



What people think,
feel and do



Opinium

Menstrual Sustainability



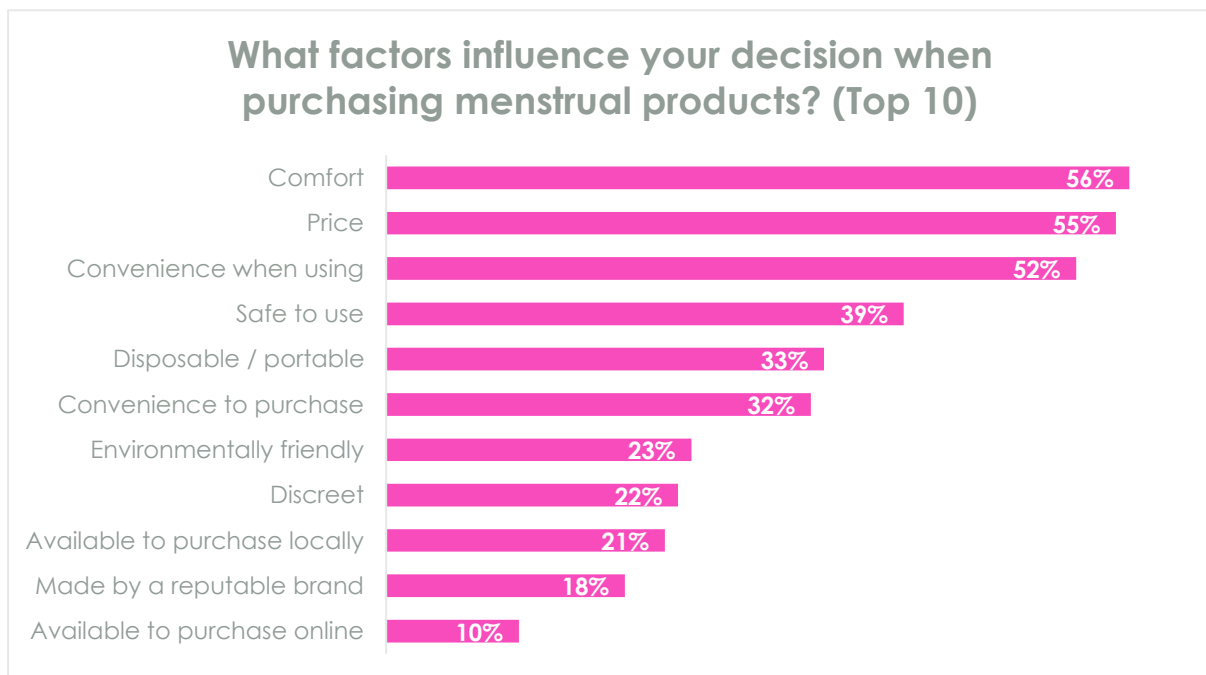
Key findings

25 June 2024

Product Preferences

Sanitary pads and tampons are the most frequently used menstrual products.

In the past 18 months, 69% of UK females aged 18-60 have had a menstrual period. Younger women (18-34) are more likely to have had a menstrual period in the last 18 months (87%) compared to those over 35 (70%). Additionally, women aged 18-34 are more inclined to use less conventional menstrual products, such as menstrual cups (13%) and period underwear (26%), whereas women aged 35-54 prefer mainstream products like sanitary pads (87%) and tampons (48%).



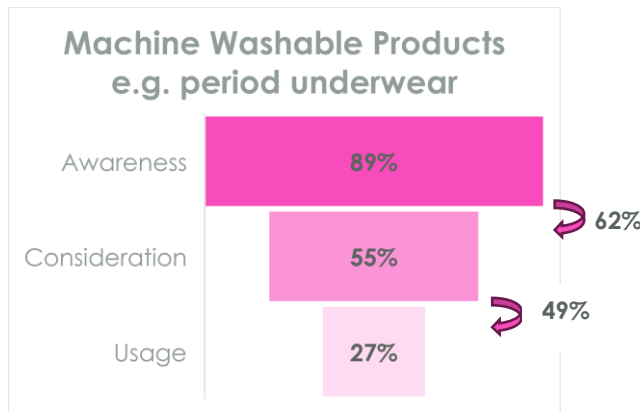
Comfort, price and convenience are the leading factors influencing purchasing decisions.

Over half of women in the UK prioritise these factors, while less than one quarter (23%) consider sustainability important. Notable age disparities exist in purchasing priorities:

- Ease and convenience are greater priorities for those aged 35-54 (58%) compared to women aged 18-34 (46%).
- Environmentally friendly products are more sought after by women aged 18-34 (25%) than those aged 35-54 (20%).

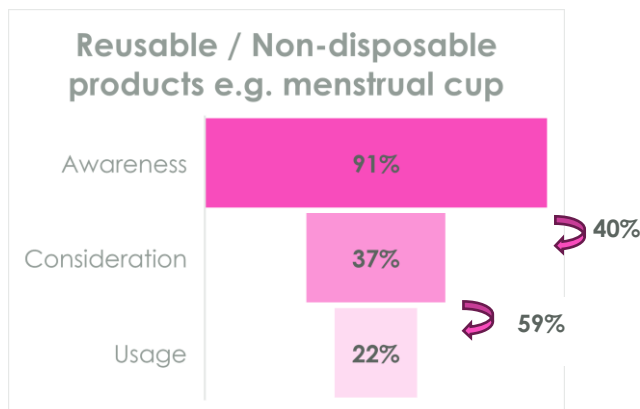
Other influencing factors include suitability for disabilities and conditions (6%), conformity to social norms (5%), and cultural beliefs (3%).

Sustainable Menstrual Products



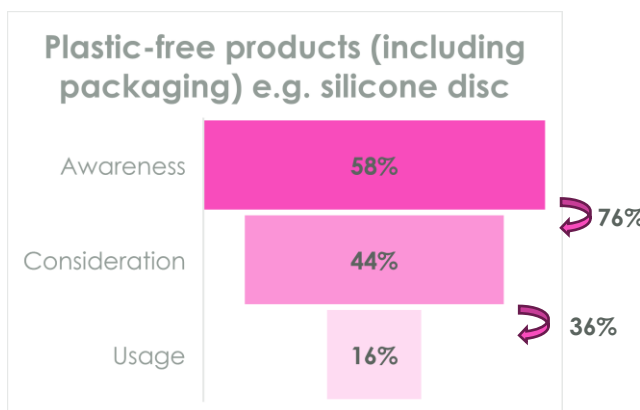
Period underwear and other machine-washable products are among the most recognised in the sustainability category. However, less than one-third of UK women use them (27%), and only half would consider using them (55%).

Menstrual cups and other reusable products also have high awareness (91%), but their usage remains low (22%) with a limited conversion rate from awareness to consideration (40%).



In contrast, plastic-free menstrual products have lower awareness (58%) and usage (16%), but the highest conversion rate from awareness to consideration (76%), indicating a strong interest.

Overall, UK women are aware of sustainable menstrual products, but this awareness has not significantly translated into usage, except among younger women aged 18-34, who show more interest in non-disposable and environmentally friendly options than older cohorts.



Products like menstrual cups and period underwear have high awareness but low usage, while plastic-free products show high interest despite lower awareness.

This raises the question of how consideration and usage can be increased amongst female consumers in the UK. Despite growing awareness, several factors prevent women from purchasing these sustainable menstrual products.

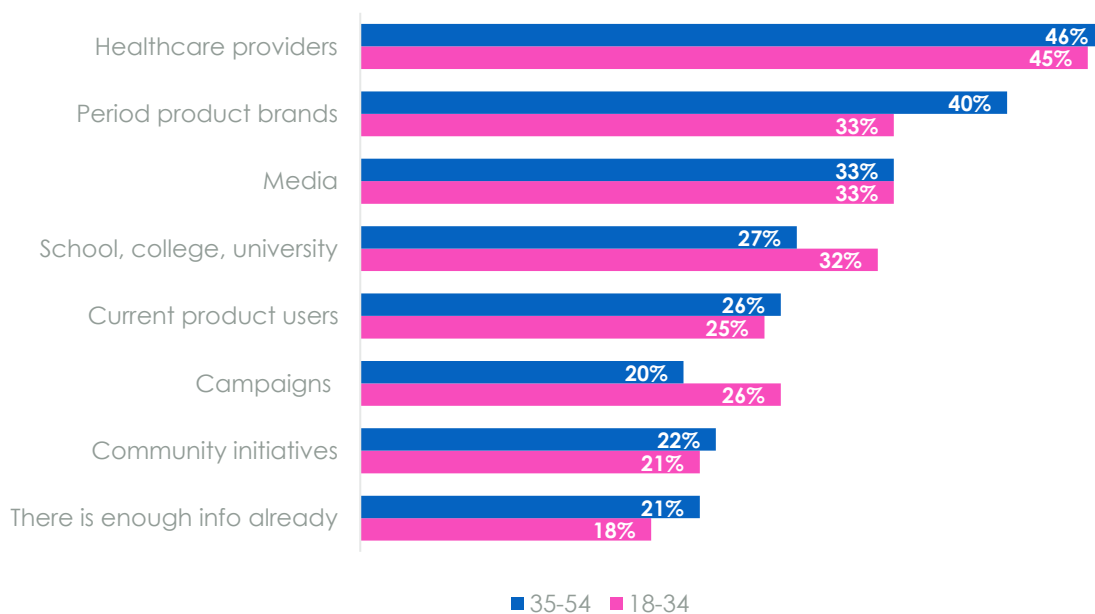
Bridging the Gap

Despite growing awareness, various factors prevent women from purchasing sustainable menstrual products.

Women in the UK are aware of sustainable menstrual products, so why aren't they more popular? The leading barriers are price (35%) and a lack of information (34%). Additionally, women find reusable products inconvenient (22%) and unsuitable for their lifestyle or routine (17%). For example, washing a menstrual cup in a public bathroom can be impractical. Health and hygiene concerns are significant (21%), as is a lack of interest (20%) and limited availability both locally (13%) and online (6%).

- Older women (35-54) are more concerned with health and hygiene (24%) compared to younger women (18-34 - 18%).
- Women aged 35-54 are more likely to lack interest in sustainable products (22%) than younger women aged 18-34 (18%).
- Younger women are more likely to find reusable menstrual products incompatible with their lifestyle (19%) or unsuitable for their condition or disability (9%), such as PCOS, physical disabilities, or allergies.

Where would you like to see information about sustainable menstrual products?





Nearly one in five think there is already enough information about sustainable menstrual products.

Few UK women feel they have sufficient information on these products (18%). Nearly half (46%) believe information should be available at healthcare providers like pharmacies, Boots, or Superdrug. Additionally, 36% think period product brands like Always and Tampax should provide this information. Many women prefer hearing from current product users for authentic testimonials (26%) over profit-focused advertisements.

Media channels, including advertisements and social media (33%), are popular for sharing information. Many women also believe educational institutions should inform younger women about sustainable menstrual products (30%). One in five (23%) think governments, NGOs, and other organisations should conduct informative campaigns, while 21% favour community-based initiatives that offer free products or waste collection programs.

Key Findings

Women in the UK significantly underestimate the number of menstrual products flushed down the toilet each year.

Women estimate around 74 million annually, while the actual number is approximately two billion. Given that around 3.3 billion single-use products are used per annum, many are flushed, ending up in waterways or landfills. Younger women (18-34) guessed about 67 million, whilst older women (35-54) estimated around 70 million, highlighting a significant underestimation of environmental harm. The 74 million estimate represents less than 4% of the actual waste caused by disposable menstrual products.

Nearly three-quarters of UK women who use single-use menstrual products dispose of them in the black bin (72%), with 16% use a recycling or compost bin. Only 12% self-reported flushing disposable menstrual products, though this figure is likely lower than the reality. Ultimately, disposable menstrual products end up either in landfill or waterways, thus are not environmentally friendly.

Brands can better meet the needs of UK women and promote menstrual products by focusing on key opportunities such as enhanced education, targeted marketing, improved accessibility, and addressing consumer concerns. This approach aligns with consumer demand and supports environmental sustainability.



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Environmental Misconceptions:

- There is a significant underestimation of the environmental impact of disposable menstrual products, highlighting the need for awareness campaigns.
- Educating women on the true scale of waste can drive a shift towards more sustainable practices and promote reusable alternatives.

Barriers to Adoption:

- Major barriers include price, lack of information, convenience, and lifestyle fit.
- Brands can bridge the gap between awareness and usage by addressing these barriers through targeted education and marketing.
- Developing affordable, user-friendly sustainable options and increasing accessible information can effectively penetrate the market.

Market Potential:

- Affordable pricing and enhanced information can make sustainable products more accessible.
- Improved convenience through easy-to-use products can encourage lifestyle integration.
- Younger women show more interest in sustainable options, suggesting a focus on this demographic.

Insights for Market Research, Branding, and Communications:

- Understanding consumer behaviour and barriers can help brands tailor their offerings and strategies.
- Highlighting the gap between awareness and adoption can identify market opportunities.
- Effective communication through healthcare providers, period brands, social media, and testimonials can build credibility and engagement.
- Acknowledging the true environmental impact of menstrual product disposal can inform educational campaigns and sustainability initiatives, positioning brands as advocates for a sustainable future.

About Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think, feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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