TRITON

January 2026

Hot water down the drain

Unlocking hot water decarbonisation through the Warm Homes Plan

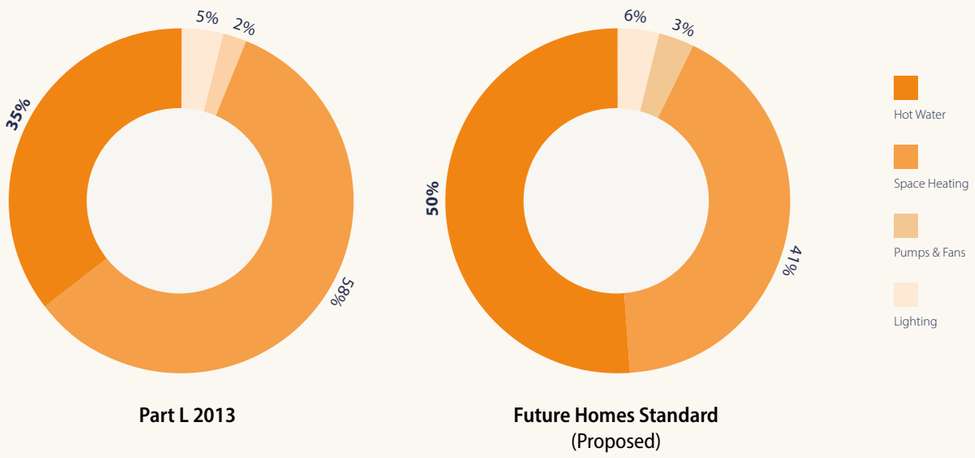
The installation of electric showers could save up to 13,062 tonnes of CO_2e in carbon emissions in 2035, compared to mixer showers - corresponding to a 87.5% reduction.

Hot water decarbonisation represents one of the most cost-effective and immediately deployable levers within the Warm Homes Plan, delivering carbon reductions, improved energy efficiency, lower household bills, and compliance with increasingly stringent water-efficiency requirements.

Introduction

As building fabric and clean heat measures are installed though the Warm Homes Plan and requirements are tightened through the forthcoming Future Homes Standard (FHS), hot water is set to become the dominant energy load - particularly in new build highly efficient, low-heat-loss homes. The Government's commitment to home decarbonisation and proposed revision to the building regulations could see the total impact of Domestic Hot Water (DHW) on household energy requirements increase by 15%, compared to homes built under the 2013 standards.[1]

Figure 1. A comparison of household energy requirements



At the same time, pressure on the UK's water resources is increasing. By 2050, the country is projected to face a daily shortfall of 5 billion litres, driven by climate change, population growth, and large-scale infrastructure projects.[2] This growing challenge is affecting housing delivery and hindering the government's ambition to build 1.5 million new homes through this Parliament as suggested in the recent Warm Homes Plan.[3]

Adding to this, household costs are rising. The average annual water bill is set to increase by £33 (5.4%) to £639 from 1 April 2026, a year on from hefty increases for households in many parts of the country[4] - prompting calls from the Consumer Council for Water (CCW) for a "stronger safety net" for those unable to pay. In England, about 11% of households (roughly 2.73 million) were classified as fuel-poor in 2024 under the government's Low Income Low Energy Efficiency (LILEE) measure.[5]

Figure 2. Water consumption by use

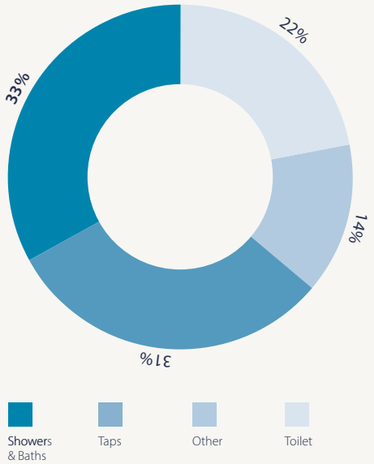
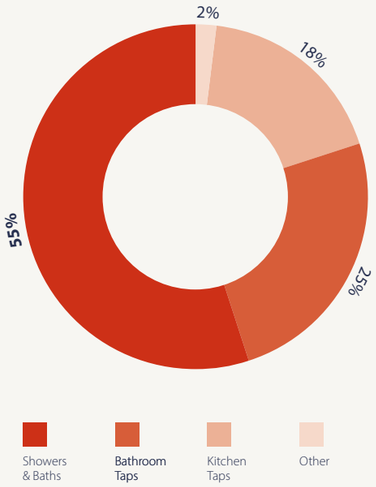


Figure 3. Hot water usage from a cylinder



The purpose of this white paper

With showers representing one of the biggest single uses of both water and energy in the home, it is vital that consumers have access to technologies that help reduce consumption and control costs - supporting both affordability and sustainability.

This white paper demonstrates how efficient shower water heating technologies, in particular instantaneous electric showers (IES) and the next generation of high-efficiency instantaneous electric showers (IES-HE) designed to connect to a waste water heat recovery system (WWHRS), can deliver substantial energy, water and carbon savings, and help lower household bills.

If included in the Warm Homes Plan schemes - the Warm Homes: Social Housing Fund (WH:SHF) and the Warm Homes: Local Grant (WH:LG):

- IES-HE connected to a WWHRS could save up to 1,042 tonnes of CO_2e in carbon emissions in the first year (Figure 11).[6]
- IES could save up to 82 million litres of potable water in the first year (Figure 12). Over the next decade, up to 902 million litres of potable water could be saved through the installation of IES, equivalent to 2.47 million litres per day. (Figure 12).[6]

High-efficiency instantaneous electric showers (IES-HE) designed to connect to a WWHRS can secure significant energy, water, carbon emission and cost savings.

Whilst this white paper advocates for consumer access to a broad range of options to deliver savings, a case study on Triton's electric shower technology demonstrates how IES and IES-HE designed specifically to connect to a WWHRS, can simultaneously contribute to the objectives of the Warm Homes Plan and water efficiency targets - helping to deliver net zero in the domestic sector and support climate adaptation efforts.

The case study uses available data from previous iterations of home decarbonisation schemes to project savings through the installation of Triton Showers' electric shower technology in specific archetypes across key schemes under the Warm Homes Plan.

Independent analysis undertaken by Talan, a global technology and consulting firm specialising in technology and data intelligence, explores the estimated at-scale savings from deploying this electric shower technology in place of a conventional mixer shower. Key assumptions include a shower operating at 41°C for a duration of six minutes, with an average cold-water inlet temperature of 13°C throughout the year. Using the insights gained from this research, alongside an assessment of industry and international case studies, a series of policy recommendations is presented..

The figures are based on specific archetypes including installation in complex to decarbonise homes and flats or terraced houses as these will face technical and special barriers to decarbonisation through the installation of heat pumps and hot water cylinders alone.[7]

Savings at a glance[6]

- Annual energy use for the IES (604 kWh) is reduced by over 50% in comparison to the mixer shower (1,532 kWh). The IES-HE connected to a WWHRS (271kWh) reduces energy use by a further 50% in comparison to the IES.
- Annual potable water use for both the IES (17,021 L) and IES-HE connected to a WWHRS (18,642 L), are significantly lower in comparison to the mixer shower (34,310 L).
- Annual carbon emissions for both the IES (133 $kgCO_2e$) and IES connected to a WWHRS (71 $kgCO_2e$) are significantly lower in comparison to the mixer shower (291 $kgCO_2e$).
- Annual energy and water costs associated with the shower system are lower for both the IES (£298) and IES-HE connected to a WWHRS (£209) compared to the mixer shower (£354).

'As we strive towards net zero, it's essential that we don't overlook the role of hot water. Electric showers offer a simple, scalable and cost-effective solution to reduce emissions, water usage and household bills across the nation. They also provide a reliable, independent source of hot water, enhancing household resilience and reducing reliance on centralised hot-water systems as homes transition to low-carbon heating. This goes beyond future-proofing our housing stock – it's about delivering tangible savings to households today.'

Paul Ravnbo-West, Market Development Manager, Triton Showers

Figure 4-7. A comparison of annual energy use, water use, carbon emissions, running cost between a mixer shower, instantaneous electric showers (IES) and high-efficiency instantaneous electric showers (IES-HE) connected to a WWHRS

Figure 4. Annual Energy Use (kWh/year)

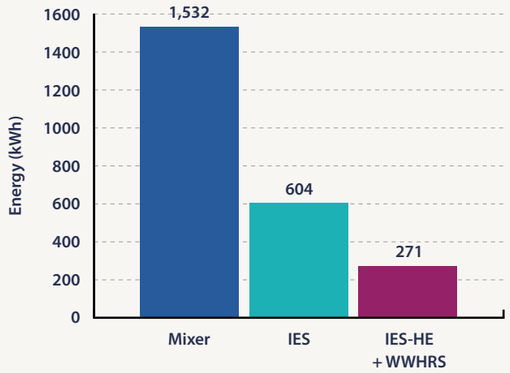
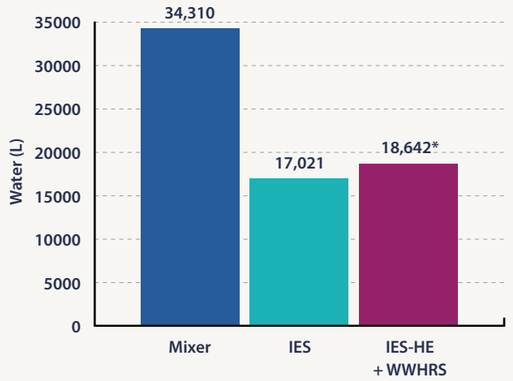


Figure 5. Annual Water Use (litres/year)



** Annual water use for IES-HE is higher than standard IES, as HeatRepeat® technology is designed to provide a beneficial increase in flow rate during the winter months, when additional boost is most needed, ensuring a more consistent showering experience year-round.*

Figure 6. Annual Carbon Emissions ($kgCO_2e$/year)

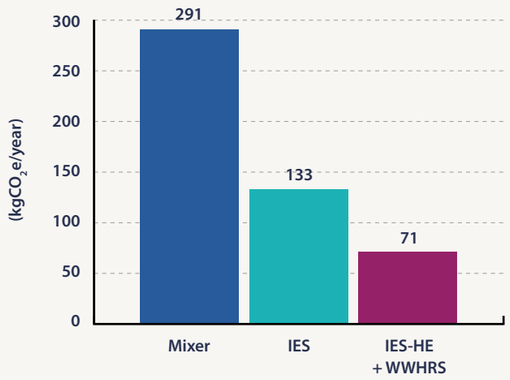
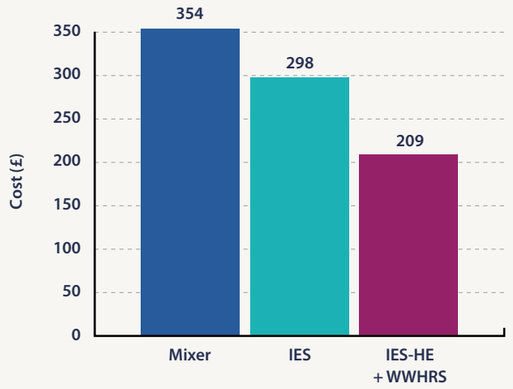
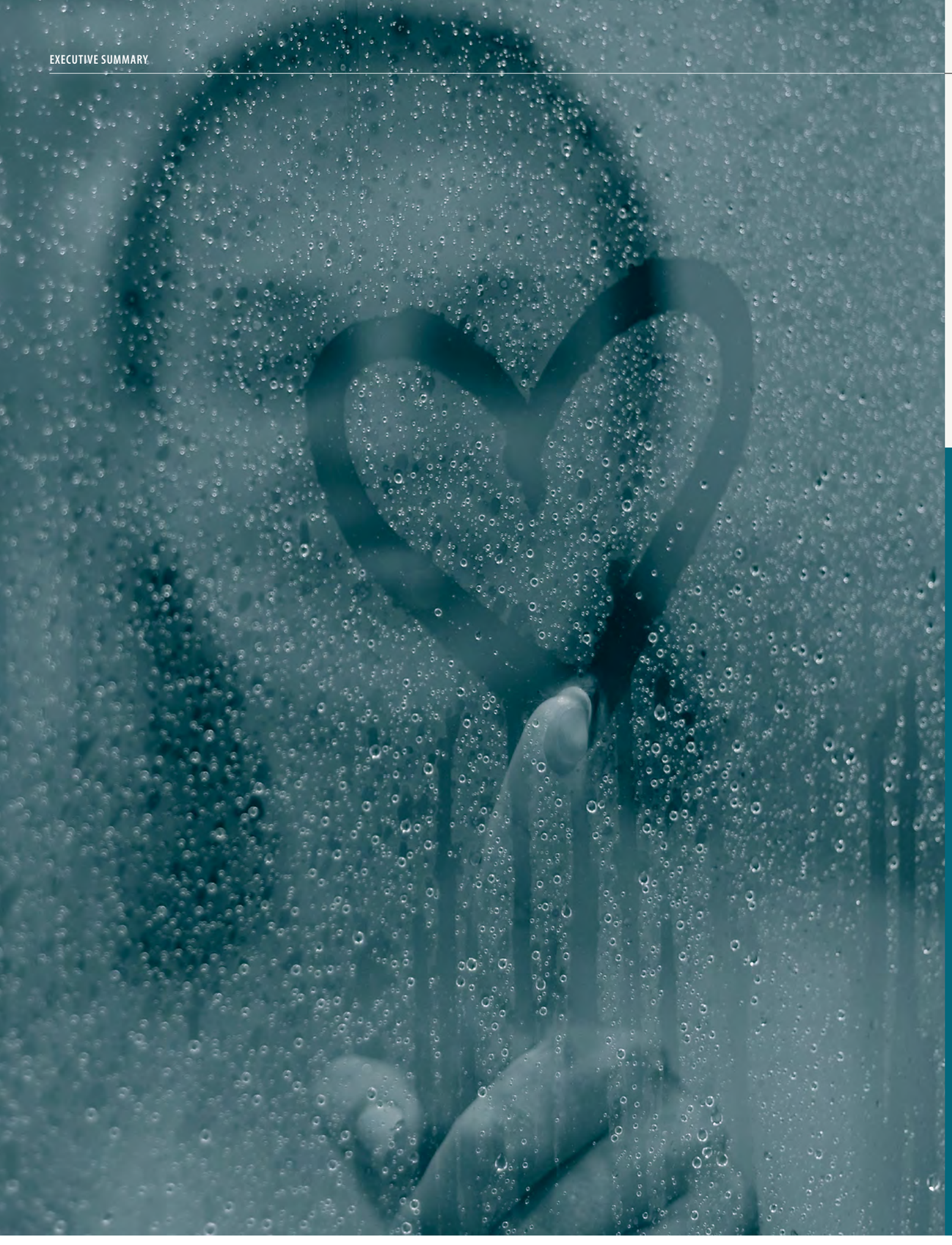


Figure 7. Annual Running Cost (£/year)



By 2035, IES could secure a 76.9% reduction in emissions in comparison to mixer showers if they are installed through WH:SHF and WH:LG. Emissions can be further lowered through the installation of IES-HE connected to a WWHRS resulting in an 87.5% reduction in comparison to mixer showers (Figure 11).



Proposed policy levers

Instantaneous electric showers (IES) and high-efficiency instantaneous electric showers (IES-HE) connected to a waste water heat recovery systems (WWHRS), have notable energy, water, cost, and carbon saving benefits which can benefit consumers, particularly those in hard-to-treat and small properties. Given that the Climate Change Committee (CCC) state that there is significant uncertainty in how emissions reduction will be met for the residential sector, and that water demand reduction in households is insufficient to achieve government policy, efficient showering technology can support progress to both homes decarbonisation and water consumption policy objectives cost-effectively.

Triton Showers has identified a series of policy levers which, if taken forward, has significant potential to contribute to key objectives across governmental departments and support the delivery of net zero.

What needs to change:

1. Integrate hot water decarbonisation into the net zero strategy for decarbonisation in the domestic sector.
2. Incentivise consumers to invest in efficient showering technologies to deliver water consumption targets.
3. Include instantaneous electric showers (IES) and high-efficiency instantaneous electric showers (IES-HE) connected to a WWHRS, in the Warm Homes Plan funding schemes.
4. Update RdSAP ahead of the transition to HEM to ensure a broad range of efficient shower water-heating technologies can be recommended through EPCs. This should include explicit recognition of high-efficiency electric showers (IES-HE) connected to (WWHRS) within SAP 10.3/HEM.
5. Permanent removal of green levies from the price of electricity to support broad low-carbon technology switching.

Research & Analysis

INTRODUCTION

Water-saving technologies can support the Warm Homes Plan

The Government has set ambitious targets for improving the energy efficiency of five million existing homes through the Warm Homes Plan.[3] The aim of which is to support consumers to improve their thermal comfort and save on energy bills whilst reducing emissions through key schemes including; *the Warm Homes: Social Housing Fund (WH:SHF), Warm Homes: Local Grant (WH:LG), the Boiler Upgrade Scheme (BUS) and new regulations including Minimum Energy Efficiency Standards (MEES) and the forthcoming Future Home Standard (FHS).* Upgrades will contribute to the Government's fuel poverty target to get as many homes as reasonably practicable to an EPC Band C by 2030.[8]

Whilst this provides a clear strategy for decarbonising space heating, there is an opportunity to broaden support for hot water decarbonisation and capture further energy, carbon and consumer bill savings whilst reducing water usage. Currently, consumers have limited choice for decarbonising hot water, as policy supports the installation of hot water cylinders, which are primarily installed alongside an Air Source Heat Pump (ASHP). This means that consumers who want to adopt other hot water decarbonisation technologies - such as low-flow fixtures, efficient water-using appliances like electric showers, or waste water heat recovery systems (WWHRS) - are unable to access their benefits. Through the inclusion of water-saving technologies in the WH:SHF and WH:LG additional energy, cost, carbon and water savings can be accessed to broaden consumer choice and drive forward progress.

As identified by the CCC, climate change will result in hotter and drier summers in the UK, leading to lower rainfall and increased water scarcity.[9] The Department for the Environment, Food and Agriculture (DEFRA) and the Environment Agency project a water shortage of 5 billion litres per day by 2050.[2] This will require rapid demand reduction and is likely to result in higher consumer bills.

To support the sustainable management of water, the Government has set limits for new buildings through Part G of the Building Regulations. By 2028, housebuilders, developers and designers are required to limit water use to 125 litres per person per day for new buildings.[10] DEFRA's 2023 Plan for Water has outlined the limit for existing buildings as 122 litres per person per day by 2028.[2] The limit for new homes may be reduced further to 105 litres per person per day, or 100 litres per person per day as part of the optional technical standard proposal, set out in the Government's recent consultation on water efficiency standards.[11] However, in the recent Progress in Adapting to Climate Change: 2025 Report to Parliament, progress in reducing household water demand was cited as insufficient to meet the per capita water consumption target of 110 litres per day by 2050.[9]

To support consumers, the Government plans to introduce the Mandatory Water Efficiency Labeling Scheme (MWELS) for household appliances,[12] anticipated to come into effect in 2026. This presents an opportunity for efficient showering technologies to help consumers get ahead of these upcoming limits. However, without access to specialised technologies, the aforementioned limits will be challenging to meet for existing and new build homes.

By supporting the installation of efficient shower water heating technologies through the Warm Homes Plan schemes progress can be delivered across multiple governmental objectives.

Electric shower technology is adaptable to home heating system changes and broader energy system changes. It also ensures security of hot water should the ASHP or hot water cylinder fail and additionally, there is no heat loss from lengthy pipe runs – a key consideration in the Home Energy Model (previously not calculated in SAP).

Definition of showering technologies

Table 1 provides a definition of the three technologies which inform this report; a mixer shower connected to a gas combi boiler, an instantaneous electric shower (IES) and Triton Showers' ENlight HeatRepeat high-efficiency instantaneous electric shower (IES-HE) designed specifically to connect to a WWHRS.

Electric showers are compared to mixer showers as they are the two most common shower systems installed in the UK.[13] [14] However, as displayed in Table 1, electric showers do not require a connection to the existing home heating system unlike mixer showers. Electric shower systems only require a cold-water supply and electrical connection to heat water directly from the mains and provide instantaneous hot water. This means that the technology is adaptable to home heating system changes and broader energy system changes. It also ensures security of hot water should the ASHP or hot water cylinder fail and additionally, there is no heat loss from lengthy pipe runs – a key consideration in the Home Energy Model (previously not calculated in SAP).[15]

Table 1. Definition of mixer showers, instantaneous electric showers (IES) and high-efficiency instantaneous electric showers (IES-HE) connected to a WWHRS

	Mixer Shower	Instantaneous Electric Shower (IES)	High-Efficiency Instantaneous Electric Shower (IES-HE)
Technology Description	Mixer showers require both a cold and hot water supply connection. They use pre-heated water from the home heating system. No electricity supply is required unless they include digital displays or connected to a pump.	IES only require connection to a cold-water supply. They heat water instantly using an internal electric heating chamber. Flow rate is dependent upon the cold-water inlet supply temperature and power rating,	IES-HE are designed to connect directly to a WWHRS. Unlike a standard IES installation, the shower's cold inlet is supplied with pre-heated water from the WWHRS outlet. This allows the IES-HE to reduce its power demand, delivering meaningful energy savings.

UK POLICY CONTENT AND GAP ANALYSIS

Immediate and long-term incentives for hot water decarbonisation

Supporting whole house decarbonisation

A whole house approach provides consumers with a comprehensive plan for retrofit installations to ensure the property operates in an as energy-efficient manner as possible.[16] It ensures that retrofit projects consider fabric efficiency, insulation and ventilation to ensure that the measures installed work together to reduce energy use, carbon emissions and improve thermal comfort. However, the Government's flagship scheme for home decarbonisation does not offer a broad range of technologies to support the whole house approach. With historic progress made on space heating decarbonisation through the previous iterations of the Warm Homes Plan schemes, there has been a lack of support for hot water decarbonisation risking a delay in the full decarbonisation of homes.

Whilst the installation of a heat pump will include a hot water cylinder which has decarbonisation benefits including hot water storage, certain housing archetypes may not be suitable for an ASHP, including small houses or flats and complex to decarbonise homes. This is largely due to space limitations, which make fitting ASHP and hot water cylinders a challenge.[7]

Along with retrofitting existing homes, having a mix of technologies available is also important for the decarbonisation of the new build market. In the joint report from the Future Homes Hub and the Carbon Trust, titled the New Homes Sector: Net Zero Transition Plan, both low-rise homes as well as four storey buildings and over are described as likely to require all electric systems to decarbonise. Meaning that offering a range of heating and hot water decarbonisation solutions will be key to the decarbonisation of buildings and broadening consumer choice.[17]

The Government's proposed revision to the building regulations could see the total impact of Domestic Hot Water (DHW) on household energy requirements increase from 35% to 50%, compared to homes built under the 2013 standards.[1] This demonstrates the significant potential benefits of supporting hot water decarbonisation by providing a broad range of efficient shower water heating technologies through key energy efficiency schemes, as part of the current decarbonisation strategy.

By expanding consumer choice and supporting a technology agnostic approach to space and water heating decarbonisation the Warm Homes Plan can deliver whole house decarbonisation, further lowering utility bills for consumers and reducing potable water use – providing a triage of benefits including lowering emissions, reducing fuel poverty and getting ahead of water consumption limits.

Fuel Poverty - Rising costs

On the 1 April 2025, water bills increased by 26% or £123 per year, resulting in average annual water bills of £606. For 2026/27, the average forecast bill increase for water and sewerage firms is £33 (5.4%), taking a typical annual bill from £606 to £639.[4] Energy bills also increased by 6% per year or £159, resulting in average annual household energy bills of £1,849.[6]

The simultaneous increase in water and energy bills marks a significant spike in the cost of living in the UK, compounding the widening fuel poverty gap.[8] To address the increase in utility bills, the Government are introducing an updated fuel poverty strategy, which aims to get as many fuel poor homes to an EPC Band C as reasonably practicable.[9] The Warm Homes Discount (WHD) and additional reductions in energy prices set to come into effect from April 2026 will also offer a £300 total reduction in consumer bills.[3] However, despite the considerable contribution showering has to household bills there is a lack of focus on hot water decarbonisation in the current strategy with consumers left with limited options for reducing their energy demand for hot water. The increasing cost of consumer bills will impact the most vulnerable households disproportionately and illustrates the need for a joined-up policy approach to address energy consumption for both space and water heating. By offering a broad range of efficient shower water heating technologies through the Warm Homes Plan schemes, households can access additional bill savings helping to reduce the financial burden of utility bills, particularly for fuel poor households.

Updates to EPCs

EPCs offer consumers advice on switching from current fossil fuel or high energy intensive appliances in the home to low-carbon and more efficient alternatives. Given that the primary place for consumers to get advice on how to improve the energy efficient of their home is through EPCs, there is a need to address the limitations in recommended shower water heating technology. Currently, recommendations to support efficient water use in the new build market include low-flow taps, efficient showers and dual-flush toilets, however, existing properties are not offered the same range of recommendations.[10] [18]

Multiple technologies are limited by restrictive and inaccurate calculations resulting in only a singular technology being recommended for a specific situation. For example, SAP 10.3 does not recognise electric shower systems under 9kW, blocking recommendations for more efficient systems. Additionally, recommendations only relate to "heat recovery systems for mixer showers," excluding electric showers designed to connect to a WWHRS.[19] These limitations in RdSAP must be addressed ahead of the transition to HEM as they reduce the variety of recommendations available through EPCs, which in turn limits consumer choice and prevents access to the benefits offered by electric shower technology. In order to support the delivery of the whole house approach to domestic building decarbonisation, a broad range of technologies must be recognised in EPCs.

Green Levies on Electricity Costs

A further barrier which is preventing broad switching to efficient and low-carbon shower water heating systems along with other low-carbon and high-efficiency technologies are green levies. Green levies make up 9.92% of the final price of electricity, adding approximately £86.80 to annual electricity bills.[20] The most recent Public Attitudes Tracker (PAT) which explicitly references running costs is the 2024 Winter PAT with 33% of respondents citing concerns over running costs of low-carbon heating systems.[21] Whilst, the Autumn Budget confirmed that the domestic portion of the renewables obligation would be temporary refunded to electricity suppliers through taxation helping to reduce consumer bills by £154 on average per year from April 2026,[22] further permanent action is needed to support long-term switching.

Green levies artificially raise running costs and penalise investment, discouraging uptake and delaying decarbonisation efforts in the domestic sector. This not only affects uptake for electric showers but any low-carbon or all electric system or appliance for use in the home and prevents access to the energy, cost and carbon savings associated with these technologies. The vast savings offered by instantaneous electric showers and high-efficiency instantaneous electric showers designed to connect to a WWHRS, will only be fully realised through the removal of green levies and the rebalancing of the electricity price in line with the price of gas. This policy change will ultimately move forward the energy transition and advance progress towards net zero.

Water Scarcity and Climate Change

As outlined in DEFRA's 2023 Plan for Water, extreme heat, rainfall shortages, population growth and heightened demands on agricultural systems are set to culminate in a supply-demand gap of 5 billion litres per day in public water supply by 2050.[2] Both the Environment Agency and UK Health Security Agency estimate that water scarcity will result in increased droughts frequency, food shortages, threats to energy security and worsened health outcomes.[23 24 25]

The limited supply of water will increase utility bills for consumers and exacerbate the strain on the most vulnerable. To mitigate water scarcity the Government, through the Environment Act 2021, has set a legally binding target to reduce public water use per person in England by 20% by March 31, 2038.[2]

Specific targets for water use in litres have also been introduced through Part G of the Building Regulations placing requirements on housebuilders, developers and designers to reduce water use to 125 litres per person per day for new build households.[18] Whilst Part G does not include targets for existing buildings, DEFRA's 2023 Plan for Water outlined that by 2038 a limit of 122 litres per person per day must be met for existing buildings to mitigate future water scarcity concerns.[2] These limits may be reduced to between 100-105 liters per person per day for new homes as suggested in a recent consultation on water efficiency, making it more challenging for them to be met without access to specialised technologies.[11]

DEFRA's Plan further outlines key steps to achieve the consumption targets including:[2]

- Unlocking water efficiency retrofit programmes delivered by Ofwat and water utility companies
- Integrating water efficiency targets into existing energy efficiency advice and retrofit programmes

The above points demonstrate the role of existing retrofit programmes to deliver the consumption targets. However, with a lack of policy drivers currently in place to support consumers to adopt water-efficient technologies and get ahead of these requirements, there is a risk that without policy intervention the targets will not be met.

Homes with spatial and technical barriers including smaller properties, such as flats and terraced houses, and complex to decarbonise homes will face challenges with ASHP and hot water cylinder installation. The installation of electric showers, both with and without waste water heat recovery systems (WWHRS), provides a valuable opportunity to achieve additional savings in energy, costs, carbon emissions, and potable water that would otherwise be lost.

ANALYSIS OF SHOWERING TECHNOLOGIES

The benefits of electric shower technology vs mixer showers

Warm Homes Plan

Five million homes are set to decarbonise under the Warm Homes Plan; however, certain archetypes will face challenges to decarbonise. Homes with spatial and technical barriers including smaller properties, such as flats and terraced houses, and complex to decarbonise homes will face challenges with ASHP and hot water cylinder installation.[7]

The installation of instantaneous electric showers, both with and without waste water heat recovery systems (WWHRS), provides a valuable opportunity to achieve additional savings in energy, costs, carbon emissions, and potable water that would otherwise be lost. These benefits are particularly important for homes facing decarbonisation challenges. The following case study explores these findings, comparing the key advantages of electric shower solutions to a standard mixer shower.

The technologies compared are a mixer shower connected to a gas combi boiler, a standard instantaneous electric shower (IES) and Triton Showers' ENlight HeatRepeat® high-efficiency instantaneous electric shower (IES-HE) designed specifically to connect to a WWHRS. The archetype modelling used to compare the technologies is based on an average UK household with 1 shower and 1 bathtub, a floor area of 78 square meters and 2.4 occupants. This results in 1.74 showers taken per day or 635 showers per year according to SAP Appendix J: Hot water, equation J1.[26]

Energy, Carbon and Water Savings

Figure 8 compares the annual energy use, potable water use and carbon emission savings associated with the three showering solutions. The y-axis demonstrates annual energy use (kWh) with IES using less than half the amount of energy annually (604 kWh), in comparison to a standard mixer shower (1,532 kWh). The energy savings from the IES are the result of greater efficiency and lower water consumption. The IES-HE designed to connect to a WWHRS, offers further reductions in annual energy use (271 kWh), cutting energy consumption in half again. This is due to the WWHRS pre-heating the incoming cold water to the shower, which vastly reduces the hot water energy required for showering.

The x-axis demonstrates annual potable water use in litres (L) with both IES and IES-HE connected to a WWHRS using half the amount of potable water (17,021 L and 18,642 L) in comparison to the standard mixer shower (34,310 L). Reductions in water use depend on the flow rate specifications of the showering solution installed. Whilst both IES and IES-HE showers connected to a WWHRS can offer considerable water savings compared with a standard mixer shower, an IES-HE connected to a WWHRS will consume slightly more water than an IES not connected to a WWHRS. This is because the IES-HE is designed to provide a beneficial increase in flow rate during the winter months, when additional boost is most needed, ensuring a more consistent showering experience year-round.

Lastly, the size of the bubbles displayed in Figure 8 represent the CO_2e emissions, with the IES producing half the amount of annual CO_2e (133 $kgCO_2e$) on average in comparison to the standard mixer shower (291 $kgCO_2e$). The IES-HE connected to a WWHRS secures additional carbon savings, reducing annual emissions to 71 $kgCO_2e$. These findings demonstrate the opportunity offered through the installation of electric showers with/without WWHRS for home decarbonisation and reductions in potable water use.

Figure 8. Annual energy use, annual potable water use and 2025 household emissions for hot water showering. Note: Bubble size corresponds to 2025 hot water showering carbon emissions ($kgCO_2e$)

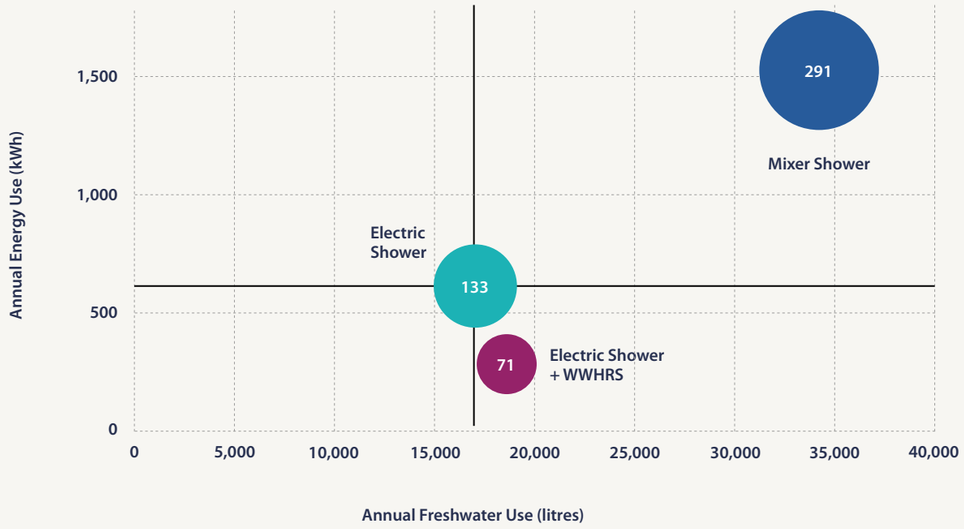
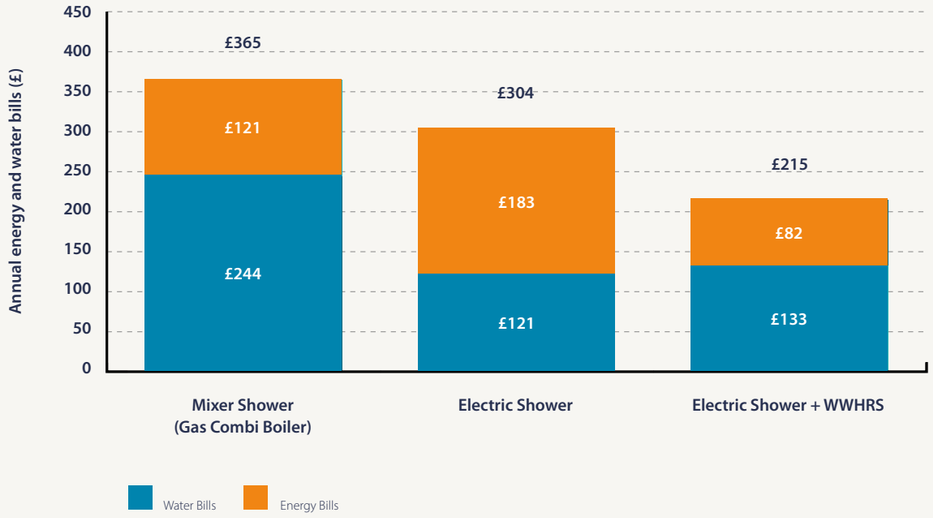


Figure 9. Energy and water cost of different showering solutions (2025)



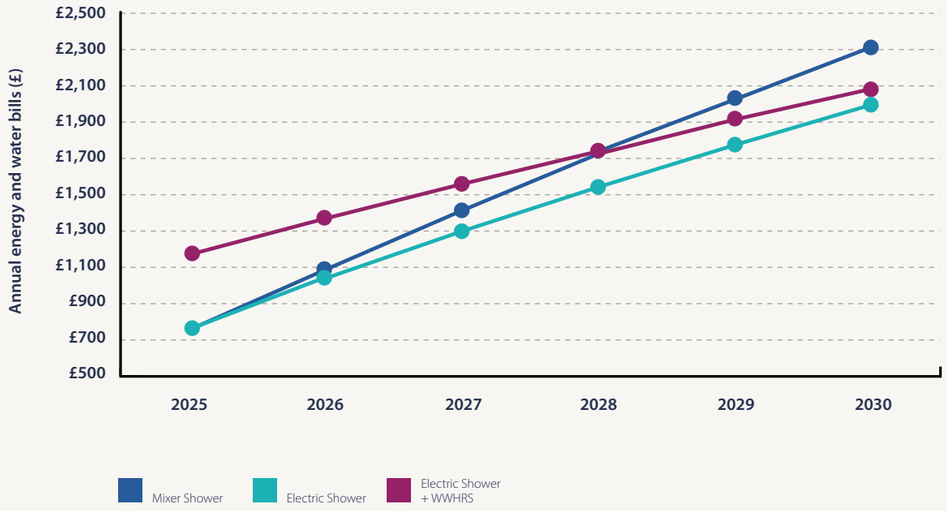
Consumer bill savings

Figure 9 compares energy and water costs associated with the three showering solutions. The mixer shower has the highest combined costs for consumers, with costs largely driven by the significantly higher use of potable water. Despite using significantly less energy the IES-HE's associated energy costs are higher than the mixer shower for the consumer. This is due to the IES-HE relying on electricity rather than gas. The IES offers the lowest annual water bills due to the lower flow rate in comparison to the mixer shower and IES-HE connected to a WWHRS. However, the IES-HE connected to a WWHRS presents the lowest overall annual utility bills due to the significant energy saving capacity of the system as the otherwise wasted heat is recycled and reused.

Through life costs

Figure 10 demonstrates the total cost of the different shower solutions over the system lifetime (6 years).[27] Upfront, installation and operational costs associated are considered. The IES has a lower upfront cost and lower maintenance costs compared to the mixer shower resulting in a total saving of £318 over system lifetime. Despite higher upfront costs, an IES-HE connected to a WWHRS breaks even in its fourth year after installation and achieves lifetime cost savings of approximately £231. This is due to significantly lower running costs over the system's lifetime, thanks to reduced water use compared with a standard mixer shower. This demonstrates the long-term bill savings that electric shower technology can offer consumers, whereas the standard mixer shower remains the least cost-effective solution.

Figure 10. Graph showing total cost of ownership of mixer showers, electric showers and electric showers designed to connect to a WWHRS



ANALYSIS OF INSTALLATION THROUGH KEY ENERGY EFFICIENCY SCHEMES

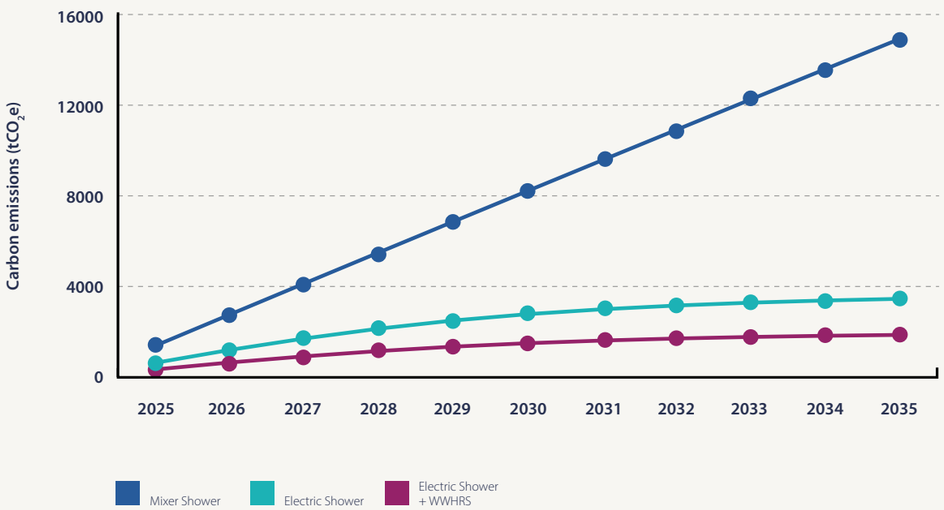
Real-world analysis

By adapting the Analysis of Showering Technologies to a real-world scenario, it is possible to understand the at-scale benefits of installing electric shower technology in UK homes. The following section estimates the carbon emissions and water savings achieved through installations delivered via historic energy efficiency schemes, using publicly available installation data from the Department for Energy Security and Net Zero (DESNZ) and previous iterations of key schemes, including...

- The Energy Company Obligation scheme (ECO4) [28]
- The Social Housing Decarbonisation Fund (SHDF) Waves 1 and 2.1 [29]
- The Local Authority Delivery (LAD) 1, LAD2 and LAD3 [30]
- The Home Upgrade Grant (HUG) Phase 1 and Phase 2 [30]

These schemes were used to inform the number hard to decarbonise homes previously targeted. This calculation has been used to estimate the number of projected homes that can be supported through the Warm Homes Plan schemes. With approximately 5 million homes estimated to be hard to decarbonise as of 2022,[31] [32] a large proportion of these houses could benefit from access to electric showers and electric showers designed for use with WWHRS. The analysis focuses on archetypes that are considered challenging to decarbonise including smaller dwellings, like flats or terraced houses. These specific archetypes were evaluated because they are likely to encounter significant technical and spatial barriers to achieving decarbonisation solely through the installation of standard solutions such as heat pumps and hot water cylinders.[7]

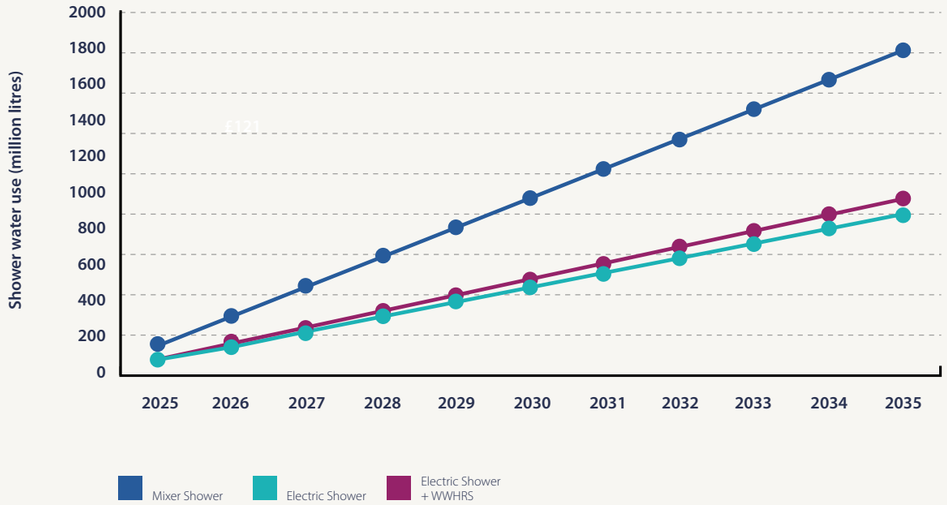
Figure 11. Estimated carbon emissions of mixer showers, electric showers and high-efficiency electric showers designed to connect to a WWHRS, if supported by the Warm Homes Plan schemes



The water usage and carbon emissions figures shown are based on typical showering behaviour in alignment with current SAP calculation methods.[26] Key assumptions include a shower operating at 41°C for a duration of six minutes, with an average cold-water inlet temperature of 13°C throughout the year. Further technical specifications of the shower solutions considered are outlined in Annex 1. The number of homes suitable for electric shower installations has been projected using the figures for complex to decarbonise homes, small flats and terraced houses that have received funding under the energy efficiency schemes outlined.

Figure 11 presents the estimated annual carbon emissions, over the next decade, associated with water heating using the different showering technologies. The installation of IES in these archetypes could save up to 11,470 tCO_2e in 2035 compared to mixer showers, corresponding to a 76.9% reduction. This saving could be increased further by 1,863 tCO_2e in 2035, through the installation of IES-HE connected to a WWHRS, corresponding to an 87.5% reduction in showering emissions. The results demonstrate the opportunity for carbon savings through the installation of electric shower solutions in the Warm Homes Plan schemes.

Figure 12. Estimated water use of mixer showers, electric showers and high-efficiency electric showers designed to connect to a WWHRS, if supported by the Warm Homes Plan schemes



In addition to lowering emissions, electric showers have the potential to deliver significant water savings. Figure 12 presents the projected water use in hard-to-decarbonise homes and smaller dwelling archetypes between 2025 and 2035. The installation of IES is projected to save 902 million litres of water by 2035, equivalent to 2.47 million litres per day, or an average saving of 25.4 litres per person per day. IES-HE systems connected to a WWHRS are estimated to achieve water savings of approximately 818 million litres, corresponding to 2.24 million litres per day, or an average of 23 litres per person per day.

According to the Energy Saving Trust's Water Calculator, the average person uses 142 litres of water per day. As such, the installation of electric shower solutions could enable the Government's water-use targets to be met by 2035 for both existing homes (122 L/person/day) and new buildings (125 L/person/day).[10] In percentage terms, IES deliver an 18% reduction in average daily water use, while IES-HE systems connected to a WWHRS deliver a 16% reduction.

This analysis demonstrates the significant opportunity for water savings offered by electric shower technology which could be used to drive forward water use limitation targets, which require a 20% reduction per person by 2038.[2] Based on the above analysis, if IES and IES-HE connected to WWHRS were supported under the WH:SHF, WH:LG, they would in their first year save 74 and 82 million litres of water respectively and between 751 tCO_2e and 1,042 tCO_2e respectively.[6] This demonstrates the clear role electric shower technology can have to deliver both the Warm Homes Plan objectives and mitigate water scarcity concerns.

INDUSTRY SUPPORT FOR EFFICIENT WATER USE AND COUNTRY CASE STUDIES

Industry case studies

There has been meaningful action taken by water companies to improve water efficiency in households by offering free advice on how to reduce bills through the installation of water saving technologies. Detailed below are examples of the direct support offered by water companies to households to reduce water use including through the installation of water saving technologies.

Table 2. Industry water efficiency scheme descriptions

Scheme	Support
Severn Trent Water Usage Incentive Scheme[33]	Severn Trent, in partnership with loyalty agency Nectar360, is rewarding Nectar customers with extra points for installing smart water meters and reducing water use. Between November 2024 to July 2026 the scheme aims to support 25,000 participants. As of July 2025 4,000, customers have been enrolled.[34]
Anglian Water Love Every Drop[35]	The Love Every Drop project (2013-2015) offered households free water audits and retrofit installations of technologies including tap aerators, water-efficient shower heads and shower timers. It achieved a 46 L saving per household per day on average.
Southern Water Water-saving Home Visits[36]	The Water-saving Home Visits scheme (2015-2020) offered customers a home visit with a Southern Water engineer who advised on water-saving tips and provided installations of a small selection of technologies for free. These technologies included cistern displacement devices, efficient shower heads and tap aerators. In the first-year average water savings were 17% or 28 L per person per day were saved.
Northumbrian Water Every Drop Counts[37]	Every Drop Counts (2017-2018) offered free home visits from a qualified plumber to install water saving technologies including cistern displacement devices, efficient shower heads and tap aerators. This scheme was available in Washington, Tyne & Wear where it achieved an average of 22 L saved per property per day. It was also available in Barking where approximately 40 L per property per day were saved.

The Environment Act 2021 and the Environmental Improvement Plan (EIP) state the importance of demand management in supporting reductions in water use and infrastructure leakages,[38] with the Environment Agency urging water companies to consider how household water use will need to change to meet growing needs as water scarcity increases.[39]

The role of water companies is explored in Ofwat's 2022 report: Water Companies' Environmental Incentives to support More Water Efficient New homes.[40] All English water companies now offer environmental incentive payments for developers to build homes that consume less water than that required by building regulations. However, according to Enabling Water Smart Communities (EWSC) uptake has been low. In their report: Summary of Water Sector Environmental Incentives the EWSC attempt to simplify the environmental incentive offering across the sector, by compiling all the environmental incentive offerings into one single document.[41]

Whilst the schemes listed in Table 2 have delivered substantial water savings, Triton Showers believe that further savings can be delivered through offering a broader range of technologies through the Warm Homes Plan schemes including electric shower solutions. Particularly given the concerns around water scarcity as a result of climate change and increased demand from households with population growth.[2]

COUNTRY CASE STUDIES

Best Practice Guide - Westminster Council, UK

In the UK, Westminster Council in partnership with Morgal Sindall Property Services published a case study on a retrofit project which aimed to trial measures in social housing. The project retrofitted a one-bedroom flat following the whole house approach to understand what mix of measures could achieve cost-effective and high energy savings. Along with fabric efficiency, low-carbon heat and microgeneration installations, a WWHRS system was fitted underneath the bath to capture waste heat from showering. The results of the project delivered impressive energy and bill savings, with the property's energy demand reducing by over half and increasing the EPC rating from a D to a B rating.[42] This project demonstrates the significant results that can be delivered through the installation of a mix of technologies in a retrofitted home. It also evidences the role WWHRS can have in supporting home decarbonisation as a cost-effective, energy saving solution.[43]

SocialWatt programme - Germany

The SocialWatt programme was introduced in September 2019 to alleviate fuel poverty following the energy crisis and improve the energy efficiency of homes.[44] The programme includes immediate financial support for households and long-term policy changes. Since 2008, the Stromspar-Check Aktiv has provided free energy-saving devices including water-saving shower heads, and vouchers of up to €200 to replace inefficient appliances. The initiative has supported over 460,000 households by offering access to a broad range of efficient space and water heating technologies.[44]

Long term policy changes have also been delivered through the removal of the Erneuerbare-Energien-Umlage (EEG) levy on electricity, which came into effect in July 2022. Prior to its' removal consumers were charged €0.065 per kWh, impacting electricity bills considerably. Following its removal consumers benefit from an average saving of €227.5 on bills per year.[44] The approach adopted through the SocialWatt programme provides immediate energy and water bill savings through access to a broad range of technologies, and permanent long-term savings through the removal of electricity levies - helping to support broad switching to low carbon and all-electric systems.

These case studies demonstrate the importance of immediate and long-term policy support. The UK has an opportunity to lead in the development of a net zero strategy which maximises savings for home decarbonisation and water use.

POLICY RECOMMENDATIONS

Instantaneous electric showers with or without WWHRS have notable energy, water, cost, and carbon saving benefits which can support consumers along the journey to net zero, particularly those in hard-to-treat and small properties. Given that the CCC state that there is significant uncertainty in how emissions reduction will be met for the residential sector,[9] and that water demand reduction in households is insufficient to achieve government policy,[9] efficient showering technology can support progress to both homes decarbonisation and water consumption policy objectives cost-effectively. Unlocking this opportunity can be achieved through a series of policy interventions which are outlined below.

Integrate hot water decarbonisation into the net zero strategy for decarbonisation in the domestic sector

By integrating hot water decarbonisation into the Government's strategy for net zero in the domestic sector, consumers will be able to access a wider variety of technology solutions suited to their home and secure permanent utility bill and carbon savings. Instantaneous electric showers (IES) or high-efficiency instantaneous electric showers (IES-HE) connected to WWHRS provide an option for homes experiencing space and technical challenges with heat pumps with hot water cylinders, such as in some flats, terraced houses and other complex to decarbonise homes. Instantaneous electric shower technology also functions independently of the home heating system meaning that savings will be secured regardless of a household's decision to switch heating system. These systems also provide hot water security if the home heating system fails. This means the technology can adapt to broader energy system changes, as the shower system is connected directly to the electricity grid, making it an effective future-proof technology.

Incentivise consumers to invest in efficient showering technologies to deliver water consumption targets

Water scarcity driven by climate change is expected to increase and so limiting the use of potable water will become essential for conservation. Whilst water use limits detailed in Part G of the Building Regulations will support households to reduce consumption, access to efficient shower water heating technologies will enable consumers to get ahead of these limits. In the immediate term, recognising the benefits of electric showers and high-efficiency electric showers connected to a WWHRS within SAP, and including them in the Warm Homes Plan schemes, will enable consumers to reduce their consumption and access additional energy, bill and carbon-saving technologies.

Include instantaneous electric showers and high-efficiency electric showers designed to connect to a WWHRS in Warm Homes Plan schemes

Key energy efficiency schemes including WH:SHF and WH:LG will provide space heating decarbonisation at scale. However, these schemes offer limited choice for consumers to invest in hot water decarbonisation. With showering contributing a significant amount of hot water demand in homes there is an opportunity to support consumers to further reduce utility costs through access to efficient shower water heating technologies. Electric showers and high-efficiency electric showers designed to connect to a WWHRS reduce consumer utility bills through energy and water efficiency. Their inclusion in retrofit schemes can therefore support government objectives to decrease energy bills by up to £600[45], and install energy efficiency measures in 5 million homes this parliament.

Update RdSAP ahead of the transition to HEM to ensure a broad range of efficient shower water-heating technologies can be recommended through EPCs. This should include explicit recognition of high-efficiency electric showers (IES-HE) connected to (WWHRS) within SAP 10.3/HEM. dSAP before the transition to HEM to allow a broad range of efficient shower water heating technologies to be recommended through EPCs

Current limitations in RdSAP prevent a broad range of technologies from being recommended to consumers through their EPCs, limiting their awareness of and ability to invest in efficient shower water heating technologies. For example, SAP 10.3 does not recognise instantaneous electric shower systems under 9kW, blocking recommendations for more efficient systems. Furthermore, recommendations only relate to "heat recovery systems for mixer showers," excluding electric showers designed specifically to connect to a WWHRS.[19] By addressing these limitations ahead of the transition to HEM consumers can be supported to access a broad range of technologies to decarbonise their homes and maximise energy, cost, carbon and potable water savings. RdSAP limitations also prevent adaptation of existing retrofit programmes to offer electric showers and high-efficiency electric showers designed to connect to a WWHRS further limiting consumer access. Through an update to the RdSAP methodology and recognition of a broad range of electric shower technologies consumers will be able to choose the best system for their property and maximise savings offered by these technologies.

Permanent removal of green levies from the price of electricity to support broad low-carbon technology switching.

Green levies make up 9.92% of the final price of electricity, adding approximately £86.80 to annual electricity bills.[20] These artificial increases to running costs penalise consumers who have invested in low-carbon and all-electric technologies, unfairly targeting those who have already switched from fossil-fuel systems and deterring wider switching across the domestic sector. Currently, full access to the bill saving potential of technologies central to the delivery of net zero are being blocked and additional energy and carbon savings secured from broad switching are delayed. To address this barrier to uptake, the price of electricity and gas should be decoupled to bring the running costs for low-carbon and electric systems in line with fossil fuel systems. By accurately reflecting the carbon intensity of fuel, the transition to clean heat can be supported and fuel-poor homes won't be left behind in the transition to net zero.

CONCLUSION

The UK Government has an opportunity to lead the decarbonisation of domestic hot water use. As space heating is progressively decarbonised through the implementation of the Warm Homes Plan, energy demand for space heating will decline, while hot water heating will account for an increasing proportion of total household energy use, carbon emissions and utility bills. As a result, hot water decarbonisation will become an increasingly critical issue in achieving net zero objectives in the domestic sector and, in particular, a growing concern for consumers, whose bills will increasingly be driven by hot water and water utility costs.

Along with supporting the Warm Homes Plan objectives, efficient showering technologies will also support the delivery of water consumption limits. As climate change reduces the supply of water and population increases demand there will be increasing stress on the UK's water system. Enabling consumers to reduce demand at source through access to technologies designed to reduce household water use is a key proponent to remain on track to mitigate water scarcity.

The analysis in this white paper demonstrates that hot water decarbonisation, through the roll out of instantaneous electric showers and instantaneous electric showers designed to connect to WWHRS, has significant potential to contribute to key objectives across governmental departments and support the delivery of net zero. This technology offers a cost-effective solution, which through sustained and specific policy support, can deliver on government energy efficiency and home decarbonisation targets. Simultaneously, consumers can fit the technology alongside any heating system to benefit from immediate bill savings and, in the long term, get ahead of water use limits – central to climate adaptation and water scarcity mitigation.

Appendix & References

ANNEX 1: TECHNOLOGY SPECIFICATIONS AND ANALYSIS ASSUMPTIONS

Table 3 is a summary of system specifications and key performance metrics of a mixer shower; a standard instantaneous electric shower (IES) and Triton Showers' ENlight HeatRepeat high-efficiency instantaneous electric shower (IES-HE) designed to connect to a WWHRS.

Table 3. Key features and technology specifications for mixer showers, electric showers and high-efficiency electric showers designed to connect to a WWHRS

Analysis Point	Mixer Shower	Instantaneous Electric Shower (IES)	High-Efficiency Instantaneous Electric Shower (IES-HE)
System Specifications	Gas Combi Boiler	9.5 kW	8.7 kW
Flow Rate	9 L/min	4.5 L/min	4.9 L/min
System & Pipework Efficiency	73%	96.5%	96.5%
Annual Energy Use	1,532 kWh	604 kWh	271 kWh
2025 Energy Costs	£121	£183	£82
2025 Water Costs	£244	£121	£133
2025 Energy and Water Costs	£365	£304	£215
2025 Carbon Emissions	291 $kgCO_2e$	133 $kgCO_2e$	71 $kgCO_2e$
Annual Potable Water Use	34,310 L	17,021 L	18,642 L

The system specifications presented in Table 3 include the energy use (gas or electric), flow rate, and system and pipework efficiencies which are based on publicly available information and data from Triton on their product range. The key performance metrics including annual energy and water usage, associated bills and carbon emissions were calculated based on the product specification data with an assumed showering duration of 6 minutes and temperature of 41 degrees Celsius. The figures in Table 3 were calculated based on SAP Appendix J: Hot water, equation J1, which stipulates that an average UK household has 1 shower and 1 bathtub, a floor area of 78 square meters and 2.4 occupants, resulting in 1.74 showers taken per day or 635 shower per year for a property.[26] Annual energy use was calculated based on the estimated average gas consumption for a mixer shower and the estimated electricity use of Triton's electric shower systems, these were multiplied by energy costs obtained from DESNZ Data tables 4-8 from the Green Book supplementary guidance.[46]

The Through Life Cost analysis uses the same assumptions as outlined in Table 3. Upfront, installation and operational costs associated with the three different showering systems were considered whilst accounting for 5% consumer discount rate. The maintenance costs were assumed to be £0 in 2025. Future energy costs were also calculated using the Green Book supplementary guidance published by DESNZ.[46] Future water costs were estimated using average consumption for 2 and 3 occupant households[47] and adjusted for the price increases estimated by Ofwat.[48] All assumptions used for the purpose of this exercise are aligned with the SAP calculation methodology.

ANNEX 2: WARM HOMES PLAN ANALYSIS ASSUMPTIONS

This section details the assumptions used to inform the scaling up analysis for projected carbon and water savings captured through the installation of instantaneous electric showers (IES) and high-efficiency instantaneous electric showers (IES-HE) designed to connect to a WWHRS into specific archetypes.

To estimate the number of homes suitable for the technology, a yearly average was calculated for the number of small hard-to-decarbonise dwellings, which received funding through SHDF (Waves 1 and 2.1, from March 2022 to April 2025), LAD (Phases 1–3, from October 2020 to April 2025), HUG (Phases 1 and 2, from October 2020 to April 2025) and ECO4 (April 2022 to April 2025). It was assumed that with the extension of ECO4 to the end of 2026 and additional funding targeting similar households directed to the Warm Homes Plan, a similar number of homes will carry on benefitting. The yearly averages were calculated by first taking a total of the dwellings that received funding which had EPC ratings of E and below on a scheme-by-scheme basis:

- Tables 12.1 to 12.5 from the "Green Homes Grant Local Authority Delivery (LAD) and Home Upgrade Grant (HUG) release, April 2025" statistics[30]
- Tables 9.1 and 9.2 from "Social Housing Decarbonisation Fund statistics: April 2025" [29]
- Table 1.4 from "Household Energy Efficiency Statistics, headline release June 2025" for ECO4[30]

The total number of homes that would receive funding was calculated by dividing the totals for each respective scheme by their durations to obtain yearly averages per scheme, calculated as 66,844 per year. This figure was then multiplied by the proportion of homes with a floor area less than 50 square metres (Table 1.6 from "Chapter 1: Profile of households and dwellings annex tables" from the English Housing Survey),[49] resulting in 6,591 small complex to decarbonise dwellings receiving funding per year. This was then used to project the number of homes that would receive funding through the Warm Homes Plan schemes including WH:SHF, WH:LG.

It is important to note that ECO accounts for the largest proportion of these dwellings at 87.6%, equivalent to 5,775 households retrofitted annually. LAD accounts for the second largest at 7.12%, equivalent to 473 households. HUG accounts for 2.80%, equivalent to 185 properties and SDHF accounts for the smallest proportion at 2.4% or 158 households. Households with ECO3 Interim measures installed were not accounted for due to a lack in visibility of EPC rating prior to measure instalment. This was done to keep the analysis consistently targeted at complex to decarbonise homes.

As per the current SAP calculation methodology, the floor area is used to estimate occupancy and the number of showers accordingly. The scaling up analysis used an average floor area of 37.5 square metres to calculate the number of showers taken in a typical year. Due to the smaller size of the archetype, the number of showers taken per year is estimated at 458 for this exercise. As detailed in Annex 1, it was assumed that one shower and one bathtub were installed in the property.

Potable water use for the different showering solutions was calculated on a per-shower basis using the specifications set out in Annex 1. The results were then scaled according to the number of small and complex-to-decarbonise homes expected to receive funding under the schemes.

For the carbon emissions calculations, a factor of 0.183 $kgCO_2e$ per kWh was used for natural gas and projected electricity emissions factors were used to calculate the emissions from electricity used, both estimates were taken from the DESNZ Green Book supplementary guidance.[50]

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A white paper from Triton Showers with independent analysis by Talan.

About Triton

Triton Showers are a market leader in showers in the UK and Ireland. Triton has a broad range of shower products including electric, mixer and digital showers.

Triton continually strives to support the journey to net zero through low-carbon products.

Triton has committed to a target of reaching net zero by 2035 and is subsequently facilitating change at every stage of product development - from conceptual design and mindful manufacturing to a sustainable supply chain and responsible end-of-life solutions. Triton Showers believe that every drop really does make a difference.

About Talan

Talan is an expert provider of professional and digital transformation services designed to accelerate the transition to a more sustainable future. Talan specialises in complex and highly regulated energy and environmental sectors at the forefront of a changing world, offering a comprehensive range of services for organisations in both the public and private sectors. Our experience in the transition to low-carbon heat stretches over fifteen years.

Talan has experience in modelling products and technologies within the energy and environmental sector to understand their role in policy development. The research, data analysis, and modelling presented in this paper were conducted by Talan. The report drafting was completed in November 2025.

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