



The voice for water consumers
Llais defnyddwyr dŵr

Essential Water Use

November 2025

ccw.org.uk

Foreword



Our Water Worries research, published earlier this year, shone a spotlight on the experiences of water customers struggling with financial vulnerability. It found that just under half (44%) of water bill payers have reported taking steps to reduce their spending in the last 12 months on necessities such as heating or food to ensure they could pay all their household bills, including their water bill.

It also found that some customers were reducing what they considered to be 'essential' water use, to save money on water bills. We wanted to explore this in more detail and get a better understanding of what different customers understand by the term 'essential' water use, particularly for the most financially vulnerable customers.

This research has looked at the range of motivations that lead customers to reduce water usage down to the "essentials", as well as the activities where they feel most comfortable in making these reductions – and where they do not. Significantly, environmental concerns are a key driver for some, but many customers said they were reducing water usage to avoid 'waste', rather than necessarily to save money on their water bill.

Most customers – particularly those who were more elderly, and financially vulnerable – said they were currently making efforts to reduce their household's water usage. However, these tend to be in relatively easy-to-achieve areas, such as not running the tap when brushing teeth, or only running full loads in a washing machine.

When it comes to defining 'essential' water use itself, we gave respondents a range of activities and asked them to select which were the most important. Unsurprisingly, almost two thirds picked hydration, while the remaining third chose personal hygiene and maintaining a clean home. Together, these actions represent the core of what customers understand to be essential. Therefore, they are less willing to adopt measures seen as time consuming or inconvenient, or which are perceived as potentially 'unhygienic'.

Lastly, while helping customers to reduce water waste is important, it should be noted that a quarter of the customers we surveyed felt that reducing their water usage further would negatively affect their mental and physical health – and this was noticeably higher among customers with a disability. It is important that incentives to reduce water usage do not lead to negative impacts upon physically and/or financially vulnerable customers.

Objectives, sample and methodology

Objectives

CCW wants to understand:

- How people interpret the term 'essential water use'.
- How views on 'essential water use' vary across different customer segments.
- When people would be willing to reduce their water usage and what would motivate them to do so.

Sample and methodology

Qualitative element:

12 x online depths via Zoom amongst water bill payers who have reduced their water usage in England and Wales.

3 key groups:

1. Motivated solely by financial motivations.
2. Driven by both financial and broader motivations.
3. Motivated by broader concerns only, such as environmental or social factors, excluding financial considerations.

Location	England	9
	Wales	3
Financial vulnerability	Financially vulnerable	6
Gender	Men	6
	Women	6
Housing status	Homeowners	6
	Renters	6
Metering status	Water Metered	7

Quantitative element:

- Yonder conducted an online survey between 15 and 17 August 2025, speaking to a nationally representative sample of **2,011 adults across England and Wales**.
- Boosts applied to reach a minimum of **250 in Wales**, and **250 financially vulnerable** respondents.

*N.B. This research represents a **point-in-time snapshot conducted during the summer period**. As the sector continues to evolve, there is clear scope and value in revisiting these findings to track changes, emerging trends and shifting priorities.*



Executive Summary

- Consumers understand 'essential water use' as the water needed to meet the core priorities they attach to water usage - primarily hydration and personal hygiene. While they are willing to cut back usage where possible so long as they can still meet their needs, they see the water required to fulfil these basic needs as non-negotiable.
- Consumers are motivated to reduce their water usage by a range of drivers, most commonly financial incentives (60%) and environmental concerns (69%). Water-saving behaviours are rarely motivated by just one driver and these often work together to shape people's habits and actions.
- Environmental concerns are particularly prevalent amongst older individuals and while both financially vulnerable and non-financially vulnerable consumers are driven by the idea that it is wrong to waste resources and environmental concerns, this is more relevant for the non-financially vulnerable who are more focused beyond solely financial related incentives to water-saving behaviours.
- Most consumers are already taking steps to reduce their water usage across a range of actions, though most commonly in instances where they can reduce their usage easily, without much compromise, and still achieve their water-related priorities such as essential hygiene. For those who have *not* taken steps to reduce their water usage, this is most commonly because they question whether changing their behaviours will have a notable impact on the amount of water and/or money they will save, and also because consumers are unwilling to take steps which they perceive as impractical to implement in their day to day lives.
- When considering their willingness to further reduce water usage, respondents express openness to low-effort actions – such as turning off the tap while brushing their teeth, only filling the kettle with what they need or washing the car less often. However, they are less willing to adopt measures seen as time consuming or inconvenient (like collecting rainwater or using a bowl to wash dishes) or which are potentially unhygienic (such as washing bedding less frequently or not flushing the toilet after use). ***In a nutshell, it is difficult to claim that people are or are not willing to significantly reduce their essential usage in areas that matter, as people are mainly cutting back on usage in areas they perceive as easier to reduce and less essential.***
- Reducing water usage has had a positive impact for many consumers – enhancing three-quarters of consumers' sense of doing the right thing and helping half to feel they are setting a good example within the home. Additionally, one in three report improvements to their mental and physical well-being as a result of their efforts. While further reduction of water usage should be approached with care, as two-fifths of respondents express concern about negative impacts on their physical and mental health, there is a strong potential for positive outcomes as over half say further reducing their usage would positively reinforce their sense of doing the right thing.



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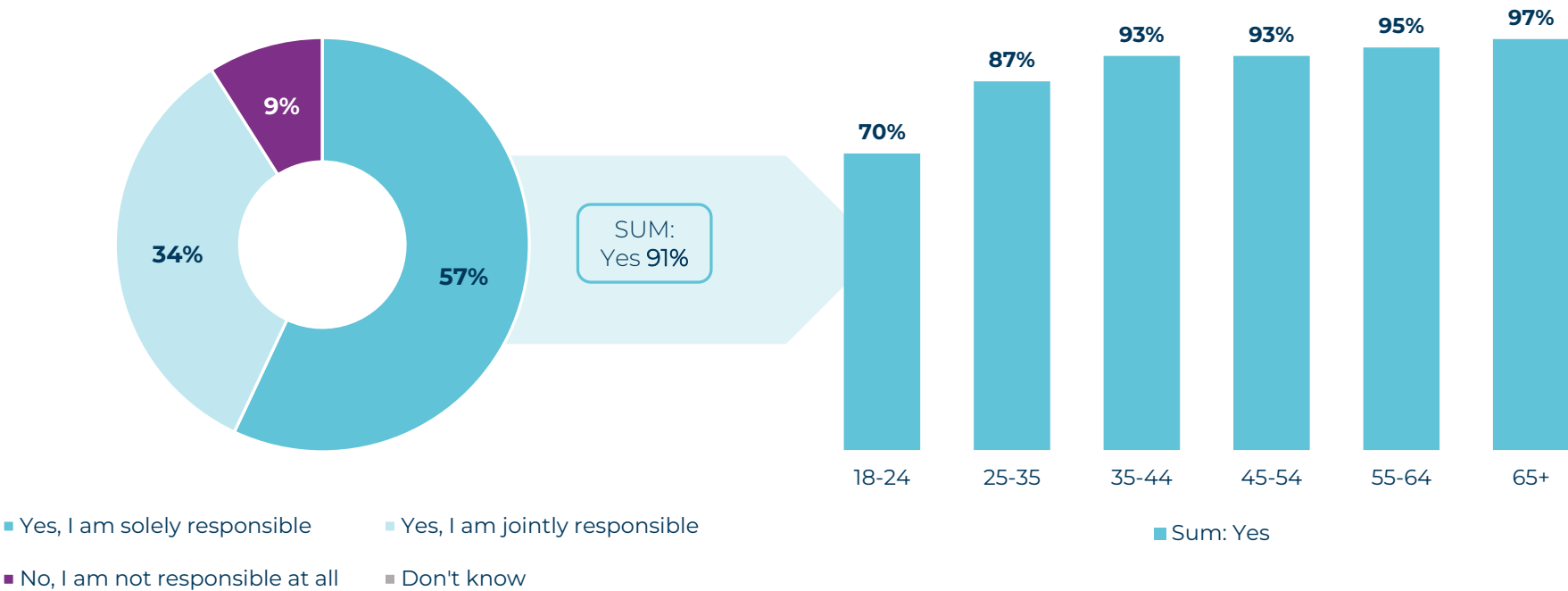
Respondent profiles

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Nine in ten people are responsible for paying their household's water bills, with this becoming more common among older age groups



Q2: Are you responsible for paying your household's water bills?

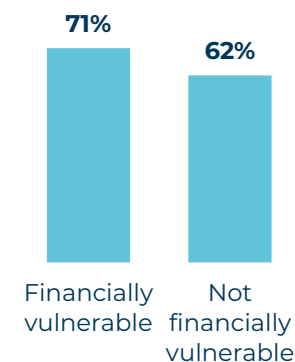
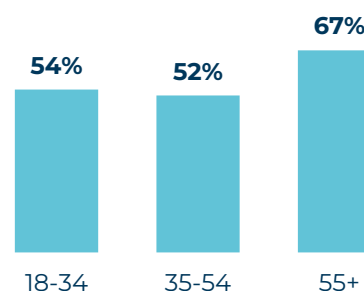
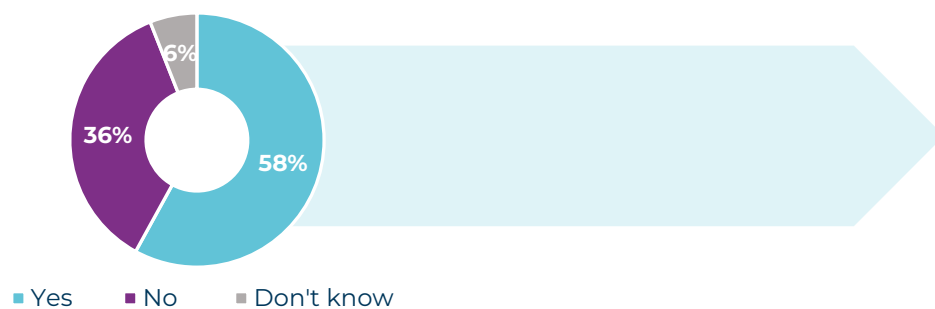


Slightly over half of people have a water meter installed; more commonly those younger and financially vulnerable are on a social water tariff

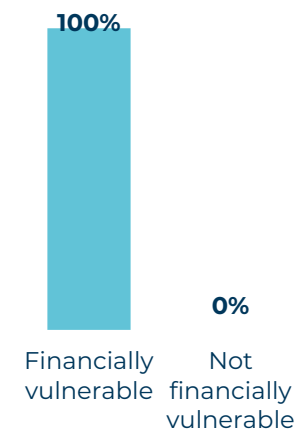
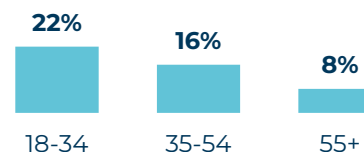
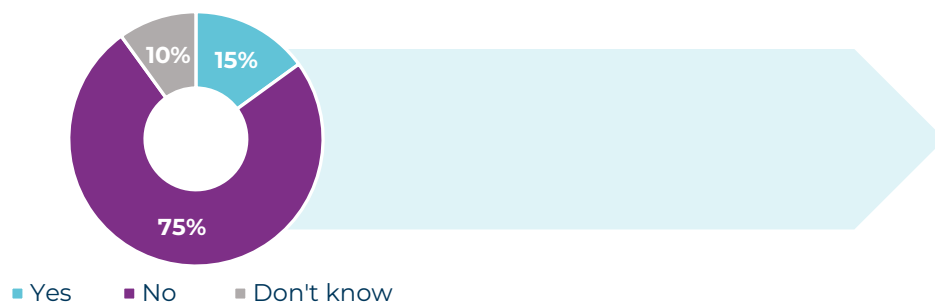


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Q4: Do you have a water meter?



Q3: Are you on a social water tariff?



Essential Water Survey
Base: All respondents (2,011)

* Bar charts refer to the proportion of each sub-group who answered 'yes'



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Setting the scene

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Consumer behaviour around water is driven by a mix of motivations, rarely just one in isolation. These drivers often intersect and reinforce one another, working together to shape meaningful changes in how people engage with water.

In an era of persistent financial pressure, consumers have seemingly embraced a **more intentional approach to managing their expenses and their households.**

With this, there has been a shift towards **making smart, more considered choices that deliver both financial and personal control.**

There has been a **growth in the ‘waste not, want not’ mindset**, where reducing consumption isn’t just about saving money, it’s about taking meaningful control over one’s resources and doing what feels right.

Water usage at home is just one of a number factors where this **wider context has relevance.**

There is a growing desire amongst consumers for **lower bills**, accompanied by a broader awareness that many of the **resources we rely on are not infinite and should be treated with care.** They are finding a **sense of satisfaction in making more considered choices** in daily life and despite water being a low-cost commodity there is evidence this too is now on the radar.

In today's climate, where many are feeling financial pressure, this shift feels both timely and widely relatable.

Growing financial pressures, environmental awareness and desire to do the right thing are all key motivators for responsible use



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Environmental awareness

Environmental motivations exist and range from a general desire to *"do the right thing"* and *avoid waste*, to more conscious awareness of *resource scarcity*, such as reservoirs drying up, and deeper concerns about environmental *impacts for future generations*. Much like the other factors, a desire to be 'green' often interplays with other factors that motivate individuals.

Financial interest

Financial motivations around water use exist on a **spectrum**. Some households monitor their water bills closely each month while others may not track costs as precisely but still try to be *generally mindful* of their consumption. For many, though, the link between water use and cost remains unclear, but it becomes more apparent when water is connected to energy use.

Waste not, want not mindset

Within the **waste not, want not** mentality, most people don't see themselves as heavy water users. Instead, simple everyday habits, like turning off the tap while brushing teeth or taking shorter showers, are embraced as meaningful ways *to care for oneself, family and society*. This mindful approach reflects a sense of *social responsibility* and often intersects with *financial concerns*, for example.

Making smarter choices for me

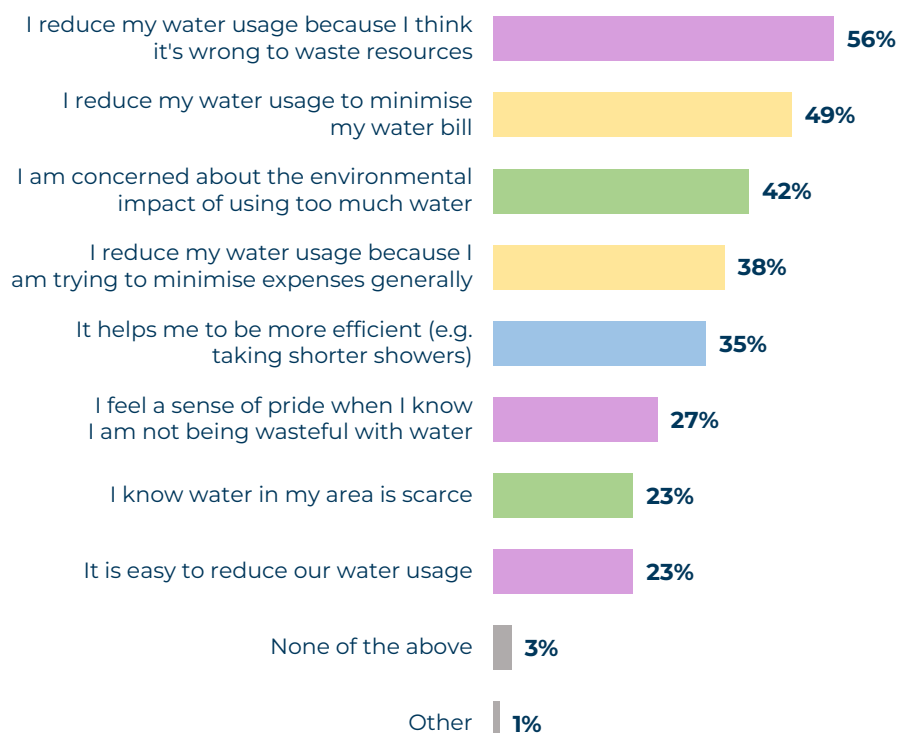
The idea of 'making a smart choice for me' is a shift in thinking motivated by convenience and efficiency, grounded in choices that suit a person's lifestyle and their circumstances. Making smart choices is where *water conscious behaviours align with making life easier, not harder*, whereby making a better choice doesn't mean having to be virtuous.

Reasons for reduced usage vary; the waste not, want not mindset is front of mind for over half



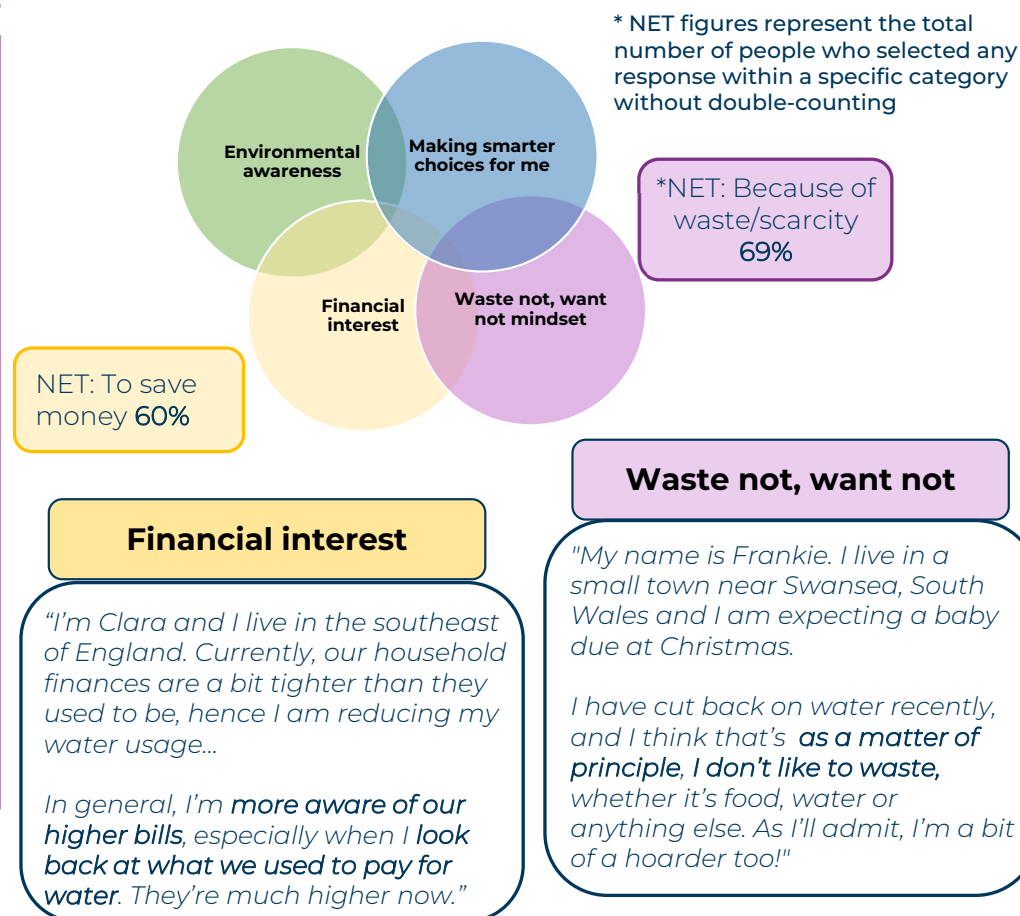
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Q7: Why have you taken steps to reduce your household's water usage?



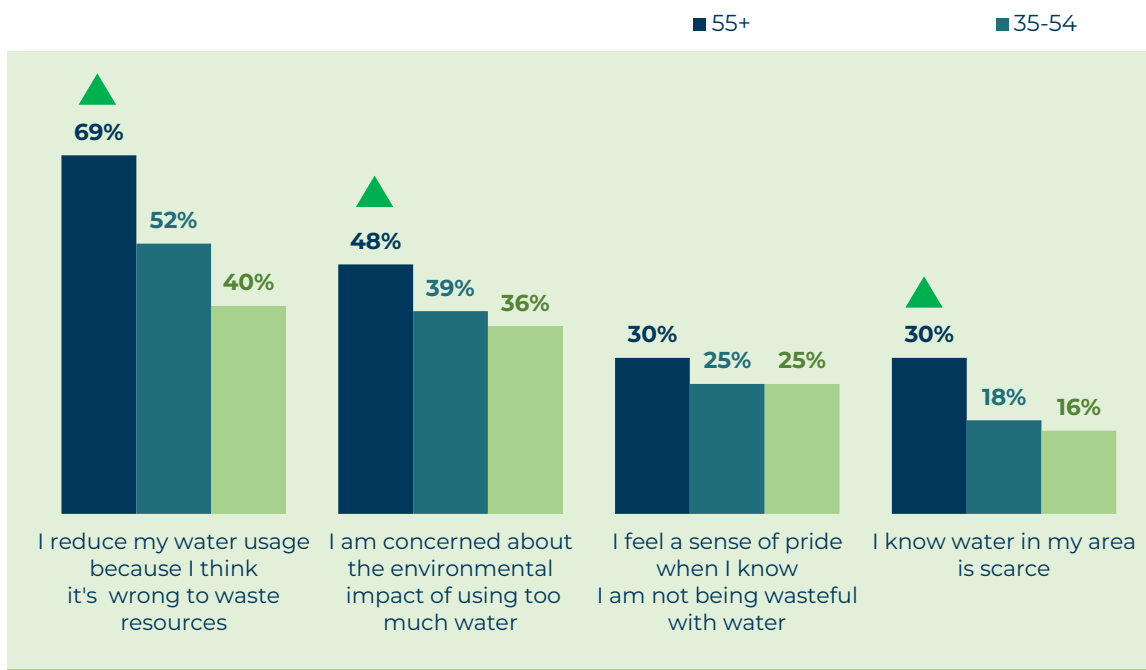
Essential Water Survey

Base: All taking at least some steps to reduce household water usage (1,823)

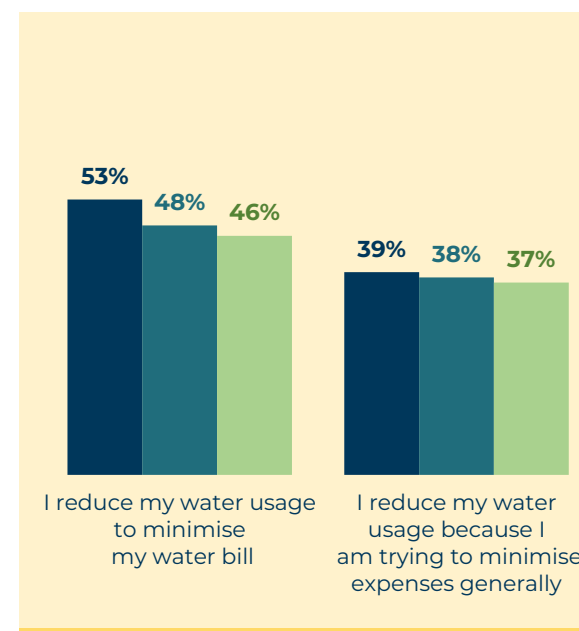


Older respondents are more likely to be reducing water usage for environmental reasons

Q7: Why have you taken steps to reduce your household's water usage?



Environmental awareness / Waste not, want not mindset



Financial interest

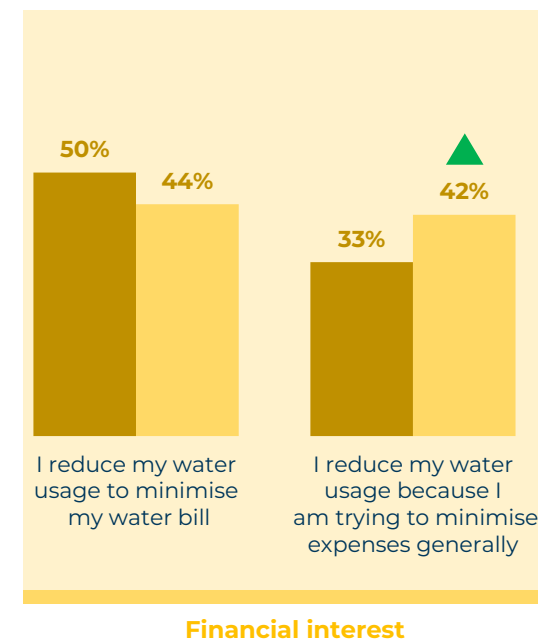
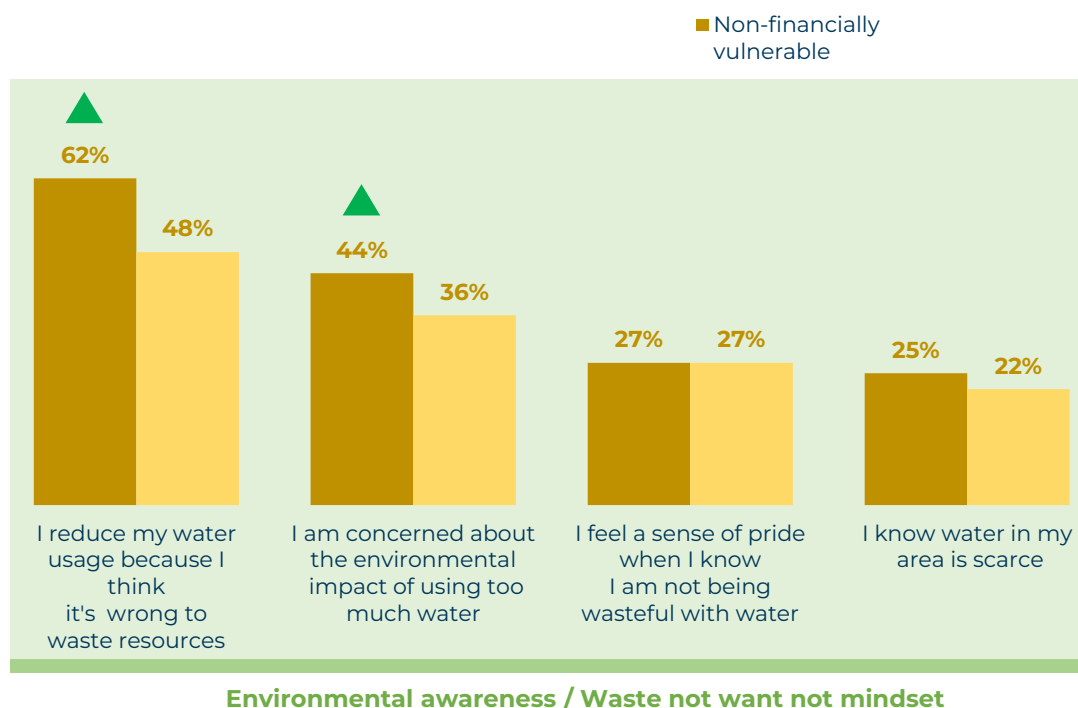
Essential Water Survey

Base: Respondents aged 18-34 (456), 35-54 (570), 55+ (797)

▲ Denotes significantly higher compared to the rest of the group.

Less financially vulnerable people have more space to consider other reasons to reduce water usage

Q: Why have you taken steps to reduce your household's water usage?



Essential Water Survey

Base: Financially vulnerable respondents (293), non-financially vulnerable respondents (806)

▲ Denotes significantly higher compared to the rest of the group.



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Priorities and behaviours

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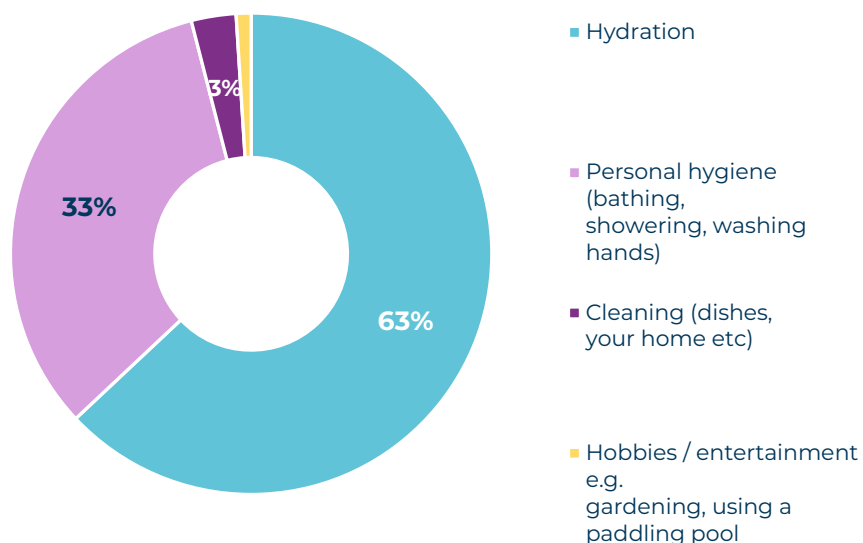
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Consumers adopt water-saving behaviours depending on a mix of factors, including how tangible the benefits appear, the practicality and convenience of the actions and the extent to which these behaviours offer personal validation.

These motivations are often amplified during times of financial pressure or when people have more time to manage compromises.

Overwhelmingly, hydration is the most important thing to people when thinking about water usage, followed by hygiene

Q5: What is the most important thing to you when thinking about water usage? [showing 1st choice]



"For me, essential water is drinkable, I mean having enough water to drink. And immediately after that would come having enough water to wash yourself. But you're not going to die if you do not wash yourself for like a week."

Group 3 (Broader motivation reducer)

"It's just to be hygienic, it just means a lot to me, it really does, and then to instil that into my son as well so as he's growing up, he understands."

It's just the hygiene standards, I think. You know, at the end of the day, even if you've not really done much. You're still going to have the dead skin on your body, and maybe the smell and stuff so it's nice to get into bed all clean and fresh, to have a good night's sleep."

Group 3 (Broader motivation reducer)

"A non-negotiable for me is washing the boys' clothes less often than a couple of times a week. I don't want the boys to smell, it's not nice for other people and not nice for them. They get sweaty at school, and they might smell. They need clean shirts"

Group 1 (Financial motivation reducer)

Consumers commonly spontaneously define essential water as the water needed for hydration, personal hygiene and maintaining a clean home



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Q. Essential: What does the term essential water mean to you?

The majority of consumers described essential water as:



Water you drink to stay hydrated



Water used to maintain personal hygiene / cleanliness



Water used to maintain cleanliness in the home or to carry out chores



Respondents' unprompted answers suggest that “essential water” is widely understood as the minimum amount of clean, accessible water required each day for drinking, personal hygiene (such as washing and bathing) and basic sanitation (including toilet flushing and household cleaning). There was a strong emphasis on the idea that essential water use means only using what is necessary to meet these fundamental needs.

Common activities like gardening or washing the car were frequently mentioned as non-essential uses, despite being part of many people's regular routines.

*“Enough water to **get showered/have a bath every day**, use for **food/cooking**, for each person in the house to be able to **drink 8 glasses of water a day** and enough for **general cleaning tasks**.”*

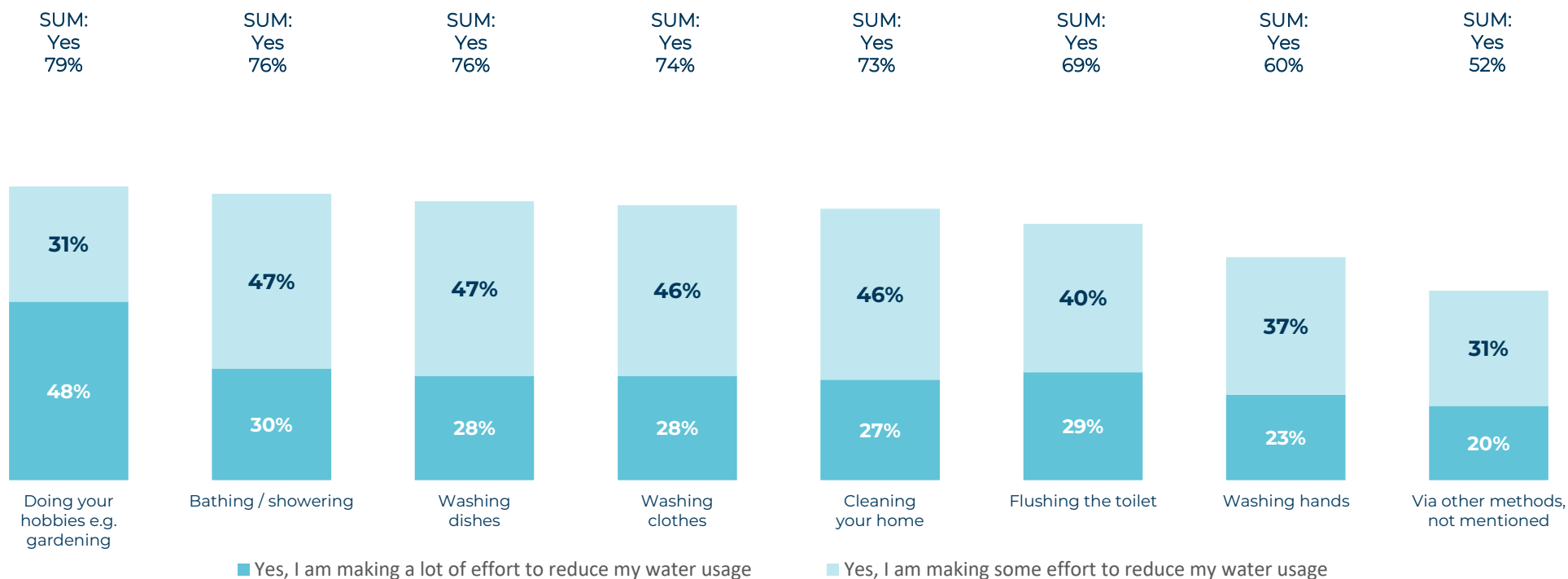
“Only use what you need and nothing more.”

*“Essential water use means **not being wasteful** and **not using water for purposes that are strictly not necessary** such as washing car or watering the garden.”*

Essential Water Survey
Base: All respondents (2,011)

The importance of hygiene does not, however, mean people are not making an effort to reduce usage

Q6: Are you currently making an effort to reduce your household's water usage when...

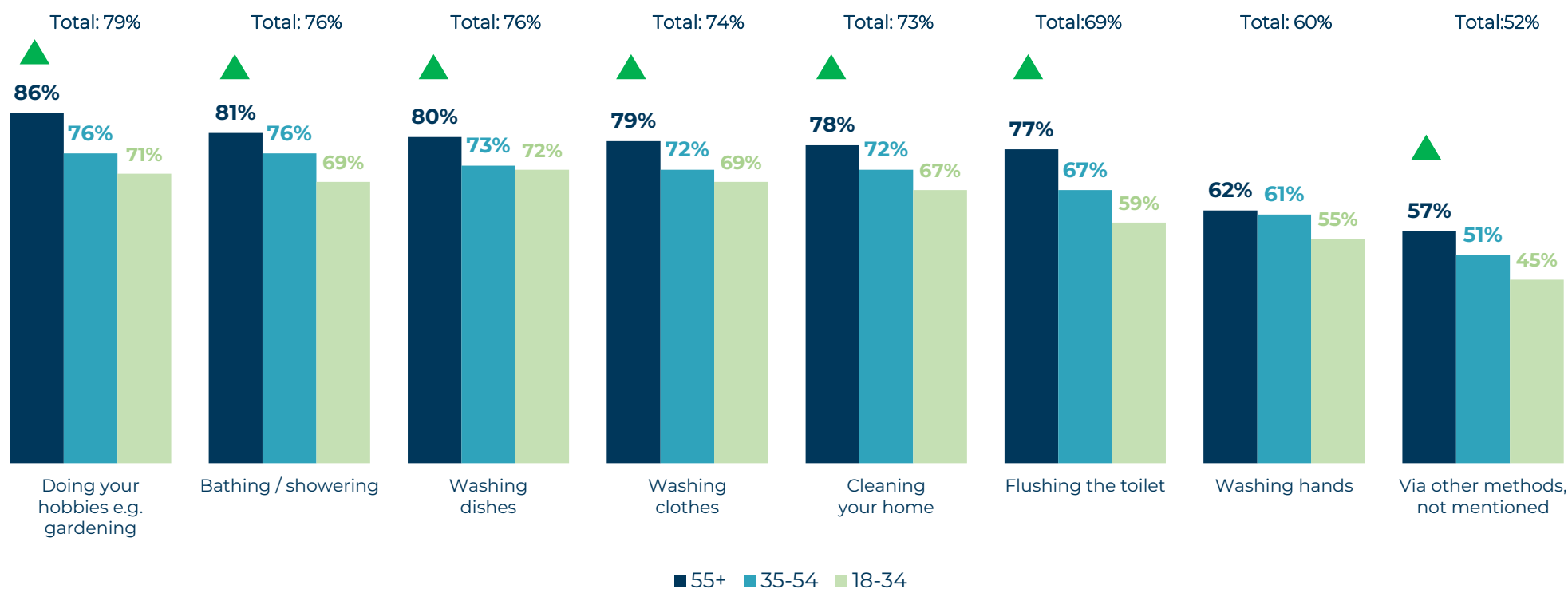


Consumers are increasingly likely to take steps to reduce their water usage across various aspects of their lives as they get older



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Q6: Are you currently making an effort to reduce your household's water usage when...
[Showing SUM: Yes]



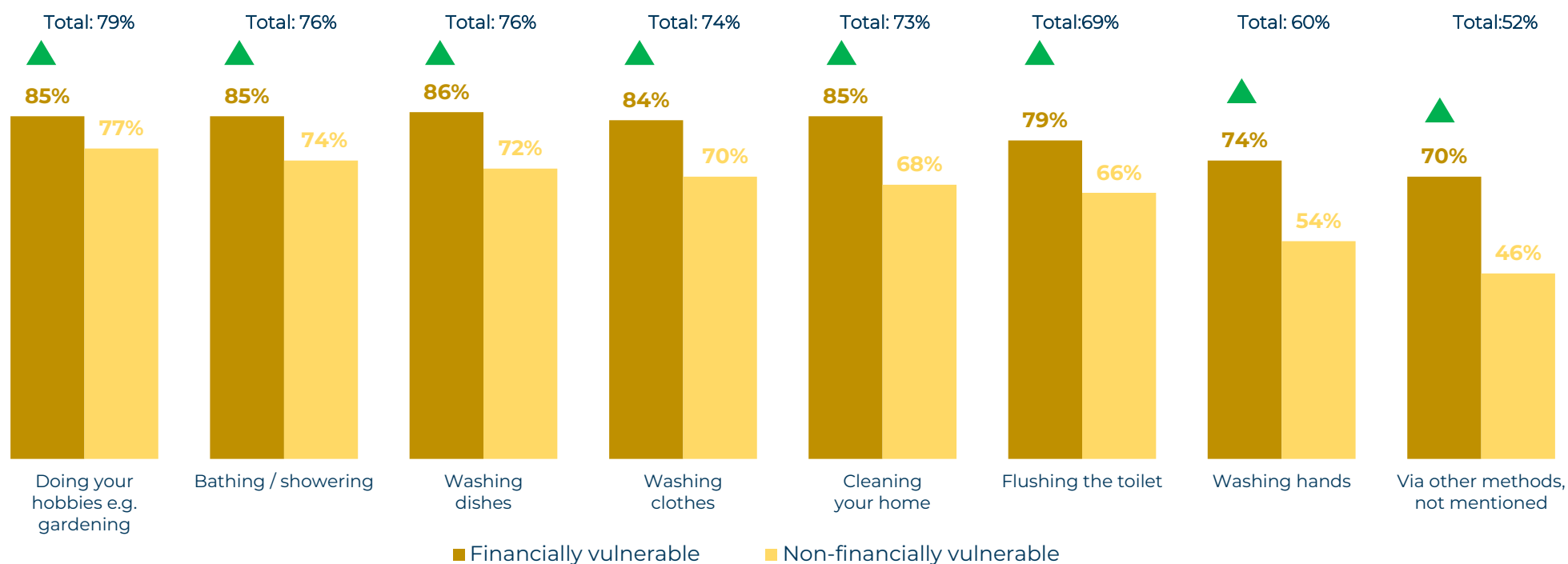
Essential Water Survey

Base: Respondents aged 18-34 (523), 35-54 (646), 55+ (842)

▲ Denotes significantly higher compared to the rest of the group.

Financially vulnerable people are also consistently more proactive in reducing their water usage than those who aren't

Q6: Are you currently making an effort to reduce your household's water usage when...
[Showing SUM: Yes]



Essential Water Survey

Base: All respondents who are financially vulnerable (251), non-financially vulnerable (908)

▲ Denotes significantly higher compared to the rest of the group.

Easy everyday actions to reduce water use at home are already commonplace

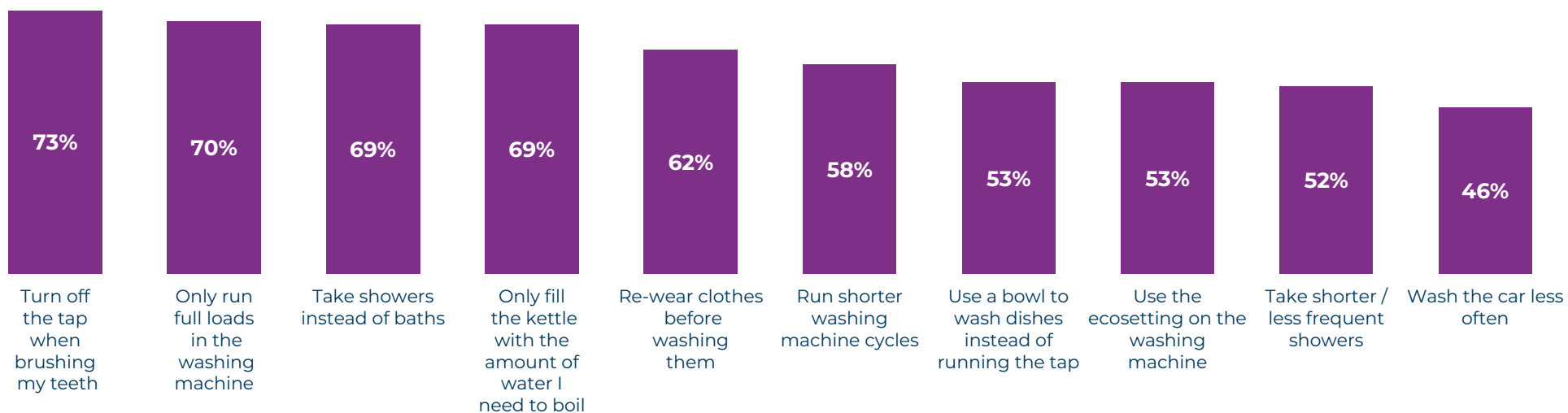


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Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following? [Showing those who said 'I already do this']

"Hi, I'm Oliver and I have four children.

We've recently reduced our water usage at home. When I think about it, I usually do stuff where **there's no real trade-off with reducing water**. So, I end up doing **something a bit less often, and I'm saving both water and money**. It means that really, there's no downside."



Essential Water Survey
Base: All respondents (2,011)

Where measures have not been taken, it is often due to uncertainty about impact



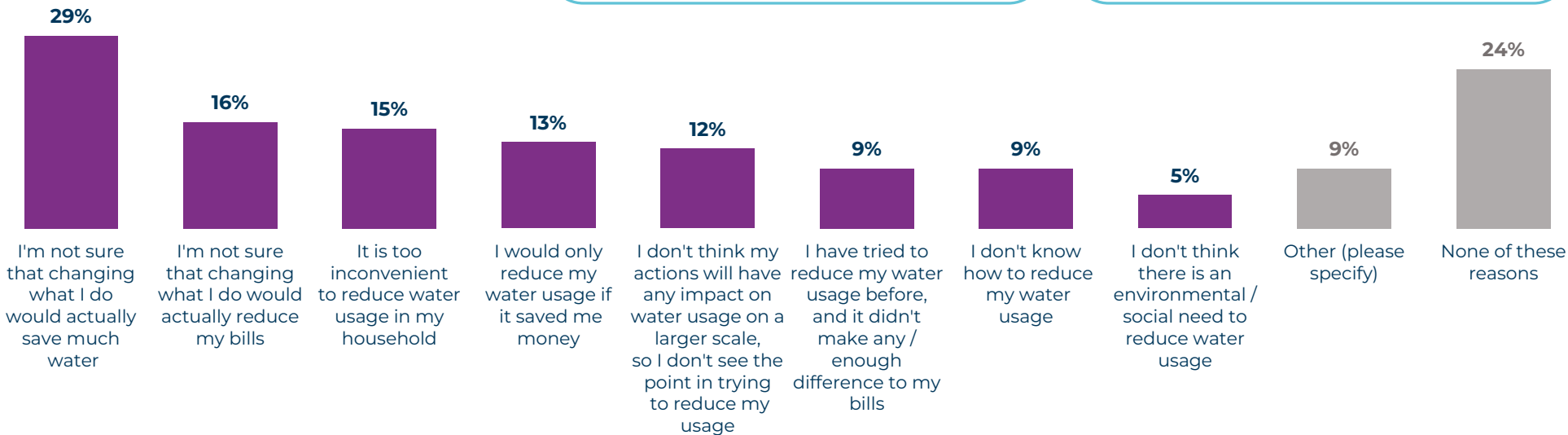
Q8: In areas where you have not taken steps to reduce your household's water usage, why is this?

"I do have eco-settings at home for the machine but then it means the cycle runs longer, albeit at a cooler temperature so I don't actually know if that will make a difference and save me anything?"

Group 3 (Broader motivation reducer)

"It would be interesting to see how much it does actually cost to fill things like my paddling pool. I find it hard to know my water usage equates to cost."

Group 1 (Financial motivation reducer)



Essential Water Survey
Base: All respondents who have not taken steps to reduce their water usage in one or more area (1,305)

There are often both push and pull factors at play when considering water usage, though strength of feeling is stronger behind positive actions

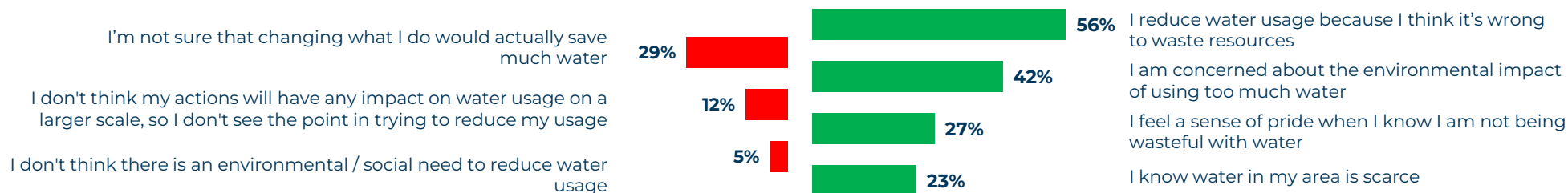


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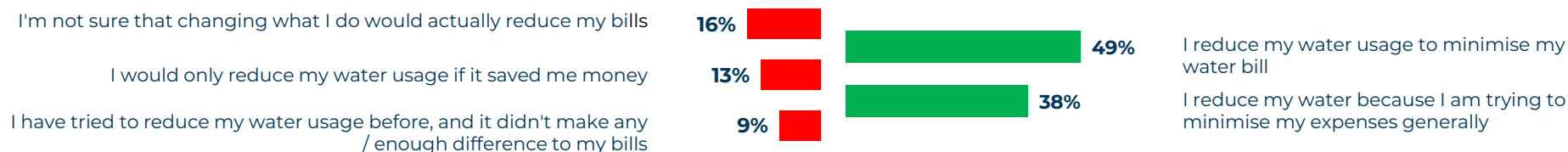
Q8: In areas where you have not taken steps to reduce your household's water usage, why is this?

Q7: Why have you taken steps to reduce your household's water usage?

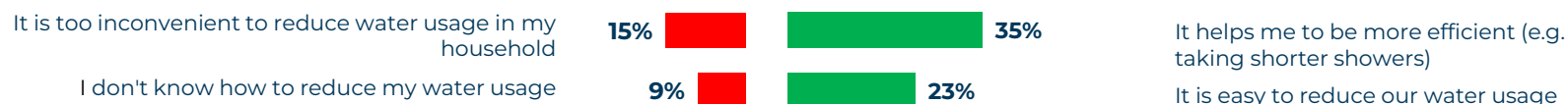
Environmental concern / waste not, want not



Financial concerns



Convenience / ease



Essential Water Survey

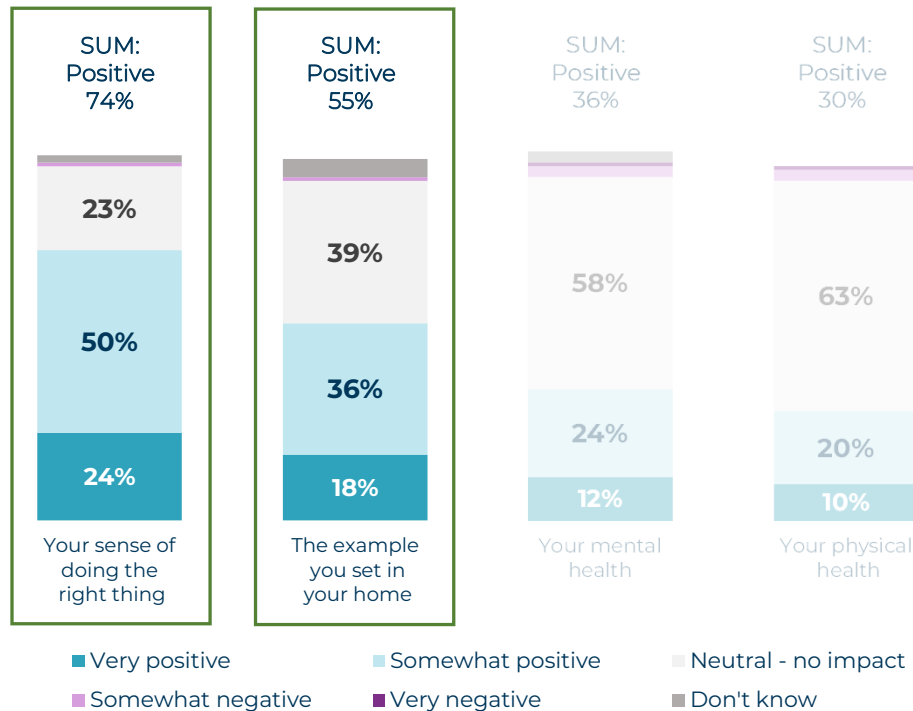
Base: All respondents who have not taken steps to reduce their water usage in one or more area (1,305); All taking steps to reduce household water usage (1,823)

Taking steps to reduce usage has a positive impact on consumers' sense of doing the right thing and the example they set at home

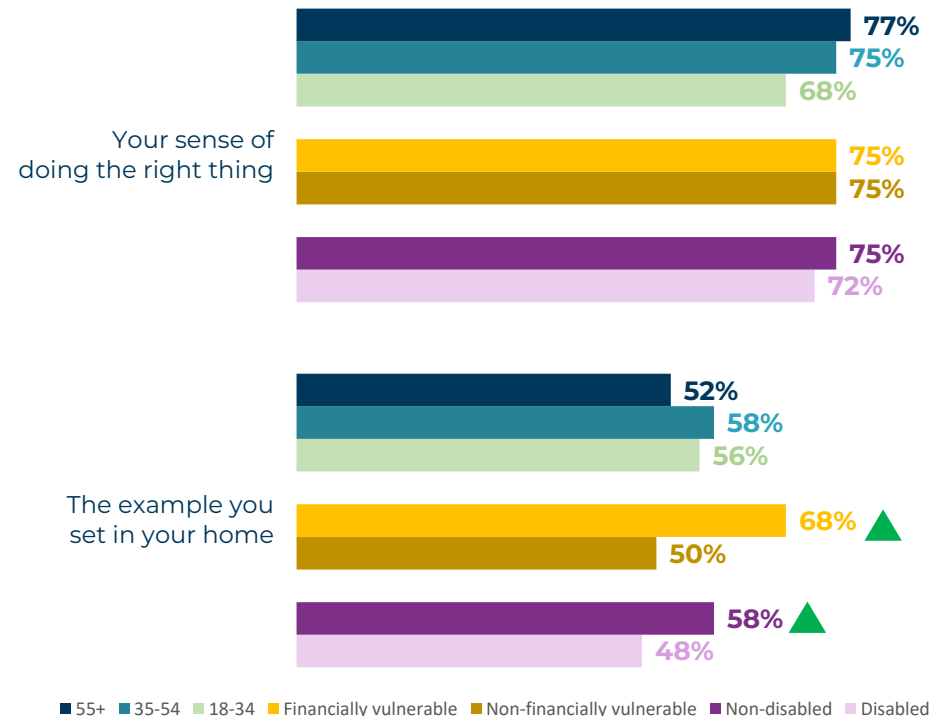


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Q9: What impact would you say the steps you have taken have had on...?



Showing SUM: Positive impact:



Essential Water Survey

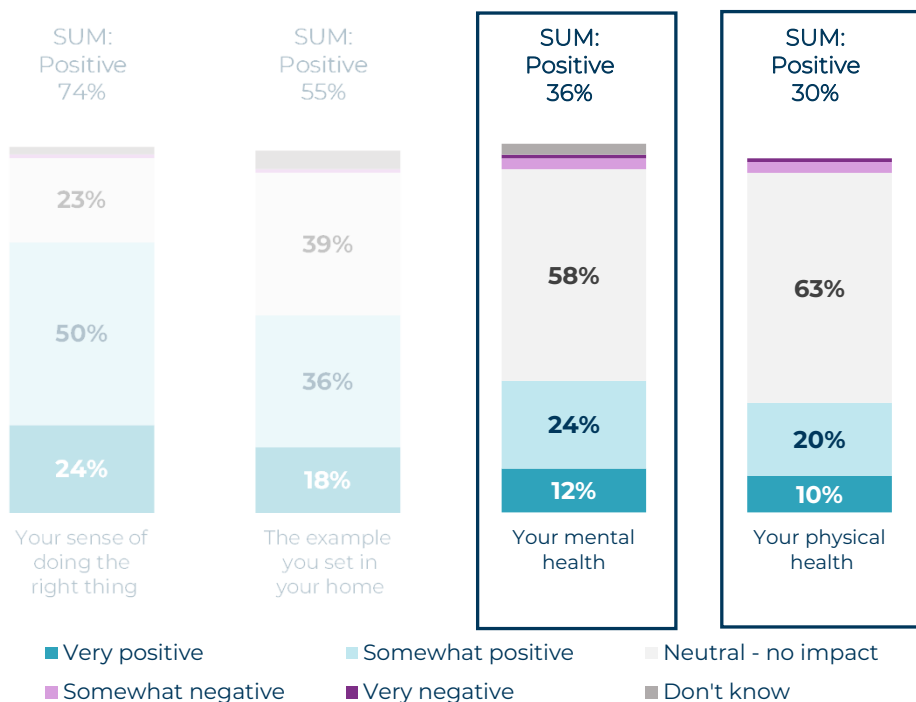
Base: All taking steps to reduce water usage (1,823); 18-34 taking steps (523), 35-54 taking steps (646), 55+ taking steps (842), disabled taking steps (526), non-disabled taking steps (1,447), financially vulnerable taking steps (251), non-financially vulnerable taking steps (908) ▲ Denotes significantly higher compared to the rest of the group.

For the most part, steps taken to reduce usage are rarely thought to have an impact on physical or mental health

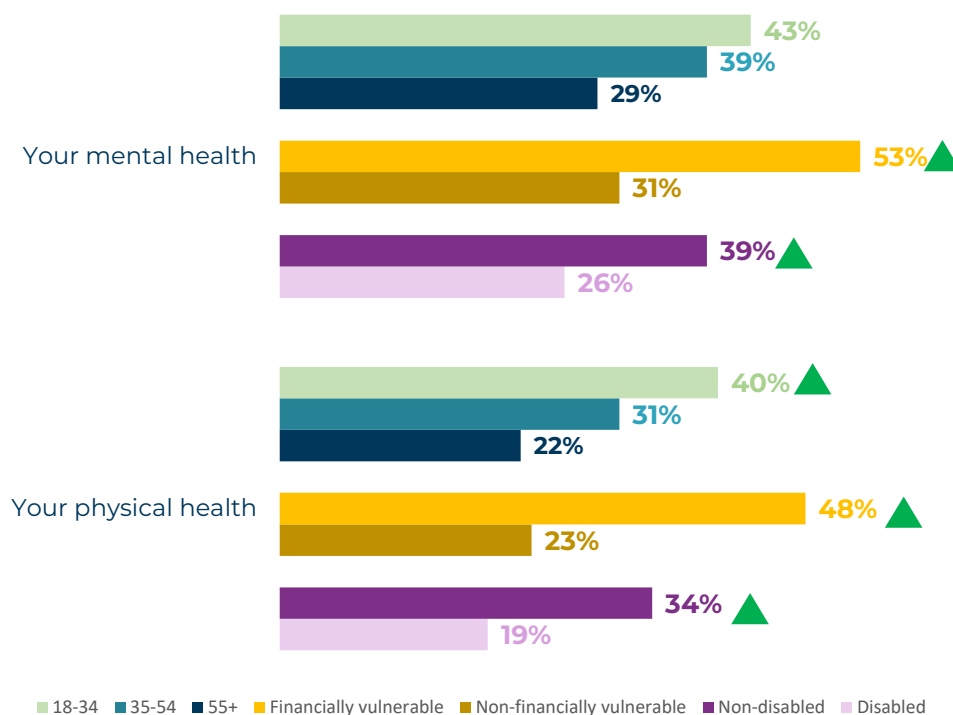


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Q9: What impact would you say the steps you have taken have had on...?



Showing SUM: Positive impact:



Essential Water Survey

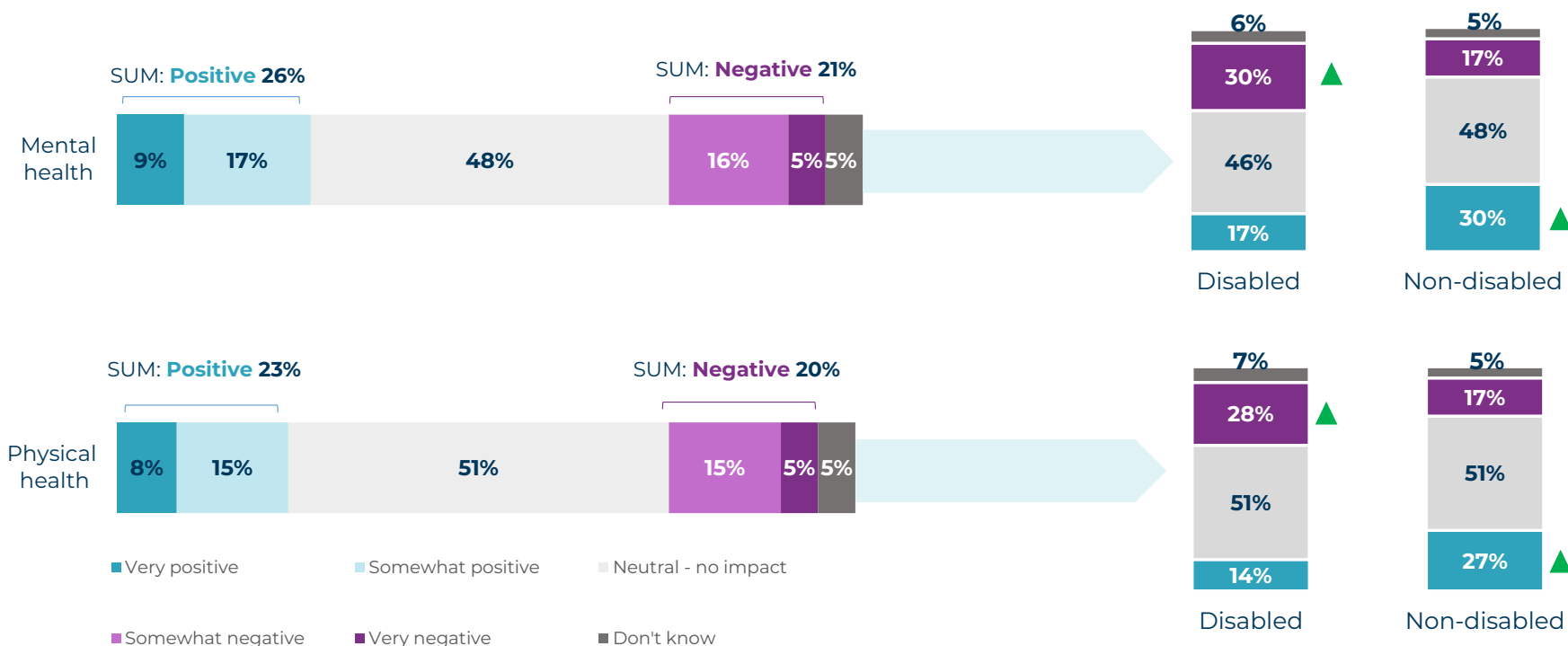
Base: All taking steps to reduce water usage (1,823); 18-34 taking steps (523), 35-54 taking steps (646), 55+ taking steps (842), disabled taking steps (526), non-disabled taking steps (1,447), financially vulnerable taking steps (251), non-financially vulnerable taking steps (908) ▲ Denotes significantly higher compared to the rest of the group.

If asked to reduce further, over half still see no impact on their health, though a negative impact is more likely among disabled people



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Q11: If you were asked to reduce ... (beyond what you are already doing), what impact do you think this would have on your...



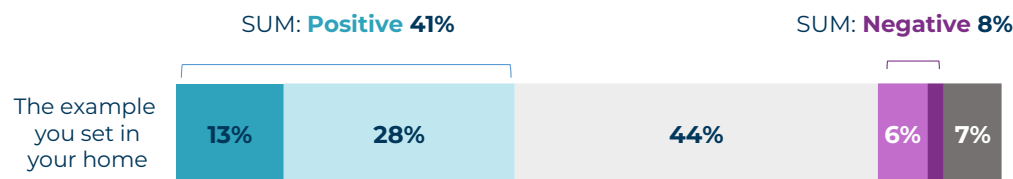
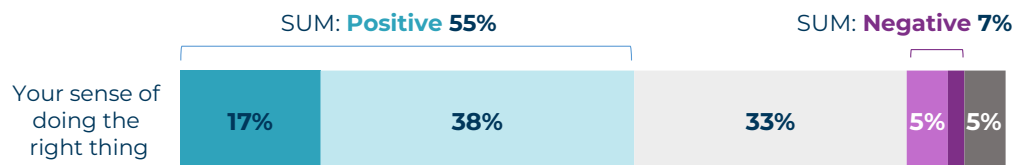
Essential Water Survey

Base: All respondents (2,011); disabled respondents (526), non-disabled respondents (1,147)

▲ Denotes significantly higher compared to the rest of the group.

Large proportions feel taking further action would have a positive impact on sense of doing the right thing and setting an example

Q11: If you were asked to reduce ... (beyond what you are already doing), what impact do you think this would have on...



■ Very positive ■ Somewhat positive ■ Neutral - no impact
■ Somewhat negative ■ Very negative ■ Don't know

Essential Water Survey
Base: All respondents (2,011)

"Hi, I'm Jack. I live in North Wales with three dogs. As a household, we have been cutting back on our water usage.

Getting older, we have become *more conscious of our impact on the environment*, especially when it comes to water use, *what we consume at home and how we recycle*. We all need to do our part to protect the planet."

"It's so sad for the kids, you know they're not allowed to fill up the paddling pools and stuff, and *it'd be nice if, you know, in a few years time these bans would stop*, because they always seem to happen, and it's always in the summer holidays, and the kids are all gutted *it'd be nice to try and make things easier for the next generation really*."



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Further reductions to 'essential' only

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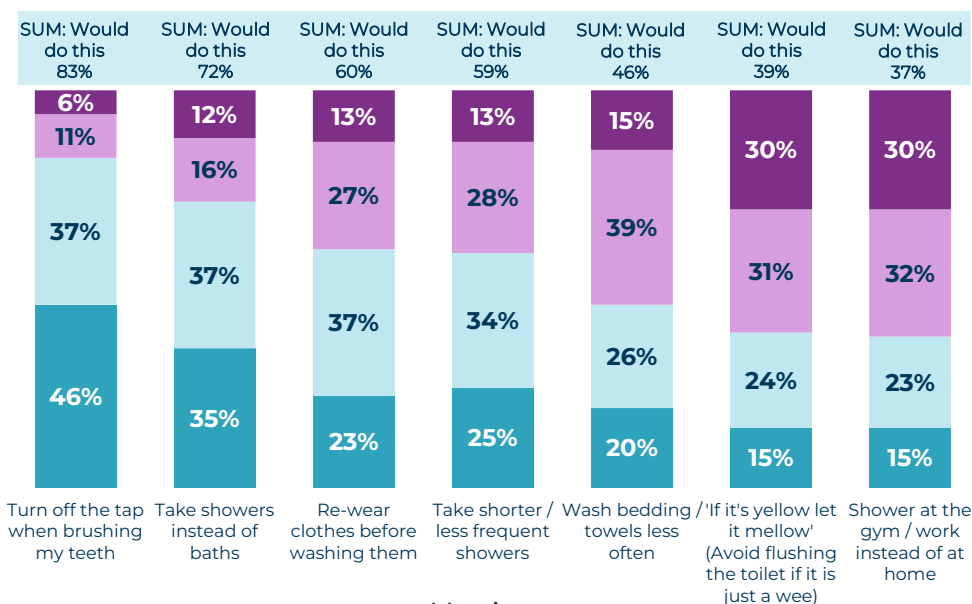
Consumers express a willingness to do more to reduce water usage to essential use only, provided they can still maintain cleanliness and carry out household chores. However, their readiness to make further reductions is tied to how easy and convenient those changes feel in everyday life.

Generally, those not already doing so would be willing to compromise on the amount of water they use for some hygiene purposes, but not in relation to things they perceive to be necessary for basic cleanliness



Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?
[excluding those who said not applicable / I am already doing this]

■ I would definitely not do this
 ■ I would be unlikely to do this
 ■ I would likely do this
 ■ I would definitely start doing this



Hygiene

"If you asked me to flush my wees less often and 'let it mellow', I just wouldn't and I feel like I can't. I don't know if it's a psychological thing or something, but I don't feel comfortable going into a toilet that has already been used.. I don't want to see that."

Group 2 (Financial and other motivation reducer)

"We avoid baths, we only have a shower. So, we go for that, showering every other day..."

I also found out that there is this way of saying it in the UK 'if it's yellow, let it mellow'. It felt weird, but now it's like it feels almost normal to be honest."

Group 3 (Broader motivation reducer)

Essential Water Survey

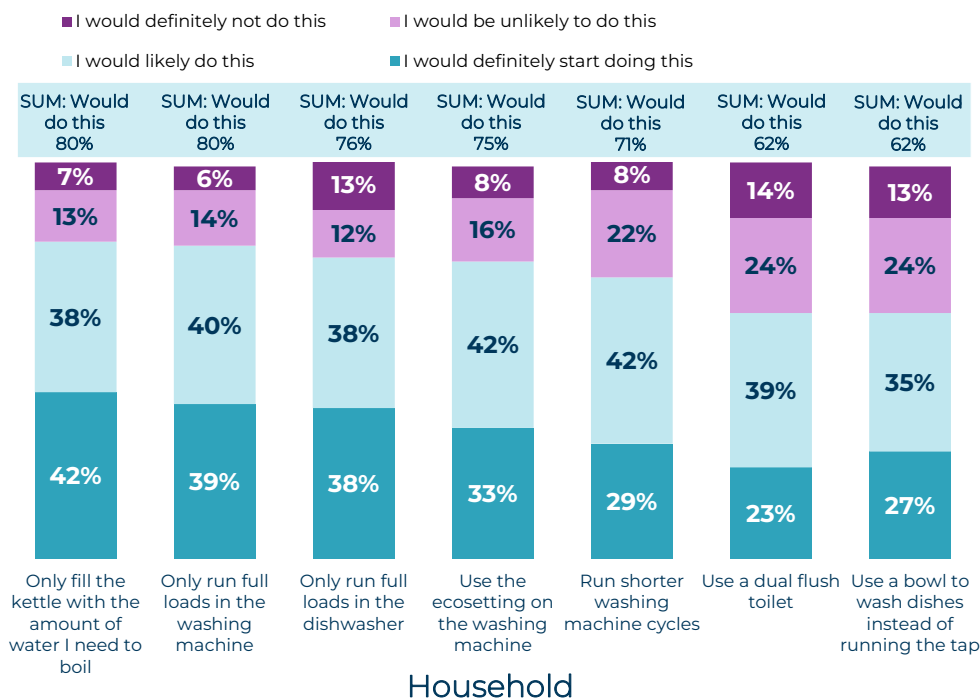
Base: All respondents, excluding those who said not applicable / I am already doing this (405-1,233)

Compared to willingness to reduce water required for cleanliness, those not already conserving water in the household are more willing to reduce household water use



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Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?



"I used to have my washing machine on 7 days a week, and sometimes the drum would only be half full.

I got some advice off Yorkshire water and they said, just do your laundry when it's a full load. So, I'd say, now it's gone from 7 days a week to 4 to 5 days a week."

Group 3 (Broader motivation reducer)

"I try to reuse the water from my dehumidifier for tasks like watering the garden as the plants will benefit from it.

But, I don't think I'd be open to using that dehumidifier water in my sink to wash my dishes as that just seems unhygienic."

Group 2 (Financial and other motivation reducer)

Essential Water Survey

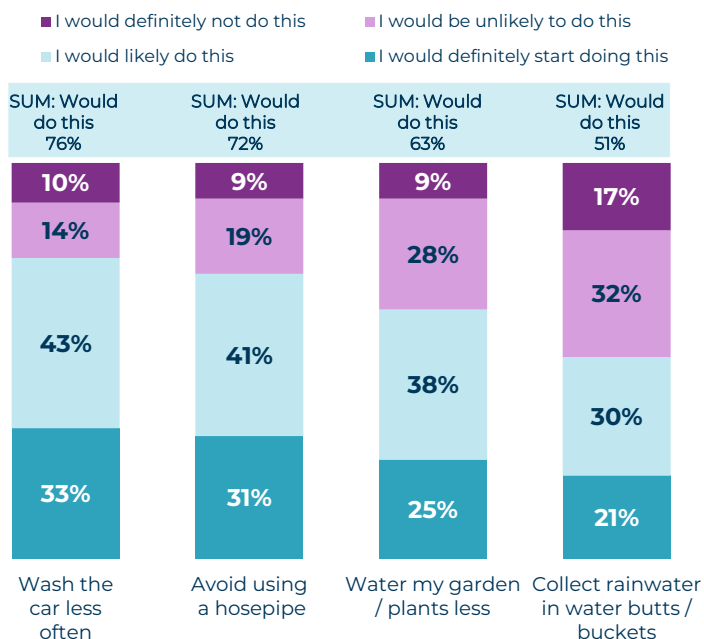
Base: All respondents, excluding those who said not applicable / I am already doing this (405-1,233)

Outside the home, consumers are willing to reduce water usage if this can be achieved with relative ease



The voice for water consumers
Llais defnyddwyr dŵr

Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?



Outside the home

"I wonder if some stuff would be worthwhile trying. For example, showering with a bucket under me to collect water."

To do this, I guess I'd have to be sort of standing over it while I'm showering and hoping that it catches something. I think, for the amount that I would save, the time I spend in the shower, the effort and then carrying it downstairs, hoping I don't spill... it is barely worthwhile."

Group 1 (Financial motivation reducer)

"I'd say as a household we are quite environmentally conscious; we have already implemented a number of measures like only taking showers and limiting our bath to once a week and turning the tap off while brushing our teeth as that's easy. I think it's important to conserve resources."

However, we would never cut back on watering the plants and looking after our koi fish. We love gardening and it's who we are."

Group 2 (Financial and other motivation reducer)

Essential Water Survey

Base: All respondents, excluding those who said not applicable / I am already doing this (405-1,233)

Views on further reducing water usage vary by age, financial vulnerability and disability status, with younger and financially vulnerable individuals more open to making cuts



Young and financially vulnerable consumers are consistently the most willing to further reduce their water usage for hygiene and household purposes as well as outdoor activities.

Non-disabled people are also more likely than disabled individuals to say they would cut back on water use.

Older adults – particularly those aged 55 and over – and disabled individuals notably view hygiene-related water use as essential and are generally unwilling to reduce related usage.



*[Would you consider showering less?]
"No, not in the heat, definitely not. No. In the hot weather it's a nightmare."*

Group 2 (Financial and other motivation reducer, aged 55+)

Meanwhile, non-financially vulnerable consumers are most likely to adopt low-effort water-saving behaviours, such as taking shorter or less frequent showers, using the eco-setting on washing machines, running shorter wash cycles and avoiding hosepipe use.

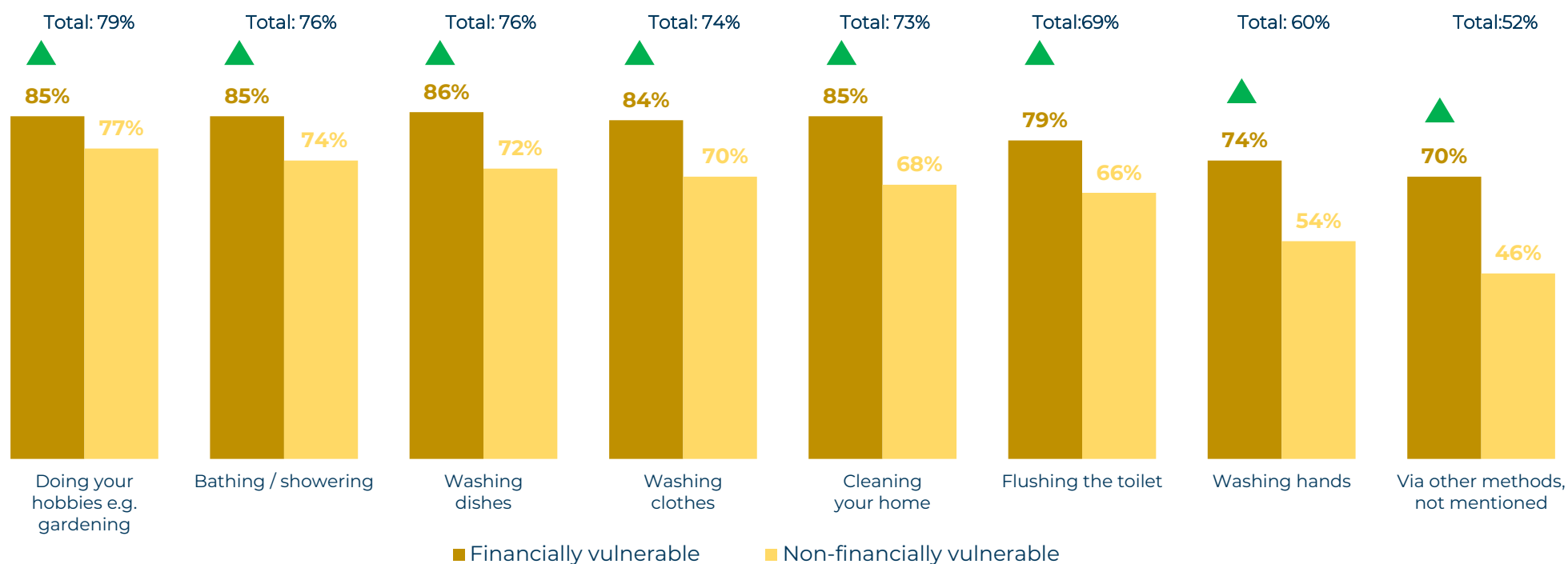


"I use a shorter cycle when I have like 3 or 4 items that I need quickly. I just do the 15 min one, which usually works well when it's a full load."

Group 3 (Broader motivation reducer)

Financially vulnerable people are also consistently more proactive in reducing their water usage than those who are not

Q6: Are you currently making an effort to reduce your household's water usage when...
[Showing SUM: Yes]



Essential Water Survey

Base: All respondents who are financially vulnerable (251), non-financially vulnerable (908)

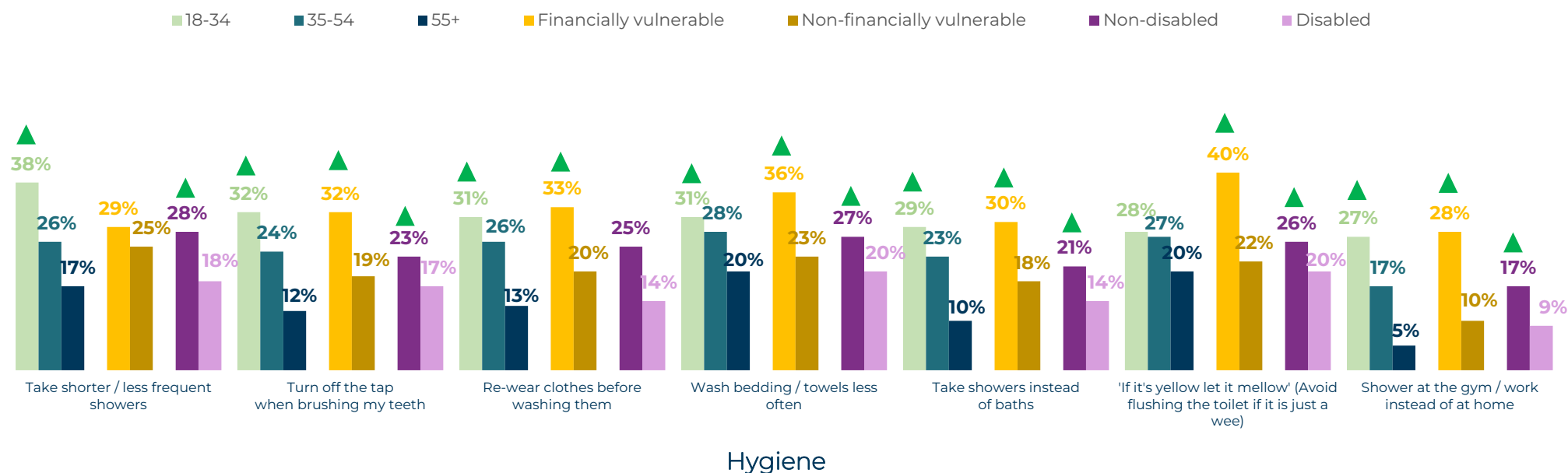
▲ Denotes significantly higher compared to the rest of the group.

Younger respondents, financially vulnerable individuals and those without disabilities are more willing to reduce their water usage across almost all hygiene categories



The voice for water consumers
Llais defnyddwyr dŵr

Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?
[Showing SUM: Would]



Essential Water Survey

Base: All respondents, excluding those who said not applicable / I am already doing this (405-1,233)

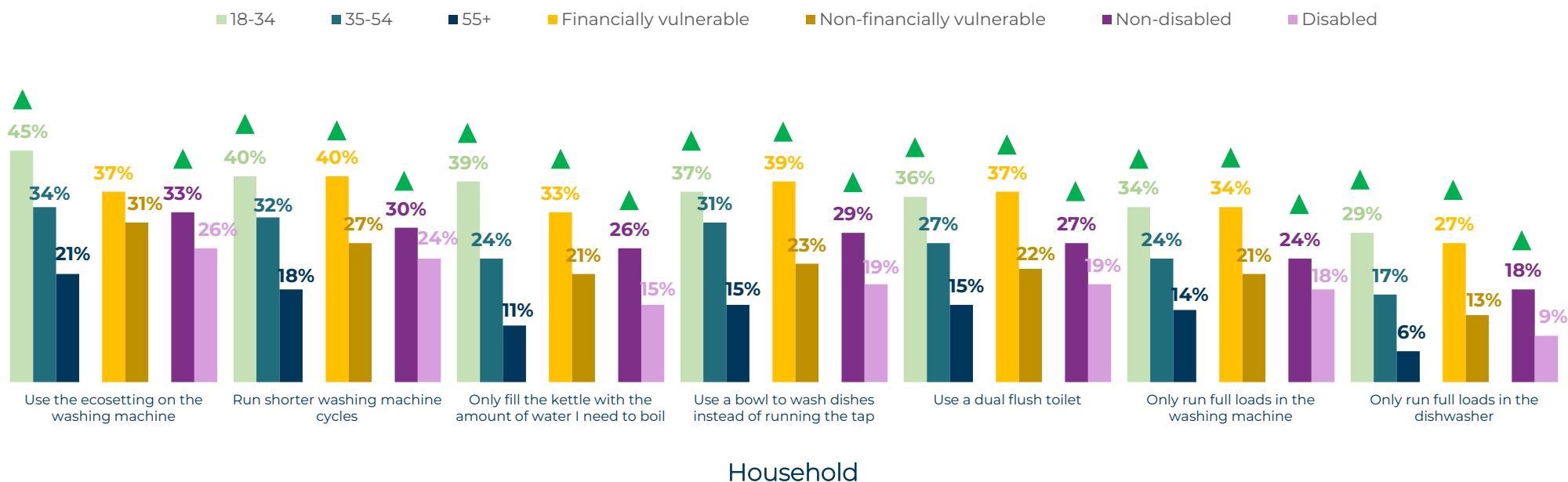
▲ Denotes significantly higher compared to the rest of the group.

Younger respondents, financially vulnerable individuals, and those without disabilities are more willing to reduce their water usage across all household categories



The voice for water consumers
Llais defnyddwyr dŵr

Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?
[Showing SUM: Would]



Essential Water Survey

Base: All respondents, excluding those who said not applicable / I am already doing this (405-1,233)

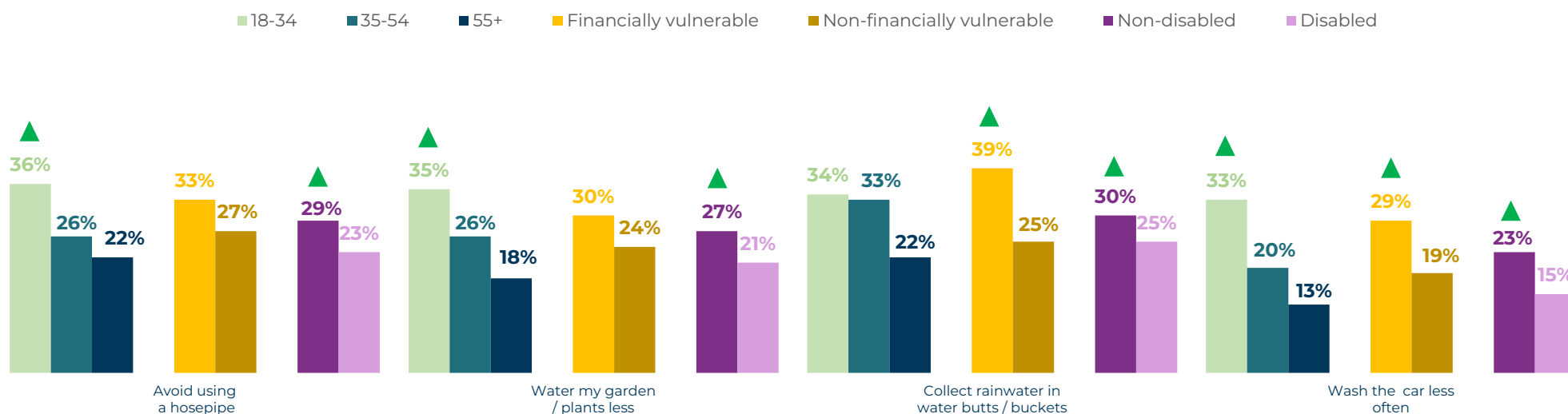
▲ Denotes significantly higher compared to the rest of the group.

Younger respondents, financially vulnerable individuals, and those without disabilities are more willing to reduce their water usage across almost all outside the home categories



The voice for water consumers
Llais defnyddwyr dŵr

Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?
[Showing SUM: Would]



Outside the home

Essential Water Survey

Base: All respondents, excluding those who said not applicable / I am already doing this (405-1,233)

▲ Denotes significantly higher compared to the rest of the group.



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Conclusions



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Conclusion

Objectives:

1. How people interpret the term 'essential water use'

Consumers understand 'essential water use' as the water needed to meet the core priorities they attach to water usage – primarily hydration and personal hygiene. While they are willing to cut back usage where possible so long as they can still meet their needs, they see the water required to fulfil these basic needs as non-negotiable.

2. How views on 'essential water use' vary across different consumer segments

Younger and financially vulnerable consumers tend to have a more flexible interpretation of 'essential water', believing they can reduce usage further while still meeting core needs. On the other hand, older adults view certain uses, especially related to hygiene, as strictly essential and are less willing to cut back beyond what they are already doing. Similarly, non-disabled individuals are more open to reducing their usage, whereas for disabled people, the physical and mental health impacts of cutting back make their essential usage less flexible.

3. When people would be willing to reduce their water usage and what would motivate them to do so

To motivate people to reduce water use, consider emphasising drivers such as water saving being quick and seamless, fitting easily into everyday life, while also appealing to responsibility for the environment, family and self. Practicality and convenience, along with visible, tangible results are key factors that can encourage stronger and broader behavior change.

Conclusion (2)

In-depth findings:

Impact of further reducing water use

The main risk around further reducing water use relates to the potential impact on disabled individuals. Over a quarter of disabled consumers expect that cutting back further would negatively affect their mental (30%) and physical (28%) health, suggesting they are already conserving water to the extent they safely can. Pushing for additional reductions may risk compromising their well-being by forcing harmful or unsustainable behaviours.

Key drivers for water saving behaviours – and how these differ across consumer segments

The main motivators for water-saving behaviour are financial – such as reducing water bills and overall expenses (60%) – and concern about waste and water scarcity (69%). Environmental and anti-waste motivations are particularly strong among older adults: 69% of those aged 55+ have reduced their water usage because they believe it's wrong to waste resources, compared to 40% of those aged 18–34.

However, financial considerations influence both age groups, with 53% of adults aged 55+ and 46% of those aged 18–34 cutting back on water to lower their bills. Similarly, consumers who are not financially vulnerable are more likely to cite environmental concerns as a reason to conserve water (62% vs 48% among financially vulnerable individuals). Nonetheless, financial factors are a key driver across all groups and even those experiencing financial hardship still take waste and environmental impact into account.

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Appendix

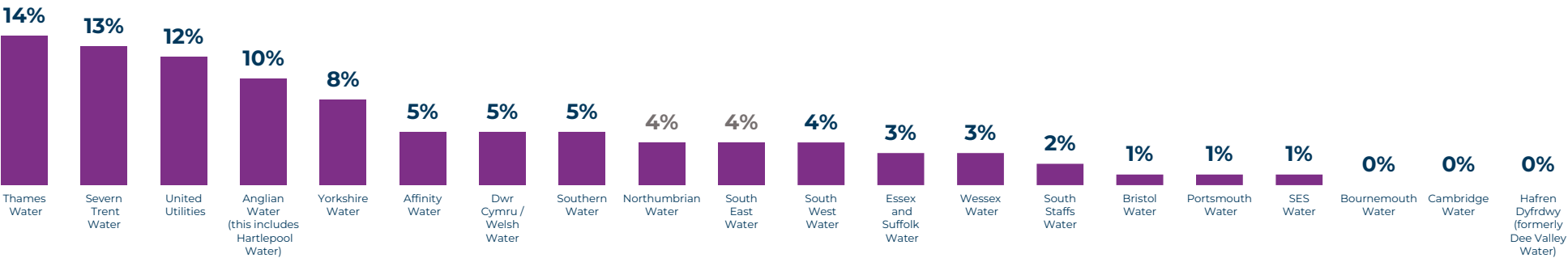
Appendix – Respondent profile



Q1: Which water company provides your water services?

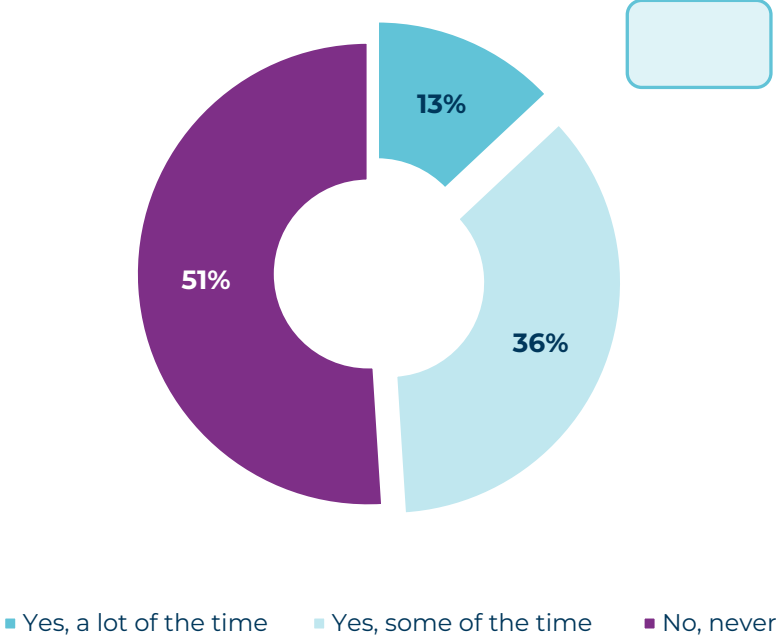
2% don't know which water company provides their water services

1% say another water company provides their water services

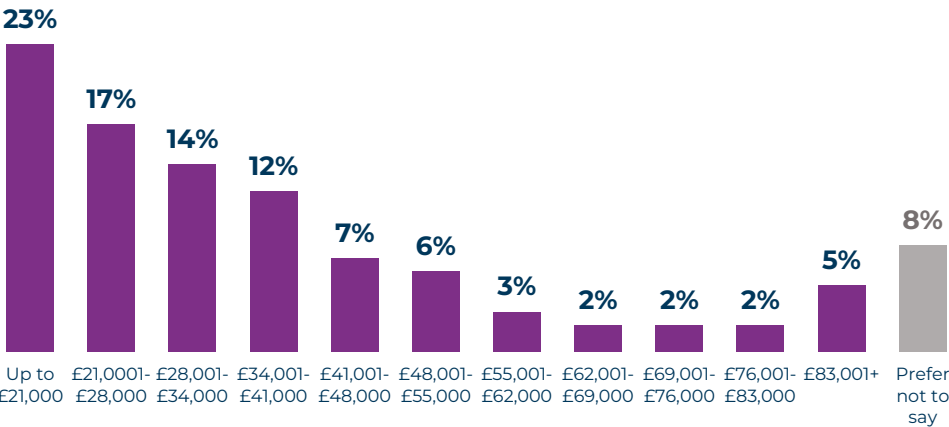


Appendix – Respondent profile (2)

Q3b: Do you find that your household income is not enough to cover essential bills such as rent, utilities and food?



HINC: What is the combined annual income of your household, prior to tax being deducted?

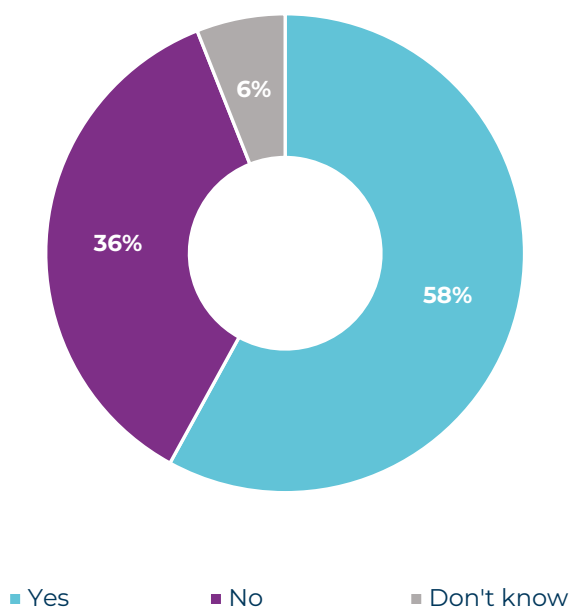


Essential Water Survey
Base: All respondents (2,011)

*Note that screener questions were used to identify financially vulnerable respondents (those whose household income is not enough to cover essential bills and who are on a social water tariff).

Appendix – Metered vs non-metered consumer behaviours and attitudes

Q4: Do you have a water meter?



Essential Water Survey
Base: All respondents (2,011)

Quantitatively, there are notable differences between consumers with water meters and those without, particularly in their behaviours and attitudes toward essential water usage. To a lesser extent, differences also emerge in the perceived impact of water-saving actions.

- **Attitudes:**

The primary distinction lies in the motivation behind water-saving efforts. **Consumers with water meters are significantly more likely to reduce their water usage to save money.** In contrast, those without meters tend to be more influenced by concerns around water scarcity. Additionally, **unmetered consumers are generally less convinced that changing their behaviour would result in meaningful water savings.**

- **Behaviours:**

Consumers with water meters consistently engage in more **water-saving practices** than those without meters.

- **Impact of water-saving behaviours:**

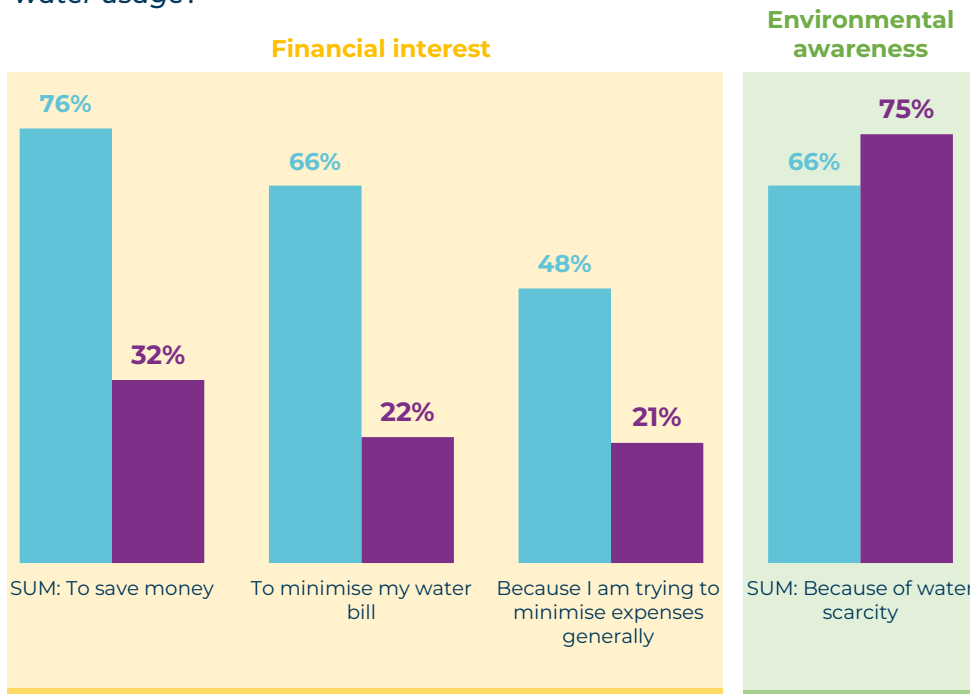
Those with water meters report **more positive outcomes from their efforts to save water.** They are more likely to say these actions have improved their mental well-being, enhanced their sense of doing the right thing and helped set a good example within their household.

Appendix – Metered vs non-metered: attitudes

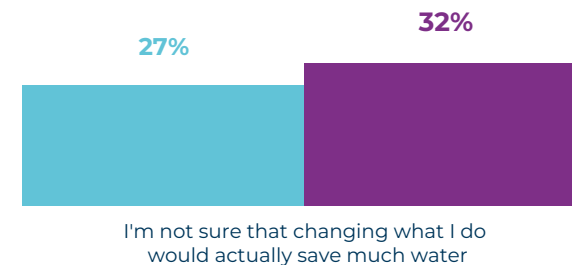


The voice for water consumers
Llais defnyddwyr dŵr

Q7: Why have you taken steps to reduce your household's water usage?



Q8: In areas where you have not taken steps to reduce your household's water usage, why is this?



■ Water meter ■ No water meter

Essential Water Survey

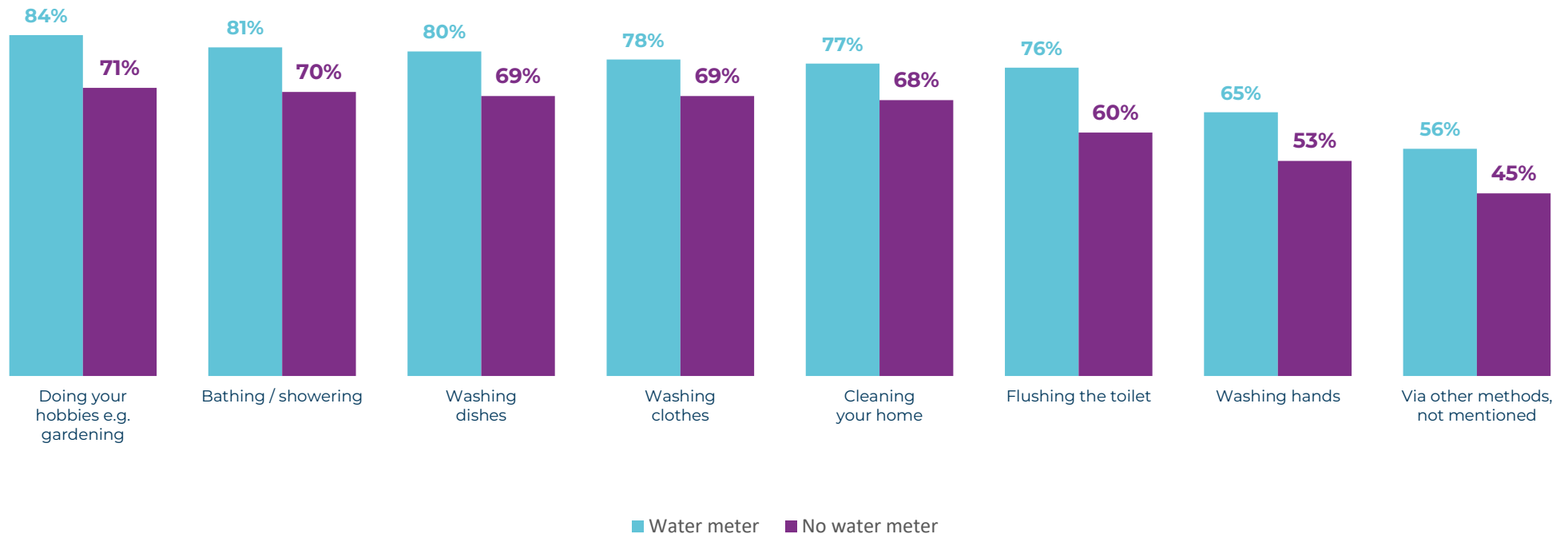
Base: All respondents with a water meter (1,169) , all respondents without a water meter (736)

Appendix – Metered vs non-metered: water-saving behaviours



The voice for water consumers
Llais defnyddwyr dŵr

Q6: Are you currently making an effort to reduce your household's water usage when...
[Showing SUM: Making an effort]



Essential Water Survey

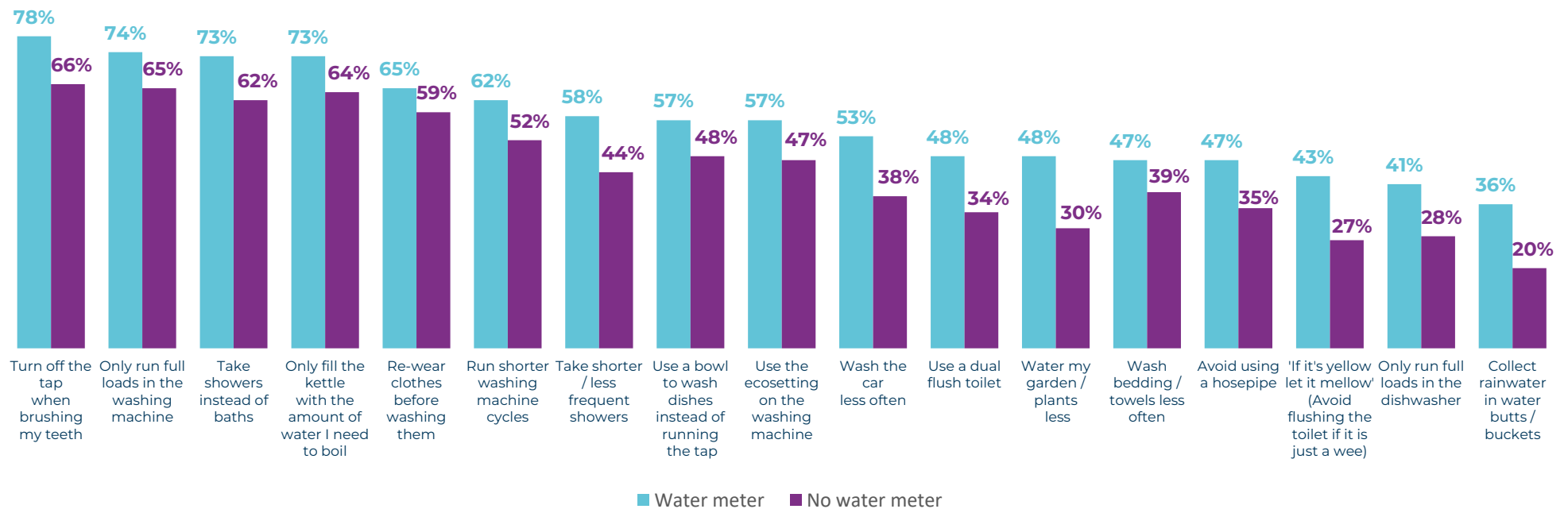
Base: All respondents with a water meter (1,169) , all respondents without a water meter (736)

Appendix – Metered vs non-metered: water-saving behaviours (2)



The voice for water consumers
Llais defnyddwyr dŵr

Q10: If you were asked to reduce your water usage to 'essential' use only, how likely or unlikely would you be to do the following?
[Showing SUM: 'I am already doing this']



Essential Water Survey

Base: All respondents with a water meter (1,169) , all respondents without a water meter (736)

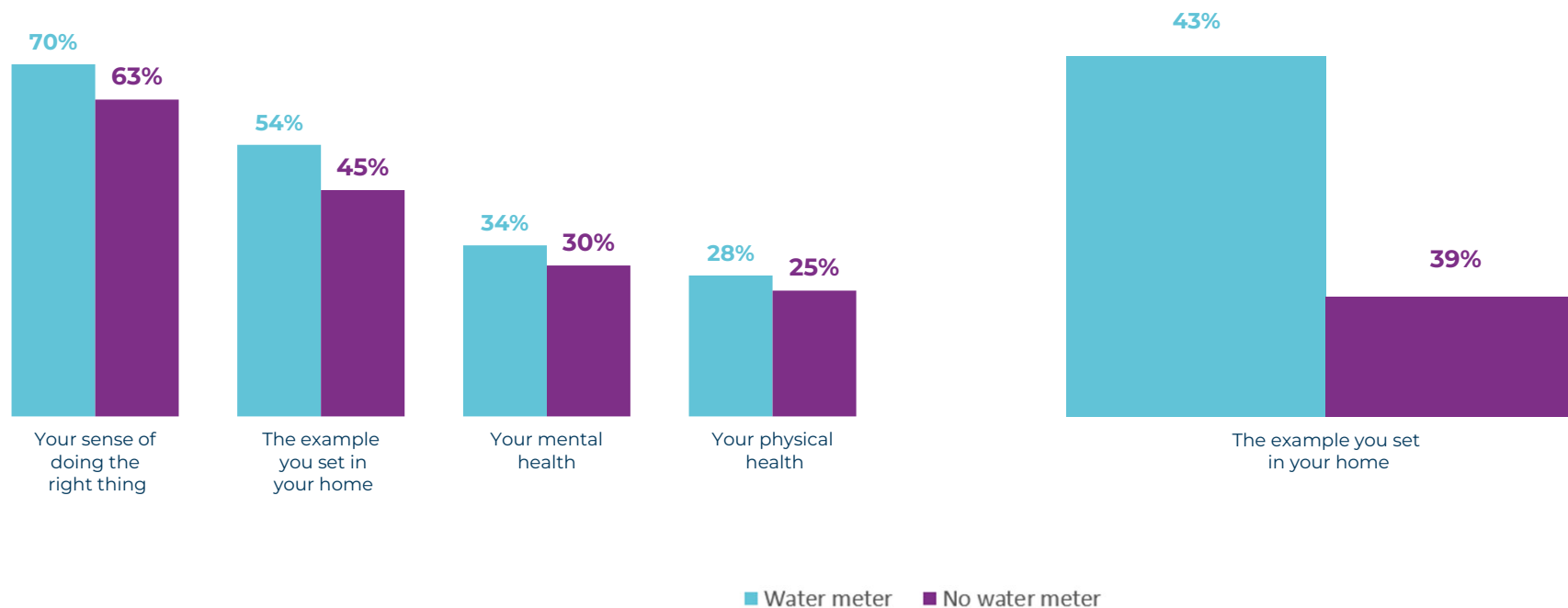
Appendix – Metered vs non-metered: impact of water-saving behaviours



The voice for water consumers
Llais defnyddwyr dŵr

Q9: What impact would you say the steps you have taken have had on...? [Showing SUM: Positive impact]

Q11: If you were asked to reduce ... (beyond what you are already doing), what impact do you think this would have on...



Essential Water Survey

Base: All respondents with a water meter (1,169) , all respondents without a water meter (736)