Educating people will also make them more aware of the repercussions.** Doing this using social media campaigns, TV ads... because **the effects of flushing wipes isn't really common knowledge.** The marketing should be informative, factual and thought provoking"*  
Female, 18-34, Lancashire, Mixed

## 5 But some watch outs and considerations are raised with this:



Is the sometimes **'risqué' branding a good fit with United Utilities'** more family friendly image? Wype comms can be off-putting for some



Is the **relatively high price of Wype** suitable for all UU customers? Any campaign would need to offer **significant incentives** to encourage buy-in & avoid seeming out of touch



Any campaign would need to be positioned to **avoid appearing to 'finger-point' at customers** (especially given current bad press about blockages & spills)



Any campaign would need to ensure it is **aligned with educational messaging and other regulatory / manufacturing interventions** – Wype is a not a magic bullet in itself



# Pre-trial behaviour

Wet wipe purchase, attitudes, & flushing behaviour

# Pre-trial, customers used a range of wet wipes for effective & convenient cleaning, but moist toilet tissues were most likely to be flushed



## Antibacterial wipes

- A quick and easy way of cleaning spills around the house, car, & cleaning children's messy hands

## Body / face wipes

- For hay-fever relief and body hygiene in hot weather

## Makeup wipes

- To wipe off makeup at the end of the day



## Moist toilet tissues (28/31 participants)

- An **extra layer of hygiene** at the end of a toilet trip: cleaning residue, a bidet-like feeling
- To **soothe sore skin** after wiping with toilet paper
- A **psychological 'safety net' whilst on the go**: light & portable, a certain clean in unpredictable toilet setups
- To **limit the amount of toilet paper used** (assumption that using one MTT was better for the drains than using too much toilet paper)
- **Versatile**: can also be used for young children, face, hands & feminine hygiene



Most household wipes were generally considered easy to dispose of in the bin, but the majority of triallists were reluctant to do the same for human waste, as this was considered very unhygienic, meaning moist toilet tissues were most likely to go down the toilet

# Moist toilet tissues were seen as a cost effective solution, and tended to be bulk bought on offer

We saw 2 core types of MTT shopper:

Moist toilet tissues are **often found on multipack promotion**, meaning most triallists stocked up in bulk pre-trial. **2-6 packs** tended to be bought at a time, **lasting around 1-3 months** & averaging around **£1 per pack** or less.

Most bought wipes / moist toilet tissues as part of a wider supermarket shop (in person or online) for convenience, but some made the most of bigger bulk buys (12 packs) & subscriptions from Amazon for further savings.



## Quality Seekers

Sought sturdy MTT with good moisture and soothing properties, as well as certified environmental benefits. The most **brand loyal**: particularly towards Andrex



- ✓ **Appreciated:** structural integrity, soothing, sensitive, 'fine to flush'
- ✗ **Didn't like:** open pack dries quickly



## Value Seekers

Sought the cheapest MTT. **Mix of brand loyalties:** some swayed by offers, others stuck to supermarket / discount store brands as typically the cheapest available



- ✓ **Appreciated:** soft & moist, value for money
- ✗ **Didn't like:** easily rip, multiple come out at once, open pack dries quickly



Regardless of income or whether triallists were Quality or Value Seekers, all had come to expect cheap prices from the wipe / MTT category, meaning the £10 Wype starter kit price tag was initially considered steep for most, and required significant convincing to overcome. Many also had large stocks of MTT to get through at the start of the trial: an additional barrier to converting to Wype straight away

# Most were already aware they should avoid flushing non-flushable wipes, but there was ambiguity around ‘flushables’

Before the trial, most were aware of the impact of blockages & fatbergs related to **non-flushable wipes** (antibacterial, baby wipes etc.), as this was prevalent in the media, and some had had direct experience of blockages themselves. Therefore, most were already making a **conscious effort to avoid flushing these**.

However, knowledge about wipes (particularly moist toilet tissues) marketed as ‘flushable’ was a lot less clear:



Many looked for ‘fine to flush’ / ‘biodegradable’ / generic ‘flushable claims’ and assumed that these were accurate & interchangeable

- They thought little of flushing these down the toilet, often believing they were doing the more responsible thing & that they were better to flush than too much toilet paper



However, some more engaged customers were already skeptical of ‘flushable’ claims, as they had heard horror stories about blockages

- Some had tried to change their habits e.g. by binning or avoiding moist toilet tissues altogether, but without awareness of alternatives, still flushed them out of convenience



Whilst the message about non-flushable wipes was clear, prior to the trial, most triallists had a blind faith in flushable claims and legitimately thought they were doing the right thing. Greater education specifically around flushable certifications e.g. Fine to Flush is required

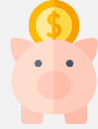
# Many attempted to only flush 1-2 'flushable' moist toilet tissues at a time, but there were times when this rule was not followed:

## Non-flushable wipes flushed



### Unclear packaging:

In some cases, customers inadvertently flushed wipes that they assumed to be flushable (e.g. FemFresh)



### Cost concern:

A small minority regarded 'flushable' wipes as too expensive, and knowingly flushed non-flushable wipes as better value for money

## Too many 'flushable' moist toilet tissues flushed



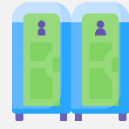
### Smallprint:

Some were unaware of the recommendation to only flush 1-2 MTT at a time, as this is written in very small font and not obvious on pack



### Extra soilage / children:

On particularly messy toilet trips, or when children were left to wipe unsupervised, up to 4-5 MTT could be flushed at once, despite the recommendation



### Public toilets:

On occasions where there was no toilet roll, multiple MTT were used and flushed as there was no alternative.



Whilst for the most part, triallists were mindful of trying to do the right thing, lack of awareness of the potential consequences meant little attention was paid to what happened to wipes once flushed, & there were times when more / wrong wipes & MTT were flushed with minimal guilt



# Customers were surprised that 'fine to flush' MTT may contribute blockages in some circumstances

Triallists were informed that moist toilet tissues marketed as 'fine to flush' may cause blockages if many are flushed and it is done often. This was widely met with negative reactions:



Triallists expressed frustration, confusion and feelings of deception towards manufacturers, prompting some to conduct their own further research

- **Frustration / confusion** about how companies are able to advertise as flushable if they can still cause problems when used incorrectly
- Sense of feeling **deceived & misled** by companies (particularly Andrex as many had high levels of trust in this brand).
- **Disappointment** that UK drain systems / technology are not advanced enough for moist toilet tissues to be flushable, even in larger quantities



Binning moist toilet tissues is not a viable option for users, and without knowledge of a suitable alternative product, many triallists expected manufacturers to sort out the confusion rather than relying on individuals changing their behaviour



But in general, without awareness of an alternative, the convenience benefits of flushing moist toilet tissues were thought to outweigh the risks

- **Reluctance to put soiled MTT in the bin** remained due to hygiene and smell concerns
- Assumption that they would **need to wrap MTT in nappy bags** (or equivalent) considered an unsustainable solution
- Issue of **no alternative binning solution in public toilets**  
Some claimed they had **never faced blockages in the past** so intended to carry on

# But the idea of an alternative product to moist toilet tissues was met with openness and intrigue

Once introduced to Wype as an innovative MTT alternative, most were intrigued and open to trying, to do their bit

- For those who were already concerned about flushing 'flushable' MTT, the availability of an alternative product was a particularly welcome revelation, as they had already been looking for this
- For the rest, motivation to try an alternative came from the surprise of learning about the potential downsides of flushing even 'Fine to Flush' wipes, especially if many are flushed and it is done often.

**Note:** triallists were offered a free product and trial incentive which may have skewed openness to try compared to real life.



However, there were some initial pre-trial reservations:

- **Ingredients:** Is it safe to use? Suitability for all skin types? Will it cause irritation?
- **Effectiveness:** how will this compare to wipes?
- **Convenience:** how will this fit into routines? Will it require significant behaviour change?
- **Toilet paper:** Will it require more / better quality toilet paper? Will toilet paper disintegrate?
- **Cost:** Seems quite expensive for what it is. How long will the product last? How many pumps?



Whilst participants were incentivised with a free product for this trial, there is some sign that promoting a MTT alternative (alongside education about 'flushables') could be particularly appealing for those already looking for this, as well as raising curiosity amongst those who would otherwise be apathetic about changing their behaviour



# Wype reactions

Triggers, barriers, & behaviour change

# On first trial, many were initially confused by the new product, and took some time to establish their own usage routines...

The process of using Wype was felt to be very different to MTT, and many faced several initial physical hurdles to overcome:



Having to **hold both a bottle and toilet roll**, instead of just grabbing a MTT: an adjustment to get used to & concern about dropping one



Working out **how much gel to use & where to place it on the tissue**: initial assumption that 1 pump should be enough but many land on 2-3



Working out **how to apply the gel to the toilet paper** – how to hold the bottle e.g. upright? Upside down? At an angle?



**How much toilet paper / what type of toilet paper to use:** concern about toilet paper getting too wet and falling apart



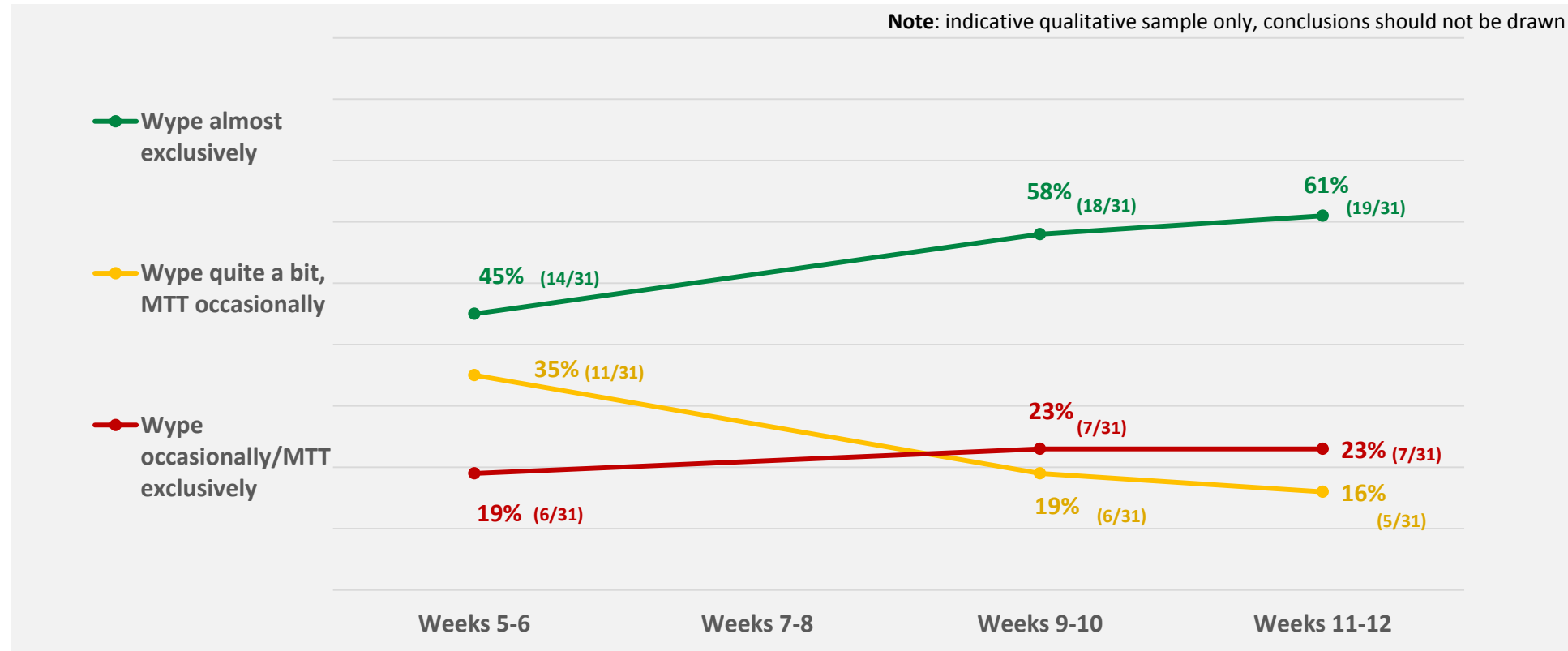
**Through trial and error, many triallists adapted to figure out the way that worked best for them – often a personal preference**

*The drive to do the right thing for the environment was a key motivator to working through initial practical issues*



Many felt there was a lack of clear instruction for initial usage, although some did use the text support which was useful in overcoming initial barriers & reassuring that there is no 'one right way' to use it

# ...But over the course of 3 months, Wype usage increased as participants became more comfortable and satisfied with the product



\* The question wasn't asked this week



3 months was a good amount of time to establish opinions & form habits with the new product: those who were initially undecided (using Wype 'quite a bit') tended to diverge into exclusive Wype / MTT usage by the end of the trial

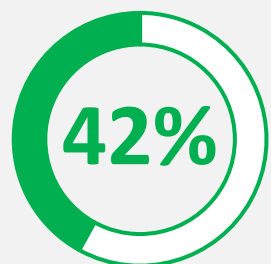
# After 3 months, Wype performed as an acceptable alternative to MTT for most, and even outperformed MTT on some metrics

Attribute (by importance)	Performance vs Moist Toilet Tissues	
Cleaning effectiveness	Mixed	For many, delivers an <b>equivalent level of clean</b> once usage routines have been established. For others, feels <b>too messy, lacks scent</b> , unable to effectively clean large messes
Convenience of use	Mixed	Once initial teething issues are ironed out, <b>typically considered quick and easy to use</b> , although <b>some never get to this point</b> . Mobility issues can also present ongoing pumping challenges
Soothing / avoiding irritation	Equivalent	Many were initially reassured that there was no <b>irritation</b> . <b>Cooling &amp; soothing praised</b> , but cooling can be an acquired taste.
Portability	Better	Wype Mini praised for <b>small size, easier to pack on the go vs. MTT</b> , and <b>saves space in hand luggage</b> when travelling abroad
Longevity	Better	Many pleasantly surprised how much use they got from one bottle, as well as <b>product not ripping / drying out</b>
Discretion	Better	<b>Not immediately obvious what Wype is for</b> : some more inclined to have a bottle on <b>display in the bathroom</b> , esp. men
Use of toilet paper	Worse	Doesn't rip toilet paper as much as expected but <b>requires more toilet paper compared to MTT</b> , which can be perceived to block systems more than using one moist toilet tissue at the end of a toilet trip.
Versatility	Worse	Generally, <b>not felt to perform as well for additional / niche purposes</b> e.g. wiping hands, feminine hygiene, compared to MTT



For **Quality Seekers**, level of clean, soothing & convenience were key as they had high expectations from existing brands; Wype delivered for many, but some were let down. **Value Seekers** were more convinced by Wype's **longevity** compared to cheap brands that rip easily and lead to wastage

# We saw 5 core groups of participants with unique journeys to Wype adoption or rejection:



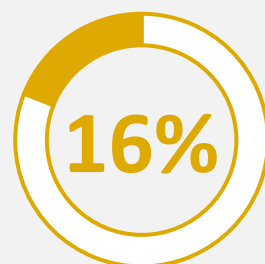
**Immediate Converters**  
13/31

Switched exclusively to Wype within 1-2 weeks of trial starting, driven by environmental mindset. Some had **already been looking for an alternative** to MTT



**Later Converters**  
5/31

Switched exclusively to Wype later in the trial (2-3 months in). Also driven by environmental mindset, but **waited to use up old MTT** before switching exclusively



**Mixed**  
6/31

Continue to alternate between Wype and MTT, or MTT are still flushed by others in the household. Whilst they like the idea of switching to Wype, **various wider constraints get in the way**



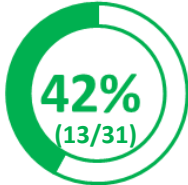
**Later Rejectors**  
3/31

Used Wype occasionally as part of the trial but **have since stopped**, as they run out of Wype and have not re-purchased. **Cost is a key barrier**



**Immediate Rejectors**  
4/31

Gave up Wype early in the trial as unable to overcome initial practical barriers & cleanliness concerns. **Mostly bought into 'fine to flush' claims** & largely happy to keep using MTT



Immediate Converters

# Immediate Converters quickly bought into the environmental benefits of Wype



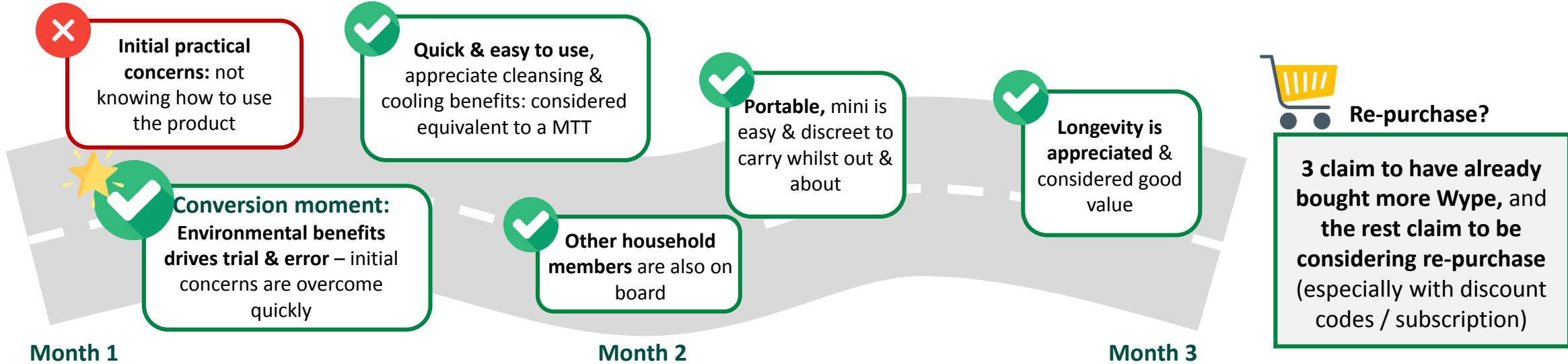
**Chris. 35-54. Merseyside. Father of two.**

*I am no longer using the flushable wipes myself and have changed my family's behaviour!*

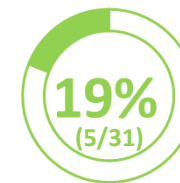
Originally seeking an environmental alternative to MTT as he had seen the fat bergs in the media, quickly switched to Wype and would consider repurchasing in the future

This group converted to exclusive Wype use within the **first 1-2 weeks of the trial**. Despite initial usage concerns as they adapted to the new product, they quickly became confident and satisfied with the cleaning and convenience benefits of Wype, **driven by a desire to stop blockages**. Many had **already been motivated to cut back on flushing MTT before the trial** and were grateful to discover a suitable alternative. A skew towards **older males in smaller households**, making it easier to convert the entire household.

## Wype journey:







Later Converters

# Later Converters switched exclusively to Wype once they had used up their previous supply of MTT

This group converted exclusively to Wype later, around 2-3 months into the trial. Whilst the motivation to do right by the environment & avoid blockages was strong, this group **took longer to overcome initial concerns**, and they tended to **alternate between Wype and MTT to compare performance**. Many in this group were **Value Seekers**, who had previously bulk bought MTT and wanted to use them up to avoid unnecessary waste. However, **once the old MTT were gone** and they were satisfied with Wype, they were happy to switch for good.



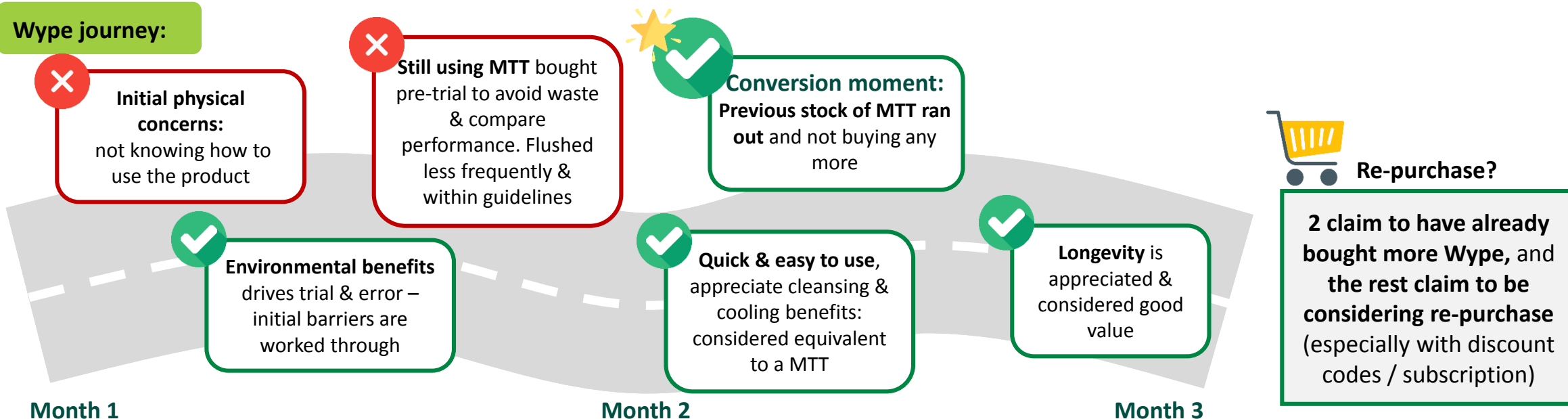
Alan. 55+. Manchester



*I don't use wipes anymore. I prefer to use Wype exclusively. I love the feel of Wype*

Enjoyed using Wype since the beginning however still had some MTT he wanted to use up in the home. He has since stopped using MTT and ordered four replacement tubes of Wype and two Wype starter kits

## Wype journey:





Mixed

# Those with **Mixed** usage liked the idea of switching, but faced several wider constraints to exclusive Wype use

Like the converters, this group shared a similarly **strong drive to do the right thing for the environment** and were able to overcome initial practical concerns. However, they tend to live in **larger households or have specific wipe needs**, presenting wider barriers to exclusive use that they have been unable to overcome. They therefore tend to **use Wype for themselves personally**, but still **buy MTT for others** or **revert to MTT when there is an additional need**. However, they are now determined to find a solution that works for them as well as the planet.

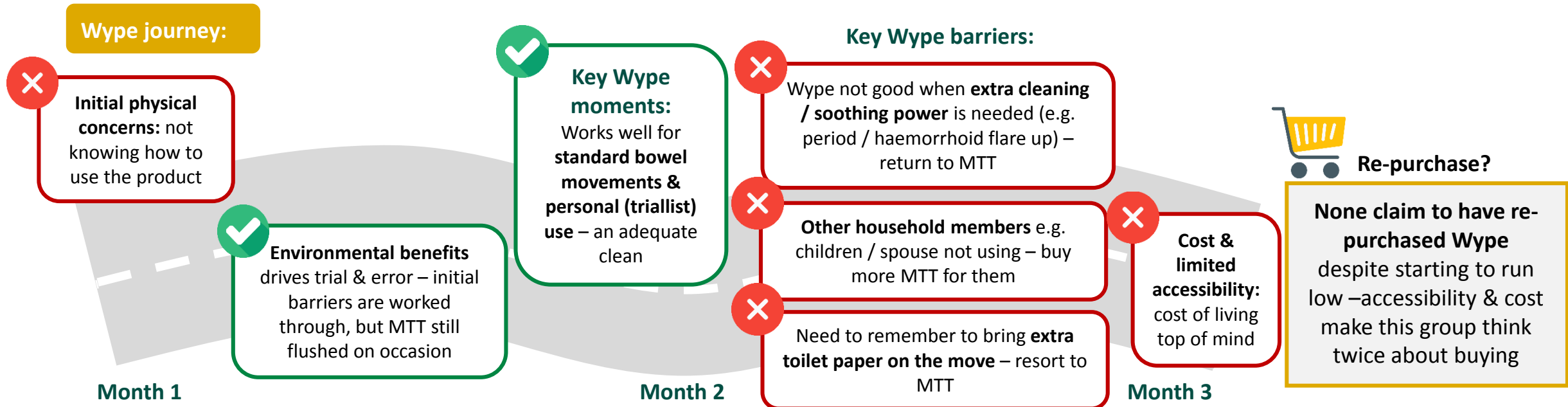


Becca. 35-54. Cheshire



*It does not get me adequately clean during my period and is not an equal replacement for using a wipe.*

Pre-trial, Becca had stopped flushing FemFresh wipes and was keen to find an alternative. Wype worked well with bowel movements, but it didn't leave her feeling clean enough on her period. She still flushes Andrex on her period, but is looking for an MTT alternative that meets her specific needs





Later Rejectors

# Later Rejectors attempted to use Wype but struggled to form new habits & ultimately rejected due to cost

This group struggled to adapt to the new product, finding it difficult to overcome initial confusion. Whilst they found it **more cumbersome and less convenient to use compared to MTT** from the start, they were **keen to see if they could grow into it** and give it a fair assessment. This group **skewed female in larger family homes but** were often the only person in the household using Wype. Ultimately, they **ran out of Wype near the end of the trial but could not justify the additional cost** compared to their regular moist toilet tissues.



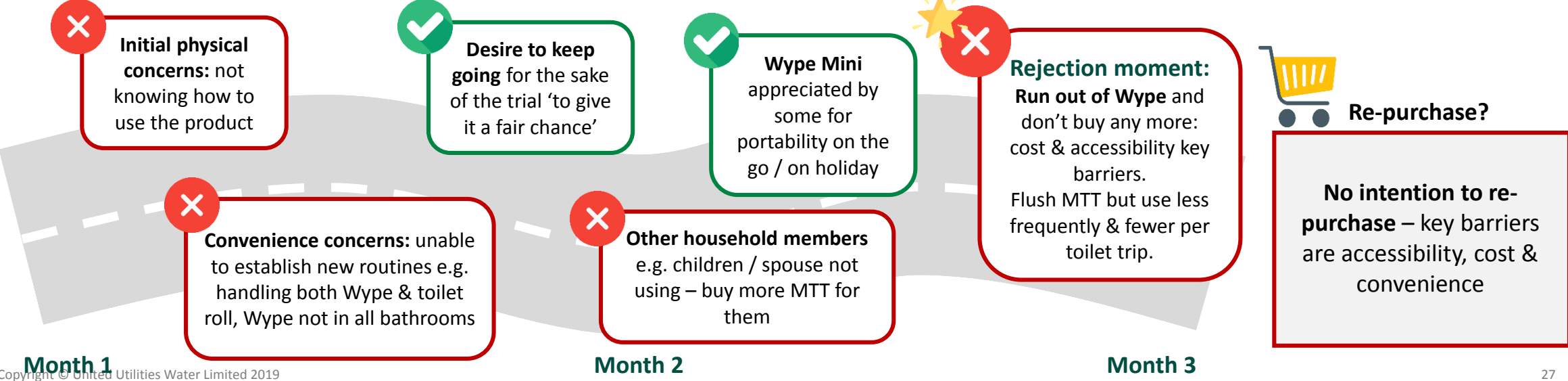
Tracey. 34-54. Cheshire



*I think because I've used wipes for so long it's become a habit that is hard to break*

Tracey didn't like Wype at the start of the trial but continued to use it until she became confident with use. Continued to use but found the habit of using moist toilet tissues difficult to break and the product not financially viable

## Wype journey:





**Immediate  
Rejectors**

# Immediate Rejectors disliked Wype from the beginning of the trial and their opinions did not change



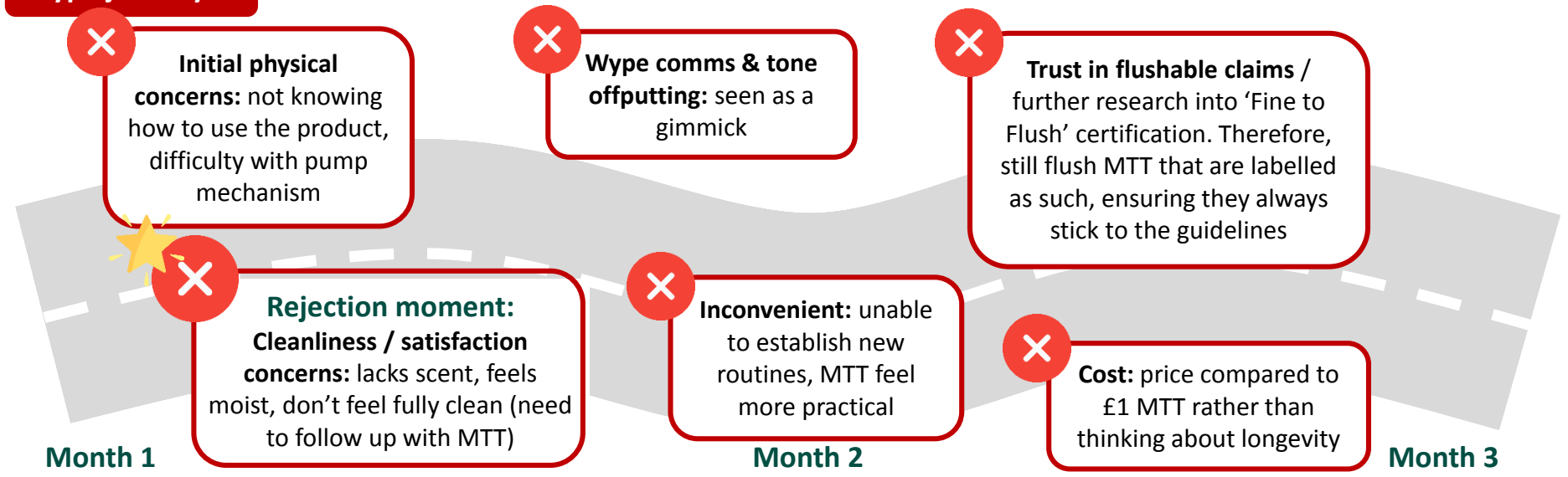
**Eleanor, 35-54, Cheshire**

*I will likely NOT buy any in the future as the product has not lived up to my expectations*

Struggled with practicality of using the canister with long nails at the start of the trial and didn't feel as refreshed as using a MTT. These feelings did not change over the trial and lead to her not wanting to repurchase Wype

This group struggled with Wype from week 1, unable to establish new usage routines and missing the convenience of MTT. They **skewed female and brand loyal Quality Seekers**, and **missed the scent & robust, thorough clean** from their typical Andrex Washlets. Though they expressed concern about blockages from wipes / MTT, this group tended to be **bought into the Andrex brand** and were **most likely to research & trust 'Fine to Flush' claims**. They therefore checked out of using Wype very early on, holding firm in their belief that flushing Andrex is ok.

## Wype journey:



## Re-purchase?

**No intention to re-purchase** – unsatisfying, inconvenient, expensive. 'Fine to Flush' is ok

# Those living in smaller households and with lower levels of MTT brand loyalty were typically more likely to adopt Wype

## Enabling factors:



### Smaller households

Triallists either living alone or with one other person (typically older males in our sample) were generally more likely to become a Wype converter, as it was easier to drive adoption across the entire household



### Less brand loyalty

Comms about fatbergs & calling out how 'flushables' are problematic was key to generating guilt & impetus to change behaviour – most likely to cut through to those who were less brand loyal & open to switching



### Regular MTT use cases

Those using MTT simply for an extra bit of freshness at the end of a bowel movement are most likely to be satisfied with Wype's performance & ability to clean

VS.

## Inhibiting factors:



### Larger households

Families tended to be relatively set in their routines, which were harder to break with the introduction of Wype. Some children enjoyed Wype, but younger children and teens were least likely to use it: a barrier to exclusive household adoption



### (Andrex) brand loyalty

Those who were particularly brand loyal to Andrex were bought into not only the quality, but also their 'flushable' claims. Education about 'flushables' encouraged them research 'Fine to Flush' & hold firm in their belief in Andrex



### Specific MTT use cases

Those using MTT to clean & soothe specific conditions (e.g. haemorrhoids, Crohn's, stomach problems) as well as for feminine hygiene tend to require stronger cleaning power that Wype can't always deliver

VS.



There may be opportunity for Wype to appeal better to younger children and feminine hygiene use cases in the future with the development of new products. However, those who are particularly loyal to Andrex (and bought into their flushable claims) are the least likely to be converted

# Wype value perceptions increased over the 3 months & some claim to have re-purchased, but cost & accessibility remain a key barrier to uptake



At first, many found the £10 starter kit investment to be too high, but value perceptions increased for some as the trial progressed

- Many were surprised at the amount of use they got out of one bottle
- Some enjoyed that the product did not dry up like moist toilet tissues which would lead to wastage
- **5 converters claim to have already bought more, and a further 10 express plans to purchase in the near future**



However, ultimately Wype is seen as a luxury good, and cost of living is weighing heavily on triallists' minds, regardless of income levels

- Cost is a key barrier to uptake across all groups, as well as accessibility (unable to buy in regular supermarkets as part of wider shop)
- Even amongst some converters, re-purchase is considered only on the condition of significant discounts and subscription services



It is important to bear in mind that since moist toilet tissues are so cheap and bought on promotion, this will be expected of Wype moving forwards, and cost and limited accessibility is likely to be the key barrier to uptake, even for those who are bought into the product

# However, regardless of individual attitudes towards Wype, MTT flushing behaviour shifted for most during the trial

## Wype usage

## Wet wipe & MTT usage

## Wet wipe & MTT flushing

## Sentiment

### Converters (immediate & later)

Most **no longer use any form of wet wipes** & have not bought more. However, some still use non-MTT (e.g. baby, makeup, antibacterial) for purposes outside of the toilet.

**Flushing all wipes is eliminated, including MTT**  
**Moist toilet tissue:** not used or flushed at all (change from before)  
**Other wipes:** all binned

**Strong sense of guilt** associated with flushing anything other than 3Ps

### Mixed

Have **wet wipes (including MTT) in the house**, bought before the trial started, to use when needed.  
**No moist toilet tissues bought since the start of the trial**

**MTT flushing significantly reduced; other wipes binned**  
**Moist toilet tissue:** occasionally flushed (only when needed, not every toilet trip, other household members use MTT)  
**Other wipes:** all binned

**Some guilt** when flushing moist toilet tissues: **exploring alternative products** to better suit their needs e.g. FreshX spray, Anusol creams

### Rejectors (immediate & later)

All **still buy wet wipes (including MTT) as they did before the trial** and have largely returned to previous purchase routines: mostly Andrex.

**More conscious MTT flushing; other wipes binned**  
**Moist toilet tissue:** flushed, but for some less frequently, 1-2 max per trip  
**Other wipes:** all binned

**Less guilt** as most bought into flushable claims, although **more conscious** of frequency, amount flushed & checking certifications as a result of increased awareness



Even though not all trialists fully converted to Wype, the process of learning about what can / can't be flushed and trying the product helped make them more mindful of their flushing habits. Frequency and number of MTT flushed at once have reduced for the majority, and all now check that any MTT they do flush are certified 'Fine to Flush'

# And for some, Wype has even been used as a means of spreading the word about what can't be flushed to friends & family beyond the trial

Beyond the triallists themselves and their immediate household, there is evidence to suggest that Wype has facilitated and prompted wider conversations around wipes, MTT and what can / can't be flushed, encouraging some further level of behaviour change

## Visitors



The presence of Wype in the bathroom has prompted some **conversations with visitors to the home** (e.g. grown up children / friends). Triallists have used the opportunity to **explain the product**, encouraged others to **try Wype**, and some have **gone on to switch** themselves

*"My daughter (44) sometimes uses it when she visits and is slowly coming round to the idea of replacing wipes"*

**Female, 55+, Merseyside, Late Converter**

## Work / colleagues



Some have **taken Wype into work**, prompting conversations amongst colleagues about the new product. For some, this has extended into **wider initiatives encouraging the banning of all wipes** (even surface cleaning wipes, replacing with sprays) as these are now deemed unnecessary

*"I take my Wype into work and lots of people have asked what it is. They're interested. I've encouraged my team to switch to antibacterial spray and paper towels to clean surfaces instead of wet wipes"*

**Male, 35-54 , Merseyside, Immediate Converter**



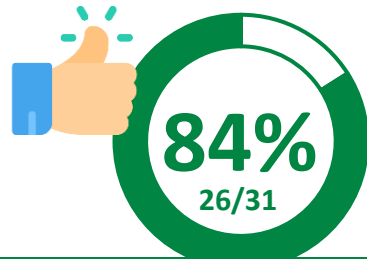
Even amongst those who are not bought into Wype, the physical nature of the product provides opportunity to start conversations about wet wipes, MTT and what can be flushed, that may not ordinarily be had. There may be potential for Wype to generate a more organic spread of awareness beyond targeted UU advertising



# Post Trial reflections

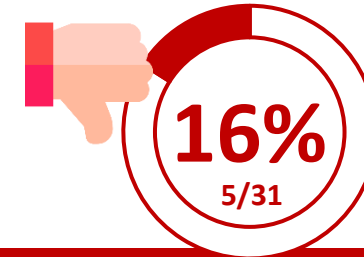
Thoughts about a United Utilities x  
Wype Partnership

# Most triallists would not oppose a partnership between Wype and United Utilities, but there are some concerns



Regardless of their opinions of Wype, most of our triallists accept a partnership between UU & Wype

- **Helps raise awareness** of the potential downsides of flushing MTT in large quantities (which many had not previously been aware of), as well as the presence of an alternative to MTT
- **Promotes a general sense that UU cares for the environment**, are socially / environmentally responsible & willing to try something new to fix the issue
- **Even some who are opposed to Wype as a product** still recognize that change is needed, & Wype may be a solution that works for others



However, a smaller but vocal minority have concerns about a negative impact for United Utilities

- **Potential personality clash:** Wype's more provocative & cheeky tone can be at odds with UU's family friendly brand image
- **Doubt around scale:** is Wype a big enough brand to affect the required scale of change
- **Risk of negative halo effect (horn effect):** in case of bad press for Wype in future – suggestion of a more subtle 'recommendation' instead
- **Out of touch?:** for some the price point feels inaccessible for regular families

# If proceeding with a partnership, active education as well as clear incentives will be key to success beyond the trial environment



## Ensure a clear link to 'stop the block' advertising & education to build context and avoid skepticism

- Promote in tandem with wider **'stop the block' advertising, stats about fatbergs & blockages** – to drive environmental shock factor
- **Comms on billboards & buses** as well as social media to drive awareness
- **Educating consumers on 'fine to flush' labelling** and the difference from biodegradable, plastic free or vegan

## Ensure there is a clear incentive, to encourage risk free behaviour change through trial and error

- Many expect **promotions / discounts (e.g. free samples / 10-15% discount / cheaper subscription service)** offered to get people started with the product
- **Potential to link to long term savings** (e.g. UU doesn't have to pay to fix blockages, which means lower bills for customers)



Key to the success of the product trial was clear education around the environmental potential consequences of flushing wipes / MTT, as well as an enticing incentive with a captive audience. Replicating this as much as possible will maximise success, although there are likely to be many more challenges & uncontrollable variables at play in the real world

# But whilst essential for the success of a potential partnership, raising awareness of the issue of flushing wipes may come with some risk

Once customers are aware that Fine to Flush is a standard that has been created in part by the water industry, and wipes with these standards *may* still cause blockages if the correct guidance is not followed, **some customers shift the blame back to regulators, water companies & manufacturers** as the ones who created the confusion in the first place.



There is a risk that by only promoting Wype as a possible solution, **UU could come across as putting responsibility solely on customers to change their behaviour**, rather than also taking action to address the confusion themselves.

Some trialists therefore propose that UU should also be seen to:



## Work with regulators to tighten certification standards:

So that even Fine to Flush wipes do not pose any risk (e.g. if more than 1-2 flushed) – ensuring it's a black & white choice, no grey area



## Work with manufacturers / brands to make packaging clearer:

Larger font explaining the certifications, what they mean & ensuring text about amount to flush is obvious



As well as promoting Wype as a possible alternative to MTT, UU should also be seen to play its part in addressing regulatory & packaging confusion to avoid the risk of being seen as finger pointing

# A Wype partnership should therefore be a single component within wider initiatives around flushing wipes / moist toilet tissues

# 1



## Educate around flushables

**Shock factor & context building is key** – greater awareness is needed particularly around the role of MTT:

- **Educate on Fine to Flush** certification: the difference between this and ‘biodegradable’ / ‘flushable’ etc.
- **Highlight statistics on blockages / fatbergs** caused by wipes
- **Reinforce UU’s 3Ps stance** as a result of widespread confusion
- **Start young** – enter schools & educate early to change habits

# 2



## Work with manufacturers & regulators

For some, brand trust is strong, and they will **not change their behaviour until regulatory standards & manufacturer messaging changes**:

- **Work with regulators** to tighten certification & packaging standards where possible
- **Work with manufacturers** to ensure packaging is clear & unambiguous
- **Show that UU is taking the issue seriously** & taking some responsibility

# 3



## Consider promoting Wype as a possible MTT alternative

Once awareness has been built & UU has demonstrated their role, people are more open to new products like Wype & playing their part:

- Frame Wype as an **alternative to moist toilet tissues** to avoid blockages
- **Incentivise** with money off / subscriptions / promise of lower bills
- **Suggest FreshX** as a possible more affordable spray product for those who prefer scent – even if not partnering\*

# We also asked triallists what else United Utilities could provide to help new home-owners be more environmentally friendly



## ✓ Many believe *fat traps* are the most useful

Some are already conscious of collecting fat before draining down the sink but use makeshift items such as yoghurt pots.

Would appreciate fat traps provided as a simple item to promote behaviour change

*I think the fat trap idea is great as it's something that can be easily done once people get into the habit*  
**Female, 55+, Merseyside, Immediate converter**



## ? *Toilet paper* is well received but deemed somewhat unnecessary

For many, providing toilet paper isn't a practical way of spreading the 3 P's message (not long lasting enough).

Most will already have this as an essential household item, and can be considered a waste of UU money to provide

*I think the toilet roll is unnecessary as most people will have toilet paper as a basic good.*  
**Male, 35-54, Merseyside, Immediate Converter**



## ✗ *Reusable cloths* are largely rejected

Most consider the idea of toilet wiping and then wiping other things extremely unhygienic, even if they have deep cleaned the cloth between uses.

Some do, however, use reusable cleaning cloths as opposed to antibacterial wet wipes and find these useful

*Reusable cloths for the body that can be kept wet for 3 days. Yuck! The bacteria on them would be acne inducing & totally disgusting*  
**Female, 35-54, Cheshire, Mixed**



Many believe that the 'welcome baskets' should be given to all customers, not just new home-owners in order to be the most beneficial.

# Moving Forwards...



# Next Steps: replicating trial success in the real world

Ultimately, the Wype trial was a success, in large part due to the research environment allowing us to have a constant and direct dialogue with the consumers.  
But we can learn from this:

## 1

### In the trial:

Context & awareness building around wipes & 'fine to flush' certification over 3 months was key to motivating triallists to persevere with Wype

### In the real world:

Promoting cold may not have the same impact: clear education over time will be key to ensuring the partnership is understood, driving uptake & avoiding skepticism (e.g. assumption that this is a profit-generating scheme)

### Suggested steps:

- Educate on Fine to Flush certification: the difference between this and 'biodegradable' / 'flushable' etc
- Highlight blockages can be caused by non-flushable wipes and, in some cases, 'fine to flush' wipes
- Reinforce UU's 3Ps stance as a result of widespread confusion
- Educate in schools to get the message through early

## 2

### In the trial:

Adopting Wype required significant behaviour change, and alongside the educational factor, free products and monetary incentive helped our triallists work through initial barriers in a relatively risk-free environment:

### In the real world:

Whilst there will not be a captive audience, incentivisation should be replicated as much as possible

### Suggested steps:

- Offering free samples
- Discounted products
- Subscription offers
- Money off bills
- Recognise that it takes time to adapt – offer money back guarantee in case not satisfied

## 3

### In the trial:

Watch out: Whilst education around flushing wipes / MTT was essential, it raised questions and some customers felt that UU was pointing the finger & not assuming any responsibility

### In the real world:

Ensure a Wype partnership is a single component within wider initiatives & work to combat blockages & reduce confusion around what can / can't be flushed, to appease the doubters – Wype is not a magic bullet in itself

### Suggested steps:

- Work with manufacturers & regulators to improve & clarify certification & packaging standards
- Recommend alternative products (e.g. FreshX spray) for when Wype is not accessible or effective\*

## 4

### In the trial:

Wype was not for everyone: larger family homes, people with specific needs & those who were particularly loyal to Andrex were least likely to adopt Wype, but flushing behaviour changed for most

### In the real world:

Whilst the trial was successful in converting over 50% of triallists to Wype and changing the flushing behaviours of the rest, recognise that this may not necessarily be the case in the real world

### Suggested steps:

- Potential to still promote Wype as a talking point to spread organic awareness of the issue of what can / can't be flushed
- Future Wype developments may appeal more to children / those using for feminine hygiene



# The WaterTalk panel

- Water Talk is an online community designed to reflect the views of those in the North West who have access to the internet (circa 90% of the population)
- Customer panels typically provide a deeper level of engagement with customers than ad-hoc pieces of research
- It provides rapid research access to UU customers
  - This can provide fast and cost effective feedback on a wide range of issues
- Where appropriate, work is supported with other methodologies and samples to represent those not present on WaterTalk
- Nearly 8,000 UU customers are on the panel:
  - 3,600 have taken part in a research activity in the last 6 months

To find out more about using the WaterTalk panel to meet your business needs, please contact **Shy Sharma** or another member of the Insight Team:



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