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# Environmental Awareness Index

Insight report by Yonder Consulting  
August 2024



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# Background, objectives and methodology

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# Background and objectives



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CCW has a strategic objective to lead an industry wide effort to raise consumer awareness of the impact their water use and disposal behaviours have on the environment.

Water behaviours affect the environment in three ways; water demand and supply, the things people flush down the toilets and pouring fats, oils and greases down the sink. In November 2022 CCW undertook research to measure consumer awareness that their water behaviours have an impact on the environment. This incorporated an Environmental Awareness Index, which was created as part of the initial February 2022 research. This third phase of research tracks the Environmental Awareness Index result in March 2024. The objectives of this new research are:

1

To understand whether the Environmental Water Awareness Index has changed since November 2022

2

Explore changes in the Environmental Water Awareness Index amongst key demographic groups



# Methodology



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## Overview



CATI survey of  
1,260 adults (aged  
18+) in England and  
Wales



Fieldwork conducted  
14<sup>th</sup> March – 11<sup>th</sup> April  
2024



The full sample was weighted to be representative of  
England and Wales combined based upon the 2021  
Census profile. The boost sample was weighted down to  
be representative of Wales

## Approach

CCW commissioned Yonder Consulting to undertake a CATI omnibus survey in England and Wales.

Yonder used their one-of-a-kind CATI Omnibus to reach the offline audience. The CATI Omnibus works to a nationally representative sample and is designed to ensure the right proportions of non internet users, vulnerable and hard to reach audiences are captured. The CATI Omnibus utilises Random Digit Dialing and calls both mobile and landlines sample, interviewing 1000 respondents each week.

The CATI omnibus survey had a sample of 1,260 adults in England and Wales between the 14<sup>th</sup> March and 11<sup>th</sup> April 2024. Boost interviews of up to 400 were conducted among consumers in Wales to allow for robust analysis and weighted back into the overall sample at the correct proportions.

## Sampling

A stratified sampling technique was employed using multiple demographic groupings to select respondents randomly from Yonder Consulting's CATI Omnibus. This approach helps to minimise selection bias and ensure certain segments of the population are not over- or under-represented.

Quotas were set on age, gender, region and social grade. The data was then weighted based upon the 2021 Census profile of England and Wales combined. Rim weighting was applied for age, gender, government office region, social grade, and working status. Tenure was weighted based upon the England and Wales profile as individual nations. The boost sample was weighted down to match the 2021 Census profile of Wales.



# Scope and limitations of this report



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## Scope

This report aims to establish attitudes and behaviours of the overall England and Wales population and highlights results at an overall level as well as by the key sub-groups as outlined in the Table 1. It provides a robust sample to be able to analyse the data on this basis.

The statistical reliability of the data at 95% confidence level is outlined in Table 1

In addition to highlighting key subgroups significantly different to the total, results are also charted for other sub-group categories of interest when data is significantly different to the total.

## Statistical differences legend (at 95% confidence)

↑ Statistically higher than the total  
↓ Statistically lower than the total

+ Statistically higher than all other categories within the subgroup  
- Statistically lower than all other categories within the subgroup

NB: Data may not sum to 100% due to rounding

Table 1	Key subgroups	Sample Size	Margin of Error for response of 50%
	Total sample	1,260	+/- 2.8%
Region	England	860	+/- 3.3%
	Wales	400	+/- 4.9%
Gender	Male	628	+/- 3.9%
	Female	628	+/- 3.9%
Age	18-34 year olds	97	+/- 10.0%
	35-54 year olds	244	+/- 6.3%
	55 and over	919	+/- 3.2%
Social grade	ABC1 (class of chief income earner in household)	701	+/- 3.7%
	C2DE class of chief income earner in household)	559	+/- 4.1%
Urban/ Rural	Urban	723	+/- 3.6%
	Rural	365	+/- 5.1%
Tenure	Owners	867	+/- 3.3%
	Renters	351	+/- 5.2%



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# Executive summary

# Executive summary (1 of 2)



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## CCW Behavioural Index

- The CCW Water Awareness Index score for this wave is lower than the previous wave at 51 (vs. 55), which we can use to compare to future waves:
  - Seven metrics were combined to create an index based on a scale of 100. Most of the results saw a softened response, including a significant decrease in those that understand how reducing personal water use helps the environment (82% vs. 88% in Nov. 2022).
- Those who are more aware that their water behaviour has an impact on the environment tend to be:
  - 55-64 year olds (59)
  - Those living in Wales (56)
  - Women (54)

## Awareness of overall impact on environment

- Nine-in-ten (90%) reported that the amount of water they personally use, what they rinse down the kitchen sink and flush or dispose of in the toilet had an effect on the environment, which represents a significant increase since the last wave (86% in November 2022), returning to the levels seen in February 2022 (91%). This indicates that general awareness of water use impact is high, but given the lower index the understanding of water use specifics needs improvement.
- In 2024, most respondents reported that they care deeply for the environment (92%). Though strong agreement was present across the board, it was significantly higher in Wales (97%), but significantly lower in London (81%).





# Executive summary (2 of 2)



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## Water Usage, Attitudes & Impact on the Environment

- Along with the significant decrease in understanding of how reducing personal water use effects the environment, significantly fewer reported they would know how to reduce their personal water use by 5 litres a day if asked to (61% vs. 69% in November 2022), and that they have heard we need to use less water due to Climate Change (73% vs. 83%).
- Other statements relating to water use were more muted than in November 2022, too:
  - I always turn off the tap when I brush my teeth (83% vs. 84%)
  - I actively avoid wasting things, even if it causes me a little inconvenience (84% vs. 87%)
  - I know where my water company takes water from, to treat and turn into my drinking water (42% vs. 48% in November 2022)
- Perhaps as a reflection of the heavy rainfall at the start of 2024, slightly more (26%) agreed that ‘it rains so much where I live there is no need for me to use less water’ than in November 2022 (23%).
- Broadly, views on Fats, Oils and Greases (FOGs) were in line with November 2022. Most (91%) understood how the things they pour/rinse down the sink affect the environment, with similar proportions reporting they wipe/scrape pans before washing to get out as much fat/oil as possible (88%).
- Around eight-in-ten (82%) disagreed that down the sink was the only way they knew how to get rid of FOGs, and that they avoided pouring FOGs down the sink (84%).
- Three-quarters (72%) agreed that they have a good understanding of fatbergs. A third (32%) expected their water company to deal with anything they pour down the sink/flush down the toilet: all in keeping with the previous wave.







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# Environmental Awareness Index Results



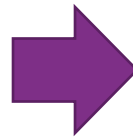
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Yonder designed a statistically robust composite behavioural index using factor analysis to analyse the similarities and differences in how respondents answer the individual measures.

The factor analysis informed the decision of which measures can go into the index to retain the most information while minimising the number of questions.

The CCW Environmental Awareness Index encapsulated all the optimal metrics into one easy to use measure which can be tracked over time and analysed across subgroups.

The CCW Environmental Awareness Index is an average of these 7 measures (on the right) for each respondent, based upon a scale of 100. It includes those who gave a response for at least 6 out of 7 measures.



Q4. To what extent do you think the amount of water you personally use, what you rinse down the kitchen sink and flush or dispose of down the toilet affects the environment?

Q23 (18). I am aware of the impact of what I flush down the toilet on rivers and beaches

Q23 (14). I don't know how else to get rid of cooking fats and oils other than down the sink

Q23 (16). I avoid putting anything except human waste and toilet paper down the toilet

Q23 (1). I understand how reducing my personal water use helps the environment

Q23 (2). I would only reduce my personal water use if it saved me money

Q23 (4). I know where my water company takes water from, to treat and turn into my drinking water

# CCW Environmental Awareness Index results explained



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- There has been general downward trend across the index measures, which, coupled with the *significant* decrease in those agreeing that they understood how reducing their personal water use helps the environment (82% vs. 88% in November 2022), has caused the index to drop against the last wave. The index result takes into account all answer codes and individual responses, not just the top 3 and top 2 box results.

- Not all statements in Q23 feed into the index, but all statements were asked within the Mar 2024 survey to maintain the integrity of the index questions as much as possible and reduce the risk of methodological changes impacting the index result. Two additional attitudinal statements were added to the question in 2024, though the impact of these on the methodology is minimal.



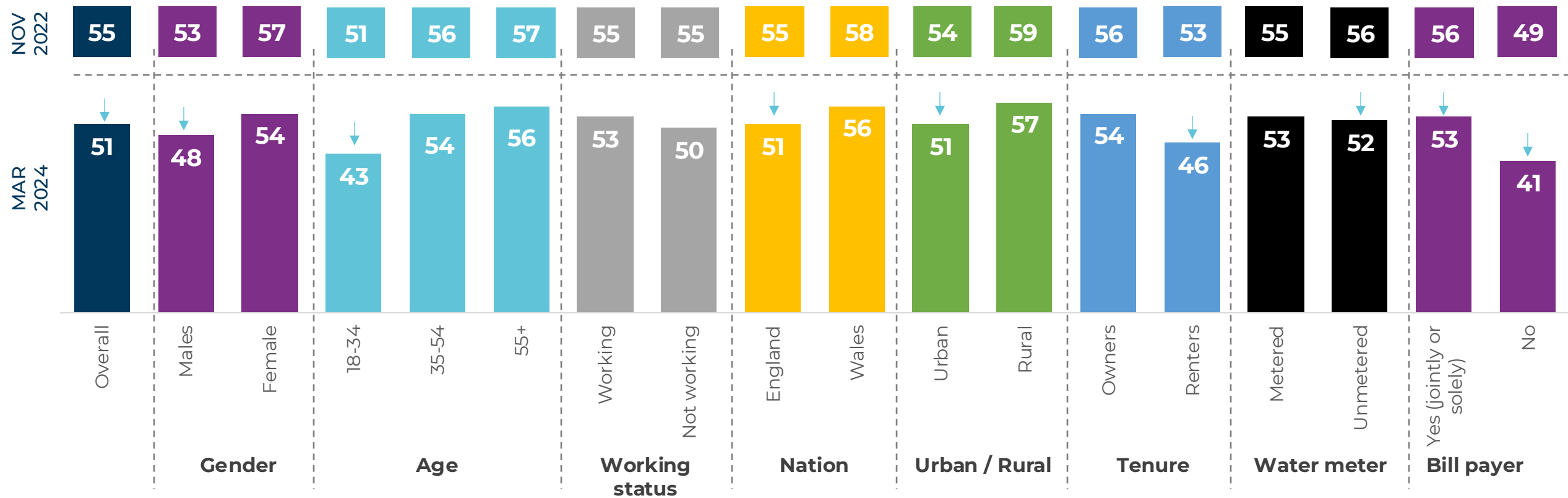
# Significant falls in the index score are more likely among men, younger people, renters, and those living in England



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## Mean scores over time, by demographic groups

Seven metrics were combined to create a composite behavioural index based upon a scale of 100



No subgroups displayed were statistically higher than Nov. 2022

↓ Statistically lower than Nov. 2022

Q4 To what extent do you think the amount of water you personally use, what you rinse down the kitchen sink and flush or dispose of down the toilet affects the environment? Please answer using a scale of a big effect, a moderate effect, a small effect or none. Q23 For each statement, please answer using a scale of strongly agree, agree, neither agree nor disagree, disagree or strongly disagree Base: All respondents who answered 6 out of 7 measures (1,205)



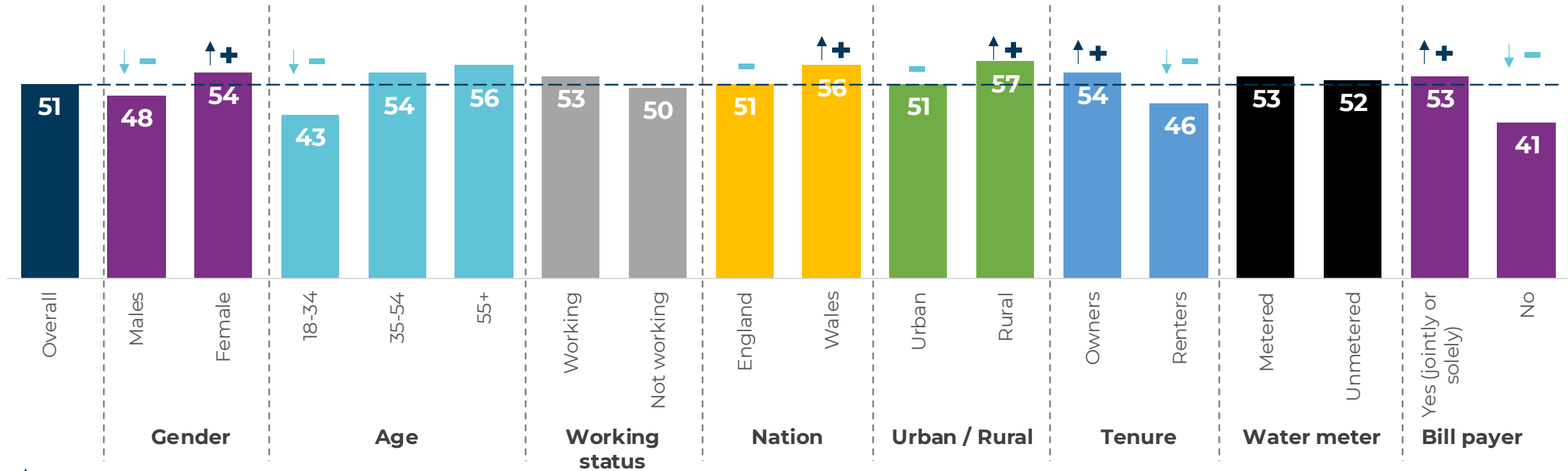
# In March 2024, those living in Wales or rural areas, along with homeowners and bill payers, were more likely to have a higher than average index score



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## Mean score by demographic groups

Seven metrics were combined to create a composite behavioural index based upon a scale of 100



↑ Statistically higher than the total  
 ↓ Statistically lower than the total  
 + Statistically higher than all other categories within the subgroup  
 - Statistically lower than all other categories within the subgroup

Q4 To what extent do you think the amount of water you personally use, what you rinse down the kitchen sink and flush or dispose of down the toilet affects the environment? Please answer using a scale of a big effect, a moderate effect, a small effect or none. Q23 For each statement, please answer using a scale of strongly agree, agree, neither agree nor disagree, disagree or strongly disagree Base: All respondents who answered 6 out of 7 measures (1,205)



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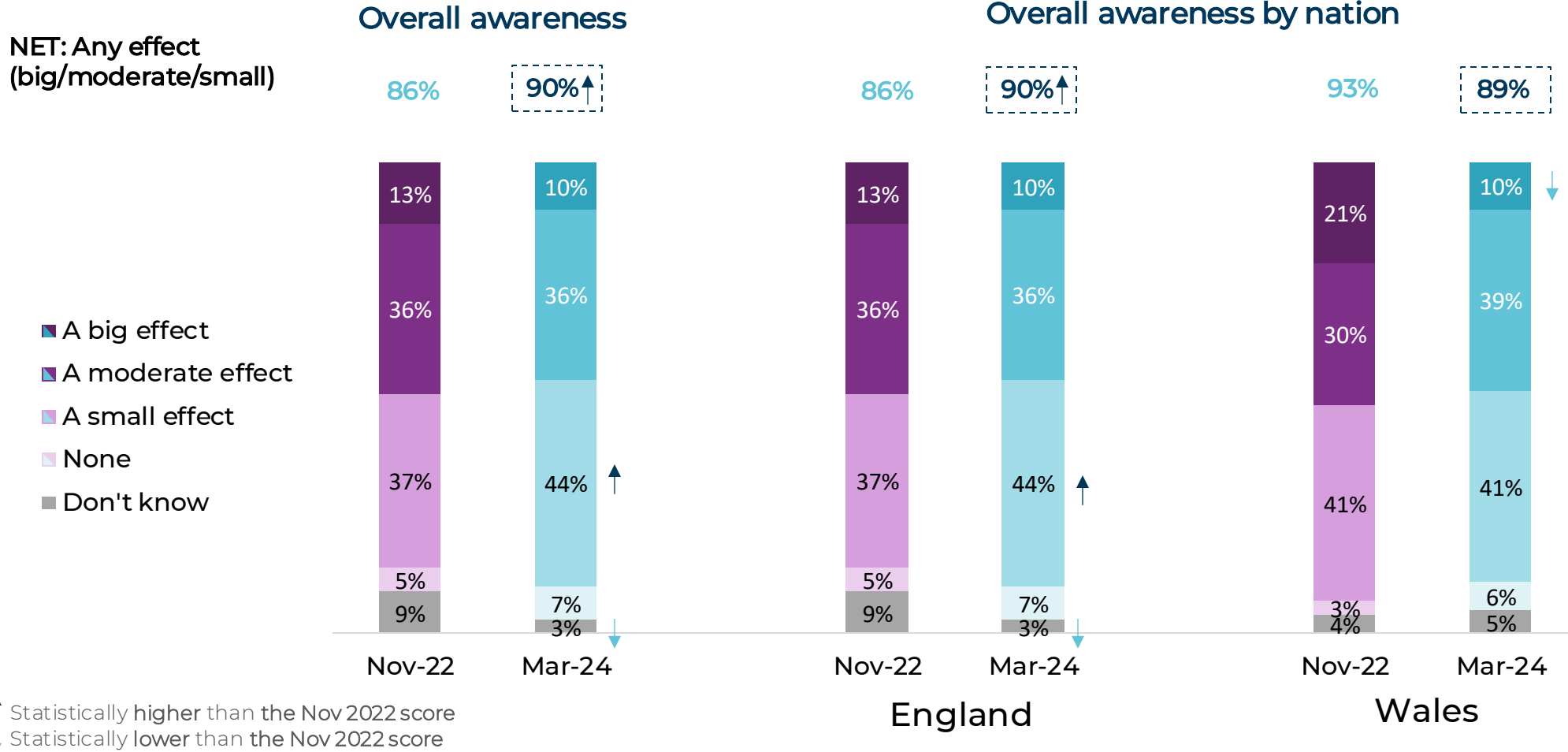
# Detailed findings: the questions that form the index

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# Most say that they are aware of the impact their behaviour has on the environment, with an increase in 'a small effect' and a decrease in 'don't know' vs. Nov 2022 driven by those living in England



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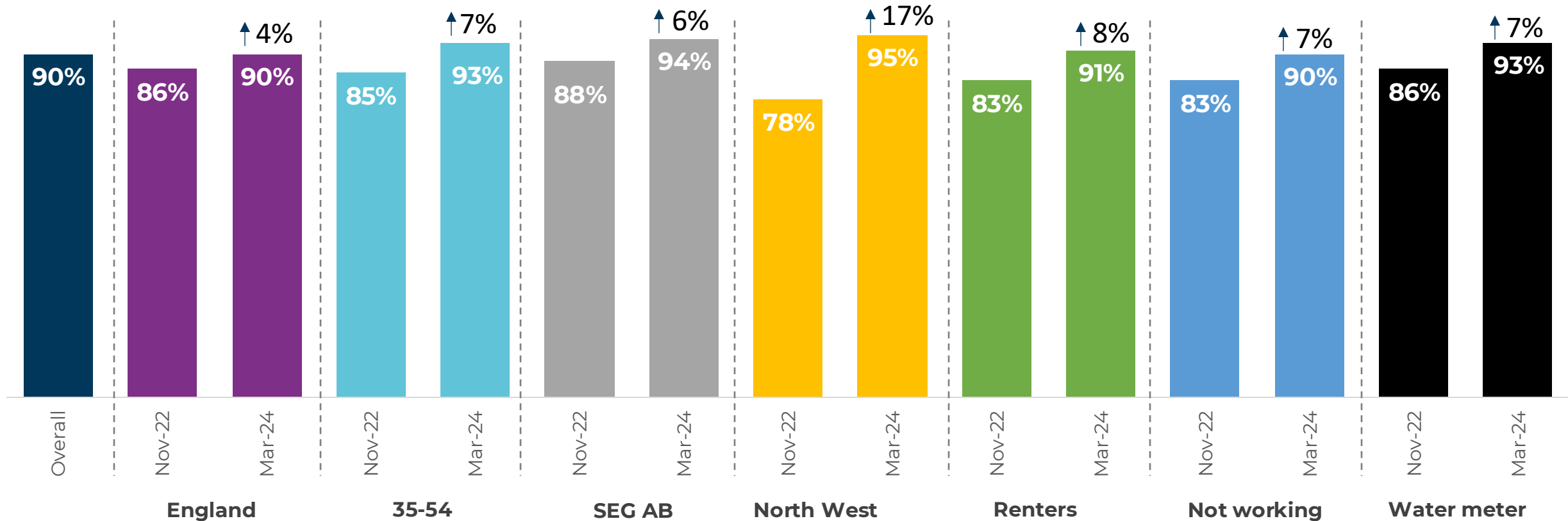


# The increase in awareness of how behaviours affect the environment is most marked in those living in England (particularly the North West), renters, those not working, 35-54s, AB households and those with a water meter



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Overall Awareness by: demographic that show significant change since Feb'22  
NET: Any effect (big/moderate/small)



↑ Statistically higher than the corresponding Nov 2022 subgroup

Q4 To what extent do you think the amount of water you personally use, what you rinse down the kitchen sink and flush or dispose of down the toilet affects the environment? Please answer using a scale of a big effect, a moderate effect, a small effect or none.  
Base: All respondents Nov 2022 (1,466); Mar 2024 (1,260); England (1061, 860); 35-54 (258, 244); AB (512, 434); North West (154\*, 109\*), Renters (416, 351); Not working (999, 819); Water meter (738, 668). \*Caution, low base size.



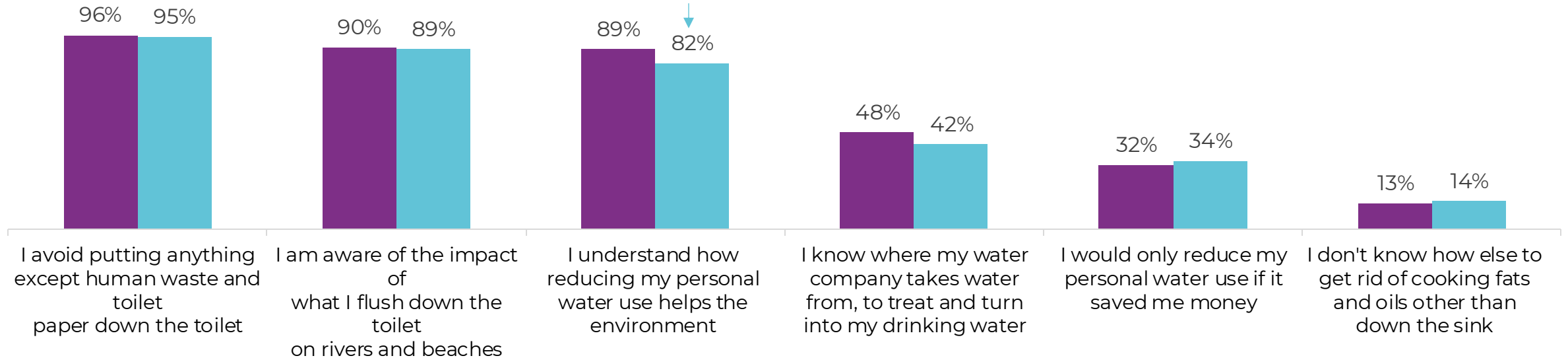
# Understanding about the impact of reducing personal water use has decreased significantly since Nov 2022



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## Agreement with statements used in the index NET: Agree

■ Nov 2022 ■ Mar 2024



↓ Statistically lower than the Nov 2022 score

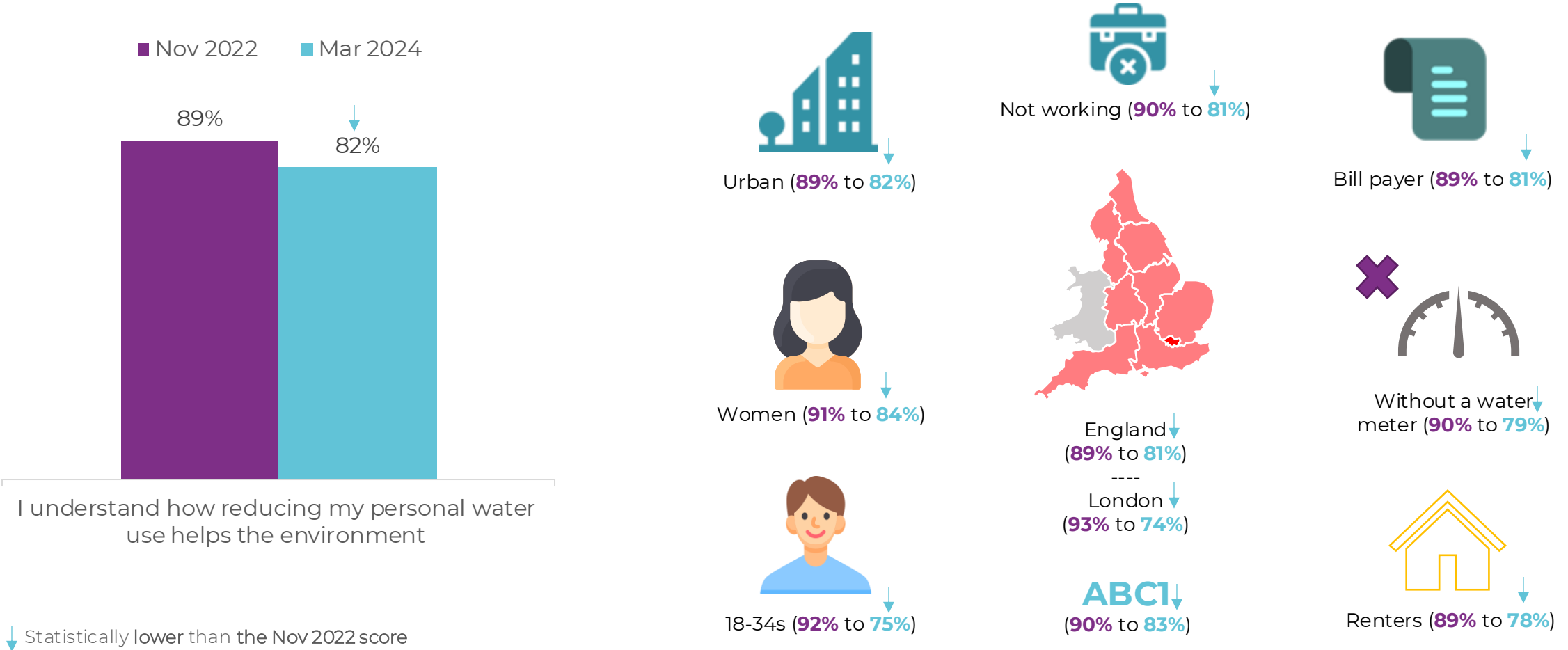


# Understanding of how reducing personal water use helps the environment has decreased most among young people, those in England (particularly London), renters, and those without water meters



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Who has decreased understanding of how reducing personal water use helps the environment:  
Demographics with significantly decreased NET: Agreement since Nov'22



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# Current attitudes and awareness

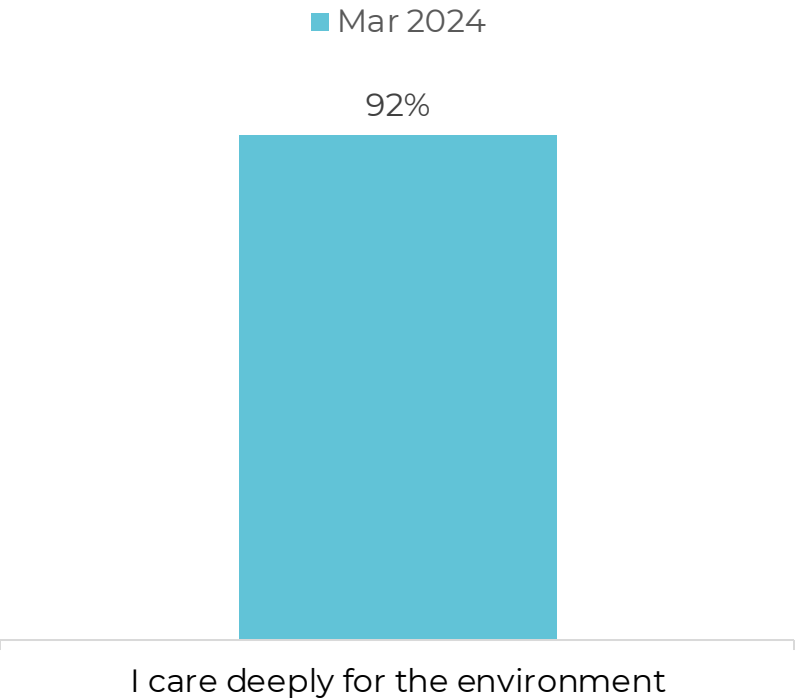
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# Most respondents said they care deeply for the environment, particularly those in Wales



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## Who is more likely to say they care deeply for the environment Subgroups with significantly NET: Agree



Wales  
**(97%)** ↑  
---  
London  
**(81%)** ↓



Has water meter  
**(94%)** ↑



55+ **(94%)** ↑



Owners **(94%)** ↑

↑ Statistically higher than the total  
↓ Statistically lower than the total

# Knowledge of the relationship between water use and Climate Change has reduced, as has understanding of how things that are flushed affect the environment, and how to reduce water use

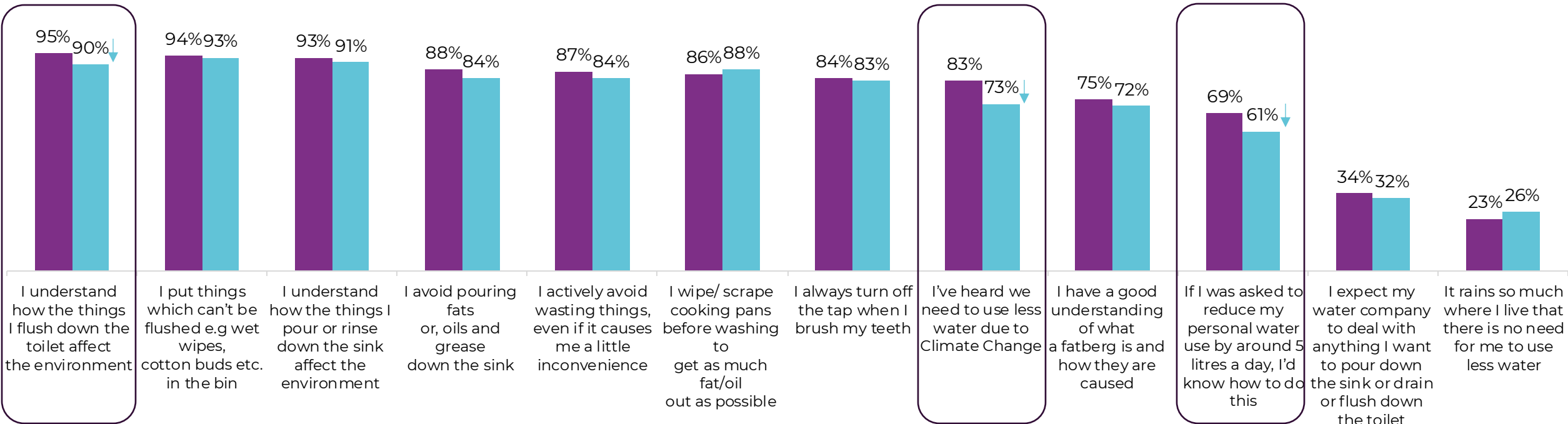


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Agreement with statements not used in the index NET: Agree

■ Nov 2022

■ Mar 2024



↑ Statistically higher than Nov 2022  
↓ Statistically lower than Nov 2022

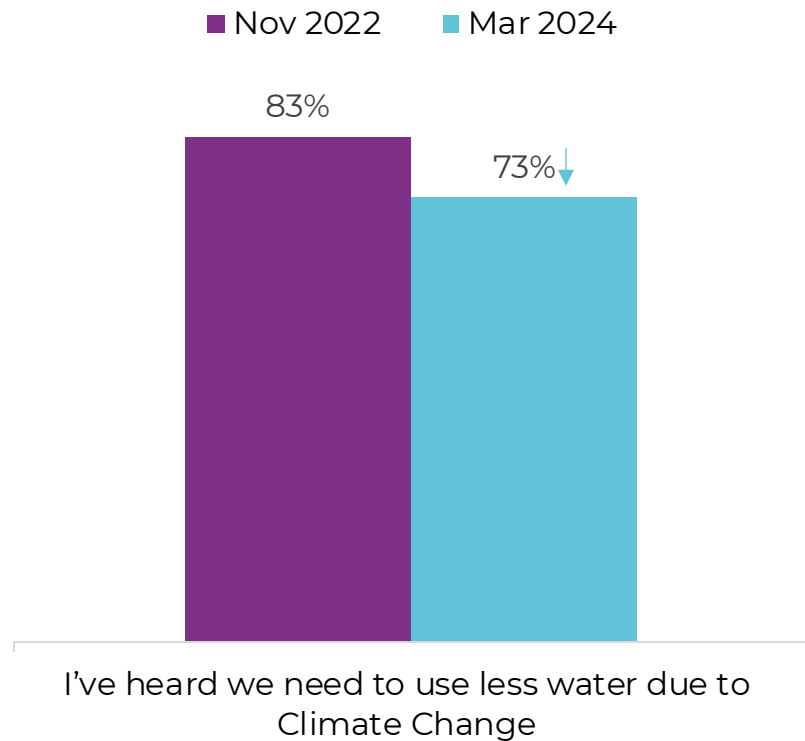


# Awareness of the relationship between water use and climate change has fell particularly among men, 55+, and numerous regions in England



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## Who has decreased NET: Agree that they've heard we need to use less water due to Climate Change Demographics with significantly decreased NET: Agreement since Nov'22



- England (84% to 73%) ↓
- 
- Yorkshire (87% to 65%) ↓
- 
- London (86% to 71%) ↓
- 
- South West (86% to 65%) ↓
- 
- West Midlands (84% to 77%) ↓

Men ↓  
(81% to 63%)

55+ ↓  
(85% to 76%)

Bill payer ↓  
(84% to 75%)

↑ Statistically higher than Nov 2022  
↓ Statistically lower than Nov 2022

Q23. For each statement, please answer using a scale of strongly agree, agree, neither agree nor disagree, disagree or strongly disagree ... Base: All respondents: Nov 2022 (1,466); Mar 2024 (1260); England (1061, 860); Yorkshire (115\*, 84\*); London (139\*, 118\*); South West (114\*, 103\*); West Midlands (124\*, 84\*); 55+ (1065, 919); Men (716, 628); Bill payer (1261, 1123). \*Caution: low base size.



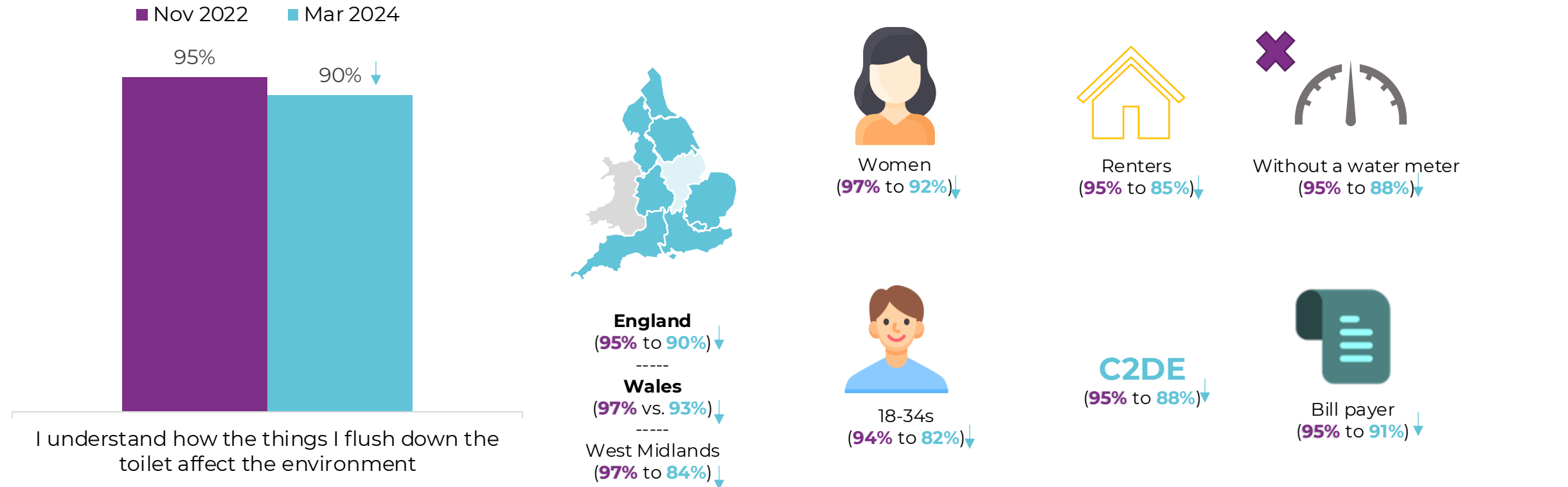


# Though still high, awareness of how flushed items affect the environment has dropped, particularly among women and young people



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## Who has decreased NET: Agree that they understand how things they flush down the toilet affects environment Demographics with significantly decreased NET: Agreement since Nov'22



↑ Statistically higher than Nov 2022  
↓ Statistically lower than Nov 2022



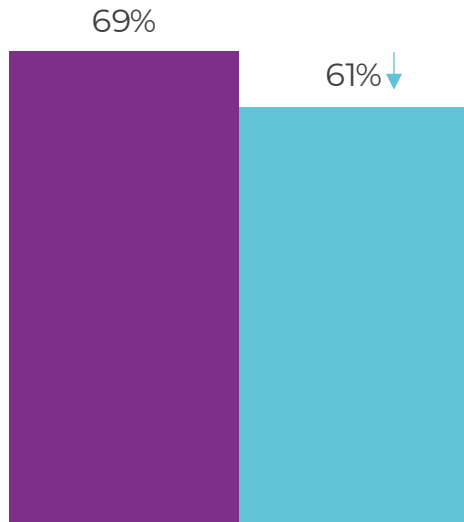
# Awareness of how to reduce water use by around 5 litres a day has dropped overall, particularly among men, 55+ and C2DE households



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Who has decreased NET: Agree that if asked to reduce personal water use by 5 litres a day, they'd know how  
Demographics with significantly decreased NET: Agreement since Nov'22

■ Nov 2022 ■ Mar 2024



If I was asked to reduce my personal water use by around 5 litres a day, I'd know how to do this



**England**  
(69% to 61%) ↓  
-----  
East Midlands  
(61% to 66%) ↑



Men  
(74% to 61%) ↓



Bill payer  
(70% to 63%) ↓



55+  
(72% to 66%) ↓

**C2DE**

(73% to 63%) ↓

↑ Statistically higher than Nov 2022  
↓ Statistically lower than Nov 2022



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# Cost of living impact

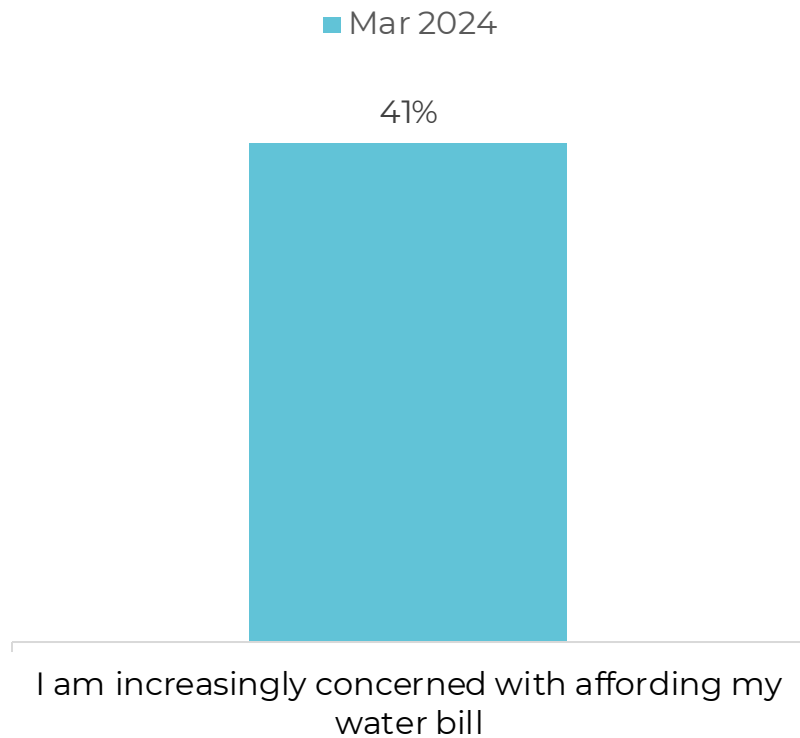
# Four-in-ten said they are increasingly concerned with affording their water bill, particularly C2DE households and those in Wales



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Who is more likely to say they are increasingly concerned with affording their water bill

Subgroups with significantly higher NET: Agree



65+ (46%) ↑



18-34 (27%) ↓

**C2DE**  
(51%) ↑

**ABC1**  
(35%) ↓

↑ Statistically higher than the total  
↓ Statistically lower than the total



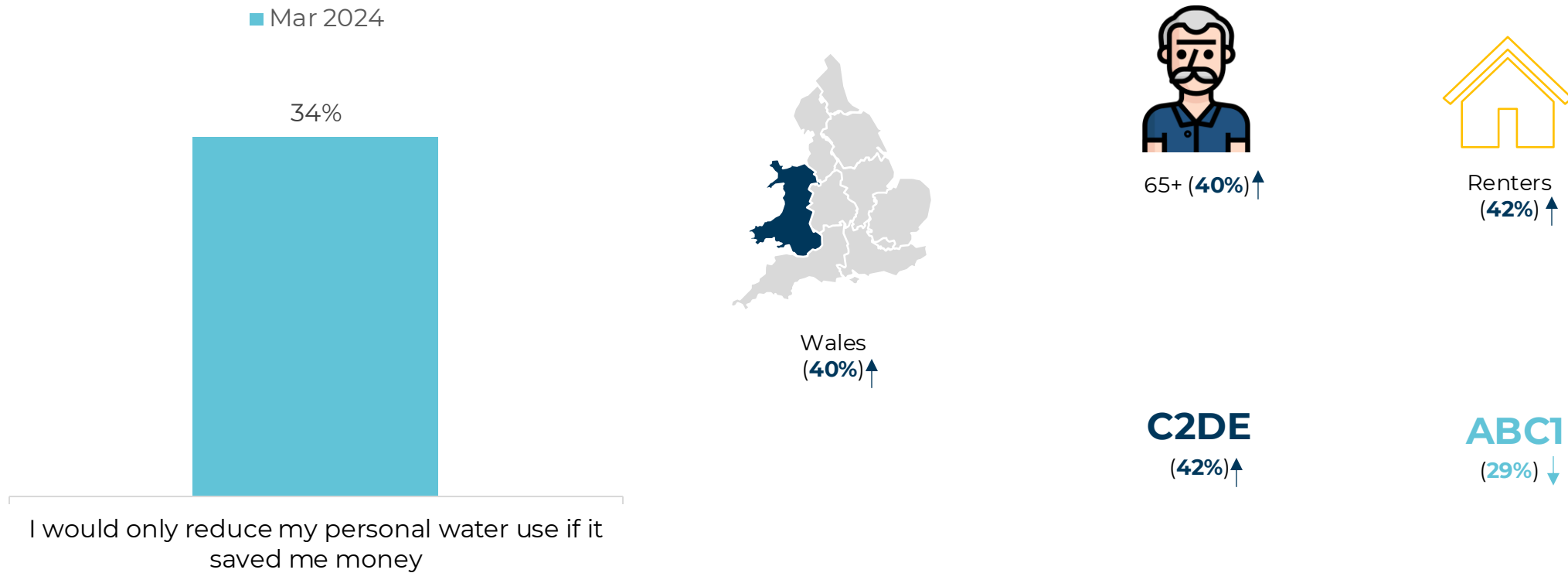
# Those living in Wales, renters, and over 65's were more likely to say they would only reduce water use to save money



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Who is more likely to say they would only reduce personal water use if it saved them money

Subgroups with significantly higher NET: Agree



↑ Statistically higher than the total  
↓ Statistically lower than the total



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# Conclusions



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# Conclusions



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1. As there has been a significant decrease in the overall Environmental Awareness Index since Nov 2022, there is a **clear need to increase awareness again about the impact of our actions on the environment and reconsider how to engage with people on these topics** in order to increase awareness levels.
2. Despite the drop in the Index metric, there has been an increase in perceived awareness of how water use affects the environment vs. Nov 2022 (to bring it back in line with Feb 2022 results). **Although general awareness of water use impact is high, there has been a move away from personal responsibility and people are less sure about the specifics / what this means in practice**, as we can see from a decline in a range of metrics. Communications focused on tangible actions, rather than impact, may improve water use.
3. **Targeted communications** about water use and the environment at **men, younger people (18-34), and renters** may be useful, because these are the groups with the lowest Environmental Awareness Index scores.
4. **In Wales, an emphasis that conserving water could both protect the environment and save money (for customers who pay metered charges)** is potentially more likely to have cut through given anxieties about the cost of living.
5. **Increasing awareness of where drinking water comes from** could also help raise results, as this is one of the lower performing attitudinal statements in the index. Given the frequent stream of news about water companies of late, use the increased media attention to educate consumers about the source of their drinking water, and how sewage is treated.





# Thank you!

For more information on this report please contact:

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