

# Women's Environmental Network

Real Nappies for London

Produced by GfK NOP Consumer

**Results of:**

- Face-to-face survey of parents & expectant parents
- 1<sup>st</sup> wave (self-completion) and 2<sup>nd</sup> wave (telephone) surveys of scheme participants

# Face-to-face survey of parents & expectant parents

## Awareness & use of real nappies (1)

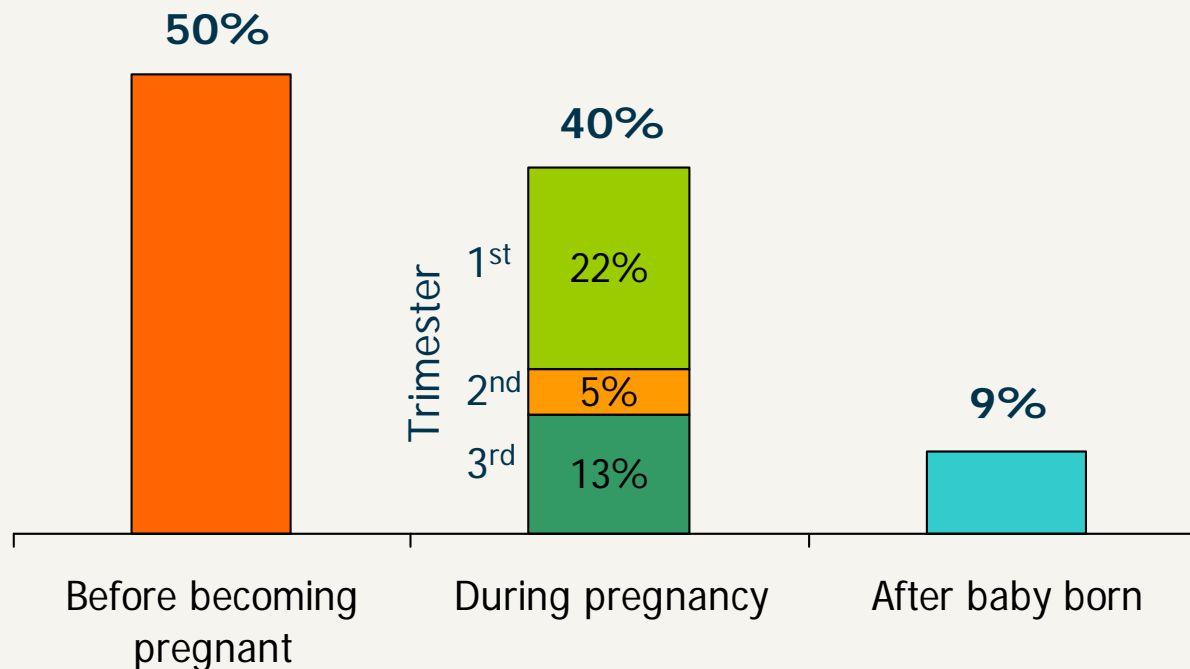
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- 79% of the sample aware of real nappies (*81% baseline survey*)
  - 49% knew about real nappies washing at home  
(17% "quite a lot" and 32% "a bit")
  - 15% knew about real nappies via laundry service  
(4% "quite a lot" and 11% "a bit")
- 31% seen or heard something about real nappies in previous six months
  - 18% - leaflets, 18% - hospital, 15% - TV
- 14% aware of local incentive scheme
- (*8% baseline wave*)
- 5% of parents with children in nappies use real nappies
- (*7% baseline survey*)
  - and only 3/10 use them "all of the time"

## Awareness & use of real nappies (2)

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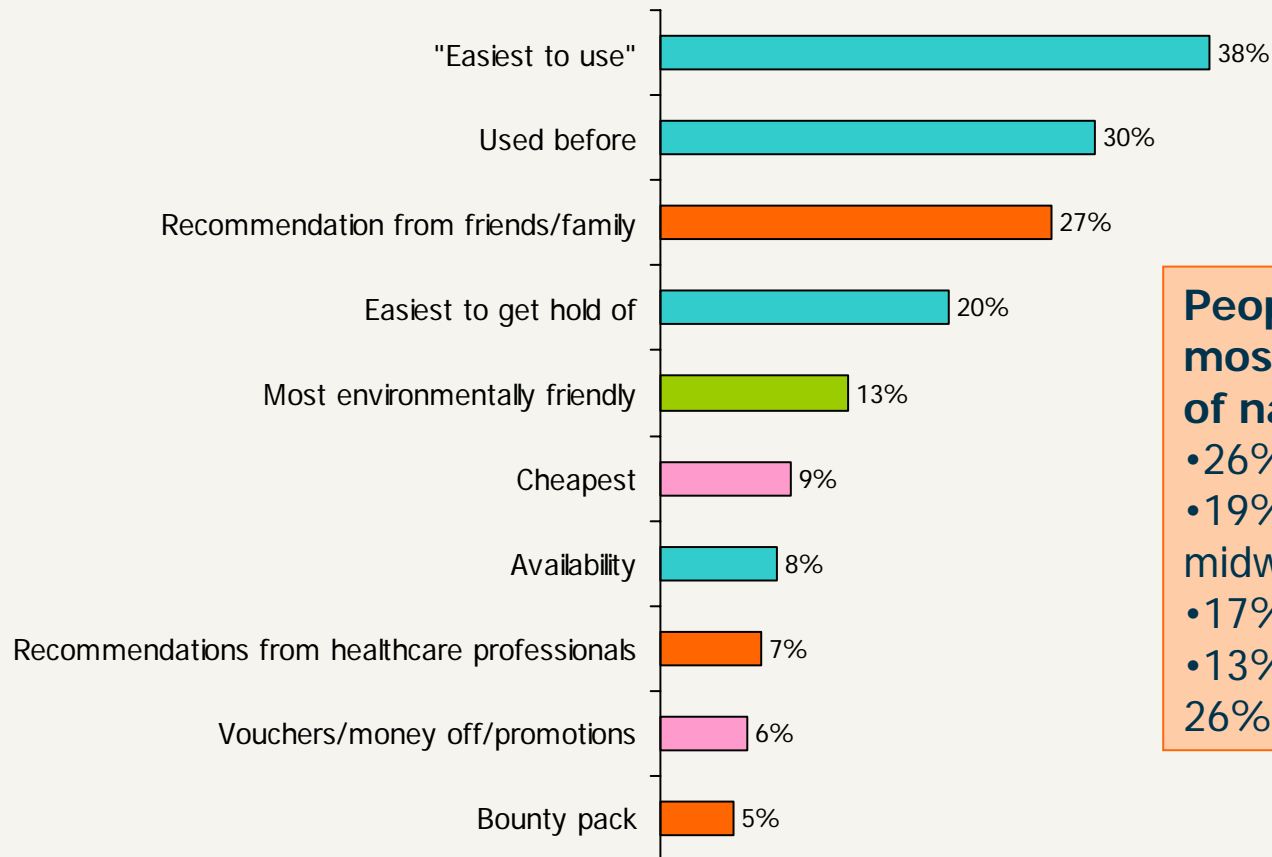
- 15% of mums-to-be say they intend to use real nappies:  
12% home washing/ 2% laundry service/ 2% either (*7% baseline wave*)
- 90% decide which nappies to use before birth (*85% baseline wave*)



# Influencing factors on choice of nappy type

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As with baseline, convenience factors (71%) were most important, then recommendations (35%) and cost (14%)...



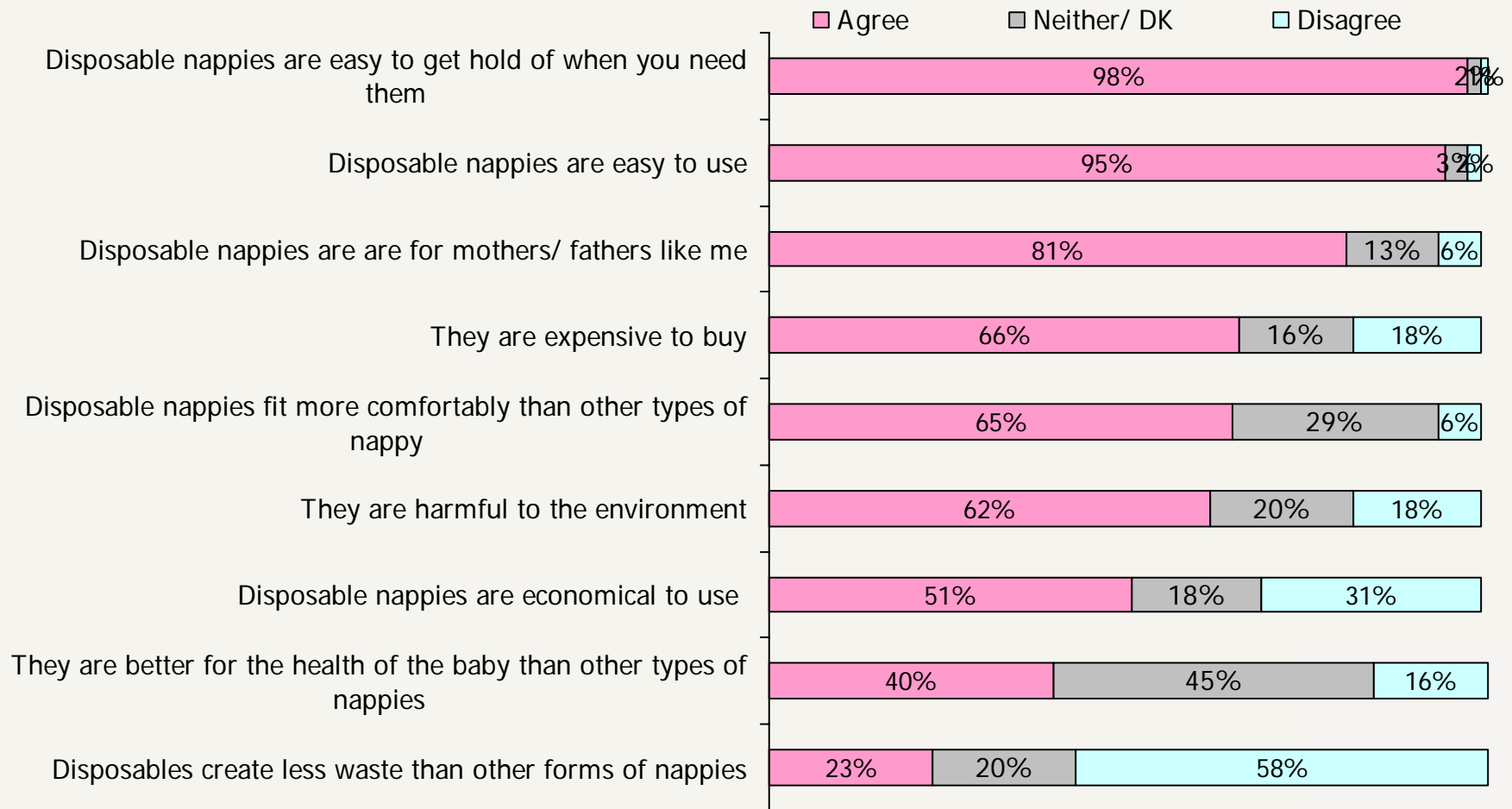
## People/ organisations with most influence over choice of nappies...

- 26% - friends (baseline 32%)
- 19% - health professionals/ midwives (baseline 21%)
- 17% - parents
- 13% - advertising (baseline 26%)

# Attitudes towards disposable nappies

- Easy-to-use, convenient, "for people like me", despite being 'expensive' & 'harmful to the environment'

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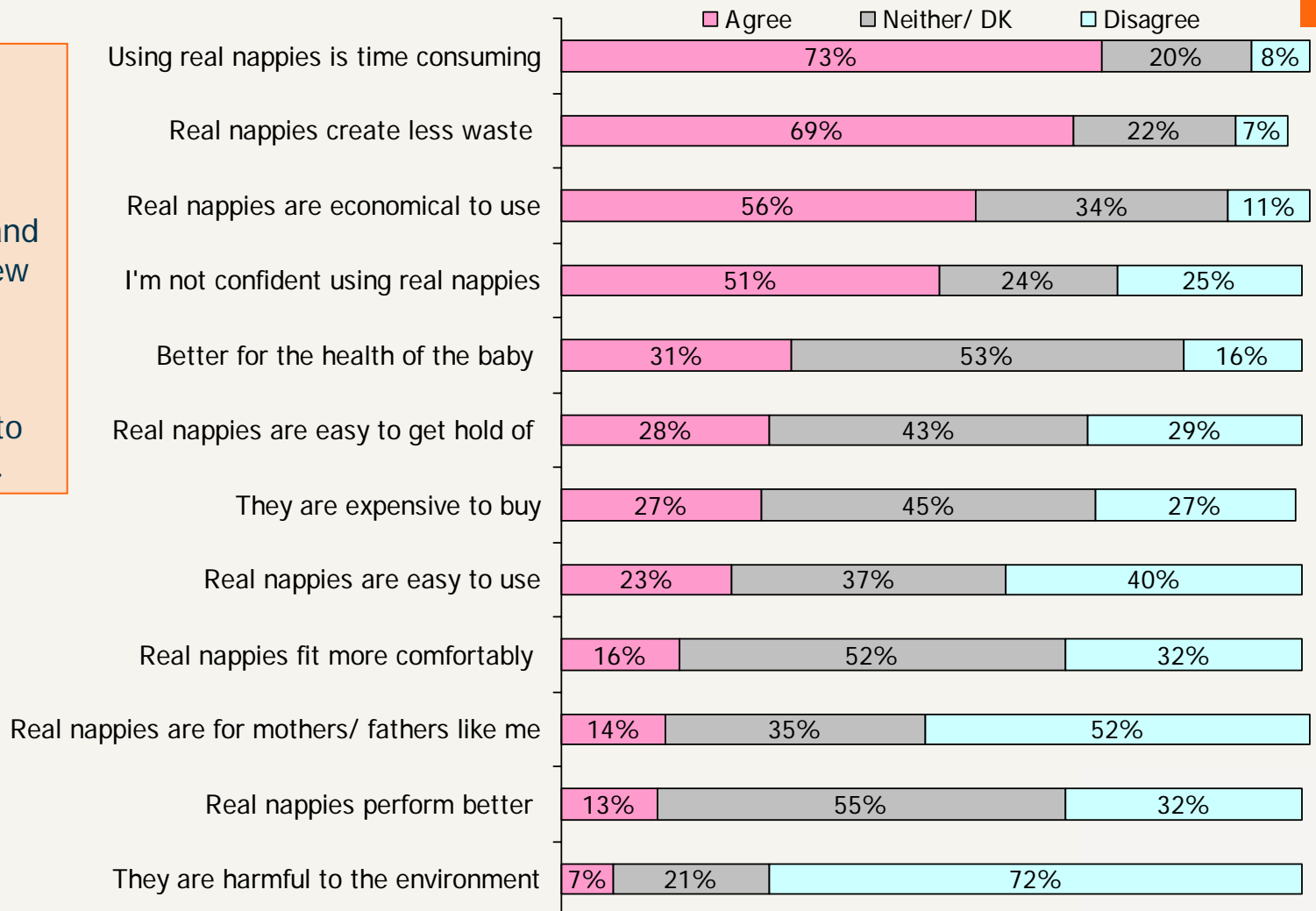


# Attitudes towards real nappies

Less known about real nappies.

Seen as better for the environment and economical, but few aware of health benefits.

Not seen as easy to use or convenient.



## Factors discouraging use ...

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### Disposable nappies

- 48% - Irritate babies skin
- 30% - Not environmentally friendly
- 29% - Too expensive
- 27% - Leak
- 25% - Poor absorption
- 18% - Poor performance generally
- 16% - Too smelly
- 15% - Difficult to get hold of
- 15% - Difficult to use/fit comfortably

### Real nappies

- 29% - Too much washing
- 21% - Time consuming
- 15% - Too much effort
- 13% - Disposables easier to use
- 10% - Not as clean as disposables
- 7% - Not convenient
- 6% - Not enough information
- 5% - Used to/prefer disposables

(NB/ cost factors 3%)

*Similar pattern of answers to baseline wave*

(Unprompted pre-coded list)

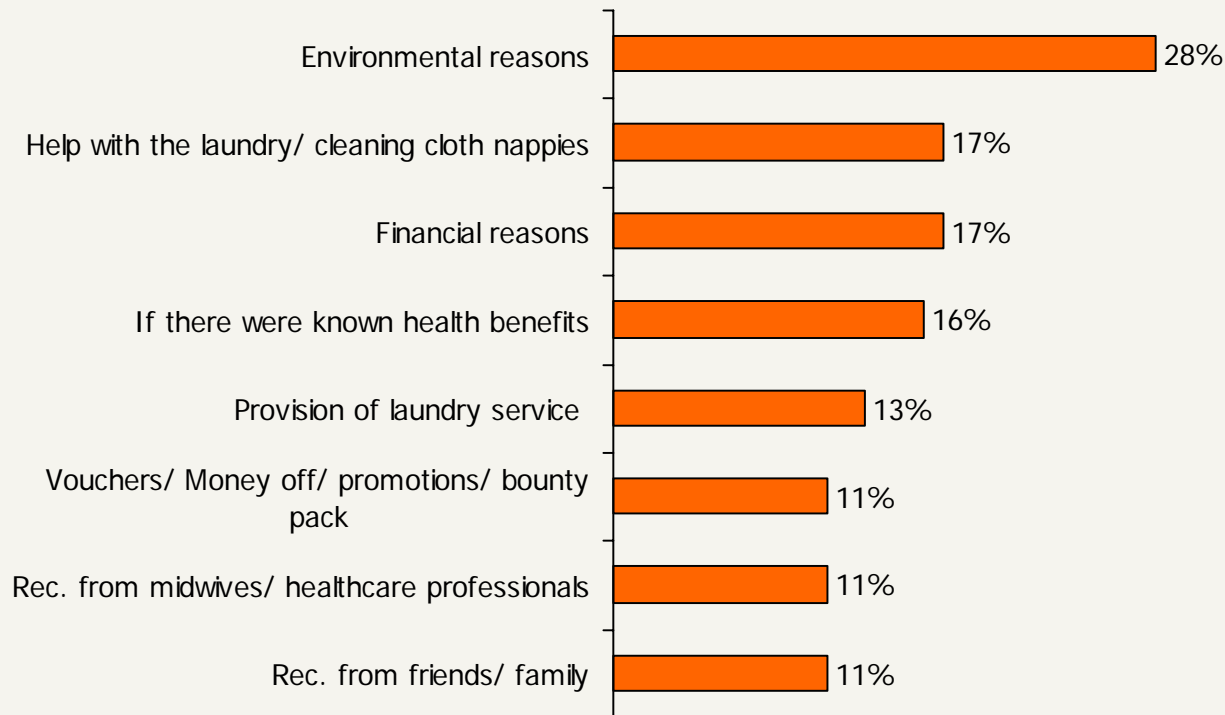
(Open-ended)



## Factors encouraging the use of real nappies

- **Prompted** - information on environmental impact most encouraging...

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- **Spontaneously** - cost more important
  - 8% "If cheaper/ less expensive", 6% "free nappies/ samples"
- 44% say they would prefer a nappy laundry service

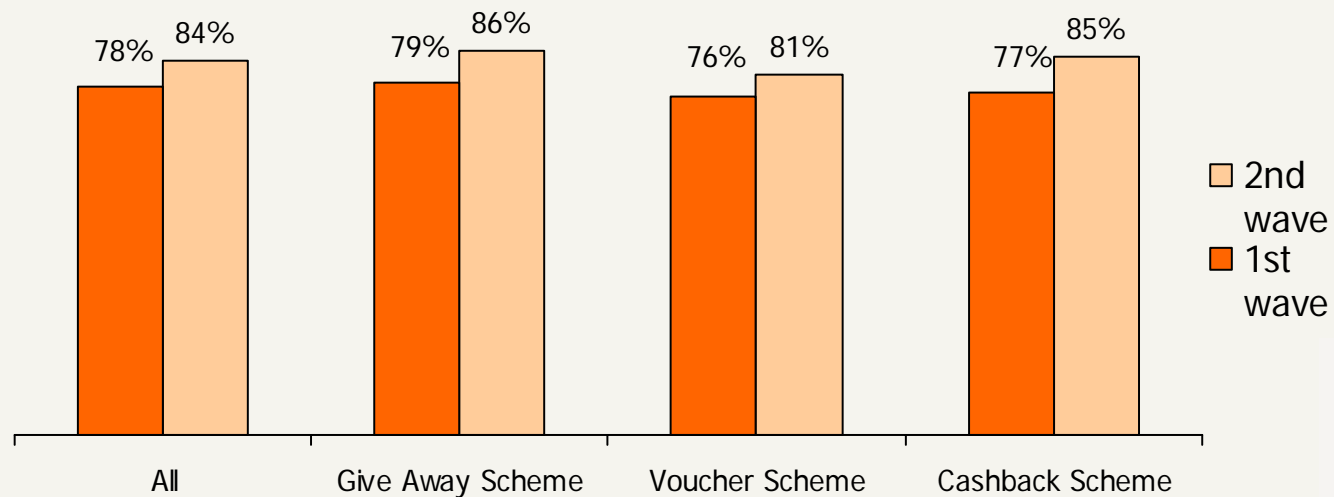
# Surveys of scheme participants – 1<sup>st</sup> wave (self-completion) & 2<sup>nd</sup> wave (telephone)

# Influence on decision to use cloth nappies and take up of schemes

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- As with non-participants, friends/partner/parents have most influence
- However, for scheme participants, schemes were second most important (1<sup>st</sup> wave 45%)
- Large proportion with no previous experience of using real nappies

% using real nappies for the first time



# Understanding of the benefits of real nappies

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- Compared to non-participants, understanding of the advantages and disadvantages is good
  - Scheme participants more likely to agree real nappies are:
    - Easier to use (2<sup>nd</sup> wave 69%)
    - Better for the baby's health (1<sup>st</sup> wave 61%, 2<sup>nd</sup> wave 66%)
    - Create less waste (1<sup>st</sup> wave 94%, 2<sup>nd</sup> wave 96%)
    - For [parents] like me (1<sup>st</sup> wave 62%, 2<sup>nd</sup> wave 73%)
  - In particular, the environmental issues are understood
    - More likely to be discouraged from using disposables because 'They aren't environmentally friendly' (1<sup>st</sup> wave 94%)
    - 'Waste/ environmental' issues likely to encourage use of real nappies (1<sup>st</sup> wave 86%, 2<sup>nd</sup> wave 79%)

## Use of real nappies

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- Commitment to use is strong...
  - Majority use/ will use them all or most of the time (1<sup>st</sup> wave 80%, 2<sup>nd</sup> wave 84%)
  - 2nd wave
    - 83% likely to continue to use them
    - 74% bought more to supplement those from scheme
    - 50% have used for more than 6 months (NB/ not all sample have children over 6 months old)
- However, 2<sup>nd</sup> wave, 95% also use disposable nappies at least occasionally (43% all/most of time) – 1<sup>st</sup> wave (59%)

# Laundry services

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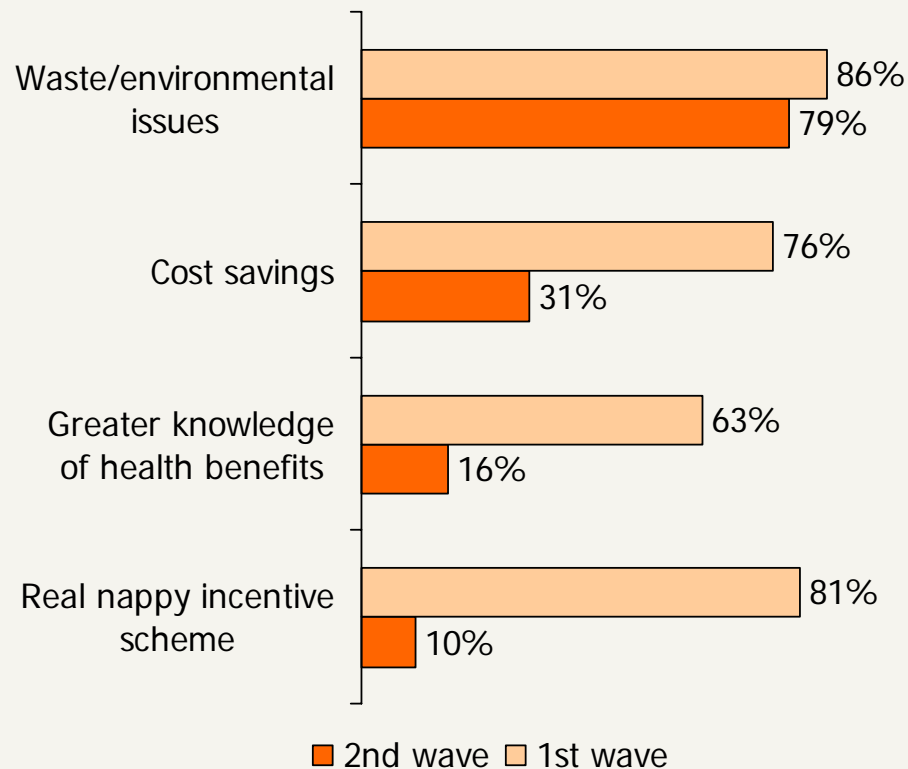
- Low take-up of laundry services...
  - 2<sup>nd</sup> wave
    - 6% use laundry service at least occasionally.
    - Only 1% claim laundry service would encourage use of real nappies
      - 1<sup>st</sup> wave 28%
  - However, of those using a laundry service at least occasionally, 61% would continue (2<sup>nd</sup> wave)

# Factors that encourage and discourage use of real nappies

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## Encouraging

- Similar drivers to non-participants survey...



## Discouraging

- Top three factors differ 1<sup>st</sup> and 2<sup>nd</sup> wave

### 1<sup>st</sup> wave

- Initially too expensive (44%)
- Lack of local support/nurseries wouldn't want to know (36%)
- Leak/ lack absorbency (35%)

### 2<sup>nd</sup> wave

- Not liking washing (23%)
- Leak/lack absorbency (21%)
- Ugly/bulky (12%)

# The Incentive Schemes

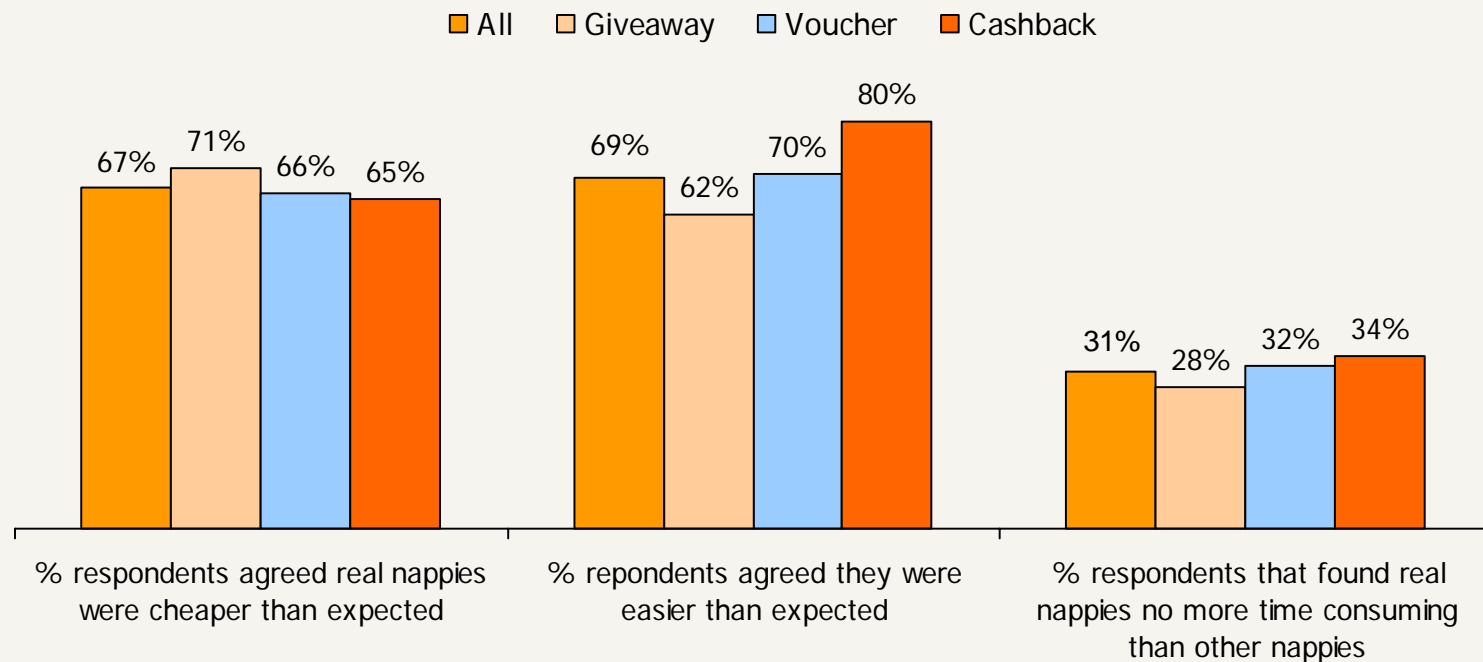
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- Perceptions of schemes generally positive...
  - 2<sup>nd</sup> wave,
    - 98% 'A good idea'
    - 79% 'Easy'
    - 74% 'Convenient'
  - Benefits:
    - "Helps save money/ Cost savings" (1<sup>st</sup> wave 24%, 2<sup>nd</sup> wave 27%),
    - "Encouraging people to use real nappies" (1<sup>st</sup> wave 15%, 2<sup>nd</sup> wave 26%)
    - "Environmentally friendly/ environmental benefits" (1<sup>st</sup> wave 35%, 2<sup>nd</sup> wave 17%)
  - Few drawbacks - "none" (1<sup>st</sup> wave 34%, 2<sup>nd</sup> wave 46%):
    - Most mentioned: "Lack of awareness/publicity" (1<sup>st</sup> wave 13%, 2<sup>nd</sup> wave 8%)

# Perception of schemes

- The schemes altered perceptions of using real nappies...

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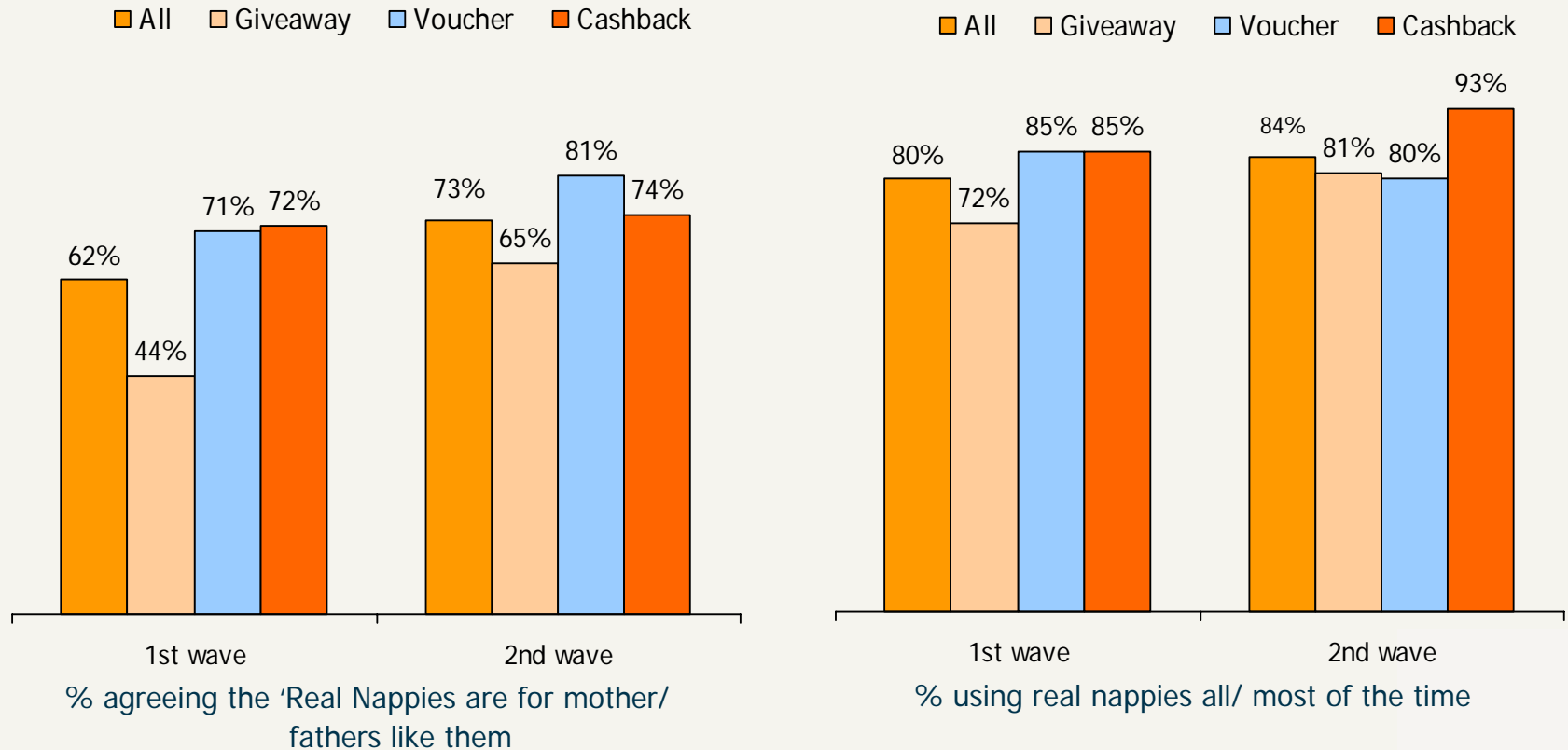
- Effectiveness of scheme varies...

- 'Free nappies' most likely to encourage participation (1<sup>st</sup> wave 48%, 2<sup>nd</sup> wave 37%)
- Give Away participants said "try real nappies before you buy" is main benefit (1<sup>st</sup> wave 26%, 2<sup>nd</sup> wave 14%) - Voucher (1<sup>st</sup> wave 10%, 2<sup>nd</sup> wave 3%) and Cashback (1<sup>st</sup> wave 13%, 2<sup>nd</sup> wave 4%)

# Effect of schemes on real nappy take-up

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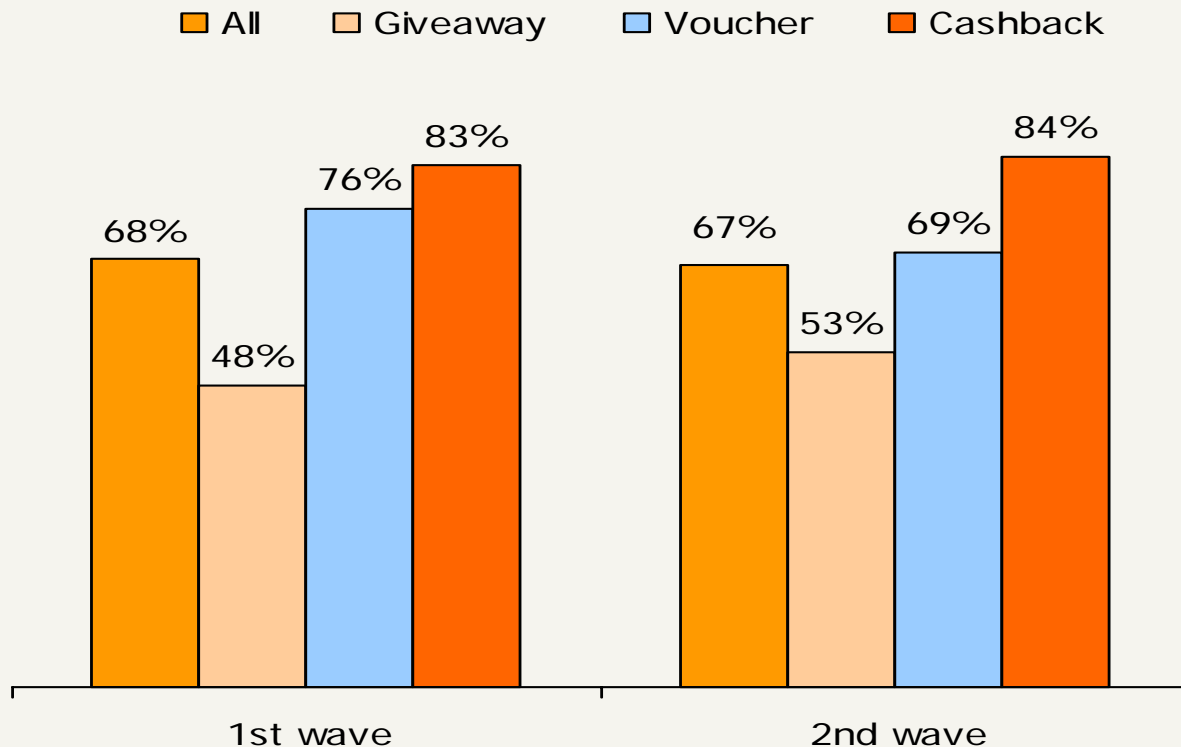
- Difficult to identify one scheme as most effective...



# Effect of schemes on commitment to real nappies (1)

- Nearly a third claim they would have not started using real nappies if schemes did not exist (1<sup>st</sup> wave 30%, 2<sup>nd</sup> wave 31%)
- However, prior commitment differs by scheme...

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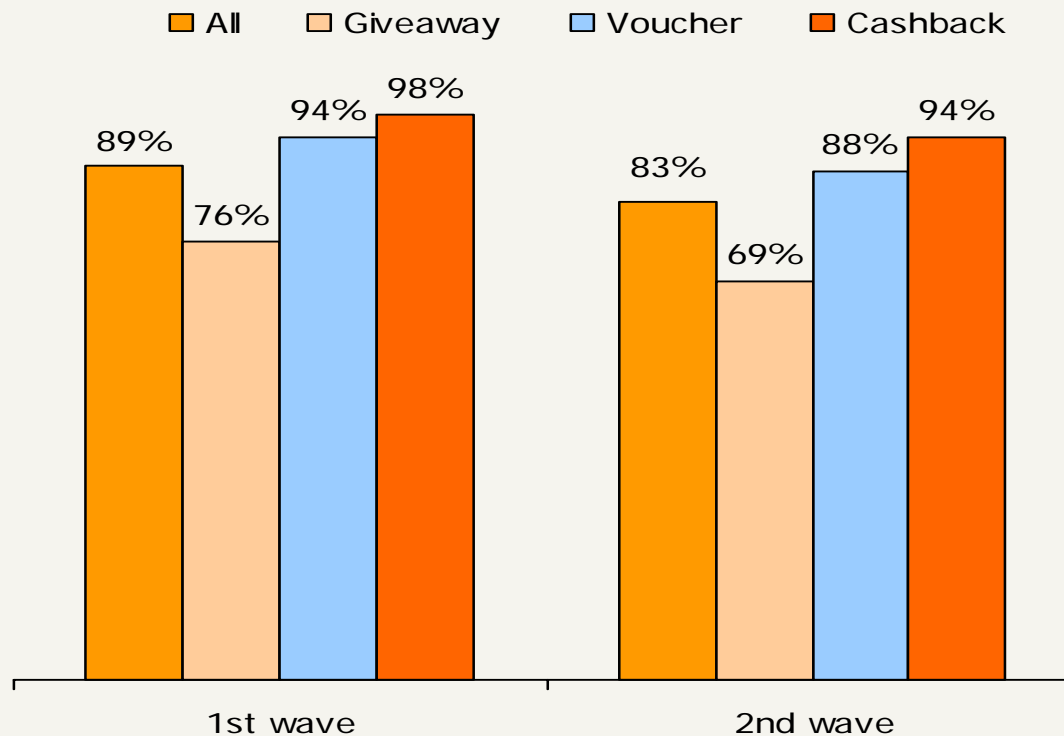
% would have started/ planned to use real nappies if scheme did not exist

# Effect of schemes on commitment to real nappies (2)

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There is very little affect on likelihood to continue using...

% likely to continue using real nappies



# Summary of key findings

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**One of the main differences between scheme participants and non-participants is their level of awareness and use of real nappies...**

- Non-participants (baseline and face-to-face):
  - High awareness of real nappies but lack knowledge about using them and confidence
  - Low take-up/ intention to use real nappies
  
- Scheme Participants:
  - More knowledgeable about using real nappies
  - Higher usage and commitment to continue using

# Summary of key findings

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**The key driver in this distinction seems to be different attitudes towards and perceived convenience of real nappies...**

- Non-participants:
  - Despite drawbacks, positive image of disposables – convenient, perform better and majority identify with them
  - Negative image of real nappies – inconvenient (not expense factors)
  - Understand environmental issues but health issues are not considered a factor.
  
- Scheme participants:
  - Better perception of real nappies – better/more convenient than expected
  - Large proportion identify with them
  - Better understanding of benefits – environmental and health issues

# Summary of key findings

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## This is reflected by the factors driving the use of real nappies...

- Similar encouraging factors across all studies – environmental issues
- Non-participants:
  - Convenience, word of mouth, and cost most influential when making decision
  - Convenience key to understanding motivation to use disposables over real nappies (in addition to lack of information)

# Summary of key findings

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## What role has scheme played?

- Very little awareness of Incentive Scheme amongst non-participants
- Scheme participants:
  - On whole, scheme received positively
    - 'A good idea', 'Convenient'
    - Wide range of benefits
    - Few drawbacks
  - Improved attitudes to real nappies?
    - scheme 2<sup>nd</sup> highest influence on decision (2<sup>nd</sup> wave)
    - chance to try real nappies (and different to expectations!)
- No prior experience yet more confidence using real nappies

# Summary of key findings

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## Important considerations...

- Effectiveness of schemes varied
- Hard to identify most effective...
  - Give Away:
    - Attracted far more people who would not otherwise had tried real nappies (less likely to continue)
  - Cashback and Voucher:
    - More likely to have tried anyway.