



The voice for water consumers
Llais defnyddwyr dŵr

Understanding consumer priorities

Insight report by Yonder Consulting October
2023



Foreword



In order to be the voice of the water consumer, we need to understand the key issues water and sewerage customers are facing across England and Wales. By listening to people and their concerns, we are able to represent them as an organisation more effectively.

Listening was at the heart of this piece of research: using advanced ‘deep listening’ tools, we monitored a range of online platforms, from social media and blogs to forum pages, to glean insights from conversations and posts. Taken together, this brought up a wide range of water-related issues that are affecting people; we then tested these via an online survey of customers, using an AI prompt function to generate follow-up questions based on what issues people mentioned.

Some of the findings from this consumer priorities research confirmed previous research findings: pollution was by far the most-discussed issue, and a source of real concern for many. High bills and water leaks were also high priorities that we were expecting to see, and indeed are already the basis for a number of CCW workstreams.

However, the research also pointed to newer, emerging priorities. For instance, the issue of water quality – whether the water that comes out of people’s taps is safe to drink – is increasingly something being discussed, perhaps prompted by news coverage of pollution in rivers and streams. It was also notable that smart meters came up repeatedly, both in the social listening and the survey – consumers, unprompted, raised concerns about having smart meters ‘imposed’ upon them against their will, or receiving higher bills with a smart meter. These more recent concerns may not always be based on accurate information, but it is nevertheless important to understand where fears exist so that companies can help allay them.

This report sets out these priorities in full, and, looking ahead, what these might mean for water companies. These findings will also help shape future CCW campaigns and policy work, ensuring we are responding to the issues most pressing to consumers in England and Wales. And of course, CCW will actively and regularly continue to monitor consumer priorities over the months to come, as news and media coverage of water topics brings new concerns to the fore.



Background and objectives



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Feeding into an insight piece, CCW wants to understand which topics are priorities for water consumers in England and Wales, beyond the known topics of pollution, bills, and leaks.

Prior research has given some direction on this, but the aim of this research is to ensure comprehensive coverage of key topics, especially ones that may not have been apparent through alternative sources.

The objectives were as follows:

1

Uncover consumers' feedback on what currently matters to them within the water industry.

2.

Identify new priorities around water related issues.

3

Validate existing and emerging priorities and assess their importance in consumers' minds on a nationally representative scale.

For this project, we took a two layered approach



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Deep Listening: insights from conversations on social digital platforms

- We used our AI-driven capabilities to delve into consumer conversations around water.
- **Purpose:** identify **valuable new and lesser-known consumer priorities** within the water category. These priorities informed the content of the subsequent online survey.

Omnibus online survey

- A nationally representative sample of England and Wales (18+).
- Starting GB sample size of n=1,167 and boosting the Wales number up to n=230.
- **Purpose: provide robust and nationally representative evidence** around consumer priorities within the water category – both known and lesser-known.

Methodologies, scope and limitations of each approach are detailed in this deck in the appendix



Executive summary



What we learnt



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1. News plays a key role in consumers' attitudes towards water related issues

Thames Water debt news stories, as well as a perception that specific MPs were not acting to stop water companies from polluting, drives a lot of dialogue in this space. This is because such news stories are seen to directly impact people's lives and the lives of their local communities.

2. There is alignment in top-of-mind topics among those more online and the nationally representative sample

Alongside the most topical priorities of "pollution", "high bills" and "leaks", also responsibility, water quality, financial stability of companies, and to a lesser extent smart water meters, all come out as key themes for consumers across both strands of research.

3. Ownership and stakeholder profits are less important than the financial and operational viability of water companies

While consumers are passionate about these issues, they are lesser priorities than pollution, water quality, and the general customer experience, including the cost of bills.



Overarching findings

Integrating deep listening findings with the Omnibus survey findings



Overview: Existing and Known Priorities



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1.

Over the past 12 months, the water debate online was fueled by a **“Name & Shame” campaign** towards MPs who were believed to have voted in favour of allowing water companies to pump raw sewage into rivers and seas.

Why this is relevant: The MPs are mentioned by name and by the local constituencies they represent, highlighting the impact of their actions on the local areas and communities.

News about pollution is top of mind and an important topic for our survey respondents too.

2.

The great majority of consumer conversations around water issues are about already-known priorities such as **pollution, high bills and leaks**. Pollution remains the most discussed topic, with an increase in conversations compared to the past year.

Why this is relevant: The online discourse around priorities we are already aware of - **pollution, high bills and leaks** – is still very much on consumers’ minds.

This suggests that further measures of intervention are needed to address such priorities and inform water consumers.



4 emerging consumer priorities: identified by the deep listening and validated by the Omnibus



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1. Concerns about tap water quality and whether it is “safe”:

consumers seek information about water composition and additives in the water, looking for advice on whether tap water is “safe” to drink. Within this theme, conversations are also driven by consumers living in hard water areas and/or relocating to these, and looking for definitive solutions (i.e. water filtration systems).

2. Understanding the financial stability of water companies

and what it means to the future of water infrastructure in England and Wales – including calls for nationalisation. The online debate around nationalisation was sparked by the very recent news of Thames Water’s debt with consumers expressing concerns about the future of the water industry.

3. Understanding where responsibility lies

when it comes to damage, functionality, and maintenance of water stop cocks, water pressure, water pipes and leaks.

Consumer concerns tend to lead to expressed frustration around the perceived **responsiveness and indifference** of water companies when reporting issues or seeking information.

4. Personal and individual relevance of smart meters:

whilst some consumers see them as extremely beneficial for cost savings, others are concerned about switching, feeling being forced by water companies, without having a choice on the matter.

Please see slide 14 for context or where these consumer priorities “sit” compared to the most known ones, such as pollution, high bills, and leaks

**Integrated in-depth
analysis**



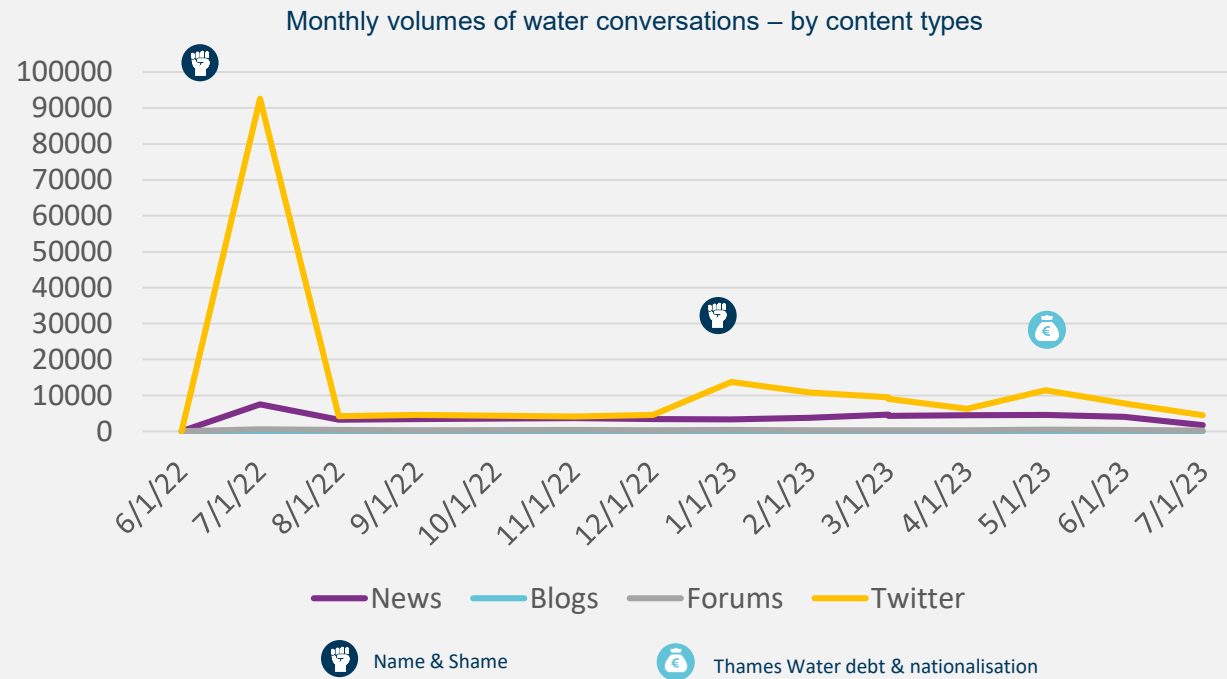
**Overview of the online
discourse around
priorities: existing and
emerging**



Overview: over past 12 months, the water debate was fueled by an MP “name & shame” campaign



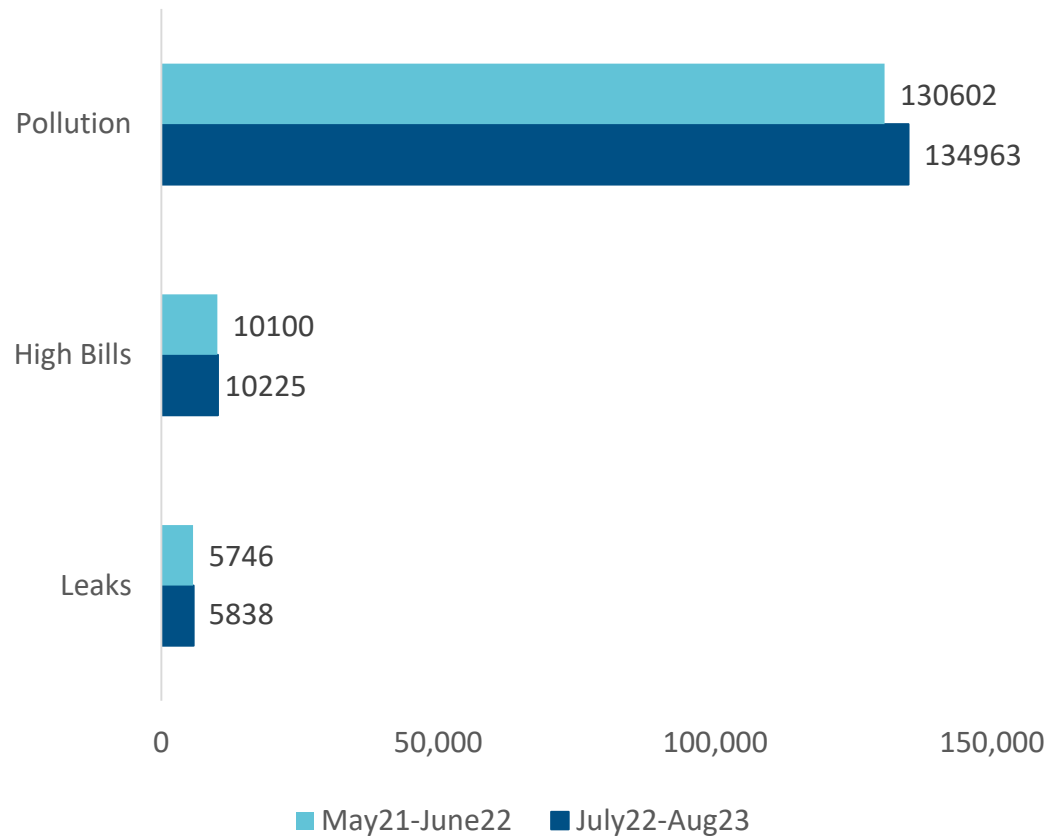
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- Across Twitter, there has been an outcry around MPs in **local areas and communities** allowing water companies to discharge sewage into the water (despite this not constituting “*correct information*”).
- Although the notion is incorrect, it generated a high volume of likes and replies with content published across several constituencies, contributing to driving the reach and visibility of the campaign.
 - The volume of mentions: **90,016/ 39%** of total water conversations
- A more recent peak in May/June was a response to Thames Water’s debt, leading to a debate around nationalisation of water infrastructures.

We compared the volume of “mentions” of those priorities we are already aware of, such as pollution, high bills and leaks, year on year

Volume of mentions around known and emerging/lesser-known priorities



Emerged priorities: Compared to the previous year (July2021-July2022), these topics are also expressed more often in conversations

What matters to consumers: size of those priorities we are aware of, from forum and Twitter consumer conversations

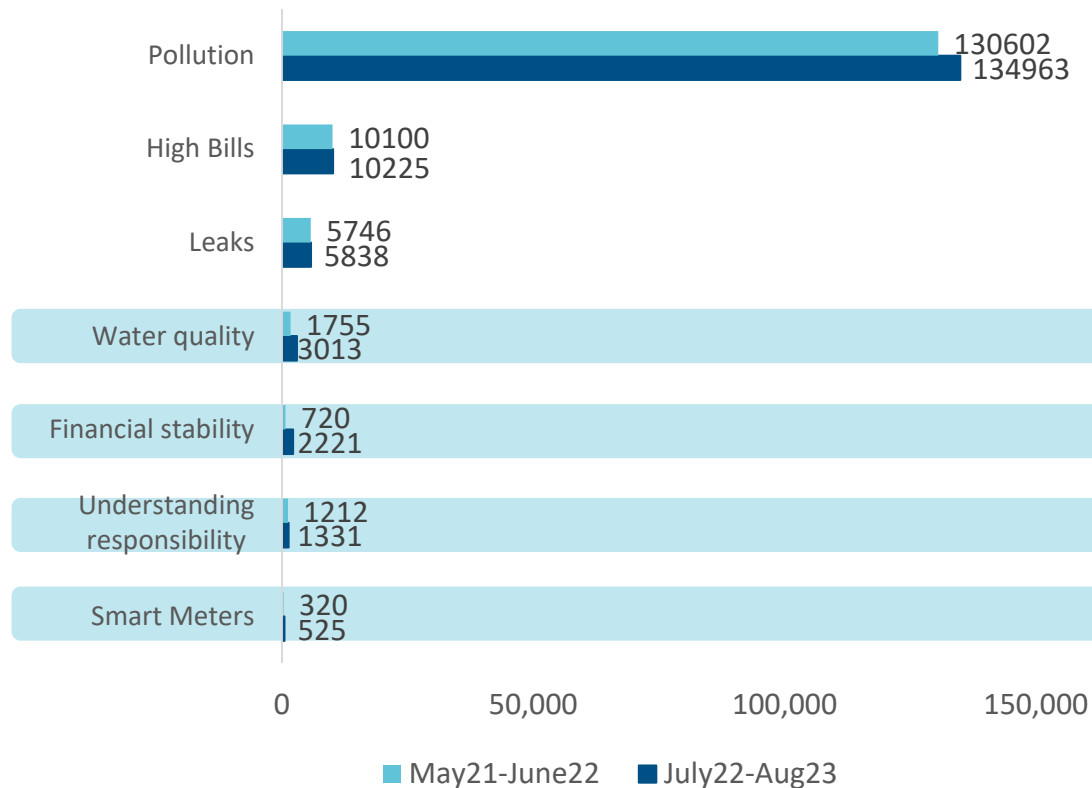
- Overall, pollution remains the most discussed topic, with an increase in conversations compared to the past year.
- There was a small increase in conversation also for high bills and leaks when compared to the past year.
- After we sized these known priorities, we qualitatively assessed a sample of 500 conversations and identified 4 additional priorities (responsibility, water quality, financial stability and smart meters).
- We then sized them to assess relevance and significance.



Source: Brandwatch: Past 12 months of data – July2022-August2023 compared to previous 12 months – across platforms, England and Wales only, Excluding news and Twitter.

From our analysis, we identified 4 additional emerging priorities, less discussed than the most known themes, but to a greater level compared to the past year.

Volume of mentions around known and emerging/lesser-known priorities



Additional lesser-known priorities: Compared to the previous year (July2021-July2022), these topics are also expressed more often in conversations

What matters to consumers: identified priorities from forum and Twitter consumer conversations

- We identified 4 lesser-known consumer priorities.
 - Why lesser known:** smaller than the priorities we are already aware of, but all 4 more discussed compared to the previous year, suggesting further importance given to these by consumers. Particularly: there has been an increase in the number of mentions around nationalisation and water quality.
 - Impetus around water quality: a hypothesis, then validated with our Omnibus survey, is that perception around this has been impacted by news of pollution and sewage discharge.
- These additional priorities are also more specific, with consumers sharing as much detail as they can about their personal water concerns.
- Together with the most known themes, the additional priorities make up 85% of online conversations around water priorities.
- No notable differences in priorities were identified for Wales compared to England via deep listening

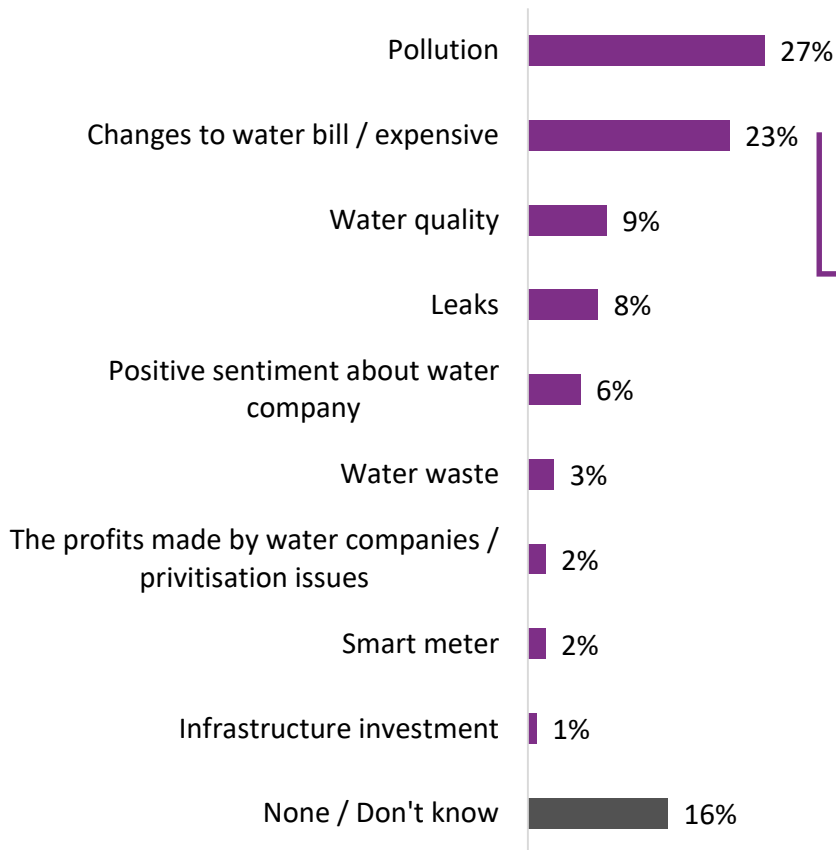
*The debate around raw sewage has been included within “pollution”.

Many of the same topics emerged unprompted from our survey when we asked a nationally-represented sample about their household water supplier



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Unprompted thoughts about household water supplier coded
Followed up with AI prompt



Pollution significantly comes to mind for:

- People aged 55+ (40%)
- Men (31%)
- Those with bill paying responsibilities (29%)

Changes to water bill / expensive significantly seen in:

- Females (26%)
- Those aged 18-34 (31%)

Pollution is significantly more likely to come to mind for people from England (27%) than those from Wales (19%)

Quotes from consumers show that news about pollution are top of mind and a big concern



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“Sewerage and pollution plus huge debts and huge payments to shareholders and senior staff ... Allowing overflows pollutes rivers and seas”

“The disgusting way water companies have been polluting rivers ... In hot spells when levels are low absolutely flooding rivers”

“Discharges of human waste into the water supply, leaks and big increases in cost ... It seems to be in the news on a daily basis that human waste is being released into rivers and seas, and this never used to happen on such a scale.”

“Raw sewage discharges into rivers and seas. Profiteering at the expense of the environment. No accountability. Lack of investment in infrastructure ever since privatization ... Greater powers to Ofwat and stricter legislation from Government”

“Sewage being pumped into rivers ... It is harming the wildlife and preventing people from swimming in them”

“Illegal dumping of sewage, destruction of nature ... It's happening a lot everywhere”

“Sewerage is being dumped in our rivers and seas. Expensive bills ... It's a health risk, it's dirty, it smells, it's unhygienic, it's bad for the environment and wildlife, it gets into our food sources and makes us sick”

“Dumping sewage ... it impacts the health of our waterways in Kent. And stops people from enjoying the beach. Should be held more accountable for it. We are paying for it to happen essentially.”

“Always being criticised for pollution from sewage in the sea or failing to mend water leaks whilst charging a lot of money to their customers. Particularly bad is we have rain all winter and it is still raining in the summer and we have a hosepipe ban which means they are running the company inefficiently and paying themselves a lot of money ... mend the water leaks properly and straightaway. Also, ensure that sewerage and other pollution does not happen so frequently. Sort out more water being piped in from other areas of England to the southeast.”

While not all consumers find the bills too high, costs associated with water influence their perception of their water company and how they invest their money



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“High prices, lots of leaks and a lot of sewage discharge incidents into the sea ... Spend more money fixing the ancient infrastructure and stop giving dividends to investors until the network is fit for purpose. I am content for bills to remain at their current high level, but only if the network is improved until there are no longer sewage discharge incidents happening around the coast and into waterways.”

“Lack of investment, slow to fix leaks, expensive, private company ... I have reported leaks multiple times it takes a least a week to come out and look and probably several weeks more before the leak is fixed. Also, my local pipes keep breaking and they just patch them up, there is no plan to replace the old pipes to stop the leaks from occurring”

“Expensive prices ... they seem to be higher than they should be”

“Cost ... I want to be sure I’m getting a competitive price, particularly with the increased cost of living”

“Cost, limits, variable ... Cost is important because I don’t want to spend more than I need to. Whether it is fixed or variable is important so I can monitor how much water I will be using”

“Overpriced and sewerage going into river ... They have paid their shareholders large sums”

“Expensive and never read the meter ... Because they are Thames Water and they are inefficient ”

“I think they charge too much and the water is horrid to drink. What are we really paying for? The sewage leaked into the water system and the water may be infected, like the ocean. I will look into other companies to see what is on offer. We should be given a water filter system for the money we have to pay out.”

“Two main areas concern me, cost and quality of water supplied ... With increasing constraints on our budget, the cost of water supply is an obvious concern to me. It also seems apparent that water companies have invested very little in maintaining and improving infrastructure since privatisation. I am very concerned that the quality of water supplied will be compromised at some point”

Q1. What topics come to mind when thinking about your household water supplier?

Base: All respondents (1,167)

Fieldwork was carried out before company business plans were submitted so any mentions of bills will not have taken those into account

**A deep dive into emerging
priorities**



Uncovering lesser-known, emerging consumer priorities through deep listening...



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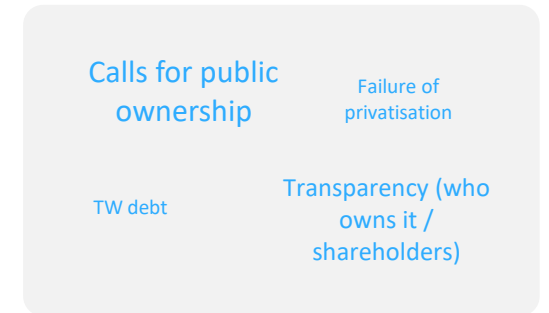
WATER QUALITY

Personal stories and experiences with water: consumers share concerns about whether tap water is safe to drink. They also share personal experiences, such as dealing with mould and water damage, using water softeners.



FINANCIAL STABILITY

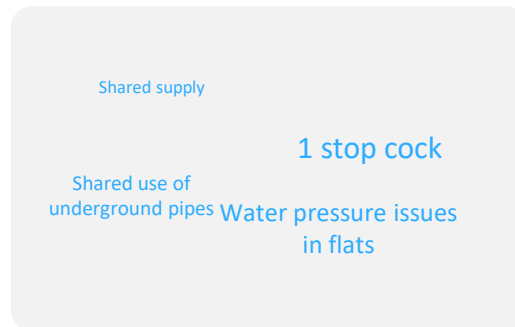
Often driven by recent news of Thames Water's debt, consumers express concerns about the financial stability of water companies. Such concerns tend to lead **to calls for public ownership**, sparking the online debate.



UNDERSTANDING RESPONSIBILITY

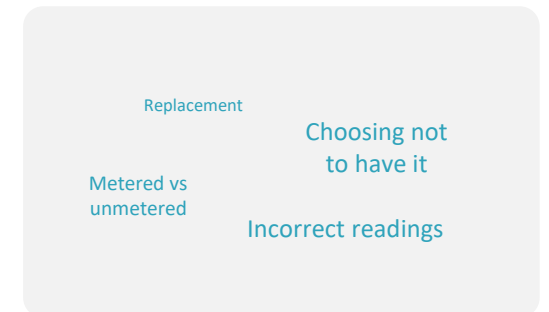
Whose responsibility is this?

Across forums, consumers feel confused about the responsibility, functionality, and maintenance of water stop cocks, shared water supplies and underground pipes. Often, they believe they are provided with the wrong information by the water company.



SMART METERS

Consumers discuss water meter installations and potential savings. However, they often feel as if smart meters are "imposed" by water companies and might not be beneficial to all households and needs.



The size of the text represents the frequency of the mentions: the bigger the word the more frequent the mention was

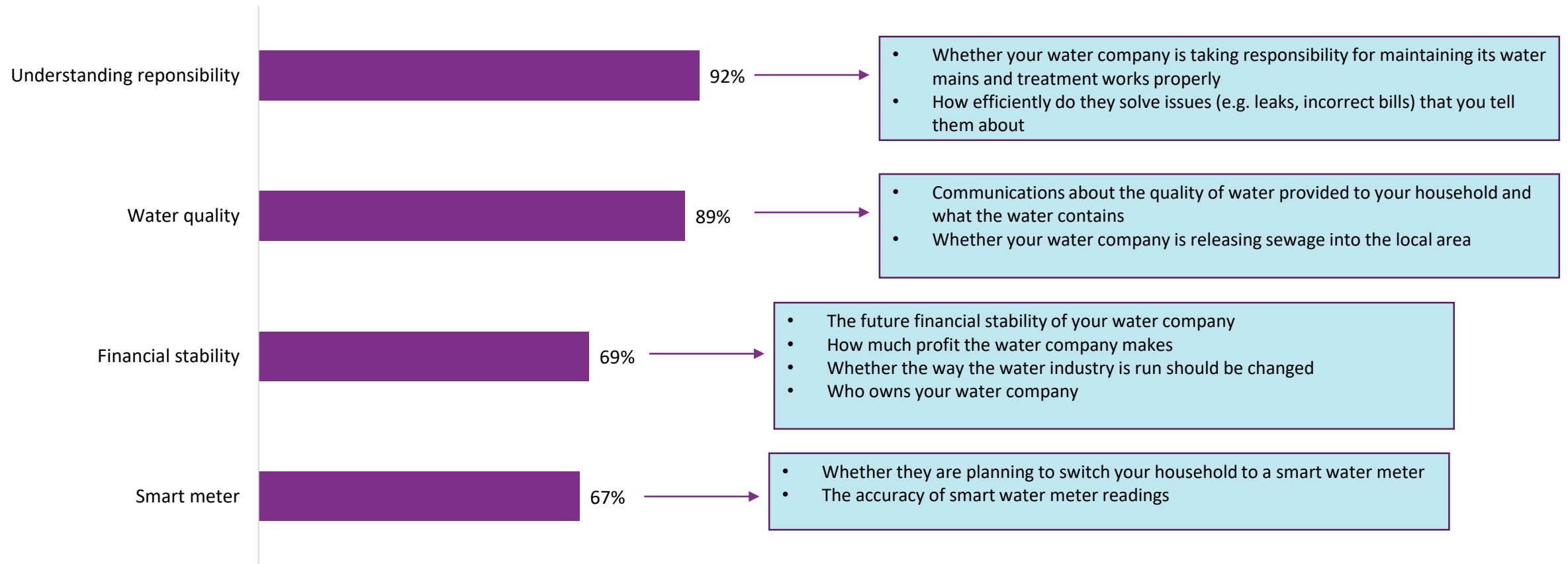


.. also reflected in our nationally representative consumer survey



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Prompted Net: importance of issues for consumers and which survey statements these were composed of*



Q2. To what extent do you consider the following issues important or not when it comes to your water company?

Base: All respondents (1,167)

*The statements tested in the quantitative element were designed to assess the consumers' attitudes towards wider themes than those pulled out of the Deep Listening analysis to provide a wider view of the themes.

Emerging priority 1: understanding where responsibility lies – when it is individual, collective or it lies with water companies

COMMENTARY:

- **Issues with shared water supply and pipes:** consumers visit forums to discuss problems and/or share confusion regarding the responsibility, functionality, and maintenance of water stop cocks, water pressure and water pipes when these are shared with neighbours.
- **Communication with water companies:** people express frustration or dissatisfaction with **the responsiveness and indifference** of water companies when reporting issues or seeking information about stop cocks, meters, and cleaning of water systems, particularly related to who should be responsible for these.
- **Seeking solutions:** residents are actively trying to look for solutions. If contacting water companies doesn't work, they are asking for recommendations around sharing installations and/or pump solutions to increase water pressure.

SHARED WATER SUPPLY AND SOLUTIONS

“ I am on a shared supply and despite my complaints to Yorkshire Water about low pressure when my neighbours are using the water supply they refuse to do anything [...] would a booster pump draw away pressure from them if fitted to my side or would it be OK?”

Forum

“ I assume the stopcock is on your property and not out in the street? My understanding is any services on your property are your responsibility, but anything beyond that boundary is the responsibility of the provider. I could be wrong though

Forum

WHO IS RESPONSIBLE FOR THIS?

“ **Maintenance responsibility.** I was told I have the responsibility for everything under my plot **including the shared-use pipes.** However, according to the website of Ofwat, the sewerage company is responsible for sewers and drains used by two or more properties if they are up to the standards, no matter they are on private land or public space.

Forum

“ I live on the ground floor of a converted Victorian terrace. Both myself and the upstairs flat have terrible water pressure [...] Is it correct that there should be only one bill, split between us? If so, how would we go about getting 15+ years' worth of bills back?

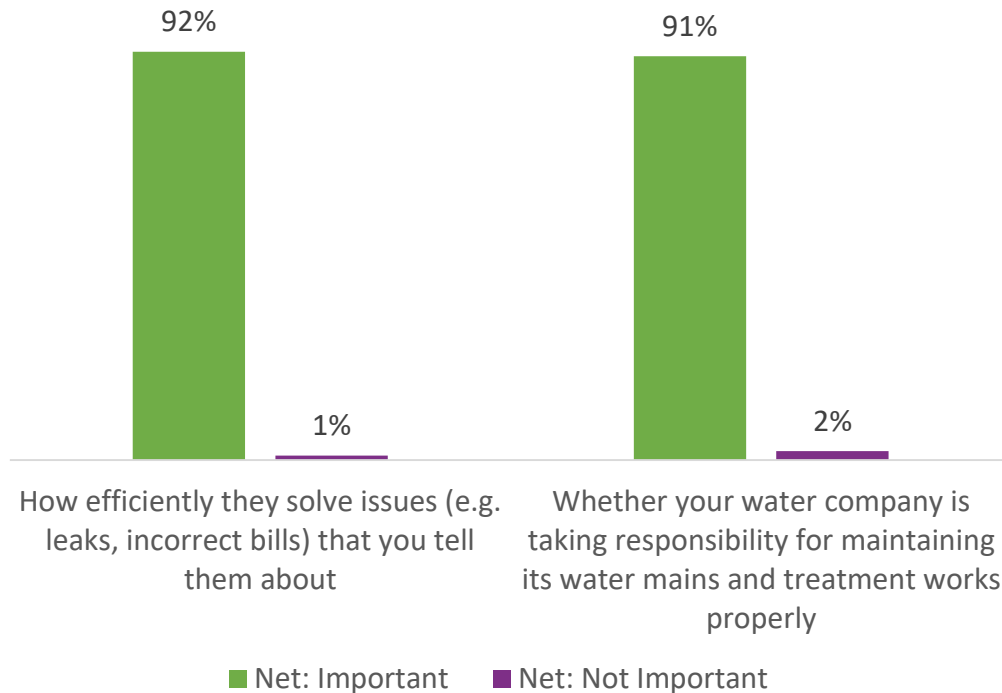
Forum

Unsurprisingly, how efficiently water issues are solved and the extent to which the water company takes responsibility for its service are the most important



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Importance of water companies' understanding responsibility for consumers



Understanding responsibilities is particularly important to:

- People over 55+ 
- Those with bill paying responsibilities 
- Smart water meter users 

Q2. To what extent do you consider the following issues important or not when it comes to your water company?

Base: All respondents (1,167); 55+ (487); Bill payers (1,048); Smart water meters users (148)

*The statements tested in the quantitative element were designed to assess the consumers' attitudes towards wider themes than those pulled out of the Deep Listening analysis to provide a wider view of the themes.

Emerging priority 2: Water quality: online, consumers are looking for options to improve the quality of their water

COMMENTARY:

- **Online, consumers seek information about water composition** and whether it is “safe” to drink tap water. They are looking for **options to improve their water quality and ways to assess such an improvement.**
- **The discussions revolve around improving the taste,** removing impurities, and addressing hard water issues.
- Hard water: some consumers share their **personal experiences around tackling hard water,** discussing the usage of water softeners or, living in hard water areas.
- **Filtration systems:** some consumers also discuss whole-house water filtration systems or water filter taps as alternatives to using a water softener or manual filtration methods.

DEALING WITH HARD WATER

“ Our old place in London was awful for limescale, worse than any other house I've lived in before [...]. **The bottom line is that I'd like to treat it at source rather than constantly descale things.** So fill me in: do in-line systems work? Is it all a pointless endeavour? Am I gonna get kidney stones from drinking my tap water?

Forum

“ The water at my daughters' house is really hard, with limescale corrosion on new taps fitted less than one year ago, already very bad. Has any of you **fitted any sort of in-line water softeners or limescale removal** with success?

Forum

RELOCATING & DEALING WITH HARD WATER

“ We have moved to a very hard water area and are moving to a new house where we will be replacing the kitchen. I'd like to install either a **whole house water filtration system** or a water filter tap in the kitchen so we can stop the endless jug filtering. Has anyone had either of these options installed please [...]?

Forum

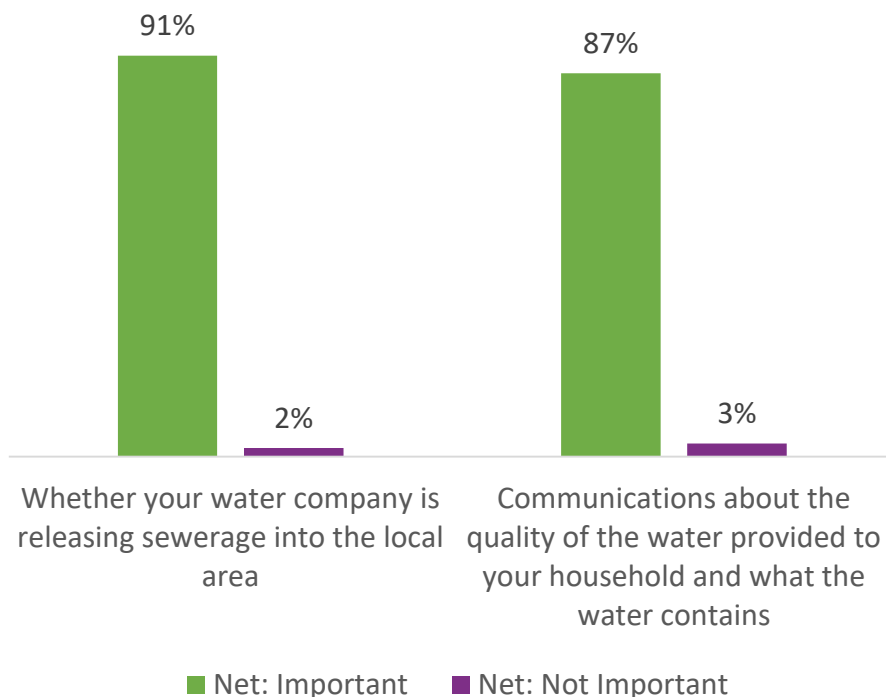
WHAT'S IN THE WATER?

“ I was going to purchase a **distiller to purify water as I am a little concerned about what is in tap water i.e. added** chemicals and chlorine. Do you think it is worth investing in a distiller to help me increase my consumption of water?

Forum

When prompted in the survey, water quality was a prominent concern, especially for those over 55+, perhaps due to the conflation of water issues in the media

Importance of water quality for consumers



Following on from the outcry on Twitter earlier this year surrounding the “Name and Shame” campaign which called out MPs who were seen to be allowing water companies to release sewage into local areas. It is unsurprising that over 9 in 10 stated this was an important issue to them.

Water quality is particularly more important to:

People aged 55+



Those with bill paying responsibilities



Q2. To what extent do you consider the following issues important or not when it comes to your water company?

Base: All respondents (1,167); 55+ (487); Bill payers (1,048)

*The statements tested in the quantitative element were designed to assess the consumers’ attitudes towards wider themes than those pulled out of the Deep Listening analysis to provide a wider view of the themes.

Emerging priority 3: understanding the financial stability of water companies and the future impact on the water industry

COMMENTARY:

- **Concerns about the financial stability of water companies: consumers express** fears over the financial resilience of water companies, with references to borrowing large amounts of money and the potential collapse of Thames Water.
- **Privatisation of water companies:** There is criticism of the privatisation of water companies, with claims that it has led to high bills, lack of competition, and environmental issues.
- **The emphasis is on the negative consequences of privatisation.** However, opinion seems to be polarised, as some consumers believe nationalisation won't offer a viable solution.
- **Some consumers also expressed their surprise** at learning about water privatisation in **Wales and England** and about the foreign investment firms owning English water companies.

NATIONALISATION IS **NOT** SEEN AS A DEFINITIVE SOLUTION

“

Perhaps water should be nationalised but you would need a really savvy and, unfortunately, Tory government to run it, though [...] The biggest complaint about the industry when it was nationalised was... **lack of investment**”.

-
Forum

“

I do not necessarily think that nationalisation will work. What it will do is to keep the funding within the industry, not paying out billions to shareholders when that money should have been spent on the infrastructure.

Forum

NATIONALISATION **IS** SEEN AS A DEFINITIVE SOLUTION

“

I wasn't aware that England and Wales are the only countries in the world to have fully privatised their water [...] Water and all national infrastructures should be owned by the people it is supposed to serve.

Forum

“

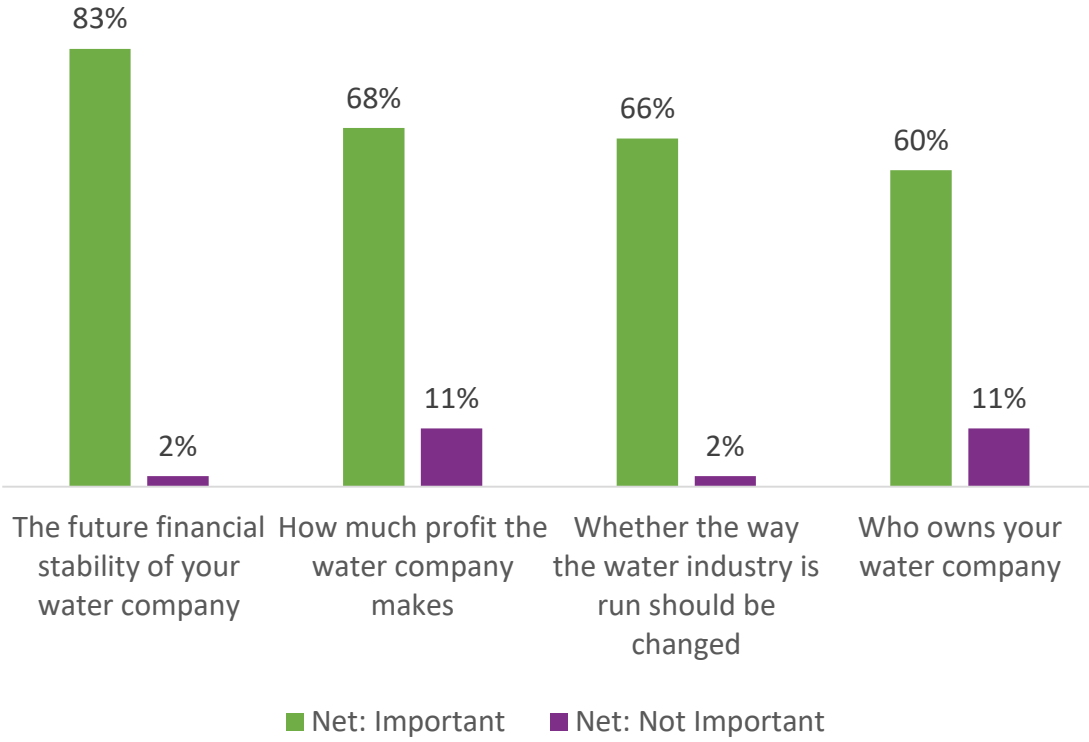
If privatisation is so good for everyone then why is Thames Water failed? Why is our water not top quality? And why has an MP said the taxpayer will have to pick up the bill?

Twitter

Future financial stability of the water companies is important for 4 in 5 consumers



Importance of water companies' financial stability for consumers



There is a high level of importance surrounding the financial stability of the water company. This could have been triggered by the recent news that Thames Water is in debt, which caused a debate as to whether the water industry should be nationalised. This might be concerning for consumers about how the future of the water industry in England and Wales will look like.

Financial stability is particularly important to:

- People aged 55+ 
- Those with bill paying responsibilities 
- Men 

Q2. To what extent do you consider the following issues important or not when it comes to your water company?

Base: All respondents (1,167); Men (560); 55+ (487); Bill payers (1048)

*The statements tested in the quantitative element were designed to assess the consumers' attitudes towards wider themes than those pulled out of the Deep Listening analysis to provide a wider view of the themes.

Emerging priority 4: smart meters – consumers are debating the benefits of smart meters, with some believing that they are not right for them

COMMENTARY:

- **Cost and savings with smart meters:** The use of smart meters is a common theme, with consumers discussing the potential savings from switching to a smart meter, vs. the benefits of paying for actual water usage.
- **Individual water consumption:** online, consumers also mention the number of people in their households and their water consumption habits, looking for recommendations on smart meters. This includes references to living alone, being pensioners at home, or having a small family, and **how this affects their water usage and potential savings.**
- **Electricity usage and meter replacement:** in some forums, consumers mention concerns about electricity meters, including requests from suppliers to replace old meters with smart meters and questioning the necessity or benefits of smart meters.

SMART METERS AS COMPULSORY

“ Thames Water **has forced smart water meters on all of us whether we want them or not.** Seemingly they can do that because of the drought. Not a word though about the 5 serious water leaks in the past 6 weeks.

Forum

“ I suggest everyone will have to have a smart meter in a few year’s time. **Indeed our water meter is being switched to a smart meter by Anglian Water.** And most companies now will not give you the best tariff without, as they save money on not employing meter readers.

Forum.

WORRIES AND CONCERNS ABOUT SWITCHING

“ **We are pensioners and trying to budget how much we are likely to pay for a smart water meter [...]** Please help if you can just give us a rough idea of what we should expect for the monthly cost. We currently pay £35 per month for unmetered which is affordable, but we are really worried about it being a lot higher than that.

Forum

“ TW recently advised that they would like to **fit a smart meter into my premises.** There is one stopcock for two flats (mine + neighbours). How is Thames Water going to fit a meter which gives separate readings for both premises?

Forum

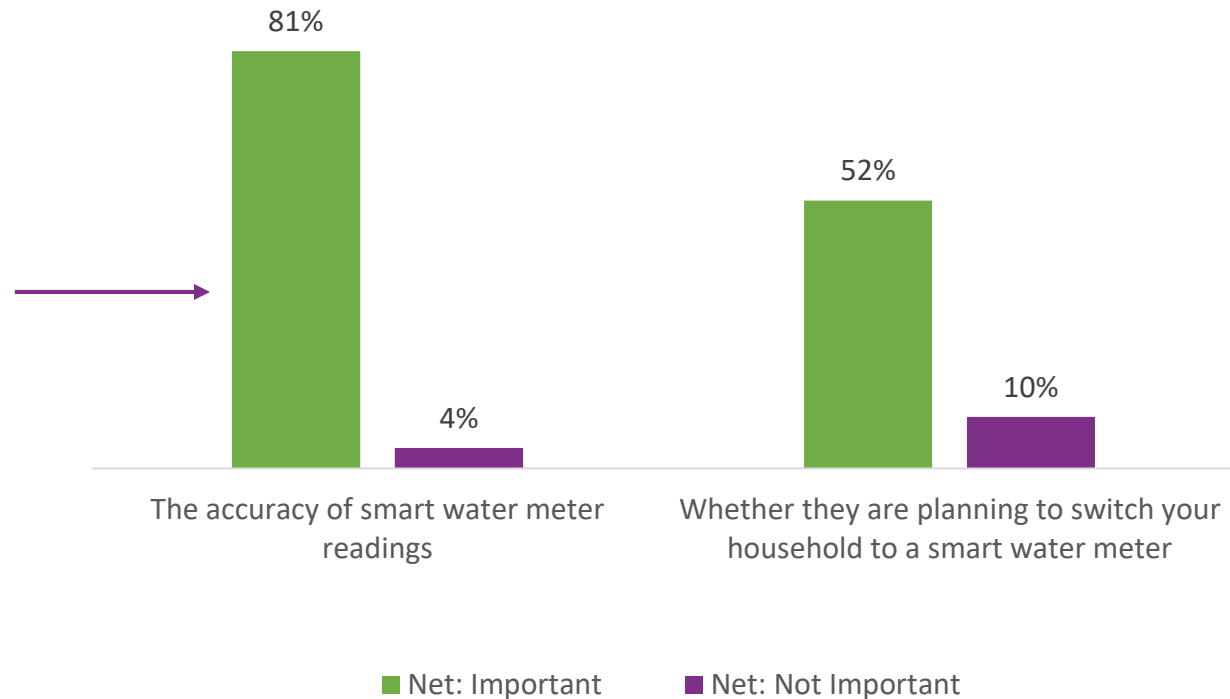
The accuracy of smart water meters is important to many but only around half are concerned about being switched



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Importance of smart meter related issues for consumers

Accuracy of smart water meter readings is significantly more important for people from England (81%) than those from Wales (74%)



Q2. To what extent do you consider the following issues important or not when it comes to your water company?

Base: All respondents (1,167); England (906); Wales (261)

*The statements tested in the quantitative element were designed to assess the consumers' attitudes towards wider themes than those pulled out of the Deep Listening analysis to provide a wider view of the themes.

Recommendations



Conclusions



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CCW already held a wealth of information about priorities that water consumers hold, including the importance of water companies addressing topics such as leaks, billing and customer services. The integrated approach in this research project has highlighted the following additional four themes to be shared with the water industry as consumer priorities:

- 1. Water quality:** knowing the composition of their water and how to deal with issues such as hard water were online discussion themes, and most (87%) think it's important for their water company to communicate about water quality and composition.
 - This is another important topic for water companies to communicate and on a local level – water composition will vary in different areas.
- 2. Financial stability of water companies:** the majority (83%) felt the future financial stability of their water company was an important issue, and topics in this area, **including nationalisation**, were discussed online too.
 - We believe this is another important topic to monitor moving forward, as it could impact consumer sentiment towards the water category.



Conclusions (cont.)



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3. **Understanding responsibility:** our deep listening uncovered areas where consumers are confused about where responsibility lies on some occasions – with them, or with their water company. Moreover, most felt that it is important for water companies to both solve issues efficiently (92%) and take responsibility for maintaining infrastructure that falls under the water companies’ responsibility (91%).
 - Water companies should ensure to have clear communication and messaging that outline their responsibilities across different consumer scenarios (i.e. shared water supply), for customers to know what to expect and by when.

4. **Understanding smart water meters:** there are themes around understanding whether smart water meters will impact bills and whether consumers are going to be forced to have a smart water meter, with the accuracy of the meter readings of importance for more than four in five (81%) consumers.
 - Whilst this might not be an issue for some people, for others switching could be seen as a stressful experience, not knowing whether they will be spending more compared to current usage. Water companies should ensure that “switching to smart meters” is not seen as negative nor as a “must” for all households and provide further knowledge and reassurance to water consumers.



Appendix



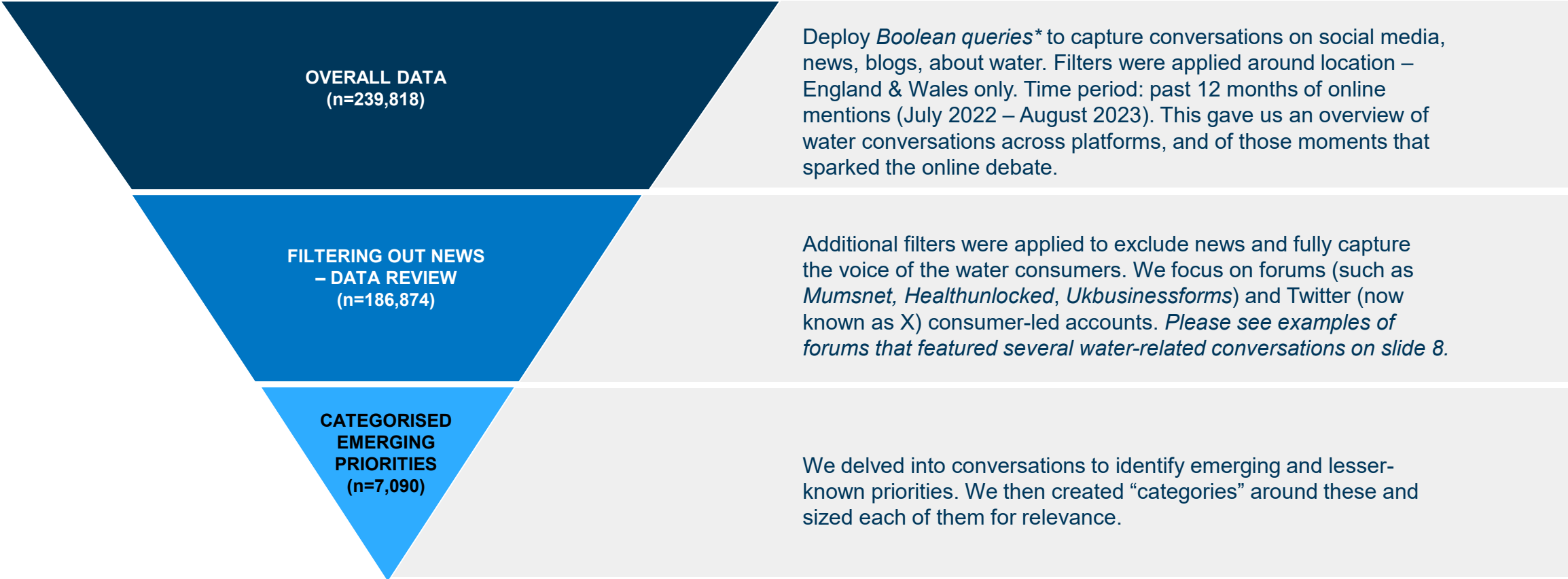
Deep Listening Methodology



Deep Listening Methodology



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***Boolean queries** refer to the use of logical operators (AND, OR, NOT) and specific keywords to refine and target the data collected from social digital platforms. This technique allows us to monitor online conversations, track category/organisation mentions, and gain insights into customer sentiment and trends.

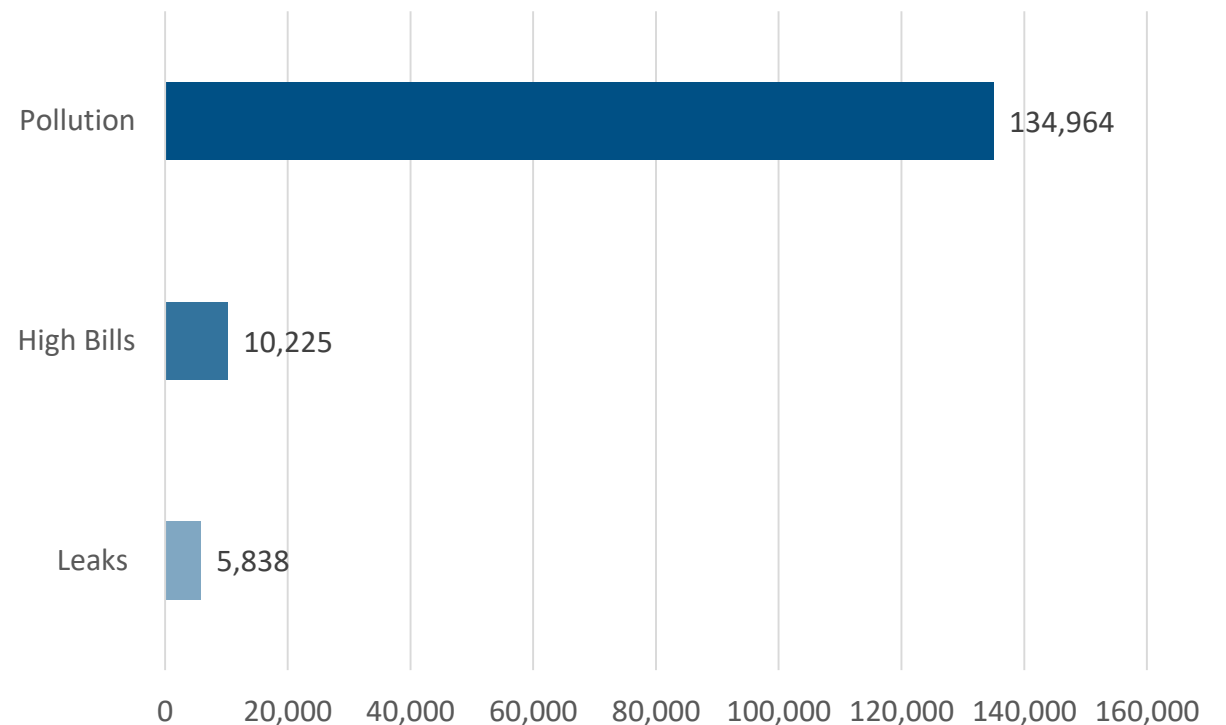
Source: Brandwatch:

Scope and limitations of a deep listening approach for this project

- The deep listening work focuses on lesser-known themes.
- It is not meant to provide a holistic understanding of all the main and most known priorities.
- For further context, we created “*Boolean queries*” around three of the most topical priorities that has been identified through prior research - *pollution, high bills, leaks* - to assess the volume of online conversations and to compare it against.
- We used the same criteria as per the in-depth analysis in the next slides:
 - + Time period: July 2022-August 2023
 - + Location: England & Wales only
 - + Exclusion of news sites

Please see our methodology of how we identified lesser-known priorities in the next slide (number 7).

Volume of online mentions around three known priorities



Identifying the lesser-known priorities: an iterative process to deep listening



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QUALITATIVE DEEP DIVE

Initial qualitative read of a sample of circa **500 consumer mentions**

Focus on forums and consumer-led accounts on Twitter (excluding “broadcast accounts”)

CATEGORY CREATION AND SIZING

A first qualitative analysis surfaced additional water priorities in consumer minds. Based on these, we developed new *Boolean queries*, to size the conversation and assess prevalence. *These were around:*

- + water quality
- + nationalisation:
- + shared supply
- + smart meters

We excluded keywords related to other topics (i.e. AND NOT) to make each category as mutually exclusive as possible.

QUALITATIVE CATEGORY CHECK

We aimed to avoid all overlaps but reading the surfaced text/verbatim and excluding any words that could be used as synonyms: for instance, consumers using the wording “water contamination” instead of pollution.

This ensured that categories were accurate.

REFINING CATEGORIES

By adding new relevant “keywords” to the Boolean query

Re-sizing

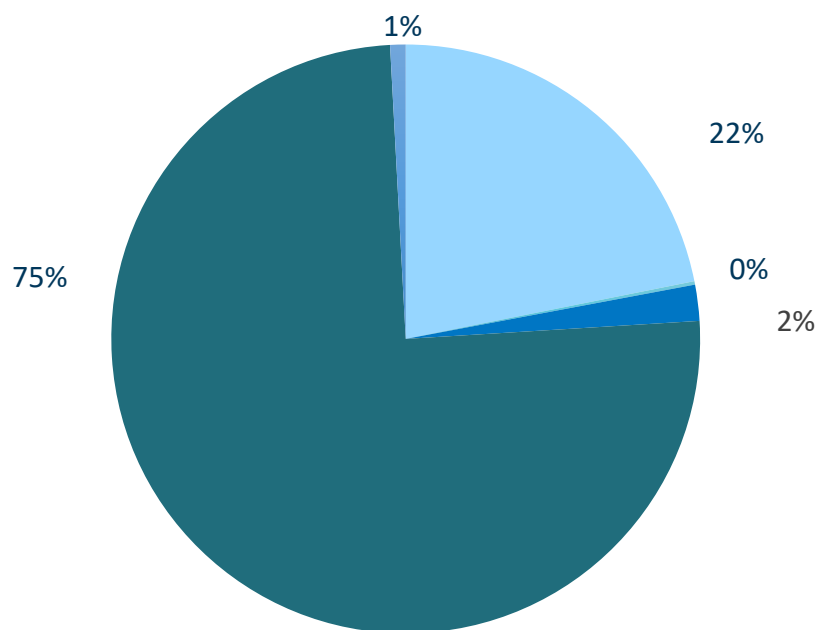
Beyond reactions to current news, consumer conversations were from a range of lifestyle forums, where water priorities featured as an “organic theme”



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Breakdown in content sources – to capture the voice of the consumer, we focused on forum conversations (2%= 4,748), followed by Twitter (excluding News and broadcast accounts).

Volume of mentions by content source



■ News ■ Blogs ■ Forums ■ Twitter ■ Other (Tumblr, review sites)

Most conversations were from forums dedicated to specific interest/passion areas (not water-related) – where regular visitors sought advice/opinions about water matters, from online consumers they interact with.

FORUM NAME	PURPOSE
DiY.not	Helping consumers navigate the world of DIY – informative forum & access to local trades
<ul style="list-style-type: none"> Overclockers Yacf.co.uk Briskoda The DIBB The Lemon Fool 	Interest specific forums, such as gaming, cycling, cars, holiday, personal finance
ukbusinessforums	Biggest community for small business owners
Mumsnet	Parents website
Health unlocked	The social network for health

Quantitative methodology



Online Omnibus Methodology

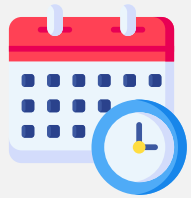


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Overview



Online omnibus survey of 1,167 adults (aged 18+) in England and Wales



Fieldwork conducted 6th to 11th September 2023*



The full sample has been weighted to be representative of England and Wales combined based upon the 2011 census profile. The boost sample has been weighted down to be representative of Wales

Approach

CCW commissioned Yonder Consulting to undertake an online omnibus survey in England and Wales.

Yonder owns and manages a highly engaged online panel of 150,000 UK adults and this resource was used as the primary source of sample for the online survey.

Yonder conducted 1,167 online interviews with consumers in England and Wales. 230 boost interviews were conducted among consumers in Wales to allow for robust analysis and weighted back into the overall sample at the correct proportion.

Sampling

A stratified sampling technique was employed using multiple demographic groupings to select respondents randomly from Yonder Consulting's online panel. 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 on the 2011 census profile of England and Wales combined. Rim weighting was applied for age, gender, government office region, social grade, taking a foreign holiday in the last 3 years, number of cars in the household 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 2011 census profile of Wales.

*Fieldwork was carried out before company business plans were submitted so any mentions of bills will not have taken those into account.

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 subgroups as outlined in Table 1. It provides a robust sample to be able to analyse the data on this basis.

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

In addition to highlighting key subgroups significantly different from the total, results are also charted for other sub-group categories of interest when data is significantly different from 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, multi choice questions or non display of other/don't know options

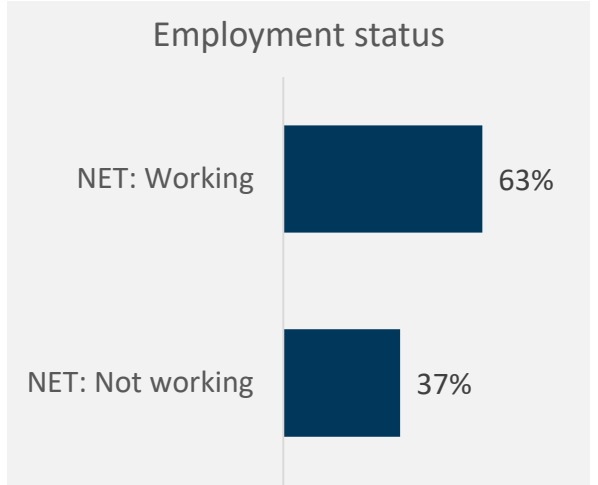
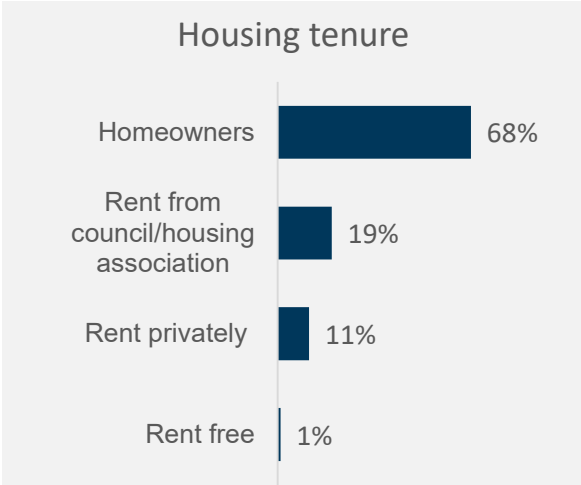
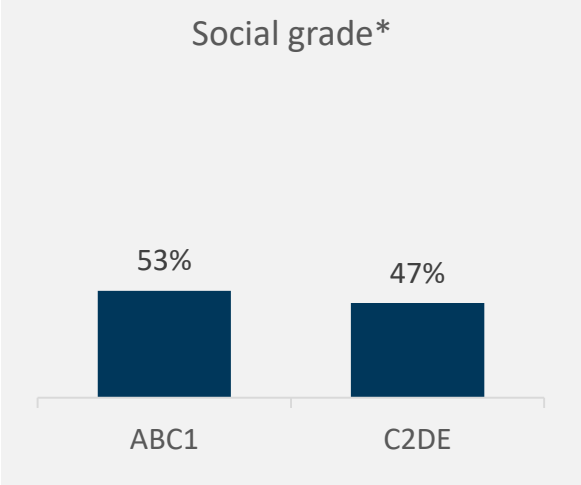
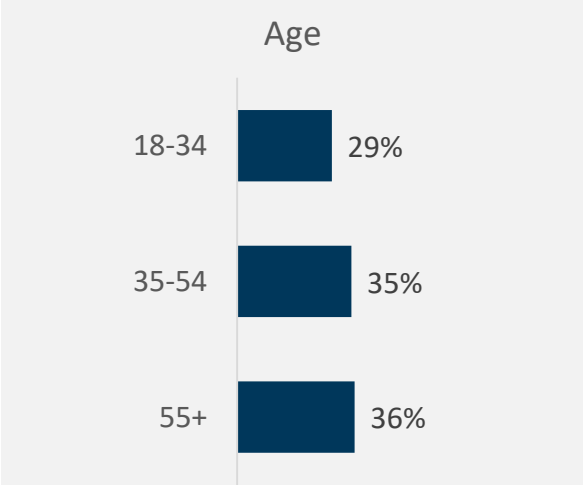
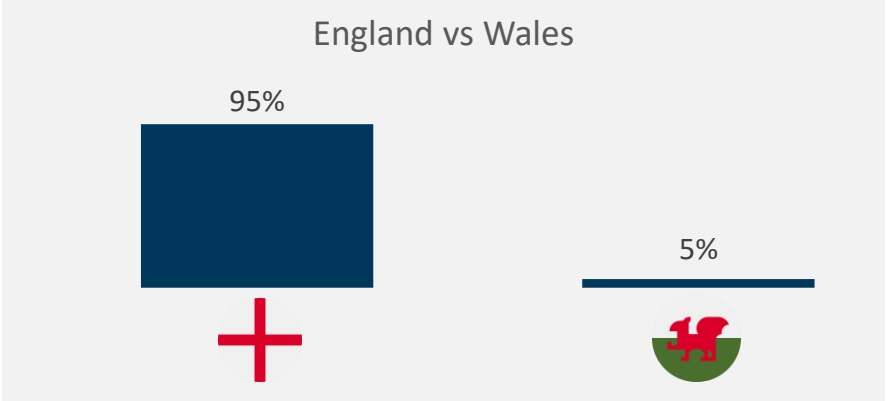
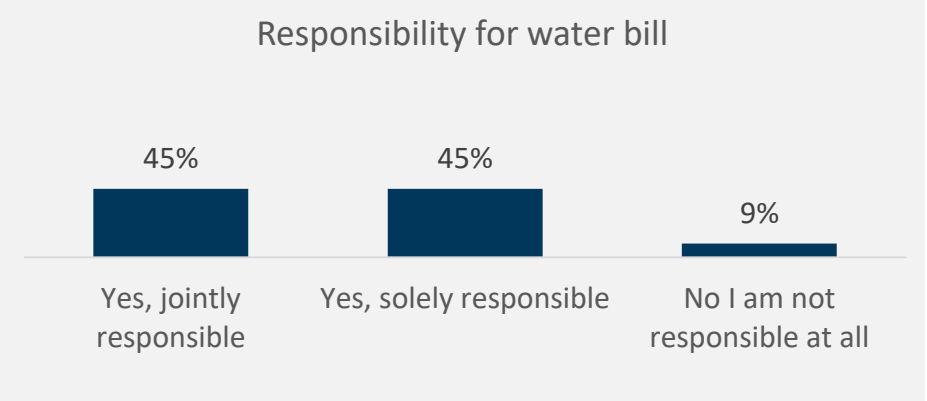
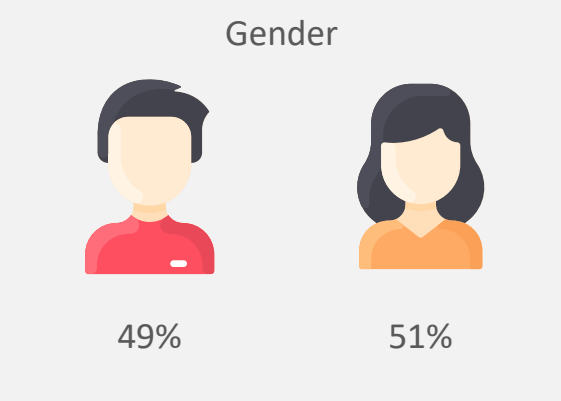
Table 1		Key subgroups	Unweighted Sample Size	Margin of Error for response of 50%
		Total sample	1,167	+/- 2.9%
Region	England	906	+/- 3.3%	
	Wales	261	+/- 6.1%	
Gender	Male	560	+/- 4.1%	
	Female	603	+/- 4.0%	
Age	18-34	308	+/- 5.6%	
	35-54	372	+/- 5.1%	
	55+	487	+/- 4.4%	
Social grade	ABC1	641	+/- 3.9%	
	C2DE	526	+/- 4.3%	

Respondent profile



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Weighted data



*Social grade is a demographic classification based on the occupation of a household's chief income earner. AB is higher or intermediate, managerial, administrative or professional; C1 is supervisory or clerical and junior managerial, administrative or professional; C2 is skilled manual workers; DE is semi-skilled and unskilled manual workers, state pensioners, casual workers and unemployed with state benefits only

Overview

The Online Omnibus survey included an open-ended question that used an AI prompt to probe deeper into the respondents' attitudes.

How it works

1. The following unprompted, open-ended question was asked to participants: "What topics come to mind when thinking about your household water suppliers?". Respondents typed in a reply to that question.
2. AI then analyses the response and formulates another question that probes the response initially given.
3. The respondent then answers the follow-up question using another open-ended question.

Results are then combined, and it provides us with a more detailed response to the initial question.

Benefits

The benefits of using this AI prompt are that you get a detailed response to the initial question you have asked. Combining the two questions together allows richer insight.

As the second question is AI formatted it is personalised for each respondent based on how they answer the initial question. During analysis we can see the details of how each respondent was prompted.

Examples of the AI prompt for the topics which come to mind when thinking about household water supplier



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Examples of the AI prompt

Initial question

“What topics come to mind when thinking about your household water supplier?”

Initial response

“Two main areas concern me, cost and quality of water supplied”

AI prompted follow-up question

“Could you tell me more about why cost and quality of water are important to you?”

Response to AI follow up question

“With increasing constraints on our budget, the cost of water supply is an obvious concern to me. It also seems apparent that water companies have invested very little in maintaining and improving infrastructure since privatisation. I am very concerned that the quality of water supplied will be compromised at some point”

Initial question

“What topics come to mind when thinking about your household water supplier?”

Initial response

“Pollution, lack of investment, customers being ripped off”

AI prompted follow-up question

“Could you tell me more about why you think customers are being ripped off?”

Response to AI follow up question

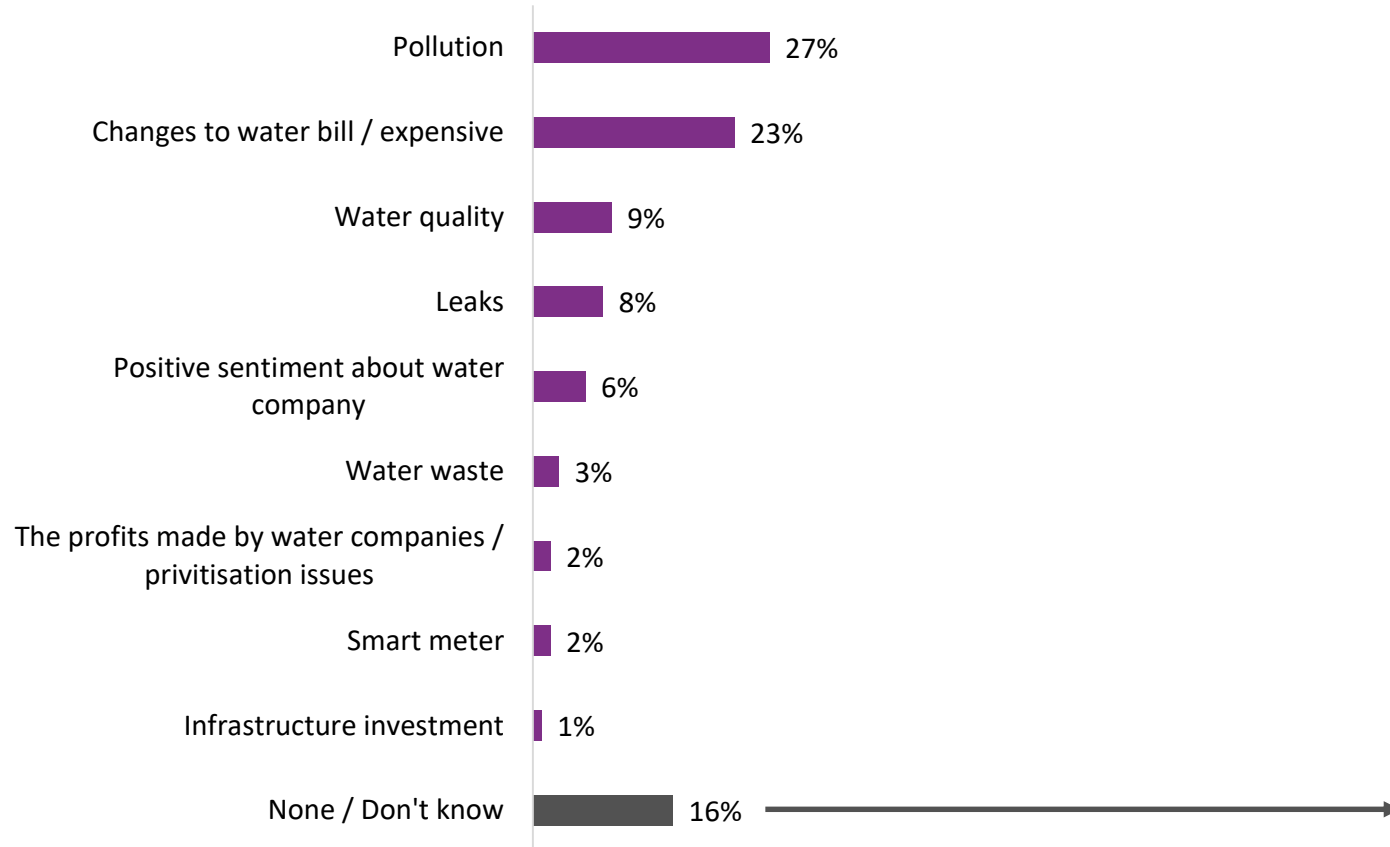
“Because the water companies are saying they will start to invest in the infrastructure (which they should have already been doing) but the customers will have to fund it and yet still pay out huge dividends to shareholders”

When asked to a nationally representative sample, unprompted about your household water supplier the same themes were important to the social insights



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Unprompted thoughts about household water supplier coded
Followed up with AI prompt



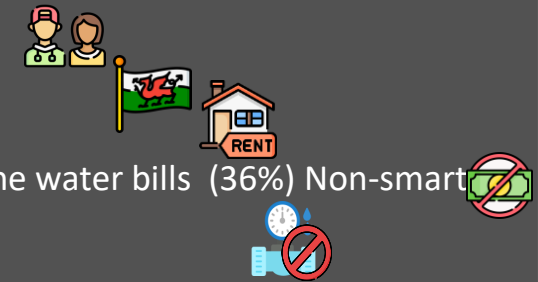
No topics about household water supplier significantly come to mind for:

Those aged 18-34 (27%)

Those living in Wales (28%)

Those renting (20%)

Those not responsible for the water bills (36%) Non-smart water meter users (17%)



Coded responses

Q1. What topics come to mind when thinking about your household water supplier?

Base: All respondents (1,167);

18-34 (308); Wales (261); Renters (364), Non-bill payer (111), Non-smart water meter user (1019)

Thank you!

For more information on this report please contact Alice Bresciani
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