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Understanding consumer priorities

Insight report by Yonder Consulting
February 2025

ccw.org.uk

Foreword

To represent water consumers effectively, CCW must understand their evolving concerns. By prioritising their needs, we can advocate for meaningful change and better support customers across England and Wales.

Building on last year's findings, this research tracks shifts in consumer priorities. Using advanced deep listening tools, we analysed water-related conversations – all water-related discussions across social media, blogs, and forums, validated through an online survey – and explored the characteristics of the audiences driving these discussions.

Among established priorities, pollution remains the most-discussed issue, underscoring its enduring significance. However, concerns about high bills have risen sharply, with affordability now a critical issue. As costs escalate, how the water sector is managed has gained importance among consumers.

Among lesser-discussed priorities, smart meters remain divisive, with mixed views on costs for consumers and transparency from water companies. Financial stability has become increasingly polarising, with some consumers advocating for nationalisation while others support privatisation. Discussions about water quality, particularly safety, have intensified, while conversations around responsibility have shifted from household maintenance (e.g., stopcocks) to broader issues like infrastructure failures affecting local communities.

Notably, established and lesser-known priorities are increasingly linked in consumers' minds, despite a lack of clear understanding of their true relationship. Media narratives, along with growing public interest in the water sector, have contributed to this perception, reinforcing widespread consumer mistrust in water companies and demanding clearer communication and tangible action.

This report outlines key priorities and their implications for CCW's campaigns and policy development. By staying attuned to consumer concerns, we aim to ensure water companies address what matters most while preparing for future challenges.

Background and objectives

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Building on last year's work, CCW aims to:

- Revisit the lesser-known priorities identified previously to assess their relevance and evolution.

This work will:

- Analyse public conversations and sentiment on topics such as **water quality**, **smart meters**, **financial stability**, and "understanding responsibility", identified as key priorities last year.
- Use quantitative analysis to contextualise these findings and assess their national significance.

Key objectives are as follows:

1 Uncover consumer feedback on what matters most in the water industry and identify the types of audiences discussing these topics

2 Explore the evolution of lesser-known priorities from last year and identify any emerging themes

3 Validate priorities and assess their importance on a nationally representative scale

For this project, we took a two layered approach

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Deep Listening: Tracking the Evolution of Consumer Priorities on Social Platforms

- We used AI-powered tools to analyse how consumer conversations around water priorities have developed and evolved over the past year.
- **Purpose:** To assess shifts in key themes, particularly lesser-known consumer priorities, and understand their relevance in shaping perceptions of water companies.
- We also used Audiense, an audience profiling tool, to explore the demographics and behaviours of individuals discussing these priorities, providing deeper context for this year's findings.

Omnibus online survey

- Nationally representative sample of England and Wales (18+).
- Starting GB sample size of n=1,143 and boosting the Wales number up to n=205.
- **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 (slides 36-49)

Executive summary

What we learnt

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1. **Water conversations have surged, fuelled by Thames Water's debt challenges, Southern Water's bill hikes, and debates on privatisation and regulation**

Media coverage has amplified these issues, making the impact personal for consumers as financial and environmental concerns increasingly affect households. The concurrent rise in discussions around Thames Water's debt challenges and bill increases has contributed to heightened visibility and a broader awareness of water-related issues.

2. **Consumers now link multiple priorities**

With topics like smart meters and water quality often connecting to established concerns like rising bills and pollution in the way consumers express their views. The overarching theme is the growing scrutiny of water companies and their responsibility.

3. **Consumer opinions are more polarised**

Online consumer conversations show greater polarisation compared to last year, particularly around topics like smart meters and the debate between nationalisation and privatisation. This polarisation reflects a growing lack of trust in water companies and providers, with many expressing strong and divided opinions on these issues.

Overarching findings

Integrating deep listening findings with the Omnibus survey findings

Overview: known and established priorities

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As we did last year, we analysed water-related conversations, including news, then focused on consumer discussions on forums and X (formerly Twitter), excluding news coverage. We sized conversations around key priorities like pollution, high bills and leaks, as well as lesser-known priorities (covered in the next slide). For established priorities, there are two key findings.

1. **Pollution, particularly sewage pollution, is the most discussed water issue, with incidents like a cancelled swimming race in Devon and ongoing sewage dumping issues at Lake Windermere raising public concern about water quality and its environmental and health impacts**

Why is this relevant?
Such incidents heighten public concerns about water quality, highlighting environmental and health impacts. While water companies pledge to upgrade infrastructure to reduce sewage overflows, these long-term solutions leave communities exposed in the short term

2. **Mentions of high bills have surged by 229%, reflecting growing consumer frustration. Financial pressures are now a key factor shaping public perceptions of water companies, amplified by media coverage of rising costs**

Why is this relevant?
Water companies in England and Wales are proposing significant bill increases to fund infrastructure upgrades and meet stricter regulations. While aimed at reducing sewage overflows and improving service quality, these increases come amidst rising public dissatisfaction over environmental, performance, and transparency issues, leaving consumers feeling burdened and concerned about household impacts

Four lesser-known consumer priorities: how they've evolved

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First identified last year, these priorities remain highly relevant and continue to evolve. **While no entirely new themes have emerged distinct from these four, we've observed significant evolution within them.** These shifts suggest the potential for these priorities to develop into new, standalone themes over time. We will continue tracking them to better understand their trajectory and impact.

1. Concerns about water quality

Shifted from personal anecdotes to broader worries about safety and sewage contamination, amplified by high-profile news stories.

2. Understanding the financial stability of water companies

Evolved from general discussions about company finances to a pressing concern, with survey results showing that the financial health of water companies is increasingly important to consumers.

3. Understanding where responsibility lies

Focus has shifted from household maintenance to broader concerns, emphasising accountability for local infrastructure and community-wide issues.

4. Individual relevance of smart meters

Discussions have become more polarised, shifting from cost-saving benefits to debates about fairness, accuracy, and consumer choice.

Integrated in-depth analysis

Overview of the online discourse around priorities: established and lesser-known

Overview: rising mentions reflect key water issues in media narratives

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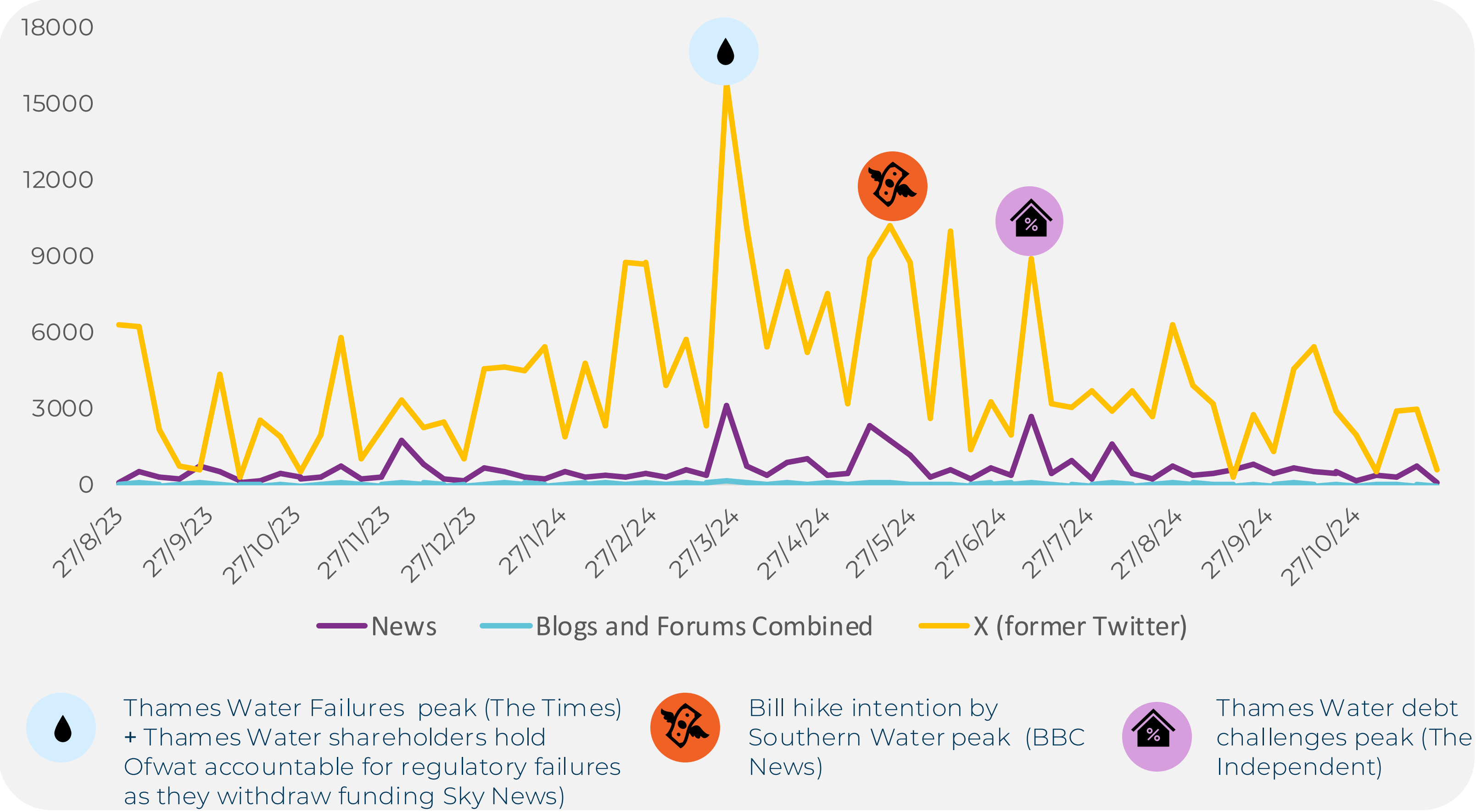

- Mentions **increased by approx. 35% compared to last year's report (July22-Aug23)**, with spikes tied to key events such as ***Thames Water's ongoing debt challenges Southern Water's proposed bill hike*** (BBC News, The Independent)
- **Concurrently with Thames Water's debt challenges, Ofwat is facing increased scrutiny** over its regulatory role, particularly following shareholder concerns about Thames Water's ongoing financial issues and pollution management practices.
- **Media coverage highlights pressing issues,** including perceived governance failures, environmental challenges like sewage management (i.e. Lake Windermere) and financial pressures, **fuelling public debates about industry accountability**.

Source: Brandwatch: September23- November24 – across platforms, England and Wales only
total volume of conversations: 324,000

Established consumer priorities: high bills now a growing concern

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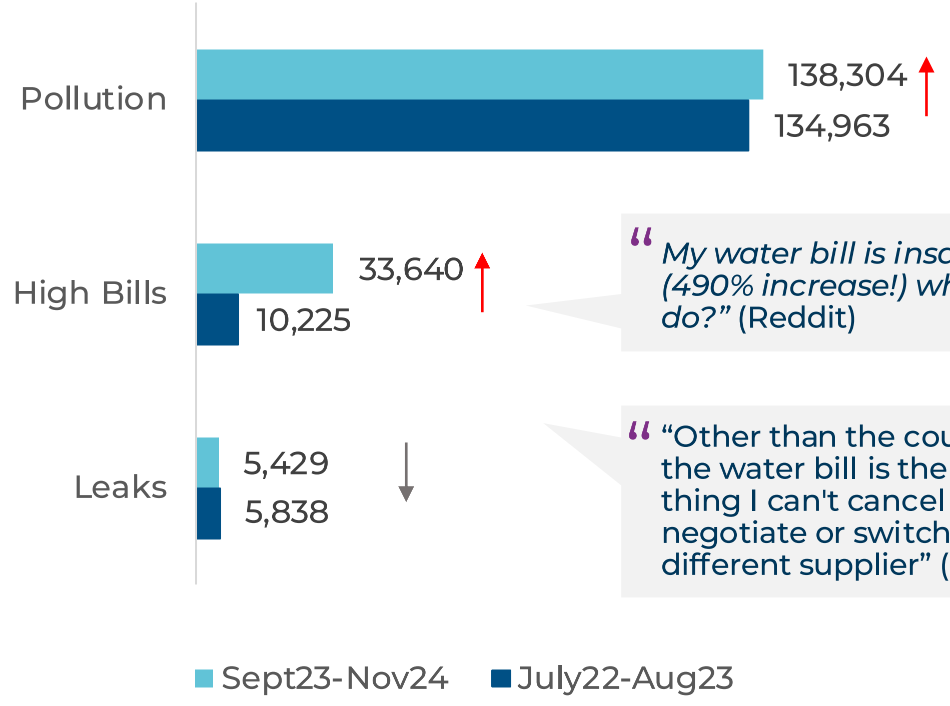
Volume of mentions around known priorities (comparison of Sept23-Nov24 vs. July22-Aug23)*



"My water bill is insane (490% increase!) what can I do?" (Reddit)

"Other than the council tax the water bill is the only thing I can't cancel or negotiate or switch to a different supplier" (Reddit)

Known priorities: Compared to the previous report timeframe (July2022-August23), pollution and high bills are expressed more often in conversations

What matters to consumers: the size of priorities identified from online communities and consumer conversations on X (formerly Twitter)

1. The top bar represents the latest period (Sept23–Nov24), while the lower bar shows the previous period (July22–Aug23).
2. Among established priorities, **pollution remains the top concern for water consumers, with mentions increasing by 8% compared to last year**. This reflects ongoing consumer awareness and discussion.
3. High bills saw the most significant growth, **with mentions rising by 229% during the latest period**. Consumers are expressing frustration over affordability, often comparing rising bills to water companies' actions.
4. Themes like h**igh bills connect with lesser-known concerns, such as smart meters and perceived lack of control over pricing, reflecting growing consumer frustration**. This frustration is further fuelled by doubts over remote readings, unprompted installations, and affordability challenges.
5. Despite a slight decrease in mentions, **leaks remain the third most discussed topic.**

*The ongoing debate around raw sewage has been included within "pollution"

Source: Brandwatch. Timeframes compared: July 2022-August 2023 vs. September 2023-November 2024. Insights are based on consumer conversations from online forums and X (formerly Twitter). Total volume of these conversations: 177,373 representing 66.2% of the overall total (after excluding news)

Smart meters drive growth in lesser-known Priorities

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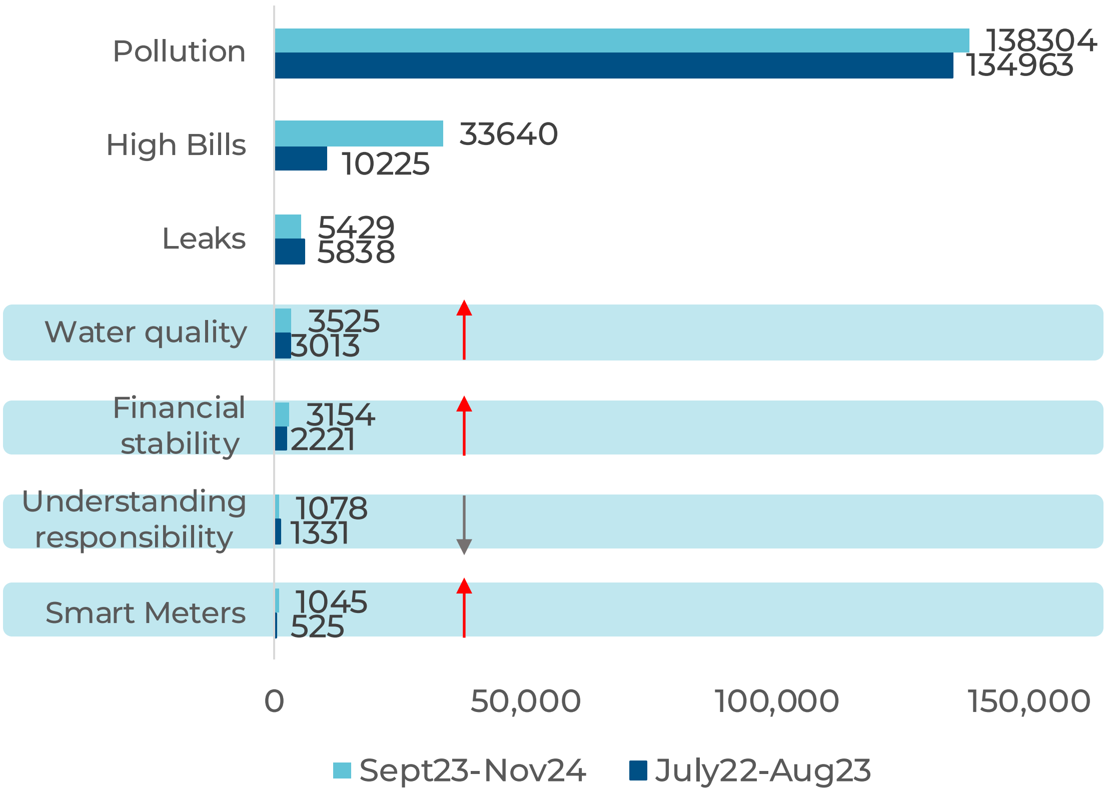
Volume of mentions around established and lesser-known priorities (comparison of Sept23-Nov24 vs. July22-Aug23)



Lesser-known priorities: compared to the previous report timeframe (July2022-August23) - water quality, financial stability, smart meters are expressed more often in conversations

What matters to consumers: analysis of lesser-known priorities from online communities and consumer conversations on X (formerly Twitter)

Overall mentions of lesser-known priorities have grown, **with increases in 3 out of 4 themes** (Sept23–Nov24 vs. July22–Aug23). **These priorities are increasingly perceived to be linked in consumers' minds** connecting lesser-known concerns to trust, control, affordability, and safety.

- **Smart meters** saw the largest rise (+99%), driven by growing interest and scepticism around water-saving technology and water companies' actions
- **Financial stability** mentions increased by 42%, reflecting affordability concerns tied to water companies' practices.
- **Water quality** mentions rose by 17%, with growing concern about the safety of drinking water.
- **Understanding responsibility** declined by 19%, but there is renewed focus on how infrastructure failures affect local areas.
- These priorities are increasingly viewed as connected by consumers, linking lesser-known concerns to trust, control, affordability, and safety.

Source: Brandwatch. Timeframes compared: July 2022-August 2023 vs. September 2023-November 2024. Insights are based on consumer conversations from online forums and X (formerly Twitter). Total volume of these conversations: 186,175 representing 69.5% of the overall total(after excluding news)

Similar topics emerged from our survey, with changes to water bills taking the top spot in top-of-mind mentions this year

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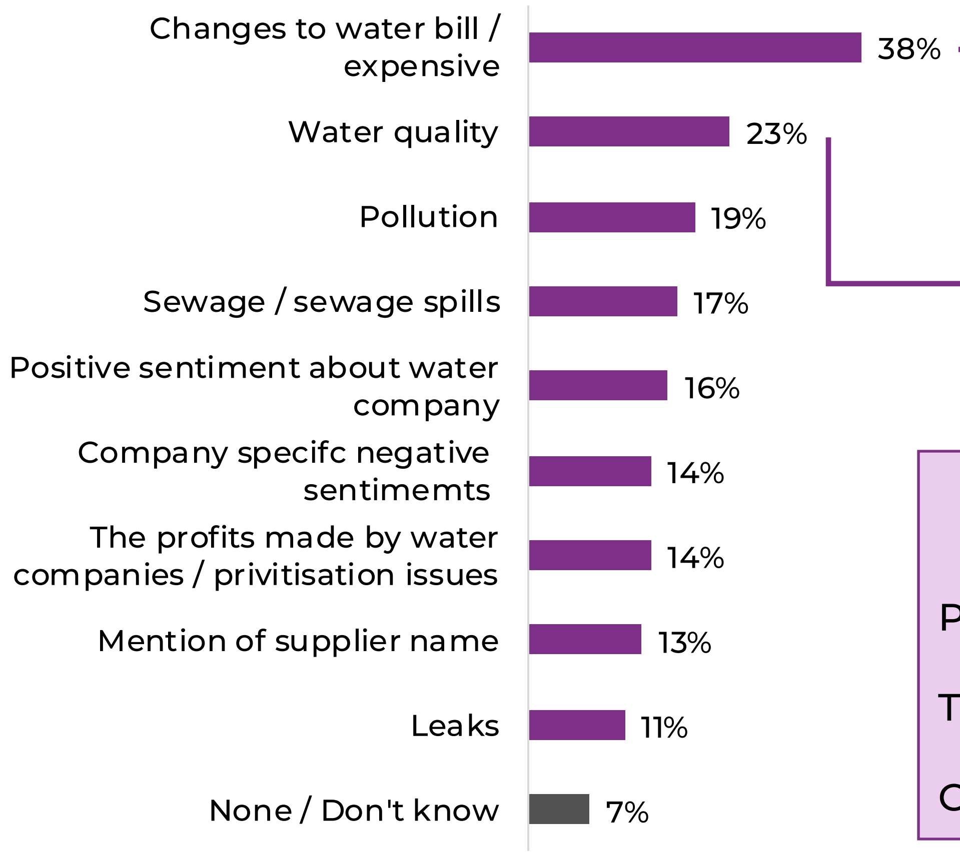
Unprompted thoughts about household water supplier coded
Followed up with AI prompt – 2024 Mentions over 10%



Changes to water bill / expensive significantly higher among:

Those in the South West (49%)

People aged 35-54 (44%)

Males (42%)

Bill payers (39%)

Water quality significantly higher among:

People aged 55+ (26%)

Those in the South West (36%)

C2DE (27%)

Coded responses
Q1. What topics come to mind when thinking about your household water supplier?
Base: All respondents (1,143)
Males (562); 35-54 (357); 55+ (507); South West (97); C2DE (466); Bill payers (1,024)

Quotes from consumers show that water bills becoming more expensive are top of mind and a big concern

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"Increasing water bills every single year but cannot see how this can be justified with the poor performance of the organisation"
Male, 35-54, North West

"High water bills and far too many leaking water pipes"
Male, 35-54, West Midlands

"To see prices increase so much and still bonuses are paid, sewage is piped into the water system, around a third of the water being paid for is lost is very disheartening"
Male, 35-54, London

"Bills get higher and higher, with no care for the cost-of-living crisis customers are living through, and I don't see any improvements to warrant the price hikes. It just also goes to ever-increasing bonuses for incompetent leadership"
Male, 18-34, South West

"The charges have gone up whereas the quality of water is getting worse"
Female, 55+, London

"They charge a lot and don't fix their leaks"
Male, 18-34, Eastern

"They are struggling with debts due to previous owners paying too much to shareholders/owners... The charges are too high and have not historically been used to improve the service"
Female, 55+, London

"They charge too much and are increasing prices saying they want to improve service however they are leaking sewage into rivers and paying themselves bonuses"
Female, 55+, London

"It is obscene that water companies want more money from customers in higher bills, when they haven't invested enough in the infrastructure and award themselves such high bonuses. The way these companies run their business is unethical and motivated by greed. Tougher action should be taken by OFWAT to stop them mismanaging the water supply and polluting the environment. The utility should be re-nationalised as a matter of urgency"
Male, 55+, Yorkshire & Humberside

Q1. What topics come to mind when thinking about your household water supplier?
Base: All respondents (1,235)

Water quality and pollution are also important concerns of consumers

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"It is very disappointing that this has occurred as untreated sewage will naturally have an adverse affect on both the quality for swimming but also from an aesthetic point of view."
Male, 55+, Wales

"South West Water have discharged sewage on our beaches with increasing frequency this year and as we are a tourist county, this does not help to promote the holiday industry"
Female, 55+, South West

"Pollution. Water companies gave put profits before the cleanliness of drinking water"
Male, 55+, Wales

"Nobody should pay for water. Ever. Its a basic human need. The fact that we have to is outrageous. The government and Ofwat have no interest in prosecuting them for pumping raw sewage into our waterways, its a scandal and we are all being polluted because of it"
Female, 34-55, West Midlands

"If they are polluting our rivers they should be fined and it should stop"
Female, 55+, West Midlands

"I often hear of industry spills into rivers which is concerning"
Female, 18-34, Wales

"Frequently the drain outside my house on the road overflows causing sewage to flow down the road, usually after rain, but sometimes due to leaks further up the road"
Female, 55+, South East

"I worried about the impact on nature and rare British wild life. It is also ruining beaches and nature reserves as all water sources connect eventually. I also think that it is increasing the risk for disease transmission not only through the water but through animals"
Female, 18-34, South West

Q1. What topics come to mind when thinking about your household water supplier?
Base: All respondents (1,235)
Fieldwork was carried out before company business plans were submitted so any mentions of bills will not have taken those into account

Exploring lesser-known priorities and their evolution

Lesser-known priorities highlight growing concerns over water safety, financial stability, and scepticism around smart meters

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1. WATER QUALITY

Consumer concerns about water quality have shifted from taste and impurities to fears of contamination and safety. Mistrust of water providers sparks anxiety about drinking water reliability and scepticism about company claims.

Safe to drink
Filtration filters
Water softeners
Drinking water contaminated
Water composition
Thames
Smell
Dumping sewage
Hard water areas

2. FINANCIAL STABILITY

Discussions around water company finances reveal rising consumer concerns, focusing on executive bonuses, shareholder profits, and rising water bills. Financial instability strains household budgets, while unclear information fuels confusion.

Rising water costs
Shareholder bonuses
Ofwat
TW debt
Calls for public ownership
Privatisation
New government
Transparency (who owns it / shareholders)

3. UNDERSTANDING RESPONSIBILITY

This year, conversations around responsibility have declined, with fewer questions about household maintenance like stopcocks and pipes. However, discussions now highlight broader concerns, including infrastructure failures and their impact on local areas.

Neighbourhoods
Shared supply
Local
From street to stopcock
Shared use of underground pipes
Water pressure issues in flats
Mains water pipes
Burst

4. SMART METERS

Conversations on smart meters have surged, balancing mistrust over billing accuracy, remote readings, and unprompted installations with savings opportunities from schemes like Watersure and dynamic pricing, especially for vulnerable households.

Metered vs unmetered
Dynamic pricing
Remote readings
Installed without notice
Capped price
Inaccurate bills
Choosing not to have it
Replacement

The size of each word shows how often it was mentioned: larger words were mentioned more frequently. Grey words were mentioned less often compared to last year, while darker words represent new emerging themes within a key topic. Words in light blue are recurring from last year and remain prominent this year, indicating the continued relevance of those sub-themes

.. also reflected in our nationally representative consumer survey

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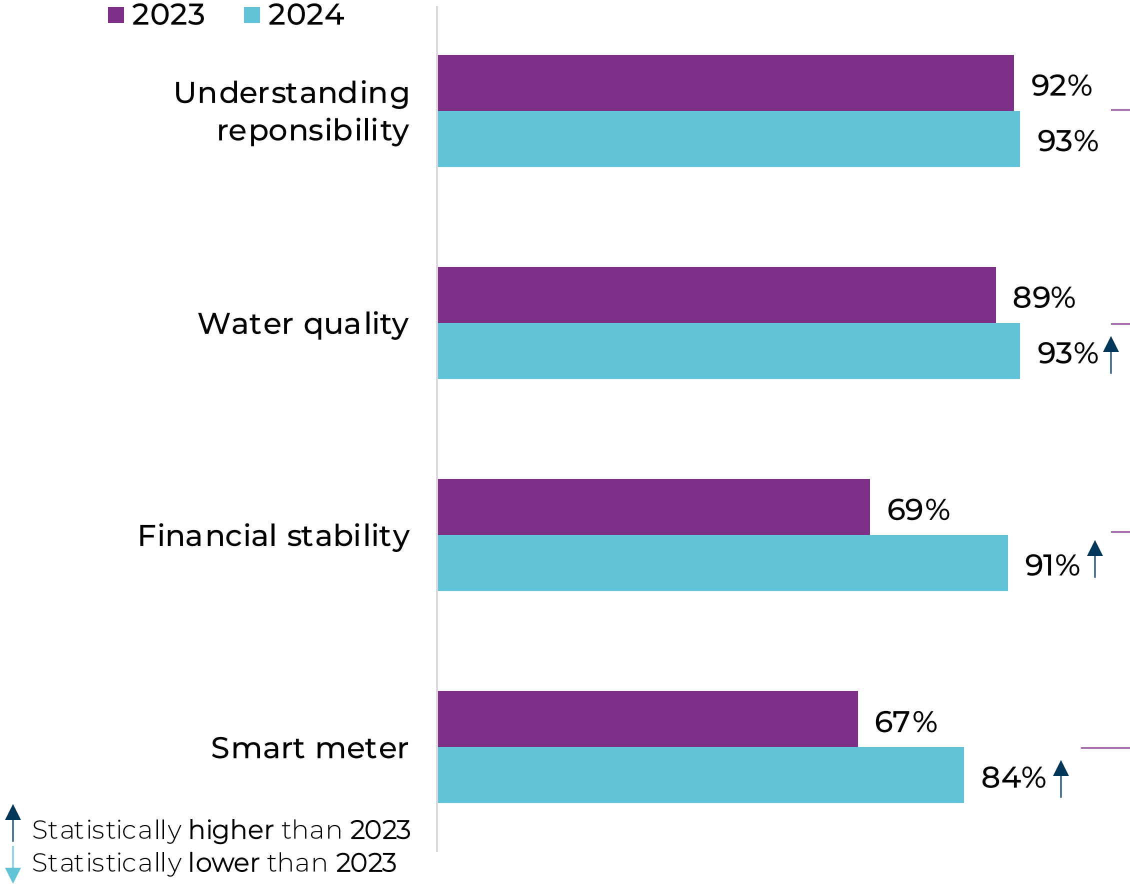
Prompted Net: importance of issues for consumers and which survey statements these were composed of*



- Whether your water company is taking responsibility for maintaining its water mains and treatment works properly
- How efficiently they solve issues (e.g. leaks, incorrect bills) that you tell them about

- Communications about the quality of water provided to your household and what the water contains
- Whether your water company is releasing sewage into the local area

- The future financial stability of your water company
- How much profit the water company makes
- Whether the way the water industry is run should be changed
- Who owns your water company

- Whether they are planning to switch your household to a smart water meter
- The accuracy of smart water meter readings

Q2. To what extent do you consider the following issues important or not when it comes to your water company?
Base: 2023 respondents (1,167); 2024 respondents (1,143)
*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.

Lesser-known priority 1: Consumers raise trust issues and concerns over water quality and safety

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COMMENTARY:

1. **Distrust in water providers:** Consumers increasingly doubt providers' ability to ensure clean and safe drinking water. Many believe that sewage spills directly affect water safety, with a perception that spills indicate contamination. However, it's important to note that this perception of a direct link between spills and unsafe drinking water is not accurate.
2. **Impact of sewage spills**: consumers refer to reports of sewage spills dominate, expressing concern about water safety and the reliability of local water services.
3. **Perceived decline in quality:** mentions of unpleasant odours, limescale buildup, and questionable water composition are frequently tied to dissatisfaction with providers.
4. **Changes in taste and smell**: comparisons to past experiences reveal changes in water taste and smell.
5. **Evolving theme:** the conversation is shifting from individual accounts—such as dealing with mould, water damage, and using water softeners—**toward broader, misplaced concerns about the overall safety and cleanliness of water** in households.

Evolving concern

From individual accounts → To overall safety and cleanliness of water

TRUST AND SAFETY CONCERNS

> @YorkshireWater **Is it safe for my family** to drink the tap water in South Yorkshire or does it contain forever chemicals and carcinogens that @WHO has told the UK government it must urgently address? And is it being addressed or do we have to drink bottled water forevermore?
> X

DEMAND FOR ACCOUNTABILITY

> @AnglianWater @EADT24 Tell me **now tap water is safe. This is my kettle only 4 months old.** I used tap water for the last week instead of bottled water. My kettle has so much limescale - **what is it doing to our bodies** if this is what it does to a kettle in 1 week. **Now tell the TRUTH**
> X

IMPACT BEYOND HOUSEHOLD WATER

> But if Thames Water weren't dumping sewage there wouldn't be the concerns about water quality in the lake (referring to Windermere lake)
>
> **Clean water is arguably our most precious resource**
> Forum

SPOTTING CHANGES IN WATER QUALITY

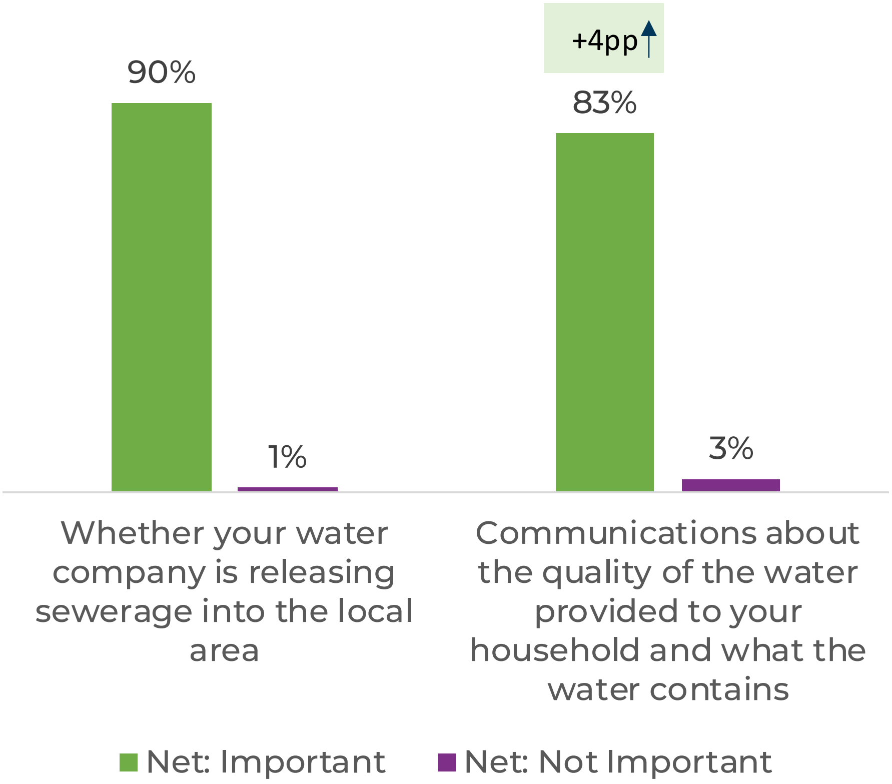
> So apparently, even though our tap water has tasted vile and full of chemicals and our bath water has been yellow/green for the last week, **it's all perfectly safe.** I wish I could completely trust the water company @BmouthWater
> X

The position of the arrow indicates the strength of the theme's evolution, reflecting how prominently this consumer priority (e.g., water-related concerns) has shifted over time.

Source: Brandwatch July 2023-Nov2024 –online communities and X, England and Wales only, based on 3,525 conversations

When prompted in the survey, water quality was a prominent concern, especially for bill payers and those over the age of 55

Importance of water quality for consumers



NET: Water quality is particularly more important to:

People aged 55+ (9%)

Those with bill paying responsibilities (94%)

Wales (96%)

Home owners (93%)

Those in the South West (99%)

↑ Statistically higher than 2023
↓ Statistically lower than 2023

Q2. To what extent do you consider the following issues important or not when it comes to your water company?
Base: 2023 respondents (1,167); 2024 respondents (1,143); 55+ (507); Wales (259); South West (97); Home owners (741); Bill payers (1,024)
*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.

‘Drinking water’ is a particular concern in relation to sewage, leaks and cleanliness

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“Sewer contamination…”

What specific aspects of sewer contamination concern you regarding drinking water?

“You don’t know how fresh the drinking water is that you are drinking”.

Female | 39 | North West

“Water companies have put profits before the cleanliness of drinking water”

Male | 59 | Wales

“Cloudy drinking water…”

What specific concerns do you have regarding the quality of drinking water?

“I don’t think they are keeping up standards”

Male | 59 | Wales

“Can we get clean and healthy water…”

What specific concerns do you have regarding the cleanliness and healthiness of the water provided by your supplier?

“Afraid they will reduce the cleanliness of drinking water due to the economic downturn.”

Male | 50 | South East

Q2. To what extent do you consider the following issues important or not when it comes to your water company?
Base: 2024 respondents (1,143). Quotes taken from verbatim responses, including in response to AI prompt.

Lesser-known priority 2: Financial stability narratives confuse consumers, leaving them uncertain about household impacts

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COMMENTARY:

1. **Ongoing debates around Thames Water:** consumers discuss debts, rising water costs, and privatisation versus nationalisation, reflecting mixed opinions and broader uncertainty.
2. **Misinformation and confusion:** misleading or incomplete information fuels confusion, with sarcastic and frustrated comments highlighting dissatisfaction with unclear media narratives.
3. **Link to personal finances:** rising water bills and concerns about financial instability make the issue personal, intensifying anxieties about affordability and transparency.
4. **Expectations for change:** with a new Labour government, consumers are watching for solutions to financial challenges, including potential reforms or nationalisation.
5. **Evolving theme:** While the theme continues from last year, financial instability has become increasingly tied to personal household impacts, driven by rising water bills.

Evolving concern

From water industry landscape → To personal impact on household

MISINFORMATION COMPLICATES UNDERSTANDING

"

Opinion: Thames Water still paid out dividends this year after they revealed how much they were in debt

Answer: This is **incredibly misleading**. Thames Water hasn't paid out dividends to external shareholders in over 5 years
Forum

"

Question: So how do you supply water and sewerage services to the Thames Valley if it goes bankrupt without a continuity plan in place?

Answer: If it goes bankrupt then the water company will enter special administration
Forum

IMPACT BEYOND HOUSEHOLD WATER

"

Referring to this BBC article on Thames water bills needing to rise 40%: Well, this story is progressing at a rate of knots as the day goes on. We've gone from: 'Shareholders won't release money until bills go up' → 'Boss admits bills need to rise by 40%' → 'Nationalisation possible'
Forum

HIGH EXPECTATIONS FOR LEADERSHIP

"

Referring to a Financial Times article on Thames Water's financial instability: It'll be interesting to see how Starmer approaches the water companies on this topic [...] but the only way to deliver what's been asked of them will be for Ofwat to allow them a big increase in water bills
X

The position of the arrow indicates the strength of the theme's evolution, reflecting how prominently this consumer priority (e.g., water-related concerns) has shifted over time.

Source: Brandwatch July 2023-Nov2024 –online communities and X, England and Wales only, based on 3,154 conversations

Future financial stability of the water companies is important to 3 in 4 consumers

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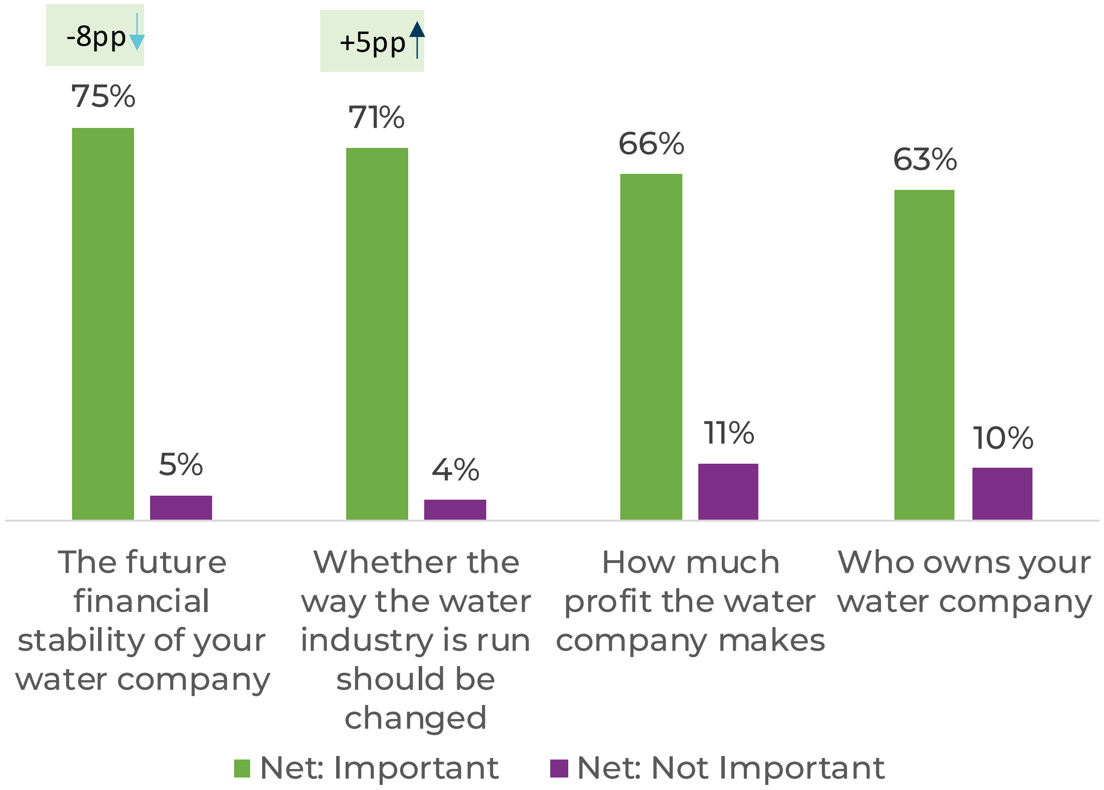
Importance of water companies' financial stability for consumers



NET: Financial stability is particularly important to:

People aged 55+ (96%)

Those with bill paying responsibilities (93%)

Home owners (93%)

Those in the South West (97%)

↑ Statistically higher than 2023
↓ Statistically lower than 2023

Q2. To what extent do you consider the following issues important or not when it comes to your water company?
Base: 2023 respondents (1,167); 2024 respondents (1,143); 55+ (507); Home owners (741); Bill payers (1,024); South West (97)
*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.

Lesser-known priority 3: With fewer conversations, consumers seem more aware of where responsibility lies. However, concerns now extend to local communities

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COMMENTARY:

1. **Fewer conversations, broader focus (19% drop):** discussions around "*understanding responsibility*" have decreased, with fewer maintenance-related questions, indicating growing awareness.
2. **Personal vs. collective impact:** However, concerns about infrastructure failures affecting local areas, such as parks and playgrounds, have become more prominent. Frustration with water companies persists, driven by delays, repeated pipe bursts, and perceptions of poor maintenance. These frustrations are becoming more localised, with residents in affected areas questioning the lack of response regarding parks or public spaces.
3. **Evolving theme:** despite fewer mentions, this priority has evolved, with discussions moving from practical household maintenance to growing concerns about local infrastructure.

Evolving concern

From individual maintenance → To local infrastructure

CONCERNS AROUND LOCAL PARKS AND PLAYGROUNDS

> This flood water was also flowing through a children's playground and the village duck pond yesterday

> @ThamesWater The water does look clean but at **drop off this morning the playground and surrounding area smelled foul**. My concern is the leak has damaged surrounding waste water pipes or something??

LOCAL INFRASTRUCTURE CHALLENGES

> **This is our local park this morning** and the third flood due to burst water pipes in a week in the area. Whats going on @SthStaffsWater.

NEGLECT IN URBAN MAINTENANCE

> Southern water **did not keep up with the maintenance of their water pipes** and a strategic mainline burst in the middle of what they call 'dense Woodland'. This stopped supply to 40000 homes from Thursday afternoon until Monday [...] **We should be able to challenge it**

The position of the arrow indicates the strength of the theme's evolution, reflecting how prominently this consumer priority (e.g., water-related concerns) has shifted over time.

Source: Brandwatch July 2023-Nov2024 –online communities and X,, England and Wales only, based on 1,045 conversations

Water companies taking responsibility, and fixing issues efficiently are especially important to bill payers and those over 55 years old

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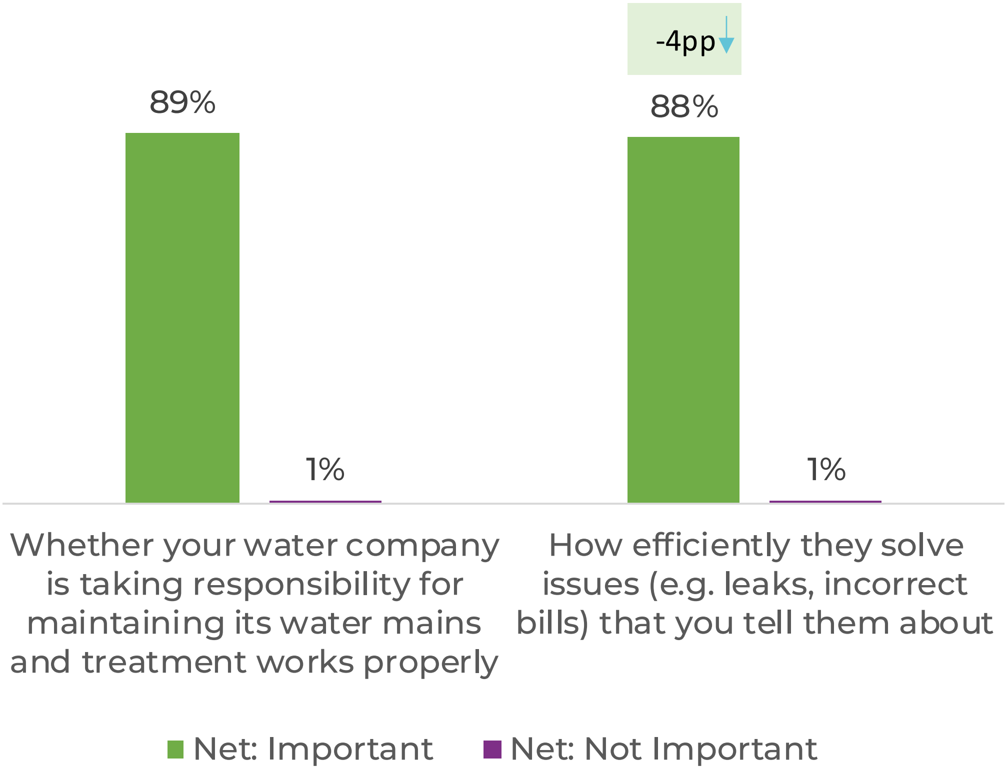
Importance of water companies' understanding responsibility for consumers



NET: Understanding responsibilities is particularly important to:

People over 55+ (99%)

Those with bill paying responsibilities (94%)

Home owners (95%)

↑ Statistically higher than 2023
↓ Statistically lower than 2023

Q2. To what extent do you consider the following issues important or not when it comes to your water company?
Base: 2023 respondents (1,167)2024 respondents (1,143); 55+ (507); Home Owners (741); Bill payers (1,024)
pulled out of the Deep Listening analysis to provide a wider view of the themes.

Emerging priority 4: Smart meters discussions rise sharply, reflecting both scepticism and optimism

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COMMENTARY:

1. **Cost and savings with smart meters:** discussions about potential savings from smart meters versus the cost of actual water usage continue, reflecting last year's priority. Scepticism persists among those doubting the financial benefits.
2. **Household water consumption:** similar to last year, consumers discuss water usage, with **new concerns about unexpected billing increases** tied to **remote meter readings.**
3. **Unprompted installations:** criticism of unprompted smart meter installations and doubts over the accuracy of remote readings have intensified debates about their benefits.
4. **Opportunities for savings:** while opinions remain divided, some consumers highlight schemes like ***Watersure*** showing how smart meters could cap bills for vulnerable households and reduce costs.
5. **Dynamic pricing benefits some users**: Some water consumers are discussing dynamic pricing schemes, similar to energy tariffs, which may help lower water costs for some households. They are linking this concept with smart water meters, suggesting that dynamic pricing could reduce water bills, especially for those using large amounts of water. Some consumers are referencing energy pricing models, where costs vary depending on usage and time, and are considering whether similar models could apply to water.
6. **Evolving theme: Discussions are evolving** from viewing smart meters as a potential cost-saving tool to questioning their fairness and suitability for all households.

Evolving concern

From less polarised opinions → To more polarised opinions

UNPROMPTED INSTALLATIONS CREATE MISTRUST

> "**TW installed ours in SE27 in October 2023, unprompted too.** We just got a note through the letterbox informing us of the switch to smart meter and its serial number, after it was done.
> Forum

REMOTE READINGS RAISE COST CONCERNS

> "**Weirdly I've only just found out my water meter is a smart meter of sorts** and can be read remotely despite it being mechanical.
> I'd also like to take this opportunity to thank Yorkshire Water for putting my water bill up by just shy of £200 a year.
> Forum

DYNAMIC PRICING TO BE APPLIED TO WATER

> "To date dynamic pricing has led to cheaper supply sessions.
> Forum

SCHEMES HELP VULNERABLE HOUSEHOLDS

> "If anyone has a person in the household with a disability, or if they are on certain benefits and have high essential water use, your water meter bill can be capped to the average in your area. Watersure it's called [...] you DO need a water meter though!
> Forum

Source: Brandwatch July 2023-Nov2024 –online communities and X,, England and Wales only, based on 1,045 conversations

The accuracy of water smart meters is important to many, but only around half think it's important whether their water company switches them to a smart meter

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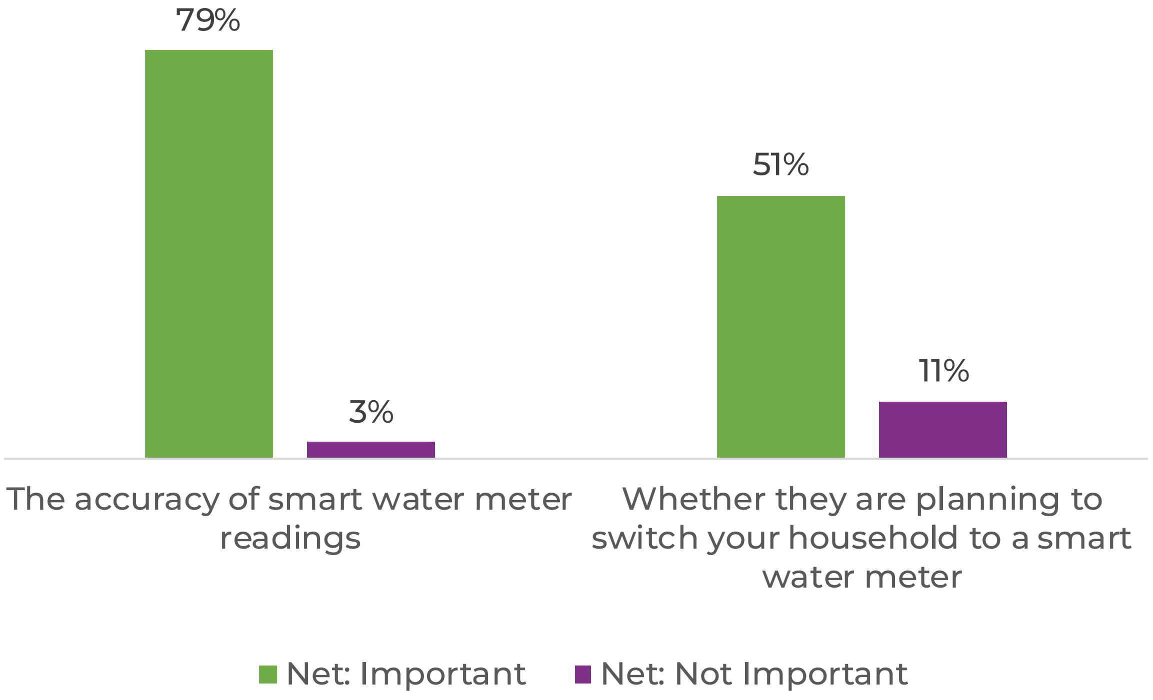
Importance of smart meter related issues for consumers



<u>NET: Smart Meters are particularly more important to:</u>

Those with bill paying responsibilities (86%)

Smart Water Meter Users (90%)

Q2. To what extent do you consider the following issues important or not when it comes to your water company?
Base: 2024 respondents (1,143); Bill payers (1,024); Smart water meter users (150);
*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.

Audience insights

Understanding the distinct perspectives of water consumers

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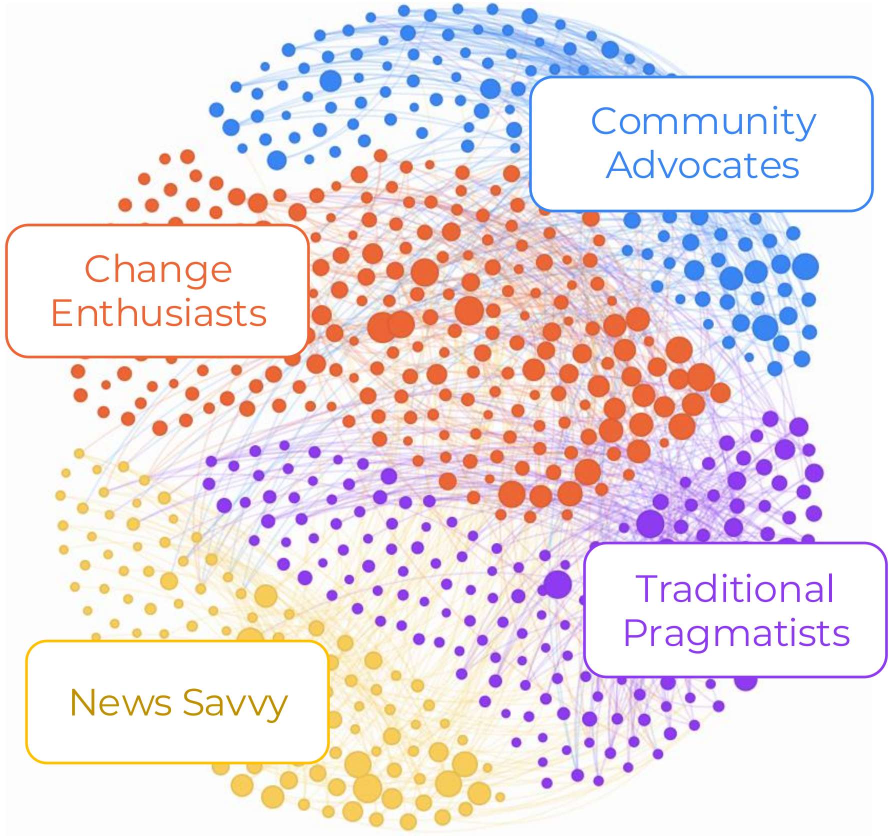
To gain deeper insights into consumers' perspectives on water-related issues, we analysed discussions on X using an advanced audience profiling tool. This approach helped us identify four distinct audience profiles, reflecting both forum behaviours and broader conversational trends:

1. **Change Enthusiasts:** Forward-thinking and open to innovation, they welcome new technology like smart meters and prioritise improvements that benefit their families and communities. However, their optimism is tempered by concerns about the rising cost of living, including water bills.
2. **Traditional Pragmatists:** Practical and self-reliant, they focus on fixing everyday problems themselves, often turning to social media for advice, reflecting limited trust in water companies.
3. **News Savvy Consumers:** Informed and curious, they actively engage in discussions on forums and online spaces to stay updated and address misinformation.
4. **Community Advocates:** Deeply connected to their local areas, they prioritise water quality and infrastructure repairs. They are vocal about issues, often highlighting problems through photos and calling for accountability from water companies.



Source: Audience, total audience size: 493

Footnote: For further information on the audience insight methodology and approach see slide 41

Consumers engage in online discussions around water-related issues for a diverse range of reasons and can be broadly categorised into four main groups

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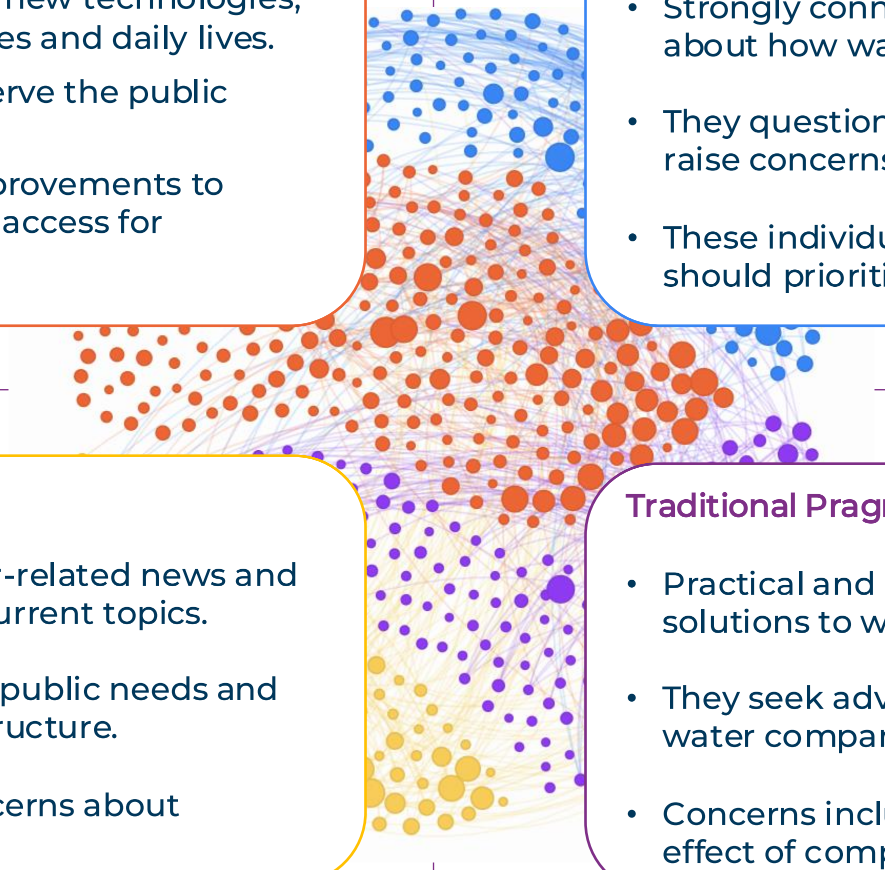
Change Enthusiasts (33% of total audience size)

- Open-minded individuals who embrace new technologies, like smart meters, to improve their homes and daily lives.
- They believe water companies should serve the public better and protect the environment.
- Focused on the future, they support improvements to ensure clean, affordable, and safe water access for everyone.

Community Advocates (19% of total audience size)

- Strongly connected to their local area, they care deeply about how water issues impact their communities.
- They question the quality and safety of water services and raise concerns about problems like flooding and pollution.
- These individuals believe authorities and water companies should prioritise both people and the environment.



News Savvy (35% of total audience size)

- These individuals stay updated on water-related news and environmental issues, alongside other current topics.
- They feel the water system falls short of public needs and advocate for more investment in infrastructure.
- Their conversations often highlight concerns about company accountability.

Traditional Pragmatists (13% of total audience size)

- Practical and independent, they want simple, clear solutions to water issues.
- They seek advice online and often feel sceptical about water company services and their impact on public health
- Concerns include water quality, smart meters, and the effect of company decisions on everyday life.

Source: Audience, total audience size: 493

Conclusions

Conclusions

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Consumer priorities are evolving and expanding. CCW's integrated approach highlights how conversations around established priorities, like pollution and high bills, are deepening, while lesser-known priorities are either gaining traction (e.g., water quality, financial stability, smart meters) or shifting (e.g., understanding responsibility).

1. **Media Spotlight on Financial Issues:** high-profile events like the Thames Water challenges and proposed bill hikes have increased focus on the water industry, reaching a diverse range of consumers and driving conversations around transparency and accountability.
2. **Affordability as a Growing Concern:** the connection between financial stability, rising bills, and infrastructure improvements has made the issue more personal, especially as households grapple with affordability challenges.
3. **Opinions around Smart Meters are Polarised:** polarisation around smart meters reflects a lack of trust and transparency. Communicating clear benefits of smart meters, such as capping water consumption and reducing bills, is essential to addressing these concerns.

Opportunities:

Water companies should :

- Develop clear, transparent messaging on financial decisions and how they impact infrastructure improvements and affordability.
- Showcase the tangible benefits of smart meters through the customer journey, aided by targeted messaging and campaigns, in order to build trust.

Conclusions Continued

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Building Collective Understanding and Connecting Priorities

1. **Evolving Narratives Around Water Quality and Responsibility:** water quality is now a more serious concern, with consumers using terms like "safe" and "contamination." Infrastructure awareness is increasing, with pollution and sewage discharge issues becoming more localised and personal.

2. **Linked Priorities Shape Consumer Concerns:**
   Established and lesser-known priorities are increasingly discussed in relation to each other, **with consumers viewing them as *"interconnected"*.**

Opportunities:

Companies should:

- Communicate both short-term actions (e.g., immediate fixes for leaks or sewage issues) and long-term plans to maintain transparency and build confidence

- Craft communication strategies that clarify how priorities are linked (e.g., how smart meters can help keep costs under control, debunking misconceptions about their role in pricing). This approach can help present narratives in a positive light and reduce confusion

- Leverage Media to Shift Narratives: take control of the water industry's story (currently "owned' by the media") by emphasising accountability, tangible improvements, and consumer benefits.

Appendix

Deep Listening Methodology

Deep Listening Methodology

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OVERALL DATA (n=324,000)	We used **Boolean queries** to capture online conversations about water across social media and news platforms. Filters were applied to focus on location (England & Wales) and the time period (September 23 – November 2024). This provided a broad overview of water-related conversations and the key moments driving online debate.
FILTERING OUT NEWS – DATA REVIEW (n=268,000)	To isolate the consumer voice, we applied additional filters to exclude news content and focus on online communities and platforms like X (formerly Twitter). This step ensured we captured genuine consumer discussions. *Examples of forums with significant water-related conversations can be found on slide 31.*
LESSER-KNOWN PRIORITIES (n=8,802)	We analysed emerging and lesser-known priorities by identifying and categorising key topics within consumer conversations. Each category was sized to assess relevance and prominence, providing deeper insight into consumer concerns.

Boolean queries use logical operators (AND, OR, NOT) and specific keywords to refine and target data collection. This method enables the monitoring of online conversations, category tracking, and the extraction of insights on sentiment and trends.

Source: Brandwatch:

Identifying the Lesser-Known Priorities: building on Last Year's Insights

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QUALITATIVE DEEP DIVE

- We revisited priorities identified in the first report, starting with a qualitative review of a sample of ~500 consumer mentions.
- Focus remained on forums and consumer-led accounts on platforms like Twitter (excluding news) to ensure the consumer voice was central.

CATEGORY CREATION AND SIZING

- Building on last year's insights, a deeper qualitative analysis was conducted to further refine water-related priorities in consumer minds.
- Based on this, we adjusted Boolean queries to size conversations and reassess prevalence across categories.

QUALITATIVE CATEGORY CHECK: OVERLAP

Emerging and lesser-known concerns are increasingly discussed together, signalling linked priorities in consumers' minds, often without a clear understanding of their relationship.

Water companies should consider this in their communication and strategy.

REFINING CATEGORIES

Added new, relevant keywords based on emerging themes from this year's analysis.

Adjusted category sizes to reflect updated consumer sentiment and conversation patterns.

Beyond reactions to current news, consumer conversations unfold across lifestyle forums highlighting water priorities organically

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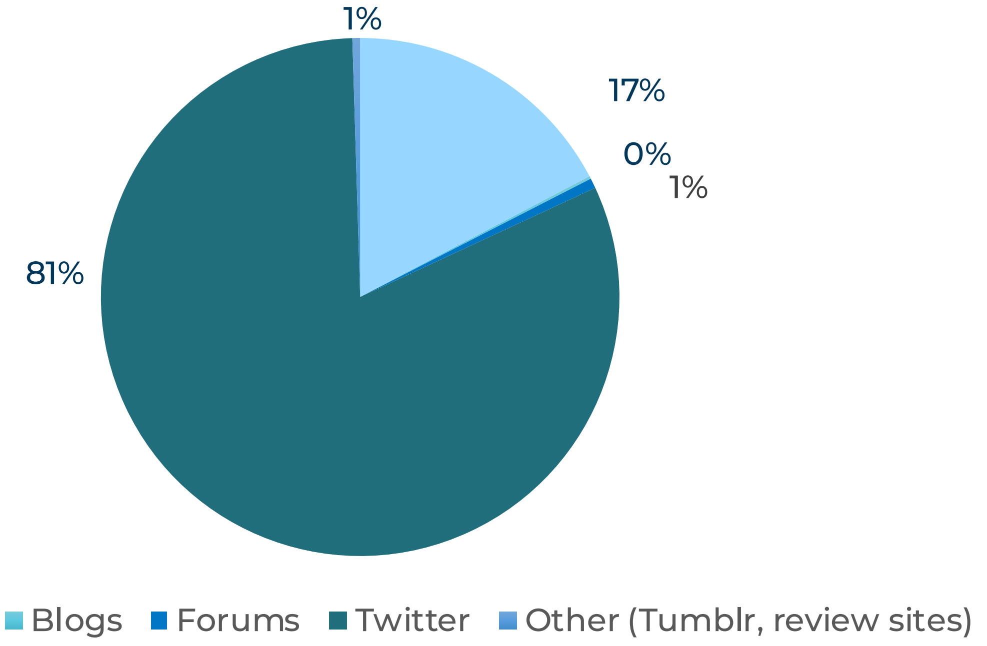
Breakdown in Content Sources – Capturing the Voice of the Consumers



Forum Insights and Purposes

FORUM NAME	PURPOSE
Reddit	A platform with dedicated sub-threads (subreddits) for niche discussions and advice.
• Overclockers • The farmingforum • Mumsnet • Diy.not • moneysaving expert	Interest-specific forums catering to niche audiences, focusing on practical advice, lifestyle discussions, and cost-saving strategies related to water and household management.
• Fixmystreet • Sheffield forum • East dulwich forum	Local community forums addressing region-specific concerns, providing a platform for discussions about water services, infrastructure, and community issues

These forums reveal that water-related issues, emerge as "organic themes" tied to broader lifestyle, financial, and community interests.

Source: Brandwatch: September2023 – November2024 – across platforms, England and Wales only, total volume of conversations: 324,000

Audience insights

The voice for water consumers
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CAPTURING ONLINE CONVERSATIONS on X	IDENTIFYING WHO IS SPEAKING	CLUSTERING OF AUDIENCES	UNDERSTANDING OUR CONSUMERS
• We analysed conversations on the social media platform X through an online social listening query. • We identified key mentions related to the water sector from individual users (not businesses or government accounts) to create a representative panel of approximately ~500 average customers.	• A panel of X users posting original content on four key consumer priorities—smart meters, water quality, responsibility, and financial stability—was analysed for demographic composition. • Demographic data, including age, gender, and geographic location, was collected for further analysis.	• The social panel was clustered according to their interests and topics to identify the common characteristics among the groups. • From this analysis, four key groups emerged: News Savvy, Change Enthusiasts, Community Advocates, and Traditional Pragmatists.	• The four clusters of consumers were further analysed to understand their motivations, drivers, and priorities concerning the water sector. • This analysis offered insight into the top consumer priorities related to the current and future state of the water system, focusing on key themes.

Quantitative methodology

Online Omnibus Methodology

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Overview

Online omnibus survey of 1,143 adults (aged 18+) in England and Wales

Fieldwork conducted 11th to 12th December 2024

The full sample has been weighted to be representative of England and Wales combined based upon the 2021 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 own and manage 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 1,143 online interviews with consumers in England and Wales. 205 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 upon the 2021 census profile of England and Wales combined. Rim weighting was applied for age, gender, government office region, social grade, taken 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 2021 census profile of Wales.

Scope and limitations of this report

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Scope

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

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

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

Statistical differences legend (at 95% confidence)

↑ Statistically **higher** than the **total**
↓ Statistically **lower** than the **total**
✚ Statistically **higher** than all other categories **within the subgroup**
▬ Statistically **lower** than all other categories **within the subgroup**

NB: Data may not sum to 100% due to rounding, 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	1,143	+/- 2.9%
Region	England	884	+/- 3.3%
	Wales	259	+/- 6.1%
Gender	Male	562	+/- 4.1%
	Female	580	+/- 4.1%
Age	18-34	279	+/- 5.9%
	35-54	357	+/- 5.2%
	55+	507	+/- 4.4%
Social grade	ABC1	677	+/- 3.8%
	C2DE	466	+/- 4.5%

Respondent profile

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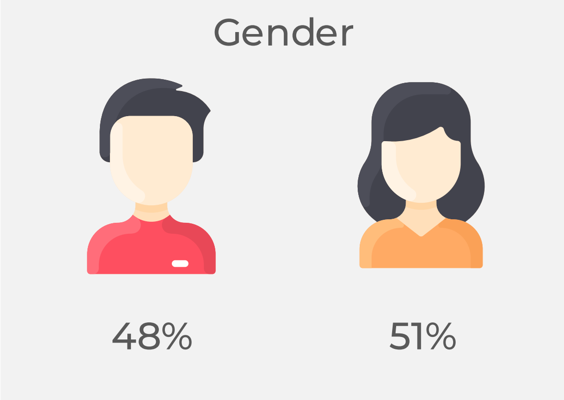
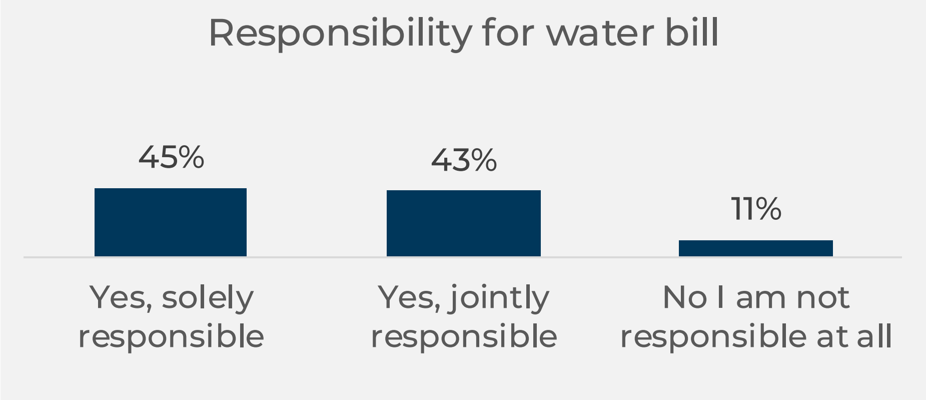
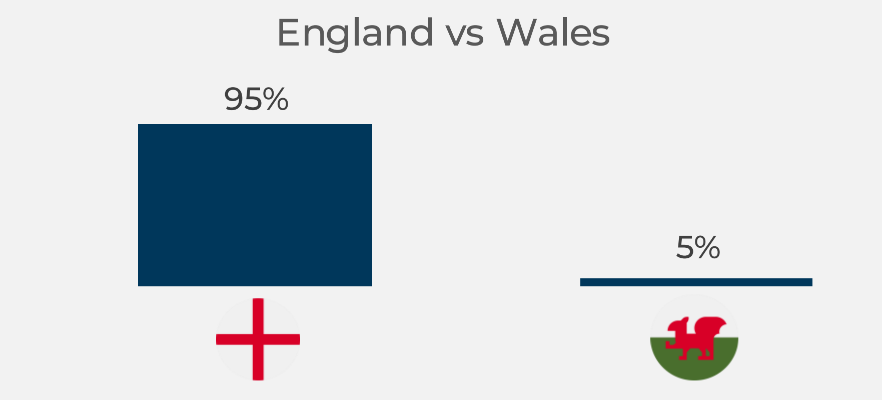
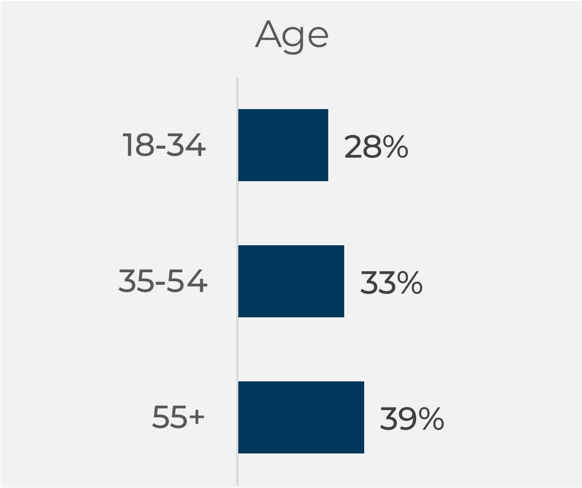
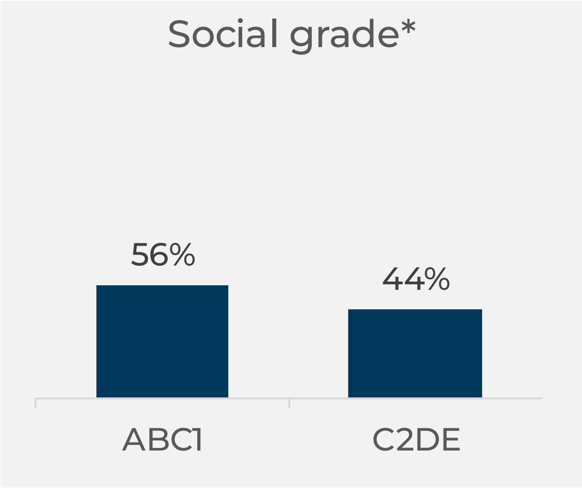
Weighted data

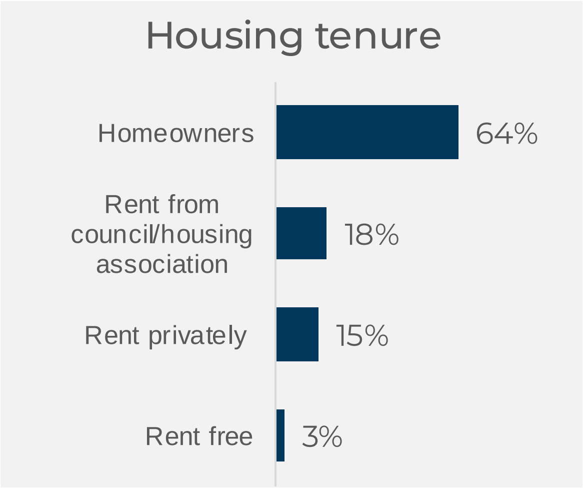


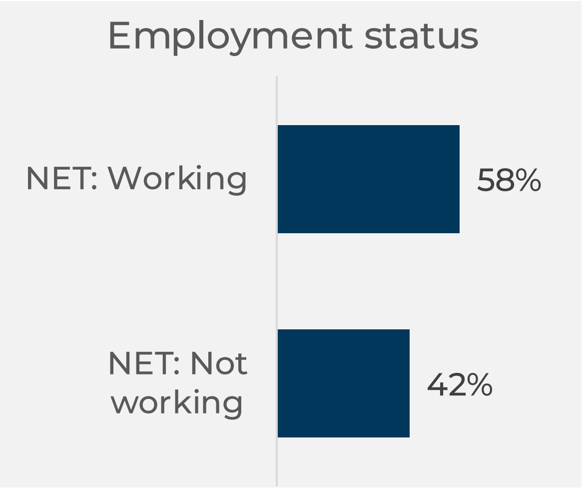












*Social grade is a demographic classification based on the occupation of a household's chief income earner. AB is higher or intermediate, managerial, administrative or professional; C1 is supervisory or clerical and junior managerial, administrative or professional; C2 is skilled manual workers; DE is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

AI Prompt Methodology

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Overview

The Online Omnibus survey included an open-ended question which 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 formulated another question that probes on 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 comes 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 comes 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"

Q1. What topics come to mind when thinking about your household water supplier?
Base: All respondents (1,235)

Top-of-mind mentions of water bills and water quality were higher this year than in 2023

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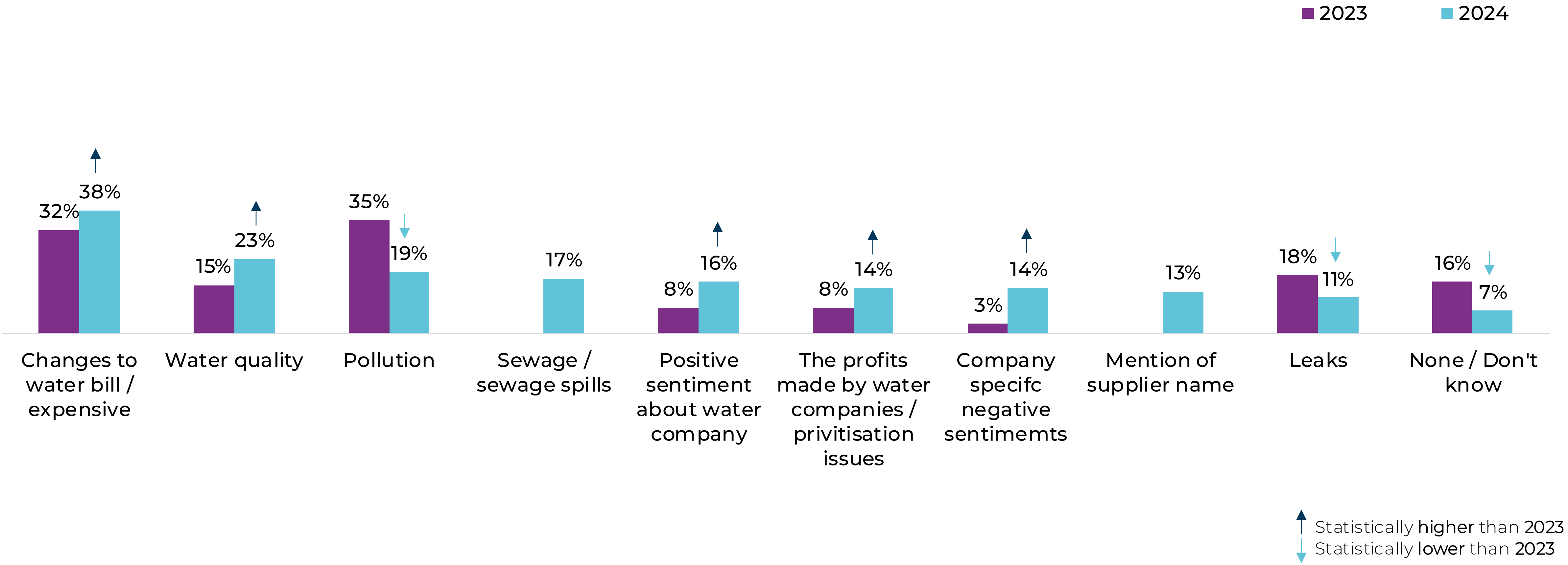
Unprompted thoughts about household water supplier coded
Followed up with AI prompt – Year on Year Comparison



Coded responses
Q1. What topics come to mind when thinking about your household water supplier?
Base: 2023 respondents (1,167); 2024 respondents (1,143)

Thank you

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