



United Utilities Water usage ethno Customer Research Report

Project introduction



What did we want to find out?

➤ Need for research:

Helping customers to reduce their water usage is a key challenge which utility companies are facing. There is a need for customers to be more mindful of their usage to ensure there is enough to go around and demand can be met.

United Utilities wanted to understand customers' water usage over time, and the factors that may influence this.

➤ Objectives:

More specifically, this research explores:

- How customers are using water in their home
- What everyday barriers exist to cutting down water usage in their home
- What could motivate customers to use less water in their home
- What can UU do to help customers make changes to water usage and break habits
- Importantly, how all this looks across different customer groups

➤ Methodology:

Online survey* & ethnographic diary study

➤ Audience:

Recruitment and profiling survey:
1003 United Utilities customers

Ethnographic diary:
36 participants – full profile in the appendix

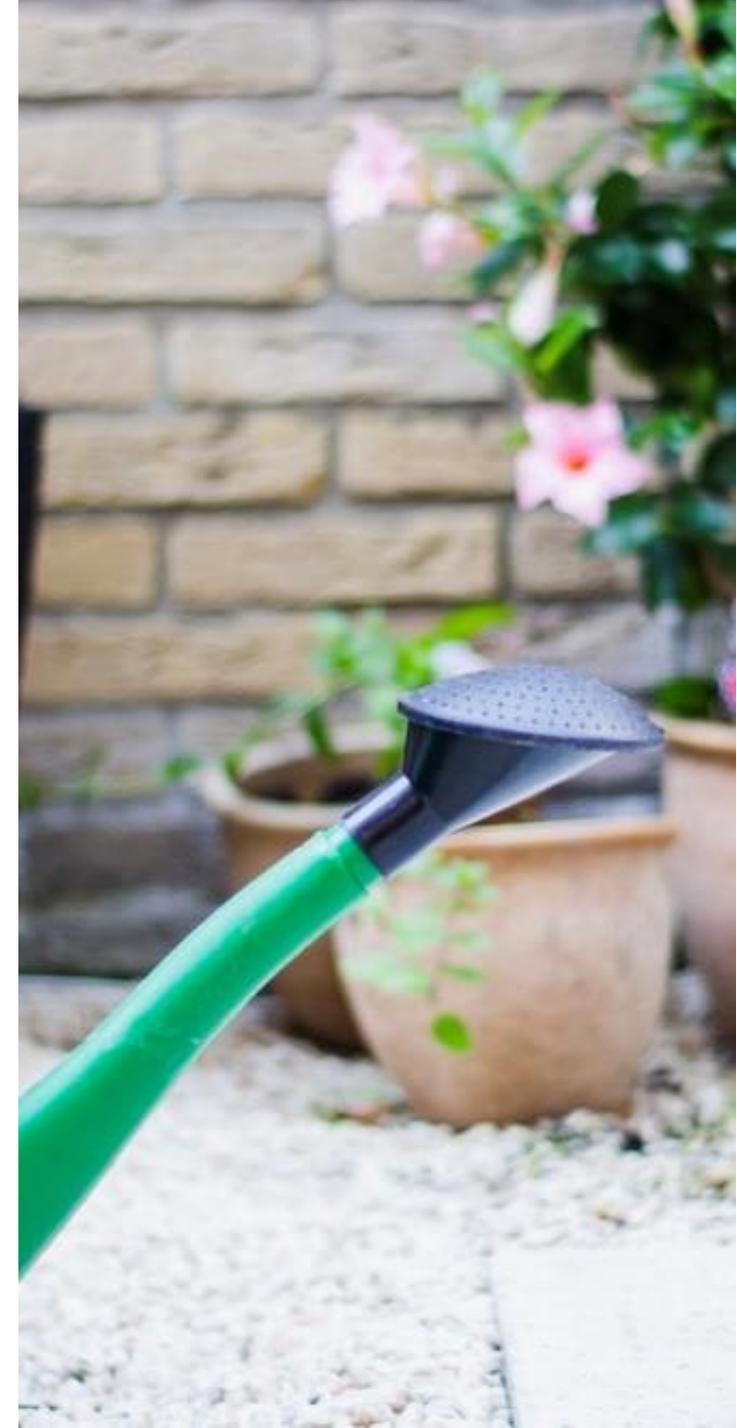
➤ Fieldwork:

Survey:

30th July – 13th August

Ethnographic Diary task:

13th August - 14th September



*Survey objective was primarily recruitment and so not representative of customer base. However data is not analysed at a total level in this report, only by lifestage subgroup.

Our diary approach

To get a full understanding of people's behaviour, we have been running an online diary. The diary runs through Field Notes and allows people to capture in-the-moment photos or videos so that we can ensure that we're always getting an accurate insight into their lives.

Throughout the diary, we've run a number of tasks, where we asked each participant to record their behaviour:

- Task One: To introduce themselves and their home and start to understand their attitudes to water and wider eco-issues.
- Task Two: Record their normal routines and behavior around water usage.
- Task Three: Try to reduce their water usage on their own via UU tips on the website and their own techniques.
- Task Four : Trial either a UU water audit or Water Saving Kit. Unmeasured customers also reviewed the water saving calculator.
- Task Five: Reflect on their experience.

The sample:



Pre-family
13 participants



Young family
8 participants

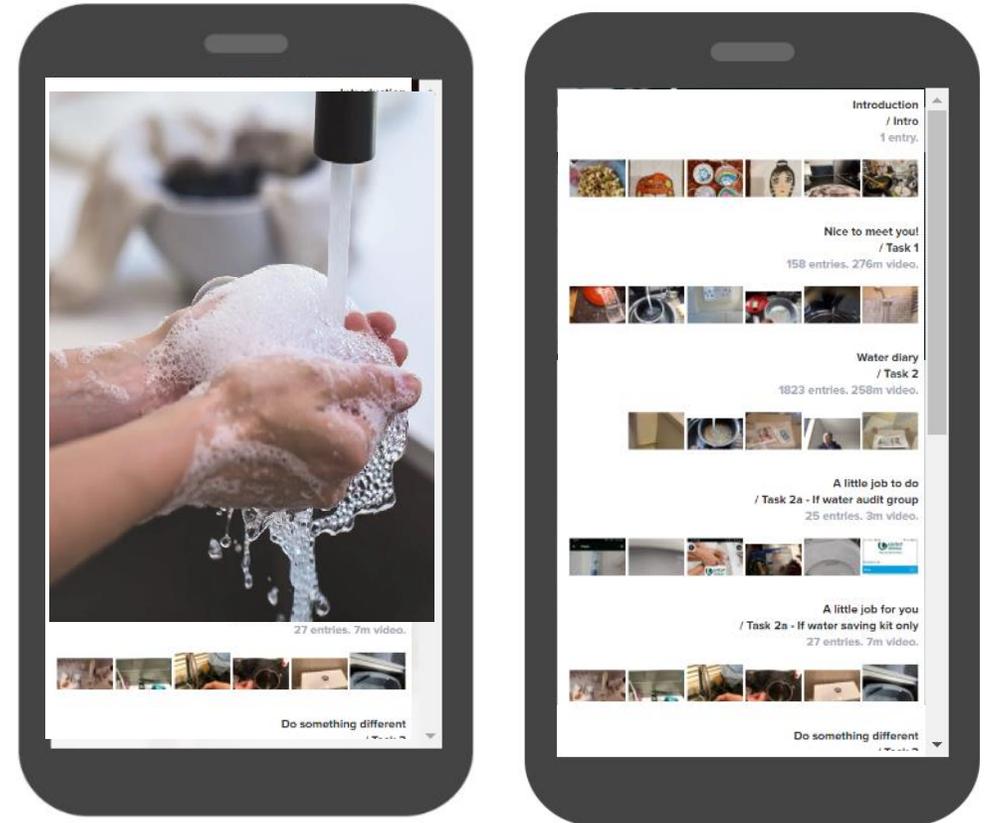


Older family
9 participants



Empty Nesters
6 participants

Full breakdown of sample in appendix but across each group there was a mix of measured/unmeasured, SEG, gender, CACI



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Key take outs

United Utilities need to address with their customers:

Greater saliency of water wastage (**WHAT**), a connection with issues they value (**WHY**) and provide direction relevant to their lives (**HOW**)

1



2



3



Awareness & understanding of water wastage is the primary issue to address across all customers



Customers have a real **blind spot** when it comes to their water usage; they don't realise how much their lifestyles drive water consumption (especially younger pre-family customers) – nor do they engage with water wastage to anywhere near the same degree as other issues such as plastics, fuel or landfill. Even financial engagement with water bills seems lower than for energy bills.



As it stands, for many, water is seen as an **affordable luxury** as well as playing an essential role in many aspects of consumer lives.



Yet **when their usage is exposed it can prompt real, customer-driven changes** in attitudes and behaviours – potentially more powerful and with more longevity than UU driven actions.

SO WHAT?

- Give customers **a reason to care** about their water usage above and beyond cost, and **make them realise how much their lifestyles waste**. This is critical before any comms around interventions and tips.
- Campaigns around 'challenges to the public' to monitor and change usage, awareness campaigns of household usage stats and impact on, not just environmental factors but energy bill costs too will be important. Also consider monitoring tools to help people 'shine a light' on their behaviour.



A central part of United Utilities' strategy for water saving has to be the **targeting of messages by life-stage**

MESSAGE TO HOUSEHOLDS



Focus on environmental impact and carbon footprint

Consider tips relating to eco friendly lifestyles, with a focus on indoor activities



Focus on trade offs and educate on informed choices

Recommend tips or products which once implemented require minimal effort to up keep



Focus on generational responsibility

Find fun ways to engage the whole family, to lighten responsibility on the parents



Focus on waste and preservation

Consider tips which help show the waste saved with innovative ways to further recycle

Interventions: promoting 'hacks', trade offs, product partnerships and repositioning meters may have better impact than current devices and audit

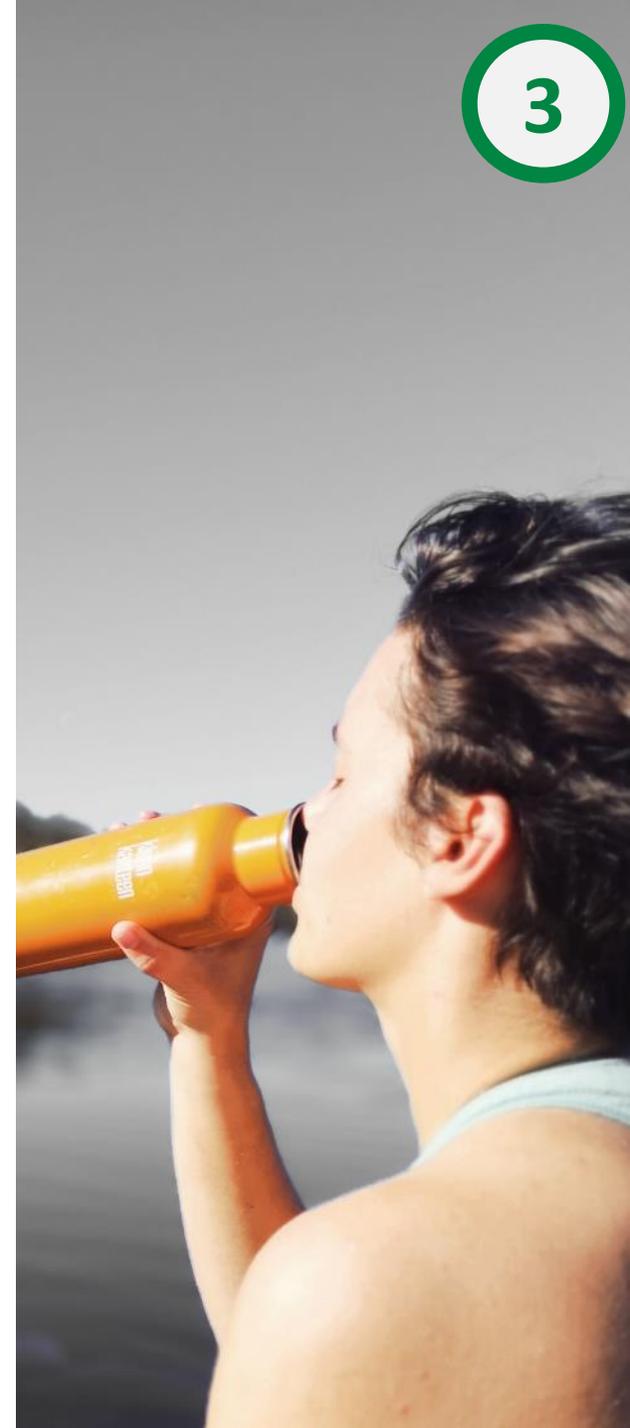
➔ Successful in-home interventions are: 1. convenient ('fit & forget'), 2. minimise aesthetic impact and 3. work for that individual's set-up. However, the current water kit doesn't fulfil all of these, resulting in short term success and abandonment for some. Website tips also focus more on older life-stages.

➔ As a result, customers develop hacks that 'work for them' and have greater success - as such, promoting 'hacks' could be an effective line of comms to complement the current range.

Likewise, asking customers to 'trade-off' non negotiable water usage against less essential could be effective.

➔ Consider product partnerships (e.g. working with showerhead manufacturers or household product brands) to deliver informed choices to customers (either explicitly or unbranded) in areas they haven't previously considered.

➔ This research supports the case for water Smart Meters – enabling better engagement, monitoring and 'real time' awareness of usage. In the interim, standard meters may need a 'rebrand' – focusing them not just on the water cost saving, although important, but what else having a meter can mean (e.g. better tracking of wastage which has impact elsewhere (energy bills, the environment), and ensure this positive comms is present within the water calculator, where currently elevated costs in isolation could 'scare off' prospective measured customers.



Understanding our customers

A still life composition on a light-colored wooden tray. In the upper left, a silver faucet is partially visible. The tray holds a white ceramic cup filled with dark coffee, a lit candle in a white holder, a clear glass vase with a wooden base containing small white flowers and a cinnamon stick, and a glass of white milk. Two orange boxes of 'SALTED' chocolate are stacked under the coffee cup. A semi-transparent grey text box is overlaid on the left side of the image, containing the text 'Understanding our customers'.

Social and contextual factors are inevitably driving relationships and behaviours with water and are thus critical for how you reach and talk to your customers...



Pre family: environmentally minded, but need water waste to have greater saliency in their lives



- Eco-aware but more so with plastic, environment and wildlife – with plant based diets trending and a connection to nature through diet, pets and plants.
- However, water wastage is not on their radar despite this focus elsewhere in their lives.
- Lifestyles necessitate lots of water – exercise, plants, pets – and so eco-lifestyle is at odds with water usage.
- Also cost-conscious, but this doesn't necessarily extend to water.

CULTURE + TRENDS

join the dots

- The youngest of this group (Gen Z) are **savvy at research and avid information seekers**. As such, they're skeptical and less likely to take things at face value. Being accused of 'greenwashing' is dangerous with a Gen Z audience.
- Gen Z within this group are characterized by being **vocal and passionate about change**, with influences around sustainability such as protest groups, like Extinction Rebellion, and forthright activists like Greta Thunberg.



(Pre Family, Unmetered)



(Pre Family, Metered)

Young family: with so much competing pressure for their time, they need a compelling reason to inconvenience themselves



- With enormous competing pulls for their attention, water consciousness becomes difficult.
- Yet becoming a parent does awaken, for some, a sense of greater social and environmental responsibility – not so much in water consumption though.
- The barriers to water saving that parenthood bring are further confounded by the characteristic of Millennials too, whilst socially minded, being more likely to prioritise their own comfort - resulting in this being a difficult group to really shift and change whilst at this life stage.

CULTURE + TRENDS

Join the dots

- Influences shaping their attitudes to sustainability include **high profile narratives**, (e.g. David Attenborough, or the war on plastic, rise of veganism), and actions taken by schools or topics covered by kids TV programmes.
- Further a feeling of 'keeping up with the Joneses' can be prevalent in these groups and may be a lever to try. The age of the 'experience' means they're likely to want to tell others about something they've done - this is important when thinking about how to generate change within the cohort.



(Young Family, Metered)



House plants & large garden – watch out for the underclaimed use of hosepipe clearly seen in the footage! 

Older family: an openness to change (with kids as a driving force) but a high demand on their time, financials and concern



- Possibly the group with **greatest demands on them** – with both dependent children but for some ageing parents to look after as well as career – resulting in high demand for their time, financials and concern.
- There is **interest to change but needs to be made easy** given busy lives.
- Energy saving in house and recycling are prevalent – recycling not just through council but also family effort – kids learn at school and educate the family.
- Indeed, like young families, **water provides both a lifeline and a necessity for running a HH with kids.**

CULTURE + TRENDS

join the dots

- Whilst this group are **influenced by public figures**, they're also heavily **influenced by the generations they're sandwiched between** especially when it comes to sustainability. In one study* 57% of parents think their children know more about sustainable living than they do, and almost three quarters (72%) of parents have been reprimanded by their children for unsustainable practices such as using too much water!
- The influence of their children's mindset to sustainability is an important influencer and could be a route to engagement.

(Older Family, Metered)

Empty nesters: habits around reducing 'waste' engrained but not always explicitly about sustainability



- Aware of water usage – habits like saving / reusing water are engrained from childhood, where often 'had less'.
- Already doing things to try and save water.
- Motivated by saving money rather than environment per se – and a theme of being motivated by waste in general.

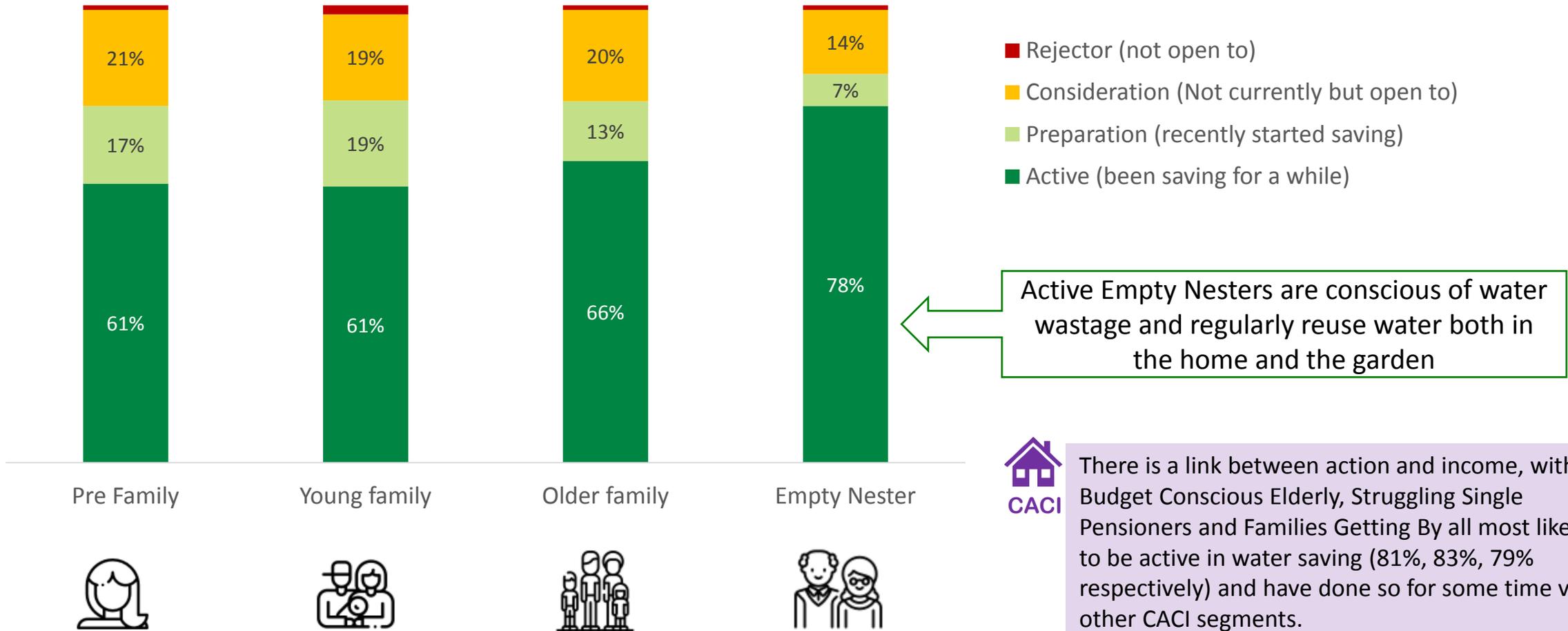
CULTURE + TRENDS

- Indeed, one study** found Only 39% of baby boomers or empty nesters buy from sustainable brands, however they are engaged with less waste practices such as having a compost.
- This group trust mainstream media, and brands and business, far more than younger generations. This is where they get their information about sustainability from, therefore sustainability isn't associated with resources, rather defined by the 'hot topics' of the time.
- This generation equate waste and sustainability with themselves and their own behaviour, whereas younger generations assign the responsibility to brands, governments, and a problem with consumerism.

Empty Nester, Metered)

Whilst older customers have been actively saving water for a while, younger customers are considering and preparing to

Claimed current water saving stage



But all customers are more likely to hold brands and companies to account to lead the way on protecting water supply

% strongly agree				
Government should play leading role	74%	70%	64%	64%
Brands and large companies should be leading the way	71%	62%	61%	64%
Utilities companies need to lead the way & encourage customers to save	62%	59%	60%	62%
Everyone is individually responsible for reducing amount they use	57%	56%	59%	64%
Every HH should do everything they can to reduce their water usage	53%	47%	53%	60%
Only way to create a positive change is collectively, in large numbers	50%	42%	44%	43%
I personally do everything I can to reduce my water consumption	23%	19%	32%	39%
My household does everything it can to reduce our water consumption	22%	16%	25%	38%

Younger customers are much more likely to hold brands and companies responsible and feel they should be leading the way.

Older people in general are more likely to feel they do everything they can to address water usage.

CULTURE + TRENDS
join the dots



Holding brands to rights is a particular issue for **Gen Z**: This cohort are aware of water as a finite resource, but at the moment their association with waste in terms of impact on the planet and environment is **squarely fixed on brands and companies** – not individual actions. **Their focus is changing the behaviours of brands, not themselves.**

A close-up photograph of a person's hand holding a green and yellow garden hose, spraying water onto a variety of green plants in a garden. The water is captured in mid-air, creating a misty spray of droplets. The background shows a wooden fence and more foliage, all in soft focus. The overall scene is bright and vibrant, suggesting a sunny day.

Current water usage behaviour

**When it comes to water usage in the UK,
there are a number of common truths**



Overall there is a lack of knowledge around water usage in the UK

- People are open about their lack of knowledge about water.
- There is confusion on how the water systems work and what role United Utilities play in bringing water into homes.
- There is even less awareness around the potentially devastating environmental and social impacts of water shortages in the future.
- A major barrier to awareness is the sheer amount of rainfall in the North West which seems at odds with messages of shortages.



So what?

Awareness and education are key gaps to target. There is an opportunity to capitalise on the openness people have to learning about water usage, and build further relationships with customers in the North West around this.

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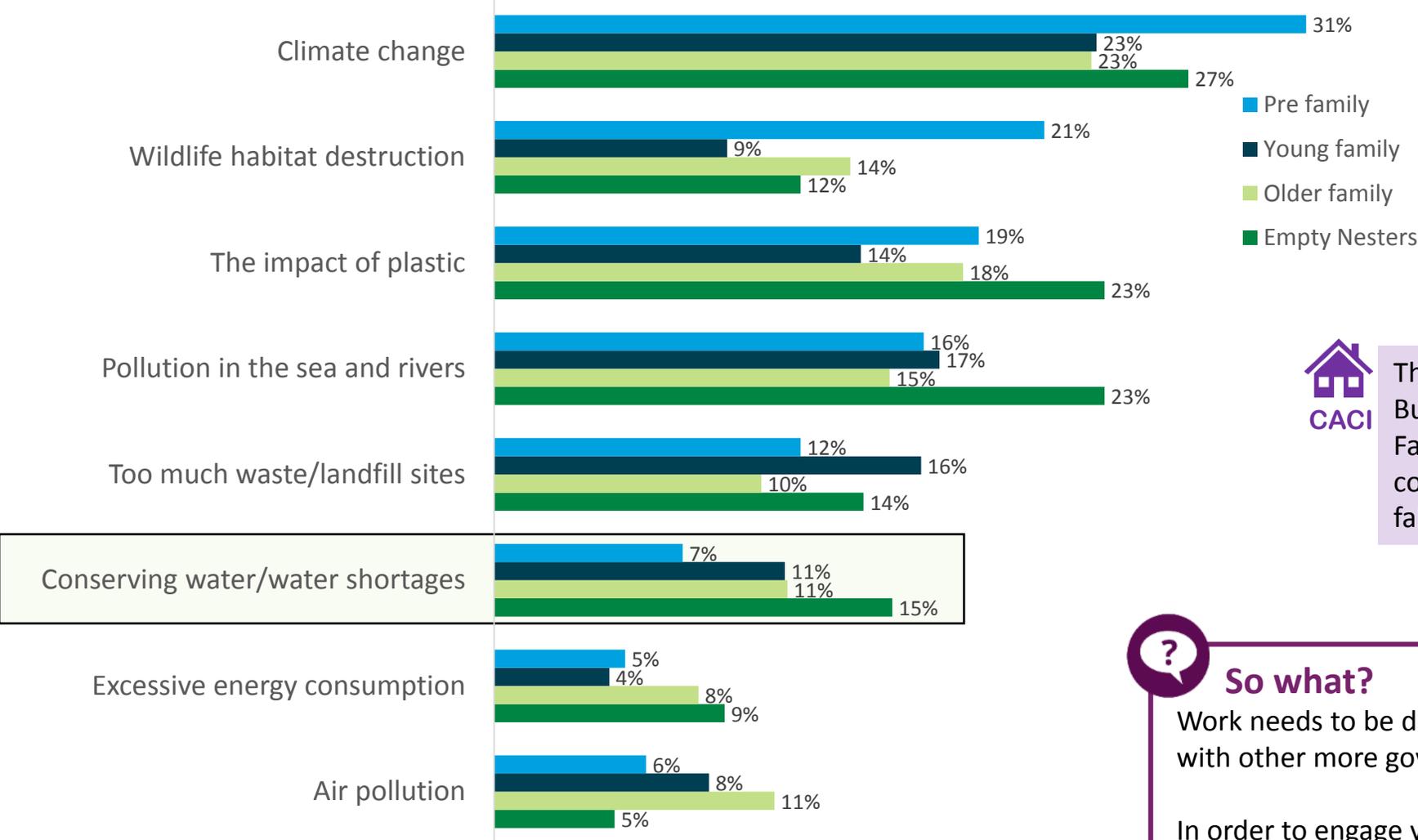
On two or three occasions we have been surprised at the water restrictions in the North West as coming from the South we thought water supplies were more adequate up here” (Empty Nester, Measured)

“

Living in the North West you take for granted water as it rains so much” (Young Family, Measured)

Water is considered low priority when it comes to sustainability

% ranking in 1st/2nd importance



Younger customers have most concern for climate change and wildlife. Older generations are the most aware of water shortages but this is still a lower consideration than climate change or plastics.



There is a link between action and income, with - Budget Conscious Elderly and Hard Pressed Families being (directionally) more likely to have conserving water in their top 3 priorities. But it still falls below other priorities they'd consider.

So what?

Work needs to be done to make water more top of mind compared with other more government backed issues such as plastic.

In order to engage younger generations its important to tie protecting water supplies with the environment.

And financially, customers aren't motivated to care as much as they are with other utilities

- 🟢 Unlike most other utilities, there is no financial incentive to monitor water usage without a meter.
- 🟢 Those with water meters don't appear proactive about them, the majority inheriting them or actively choosing not to reinstall one if moving house.
- 🟢 When they are installed, few look at the readings regularly to understand how their usage breaks down.
- 🟢 There is a further barrier for those who don't own their own house so do not have the choice of fitting one.



So what?

Few have linked their water usage to other areas they care about such as energy. It's important to stress that reducing water can reduce consumption of other utilities which in turn also have environmental and financial benefits.

“ As I don't currently have a water meter I'm not actually aware of how much water I'm realistically using” (Older Family, Unmetered)



(Young Family, Metered)

Instead, water is seen as an affordable luxury, playing an essential role in many aspects of consumer lives



Health

Keeping hydrated is associated with keeping healthy, and having clear skin.

Many diets or beauty regimes encourage high levels of water usage.



Hygiene

On top of the usual washing, keeping Covid safe, playing sports/going the gym, having a labour intensive job and going on holiday all increase the need for washing.



Relaxation

Many associate long baths or showers with destressing from the day, having some thinking time or escaping from the family.



Entertainment

Water is a key source of entertainment in the household; from water fights, paddling pools, painting or hot tubs, water can provide an endless source of fun.



Home Interests

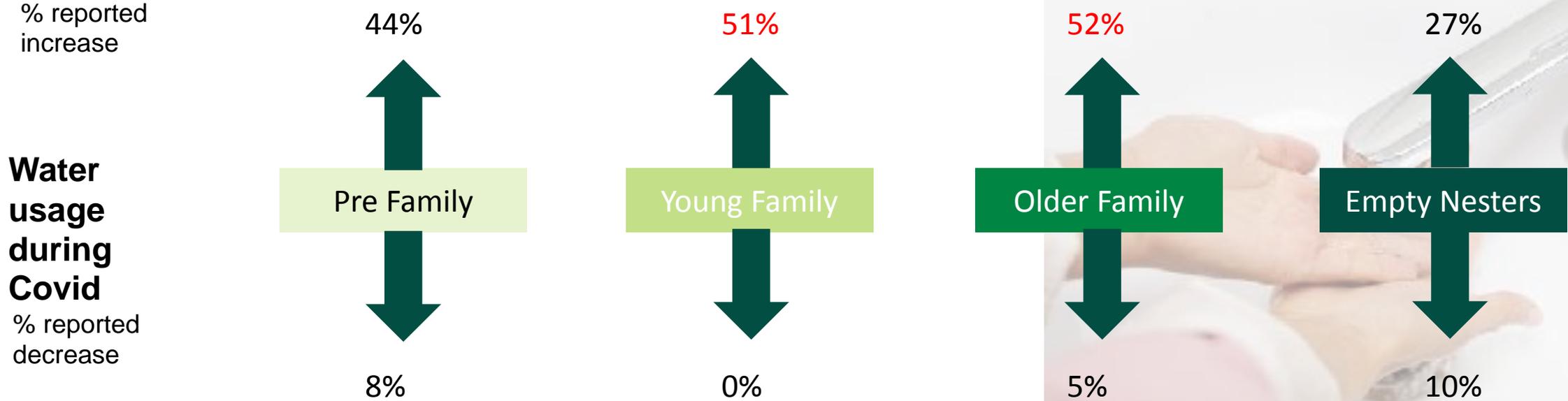
Water is key for facilitating interests within the home such as plants or pets or home renovations.

“A nice long shower is just nice, I don't want to rush it. I'm more than happy to spend the extra couple of quid to have that luxury” (Pre Family, Metered)

“Having a paddling pool has been a lifesaver during lockdown” (Older Family, Unmetered)

... with water usage only set to increase from the long term effects of Covid

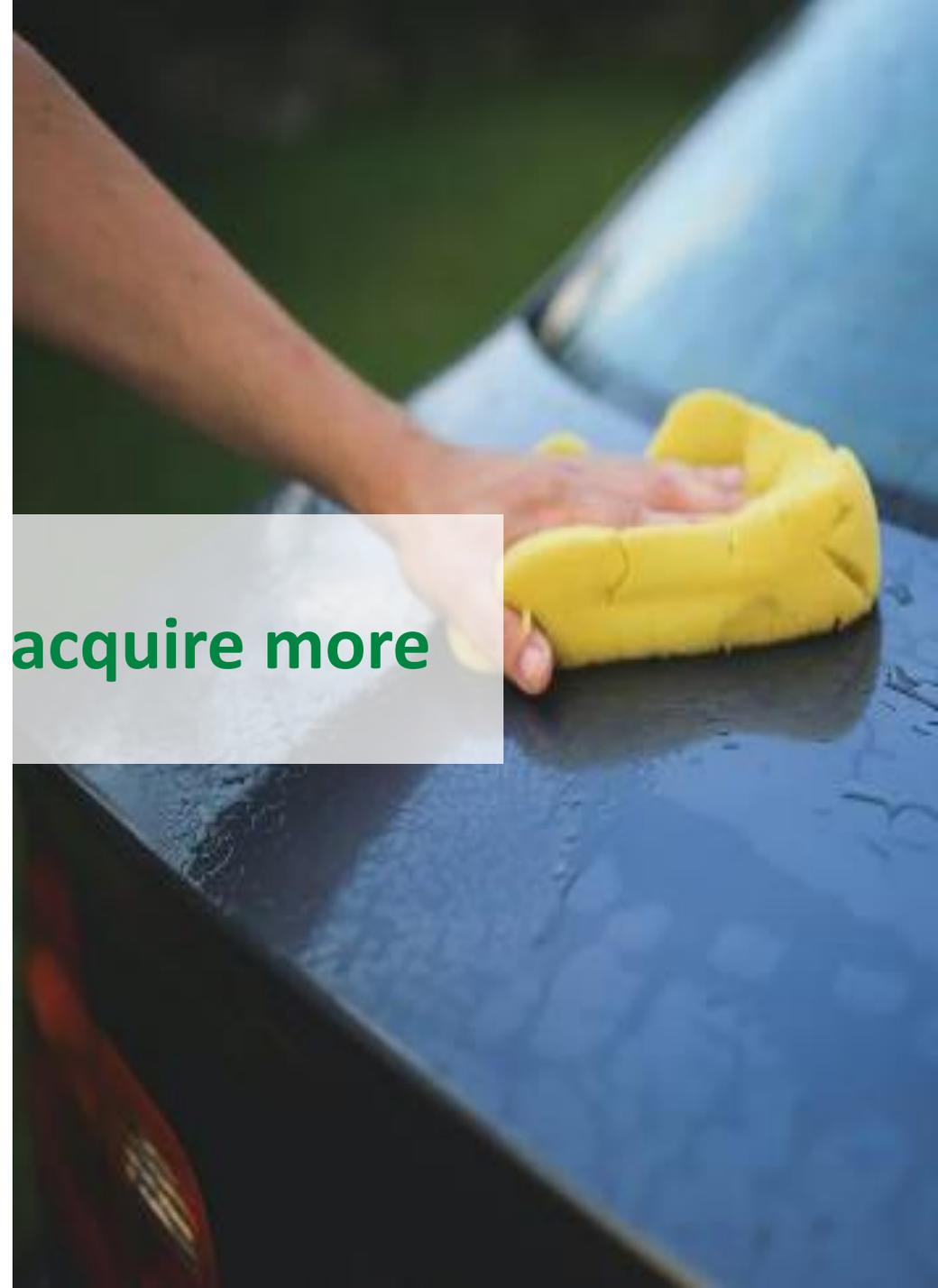
With so much time spent at home, and an increased focus on hygiene, combined with the heatwaves during this period, most groups have reported a higher level of water usage during the pandemic.



“We spend all day at home which means we use lots of everything – including water”
(Pre Family, Metered)

So what?
These new hygiene behaviours are likely to be the new norm so its important United Utilities find ways to address excessive water usage. However, messaging needs to be considered so it doesn't appear against government or safety regulations. Areas to consider are encouraging lowering water usage in less essential areas, or recommending water efficient products. Breaking the myth of rain and the North West is also key – educating around how water works.

**Life-stage is a differentiator:
As people move through life-stages they acquire more
assets that require water**



Across the board, most are unaware of their usage, assuming it to be in line with other similar households

There is a real **blind spot in terms of personal water usage**, perhaps driven the current lack of incentive, reason or motivation to engage.

Most believe they are in line with similar households further enforcing their lack of action.

% agree about current water usage				
More than other similar households	11%	6%	15%	5%
The same as other similar households	57%	70%	64%	52%
Less than other similar households	32%	24%	22%	43%



So what?

A combination of more education and awareness around water is needed to give people a reason to engage. **Without a benchmark to compare, few see their current water usage as excessive.**

With little awareness of the main sources of water usage, most reduce careful water usage to purely turning the tap off



(Older Family, Metered)



(Pre Family, Unmetered)

As people get older, they are more likely to live a lifestyle that traditionally drives high water usage

Areas HH likely to use water on a regular basis (highlighted if over index against at least one other age group)

Pre Family

-  Bath
-  Long showers

Young Family

-  Bath
-  Long showers
-  Dishwasher
-  Paddling pool

Older Family

-  Bath
-  Long showers
-  Dishwasher
-  Paddling pool
-  Car washing
-  Hosepipes
-  Outdoor water feature
-  Swimming pool or hot tub

Empty Nesters

-  Dishwasher
-  Car washing
-  Hosepipes
-  Watering cans for garden
-  Outdoor water feature

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So what?

It's important to tailor messaging to every life stage to ensure that United Utilities aren't alienating certain groups and reinforcing a perception that they aren't using excessive water. For example, younger groups are less likely to own a house, have a garden or have a car so creatives and messages around sprinklers and car washing won't engage or disrupt them enough to reconsider their own water usage.

“ If we compare our usage with other similar households I think that would give us a bit of encouragement” (Empty Nesters, Metered)

However, our ethnography showed that even the smallest households can use excessive water in other ways





Pre families' focus on 'sustainable' lifestyles means they require high water usage in unusual places

There are lots of **false assumptions** around water usage especially within this life-stage. A common misconception is that living in smaller houses or flats, often without any outside space means they have a lower dependency on water.

However, lifestyles that are more health and environmentally conscious, typical of this age group, require water usage in other ways



(Pre Family, Unmetered)



Plant based diets can be water intensive with the need to rinse and soak dried pulses and lentils and cooking more meals from scratch.



Some are quite active, going to the gym, playing rugby, hiking and camping which equates to more washing.



Finally this group are also the most likely to drink water regularly with water often closely associated with health and beauty trends.

“ We use uncooked beans a lot and they require soaking. We also eat a lot of rice, couscous and potatoes which all require boiling” (Pre Family, Unmetered)



Their desire to live more in touch with nature further contributes to their water usage



(Pre Family, Unmetered)



(Pre Family, Unmetered)



(Pre Family, Unmetered)



Many of this life-stage reported having **pets** which increase water usage through filling water bowls, cleaning the animals, cleaning the house as well as the soft furnishings.



They also likely to have lots of **indoor plants**, often as they have no outdoor space. These require watering from the tap rather than making use of rain water.

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So what?

Highlighting some of the less obvious uses of water can help dispel the myth of low water usage in this life stage and open their eyes to the need to play their part in reducing water consumption.



Social media provides an opportunity to target this group specifically around their interests

Yorkshire Water's Facebook page for example pushes engaging content around wildlife, nature and hydration; all interests of the younger demographic.





Once having children, young families' reliance on water in the home vastly increases



Becoming a parent can be very a **stressful and chaotic time** for many, with 'getting through the day' an achievement enough.



The sheer amount of washing and laundry puts many families on **auto pilot** as they try and manage the extra chores on top of the distractions of looking after children and lack of sleep.



Parents in this group tend also to be especially careful with **hygiene and cleanliness**, with the health of their children a key priority.

This can involve the use of sterilisers and deep cleaning, often with eco friendly cleaning products as they are considered kinder to the skin.

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So what?

Tread carefully with this group by showing empathy for their chaotic lifestyle and understanding the importance of hygiene. Instead of harder messages, try to raise awareness of alternative products (such as steam sterilisers) which will automatically reduce their water consumption.



(Young Family, Metered)

“If I’m honest we do pay more attention to our utilities some days more than others, like when things with the kids is hectic things do get left on” (Young Family, Metered)



The impact of kids on their carbon footprint steers eco friendly parents towards reusable products, at the cost of using more water



Some parents discussed the noticeable difference they felt to their **carbon footprint after having children** and how they have actively tried to take steps to reduce this.



With society's focus very much on plastic, some people are turning to **reusable and washable nappies** and wipes to prevent the guilt they feel at the amount of landfill they are creating, unwittingly then using more water.

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So what?

Conscious behaviour can be confusing and full of contradictions but UU can help provide clarity and informed choices by educating around how different choices impact their levels of water usage.



(Young Family, Unmetered)

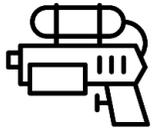
“ We just want to make sure that we leave the best planet for her and her children or grandchildren we can so we just think that doing the best we can now will help in the future ” (Young Family, Unmetered)



As children grow up, older families feel they have less control on the water usage in the household



For older families water is often a **source of entertainment**.



During the **summer holidays** water becomes a direct way to **keep children entertained** with paddling pools and water fights. Indirectly water is also used to **clean up after other activities** such as painting, sports and muddy walks.



Once back at school there is also the addition of **washing uniforms** (with Covid increasing the frequency of this).



As children grow up they also become more independent and **parents are less able to monitor** their every move. Parents discuss having to accommodate children's preferences, attitudes and behaviours as they no longer actively monitor all their activities e.g. toilets and hand washing.



(Older Family, Unmetered)

“Soaked some rice in tap water, cooking chicken rice for the fussy child!”

(Older Family, Metered)



But together as a family, they have the opportunity to become more aware



As children become increasingly educated about the environment at school this group are learning from their kids and turning sustainability into a family activity.

However so far this is mostly related to other aspects such as recycling .

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So what?

Leveraging engagement at a family level (e.g. family challenges, recognising and addressing the barriers) could be an important strategy for this group of customers. This could help overcome the barrier of being unable to monitor family members water usage.



(Older Family, Metered)

“It's challenging and fun and my daughter's keep saying we have saved water again so it's educating us all”
(Older Family, Metered)



Empty nesters are the most likely to have acquired the assets traditionally associated with heavy water usage



Despite having a reduced number of people in the household, they are more likely to engage in activities which require high water usage such as spending a lot of time **tending to their garden**.

House renovations, which can use significant water, can come into play at this age:



- May be at retirement stage where **completing house renovations**
- May also be at the age where they are considering renovations on their home in preparation for old age



(Older Family, Metered)

“ I put water crystals in my water feature to reduce the need to clean it”

(Empty Nester, Metered)



However, this generation has grown up with a focus on waste and are therefore the most savvy about their water usage

This generation has grown up in a time of anti-waste and are most likely to take part in a range of water saving activities, from the traditional hose pipe bans to more inventive solutions such as soaking dishes in pasta water!

Areas households likely to save water (highlighted if over index against at least one other age group)

Pre Family

This group are not more likely to save water in any area than any other group perhaps as many of these behaviours do not apply to them

- Water can over hose
- Dishwasher when full
- Tap off teeth brushing

Young Family

- Water can over hose
- Eco settings on white goods
- Water butt
- Wash car with bucket over hose

Older Family

- Water can over hose
- Eco settings on white goods
- Water butt
- Washing bowl in sink
- Water saving device in cistern

Empty Nesters



(Empty Nesters, Metered)



So what?

Traditional water saving tips have resonated with this audience; can United Utilities now go further with suggesting less obvious tips for this group to try?

**Being metered doesn't always drive
conscious water usage**



Having a water meter doesn't automatically mean people are more conscious of their water bill



When asked, metered customers are no more likely to see saving money on their water bill as very important compared to non metered (63% vs 59%)



The lack of difference between metered and unmetered in terms of cost sensitivity could reflect (in order of prevalence in our research):

- A disengagement among some households with their meters.
- Perception that water meters will cost you more money so avoided by some unmeasured but cost conscious households.
- Preference among cost-conscious people to manage a known, flat rate.



(Young Family, Metered)

But for some, price was the main reason for getting a meter installed, and does drive more conscious behaviour, even if its short term

Some are **motivated to get a meter based on price**. Often these customers have directly compared prices and deem their standard rates too high. This decision often takes place when moving house.

But despite good intentions, for some, even those that chose to have a meter, **won't then necessarily check** they are saving water and adjust their behaviour as other things get in the way



“ We have a water meter. it was installed when we moved in 2 years ago because the standing rate was so expensive! Our previous house was on the standing rate as it was so cheap. it has been decided purely on price.” (Pre Family, Metered)

“ We rented before we bought this house and I thought the water bills were really high. The landlord got a meter and it made a massive difference to the costs. I hadn't realised that the bills were based on the average use expected from the type of house you live in. When we bought our house the first thing I did was get a meter.” (Young Family, Metered)

(Young Family, Metered)



So what?

There is an opportunity to build out comms specific to moving house to encourage people to check rates and apply for water meters as soon as they move in.

Success stories could also be promoted on the website to encourage people to make the switch.

Energy smart meters are considered much more engaging and easy to use

Metered consumers were positive about their smart meters and how they helped them keep on top of their usage and ultimately their bills

“ *As my smart meter is translated into money it makes it easier to think about saving” (Young Family, Metered)*

“ *Also we recently had a smart meter fitted for our gas and electric, so I can see that the kettle boiling uses a large burst of electricity. So I try not to boil it for longer than I need to.” (Young Family, Metered)*



So what?

Real time water meters with engaging interfaces may be likely to have better engagement than current models. It is worth investing some research into the potential development of these. In the shorter term, could the app be utilised in helping to educate people on their personal usage through their bills.



(Young Family, Metered)

Education is needed to overcome misconceptions around meters to broaden their appeal

In order to change people's perceptions around water meters, United Utilities could consider messaging around the following areas:

Consider the following areas:

Educational videos about how they work and why they can save money

Reviews and customer stories

Promoting the following benefits:

Only pay for own usage

Keep track of usage

Gain control over finances

Understand areas of wastage

Help identify leaks

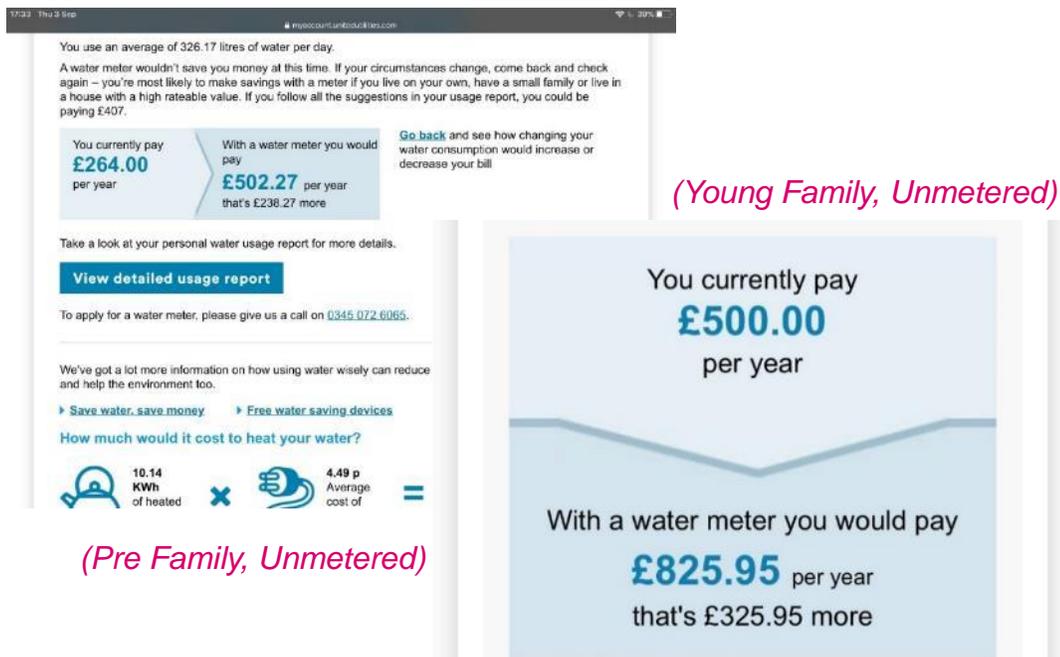


(Pre Family, Unmetered)

With communications from United Utilities needed to help show the bigger picture

Whilst many found the water calculator a useful exercise in working out their water usage, they were often left with the message that getting a meter would cost more than their existing bill. In some cases their water bills doubled.

As the difference was quite shocking, the impact of this may be long lasting



? **So what?**

Whilst customers are incredibly unlikely to switch in the face of a significant cost increase, ensuring that messaging around water meters is more holistic, tying in the environmental benefits of saving water as well as the financial, could help give people a more compelling reason to switch even if savings are minimal and help them understand why metering is beneficial to certain households and wider population.



**Changing attitudes &
behaviour:
Customer driven**

Consumers found the tips on the website helpful but limited due to their focus on outside space

Many of the tips on the website were garden-focussed which appealed mostly to empty nesters. Whilst this group were open to implementing these changes, they faced challenges due to the extra strength needed to mulch or use water butts.

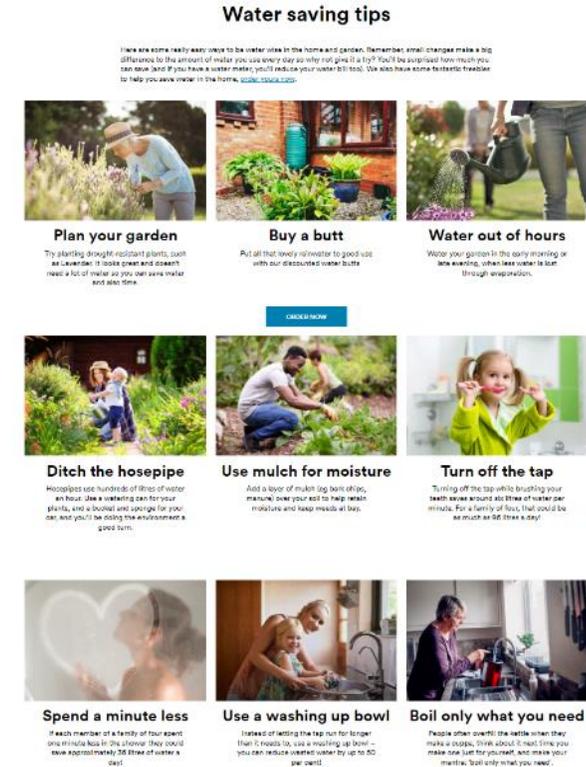
The idea of a water butt appealed widely however few were in a position where they were able to use one due to:

- Didn't own house so felt uncomfortable installing one
- Felt to be too expensive
- Sold out on the United Utilities website when trying to source one

? **So what?**

Providing a wider range of tips which appeal to all lifestyles may help people find solutions which work best for them.

Highlighting the cost saving in bills by using these devices to offset initial cost of the butt.



“ The other water saving tips mainly focused on the garden and as my grass and plants are fake I didn't need to worry about those tips, however I did share them with my friend who does have a garden” (Older Family, Metered)

The easiest tips to implement were often the hardest to remember

- One of the biggest challenges for people trying to change their behaviour was remembering to do it!
- This was especially the case for the tips which required minimum effort such as turning off the tap or filling the kettle
- Families found these tips especially difficult to implement as they tended to be on autopilot when doing tasks around the home.
- Pre family and empty nesters were the most aware of careless waste and were either happy to implement these or were already doing so.



Turn off the tap

Turning off the tap while brushing your teeth saves around six litres of water per minute. For a family of four, that could be as much as 96 litres a day!



Boil only what you need

People often overfill the kettle when they make a cuppa, think about it next time you make one just for yourself, and make your mantra: 'boil only what you need'.

Some also questioned how this saves water if you keep the excess water in the kettle for next time



?

So what?

Mechanisms around alerts, reminders or memory aids would be key to consider.

Pre Family, Unmetered)

“The only thing is it's hard to break the habits of a lifetime but I will keep trying” *(Older Family, Metered)*

Tips relating to hygiene were often seen as too great a compromise

There was an openness to trying the tips around reducing time in shower and using a washing up bowl as after the diary it was clear to many this is where a lot of their water wastage was.

Pre Family were the most open to making these changes, whilst the other groups struggled with the perception of hygiene



Use a washing up bowl

Instead of letting the tap run for longer than it needs to, use a washing up bowl – you can reduce wasted water by up to 50 per cent!

(Empty Nester, Metered)



Barriers to overcome:

- Most had to buy a wash bowl to implement the change.
- People felt uncomfortable with the idea of using 'dirty' water to wash up, some even felt it look longer in the long run.



Spend a minute less

If each member of a family of four spent one minute less in the shower they could save approximately 36 litres of water a day!

(Young Family, Metered)

Barriers to overcome:

- How to measure shower length without timer.
- Harder to implement when trying other things like shaving legs, exfoliating skin.



So what?

Position saving water as a trade off, if actions around washing and hygiene routines are considered non negotiable then are there other areas that people may be more willing to compromise on e.g. car washing etc.

Critically, people adapted their own behaviours after observing where they personally saw the most water wastage

In addition to trialling the tips shared by UU, people also started to implement their own personal water saving techniques as their awareness grew around their own usage. (See appendix for more 'hacks')

For many, this involved finding ways to recycle water, mirroring their attitudes and behaviours around plastic .



(Young Family, Metered)

“ Since making videos has made me more conscious of how much water I use, in one of the last videos I soaped everything first and then washed to see if I felt I used less water and I think I definitely did use less.”
(Older Family, Metered)



(Pre Family, Unmetered)

?

So what?

Mirroring the common language used in plastics could help people understand and remember to reduce their water waste too. Terms such as **cyclical**, **recycle** or even '**single use water**' may resonate well.



Changing attitudes & behaviour: United Utilities driven

The presentation and context around the water kits and audits are key to motivating people to engage

Audits and Water Kits act as a way to engage consumers and prompt behaviour change. However often these are short lived when solutions don't work or their homes or lifestyles

- Personalisation; The audit was considered friendly and informative, however some felt the information could have been more specific to their household.
- Versatility; Many of the products received in the audits and kits didn't work with people's fixtures and fittings highlighting the need for a range of options tailored to individual homes.
- Context; It was felt across both the kit and audits that more context could be given around the products included with contents lists and personal comms and explanations of how they save water.
- Consistency; As sustainability is a key message from United Utilities, consider the packaging both in terms of size and materials.



(Older Family, Metered)



(Pre Family, Unmetered)

The most popular water saving devices were those which people could fit and forget about



Fit and forget



Tap Inserts

- Pros:**
- Permanent change
 - Improved water texture
- Cons:**
- Some questioned the impact on water pressure
 - Doesn't fit all taps



Leaky Loo

- Pros:**
- Brought attention to issue of leaky loo
- Cons:**
- Requires follow up action to fit leak



Shower inserts

- Pros:**
- Permanent change
 - Improved water texture
- Cons:**
- No explanation of how they saved water
 - Complicated to fit
 - Doesn't fit rainfall shower heads



Toilet bricks

- Pros:**
- Permanent change
- Cons:**
- Not everyone able to open cistern

THESE PRODUCTS ARE ONLY SUCCESSFUL IF THEY ARE TAILORED TO FIT PEOPLE'S INDIVIDUAL FIXTURES AND FITTINGS



So what?

Unlike trends in other areas of home décor such as soft furnishings, people still do not consider the water usage when buying kitchen or bathroom fittings. There's an opportunity to partner with companies to ensure water usage is built in further up the chain, and educate people on point of sale about the importance of buying more water saving devices.

The devices aimed at changing personal behaviour were considered temporary and unattractive

The response to the timers was positive in helping people know what they should be aiming for;



Shower timer

Many were surprised how quickly 4 minutes went and found the shower timer helped them focus more. There was some push back on whether it was achievable with hair washing etc.



Teeth timer

The design of the teeth timer was very popular with young families and worked well and engaging people at a family level.

However people questioned the quality of the timers and found they were not aesthetically pleasing or kept falling off the wall.

Despite the best of intentions, the quality of these signalled they were short term measures rather than permanent fixtures.



So what?

Consider either modernising the aesthetics, improving the quality or think about how to invest in supporting people's own behavior change rather than sending out these devices entirely.

A photograph of three young children of African descent playing in a blue inflatable pool. The child on the left is wearing a blue fish-scale swimsuit and has water splashed on their face. The child in the middle is shirtless and also has water on their face. The child on the right is wearing a pink swimsuit with a 'Summer Pony' logo and a cartoon pony. They are all smiling and laughing. In the background, there are colorful toys and a green storage bin.

Instilling and maintaining conscious behaviours

Shining a spotlight on an individual's behaviour is key to prompting change



Only by observing own behaviour can people realise how much water they use and where they could personally cut back

In an age of tracking minute behaviours from steps to calories, there is scope to encourage the **tracking of water usage** through apps or devices. This is especially the case for younger audiences who are digitally savvy

“In an ideal world I'd have some kind of sensor on every appliance and tap to monitor our exact water usage to see where most of its going and where we can save water, obviously this is quite the undertaking” (Pre Family, Unmetered)



The **water calculator** also proved successful at offering a snapshot of typical household usage, and could be developed further to offer more in depth analysis

Once individuals understand their personal water usage, they can then be encouraged to see where they could consider trade offs

“I was surprised at how much we use just on showers and baths” (Older Family, Unmetered)

Being able to benchmark against others encourages people to make small changes, with a greater push to collectivism needed



CONTEXTUALISING BY HH USAGE STATS

It's only when people are able to **contextualise their usage** in relation to others that they could get a true sense of their own

“If we could compare our usage with other similar households I think that would buy the people encouragement and spur them on” (Empty Nester, Metered)

For others this meant disillusionment that in the grand scheme of things their actions meant very little

“I think also you see neighbours washing their cars or the sprinklers watering gardens and it does make you wonder how much water one person turning off the tap for 30 seconds to brush their teeth is going to make much of an impact. I suppose it needs to be everyone” (Pre Family, Unmetered)



CONTEXTUALISING BY IMPACT STATS

Water stats that emphasised collectivism were well-received if also combined with individual impact...

“If every household in the UK took just one minute off one shower every day, it would save £215 million on our collective energy bills a year.”

“If everyone in the UK turned off the tap when brushing teeth we could save 1,584,000,000 litres (1584 megalitres) a day and could reduce your water bill by as much as £100 a year for a family of four”

As were those combining environmental, energy and cost saving stats...

“About 28% of a typical gas heated household's heating bill is from heating the water for showers, baths and hot water from the tap. Heating water affects a household's carbon footprint so being water efficient helps to reduce both your environmental impact and your energy bills too.”

The idea of collectivism appealed most to families; pre family were the most skeptical of getting mass buy in so wanted a focus on individual impact too

The link to gas appealed to all groups, but carbon footprint was especially impactful for pre/family and young families

Give people a reason to care about water shortages in order to change their behaviour

Although the study was a success in raising people's awareness of their own water usage, many, especially pre family, still left lacking the knowledge and understanding about why they should care.

In order to motivate themselves and others around them, people found they required more information about how our water systems work and what will happen if we don't start protecting them.

Many referenced the lack of visuals in comparison to other sustainability issues as such plastics and suggested more documentaries to help educate further.

? So what?

Give people the tools to fight the case for water. This involves informative facts, emotional arguments and practical tools for change. Visual cues will be key. It's important to tailor messages, motivations and tactical advice to each life stage.

(Pre Family, Metered)



(Pre Family, Unmetered)

Ultimately, United Utilities' strategy for water saving has to be a combination of both **mainstream customer messages** plus the **targeting of messages by life-stage**

MESSAGE TO THE MASSES

- WHAT** Contextualise average water usage so households have a greater sense of their own water waste – balance the message of individual impact and collective change
- WHY** Give people a reason to care about saving water; tie back to long term impacts on the environment e.g. wildlife and social e.g. future quality of life
- As a secondary message, promote how saving water helps save money, whether directly through a meter or the knock on effects on energy bills
- HOW** Use messaging around trade offs, ask people to identify areas they are willing to make change in the face of 'non negotiables'
- Prioritise investment in 'fit and forget' measures
 - Replicate familiar messaging around plastic; talk about recycling, single use and waste
 - Connect emotionally to customers in order to overcome the barrier of simply forgetting

MESSAGE TO HOUSEHOLDS

 **Focus on environmental impact and carbon footprint**
Consider tips relating to eco friendly lifestyles, with a focus on indoor activities

 **Focus on trade offs and educate on informed choices**
Recommend tips or products which once implemented require minimal effort to up keep

 **Focus on generational responsibility**
Find fun ways to engage the whole family, to lighten responsibility on the parents

 **Focus on waste and preservation**
Consider tips which help show the waste saved with innovative ways to further recycle



THANK YOU FOR READING

Any questions?

Do not hesitate to contact the project team...

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Appendix



A central part of United Utilities’ strategy for water saving has to be the targeting of messages by life-stage

	 Pre-family	 Young family	 Older family	 Empty Nesters
Motivators	Appetite for changing water behaviour alongside other eco-behaviours.	Having children can drive a sense of social and environmental responsibility – it’s just difficult to fulfil.	See the value of sustainable lifestyles and children a key influencer here – bringing home ‘education’ from school and peers / influencers.	More likely to take responsibility for their water consumption – often born out of engrained ‘avoiding waste’ habits but there is also a higher concern for current and future water supply and a ‘not wasting’ money culture too.
Barriers	Lack of awareness of where their lifestyles waste water and how it connects to the issues they value.	Competing priorities of young parenthood compounded by the millennial mindset of ‘my comfort is important’ mean shifting behaviour is difficult. Water is essential for childcare and associated hygiene – can’t be compromised.	So many demands on their time, possibly the busiest life stage. Water is a lifeline – for entertaining kids and for relaxation – a resistance to give this up.	As people get older they acquire more water-intensive assets (gardens, cars, appliances). Some resistance to changing habits.
Levers	<ul style="list-style-type: none"> • Need to engage with UU: digital content will be key either via the app or social media – but WHAT you say is critical: in the absence of government backing, you need to generate meaningful links between their particular life-stage motivators and water usage. • For example, bringing together the link between protecting water supply and impact on the environment (incl. wildlife) and shining a spotlight on how their conscious behaviours in other areas negatively impact their water usage. 	<ul style="list-style-type: none"> • Empathetic messaging recognising the essential use of water (e.g. hygiene) but encouraging trading this off in other areas may work better than stronger policing messages for this group. • A strategy that leverages social influencing may also resonate here too given the mindset of this group. • Softer, informed choicing messages may also be key here – raising awareness but not pushing the message too far. 	<ul style="list-style-type: none"> • Make it easy. • Building on the influence of children’s sustainable attitudes could be lever to pull – a family engagement strategy for example. • Like young families, any comms needs to be empathetic to their situations – look at trade off and informed choice messaging rather than policing where water is seen as a ‘lifeline’. 	<ul style="list-style-type: none"> • This group may be more about reinforcing and maintaining behaviours. • Messaging around ‘waste’ and ‘preservation’ of all forms likely to resonate here.
Opportunity	HIGH	CHALLENGE	GOOD	

Many developed additional hacks that were related not only how to save water, but how to remember



Tactical hacks

- Leave to soak before washing up (especially cereal bowls and protein shakes)
- Soap everything before running tap
- Shower with the window closed in winter, then turn on and off when needed
- Use saucers under plant pots in the garden
- Throw any waste water onto plants e.g. kids beakers etc
- Drink glass of water at sink before putting down and getting distracted
- Fill mugs with water before pouring in kettle
- Buy more water friendly appliances



Memory hacks

- Use post it notes as reminders
- Play favourite song in shower as reminder to get out when finished
- Use of mantras including 'only use what you need'



Visual hacks

- Put plug in bath when showering to see how much water used
- Consider water usage when camping to put litres into perspective



So what?

The unprompted changes in behaviour shows the power of observation; try encouraging people to become more aware of their natural behaviour through a challenges campaign, better breakdown of usage on bills (if possible) or using the app for digital tracking.

Other messages were found hard either hard to contextualise or hard to implement

“By running your bath by just an inch shorter than usual you can save on average 5 litres of water”

“A tip for saving drinking water is to fridge it, putting a large bottle of tap water in the fridge will ensure you can have chilled water all the time. Letting a tap run until it's cold can waste 4 litres of water”

“Fixing one leaking toilet could half a customer's water bill (if on a meter)”

People struggled to put both these metrics into perspective.

Few could relate to taking regular baths themselves; Young families felt they had no choice but increase their bath water as children grew up, but for older families, it did prompt the desire to shower their children more.

This fact was felt as quite new and they liked that it provided a solution to an issue. However it was felt to be hard to implement, with some families even feeling it might be unhygienic.

Feedback around leaky toilets was positive both throughout the study as many saw it as an area they hadn't previously considered. However this fact was considerably less impactful for those who didn't have a meter.

Ethnography Profile

				
Number of recruits	13	8	9	6
Metered	Metered - 3 Unmetered - 10	Metered - 7 Unmetered - 1	Metered - 7 Unmetered - 2	Metered - 5 Unmetered - 1
Gender	Male - 3 Female - 10	Male - 1 Female - 7	Male - 2 Female - 7	Male - 4 Female - 2
Social Grade	ABC1 - 5 C2DE - 8	ABC1 - 7 C2DE - 1	ABC1 - 5 C2DE - 4	ABC1 - 3 C2DE - 3
BAME	White British - 9 Mixed ethnicity - 2 Asian - 1 Other ethnicity - 1	White British - 7 White Irish - 1	White British - 8 Asian - 1	White British - 6
Location	Rural town - 4 Suburbs - 5 Urban town - 4	Rural town - 1 Suburbs - 6 Urban town - 1	Rural Village - 2 Suburbs - 4 Urban town - 3	Rural town - 2 Urban town - 3 Rural Hamlet - 1
CACI	Mainly Tech dep young families	Hard pressed families Tech dep young families Comf mid life est families	Mainly Comf mid life est families	Budget Conscious Elderly Tech dep young families Comf mid life est families

Thank you.