Smart Water Meters: Understanding attitudes and engaging with household customers

April 2025

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Foreword

Over the next five years, water companies in England and Wales are planning to install an unprecedented number of smart water meters. While this presents some challenges it also provides a great opportunity to engage with their customers.

Smart water meters have many benefits – they can help people understand and reduce their water use, and in doing so some people will be able to save money. They can also help to find leaks in homes and businesses as well as in companies' networks. Reducing leaks and water use will also help to improve the resilience of our water resources and to protect the environment.

CCW commissioned Yonder to understand people's views and expectations of smart water meters, and how they would like to see and interact with the information collected by the meter. One of the challenges for water companies will be how they can encourage their customers to engage with and act on the information provided by the smart water meter. This is likely to require proactive nudging and innovative approaches such as gamification and incentivisation. It is important that the information is relevant and framed in a positive way. Also, that it is displayed in a way that is visually appealing and easy to understand.

Those customers who don't see saving money as a potential or likely benefit will need support and encoragement as well as reassurance. As the cost-of-living crisis continues, appropriate financial support will be vital for many households.

We want the insights from this research to help shape companies' metering programmes and efforts to realise the full benefits that smart water meters can provide.

We would like to thank the water companies who supported our research by providing materials to be used in the discussions with customers.

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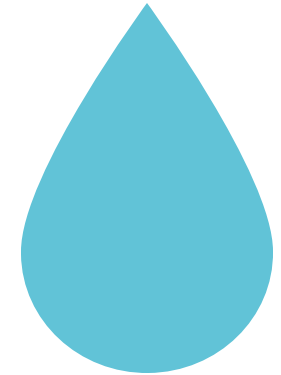
Background and research context

Research Context: This research builds on previous *studies to deepen understanding of household customer attitudes towards **smart water meters ahead of their rollout across England and Wales.

This research aims to uncover key insights and test hypotheses about how different groups engage with the concept of water smart meters - including:

- financially vulnerable individuals
- those with low numerical confidence
- neurodiverse individuals
- digitally disadvantaged audiences
- people with disabilities
- and unmetered customers on flat-rate bills.

Only 12 % of metered customers in England have a smart water meter installed.

https://www.gov.uk/government/publications/a-review-of-englands-draft-regional-and-water-resources-management-plans/appendix-a-smart-metering-in-draft-water-resources-management-plans

* Understanding consumer priorities – CCW 2023 and Understanding consumer priorities 2025 - CCW

**In the context of this report, a smart water meter records how much water is being used by a household and sends this information automatically to the water company at regular intervals through a secure communications network. Dŵr Cymru-Welsh Water will not be using this technology.

Research objectives

CCW aims to understand how water usage information from smart water meters can be best conveyed to customers, including consumer responses to smart meters and any takeaways or nuances for specific groups.

What are the preferred methods for receiving usage data (e.g., app, company web portal, letter)?

What is the most useful information to help customers understand and manage their water use?

How often do customers want to interact with this data? Identifying any variations in preferences, particularly for digitally excluded customers

How has the metering journey been for customers who have had a smart water meter installed? What compelled them to have one installed?

Have customer views changed at all after having their smart water meter installed? Has this influenced water use and conservation in their home? What drives this?

How can companies maintain customer engagement and influence water use behaviour change (e.g. saving water) pre- and post-smart meter installation?

An overview of our approach:

25 x 45-minute online interviews with a mix of people across England (n=21) and Wales (n=4) covering a spread of water-stressed, non-water-stressed areas all who are responsible for their household water bill.

Unmetered	Metered	Smart Metered
11	8	6

People aged 18+, across life stages and household compositions: including those single and living alone, single and cohabiting households without children/all children left home and those cohabitating with children living at home.

A mix of water providers in England and Wales: Severn Trent, Thames Water, Wessex Water, United Utilities, SES Water, Anglian Water, Northumbrian Water, South West Water and Hafren Dyfrdwy* (i.e. all 4 respondents from Wales).

We spoke to people across a range of household incomes and attitudes towards smart meters including eight respondents with a type of health-related or financial vulnerability and individuals with low digital or numerical confidence.
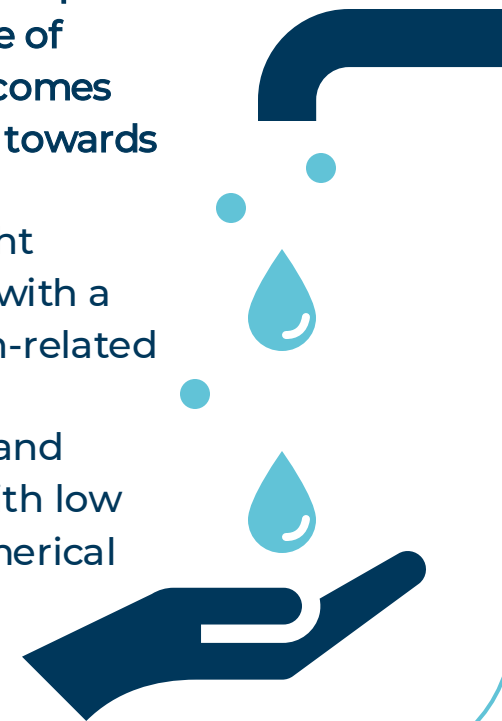
* Dŵr Cymru-Welsh Water customers were not included in the sample because the company will not be installing smart water meters during 2025-2030. Our research focusses on testing customer expectations of smart meter technology that records water use by a household and sends the information (which can then be shared with customers) automatically to the water company at regular intervals using a secure communications network. The technology that Dŵr Cymru-Welsh Water is proposing to install will not allow the same level of potential interaction with customers.

Ensuring everyone is represented:

We spoke to eight participants who had financial or health vulnerabilities (e.g. physical disabilities including visible and non-visible conditions), identified as neurodiverse or with a mental health disability, or were digitally disadvantaged, or low in numerical confidence.

Health vulnerability	Financial vulnerability	Digitally disadvantaged	Low numerical confidence
4	2	2	2

Financial vulnerability, digitally disadvantaged and low numerical confidence respondents all identified as experiencing circumstances that made them vulnerable in different categories.

Health vulnerabilities including visible physical and non-visible conditions (e.g. chronic pain, fibromyalgia, arthritis, mobility) and mental health conditions.

Less digitally confident including those who struggle to use technology and online interfaces to do daily activities and go online infrequently.

Financially vulnerable individuals including those on low household income, universal credit, and struggling to pay bills.

Less numerically confident individuals including those who find numbers challenging and struggle with checking bills and with calculations.

*This sample also included two financially vulnerable customers who were also from unmetered households, as previous research has found that hesitancy towards adopting a smart water meter may be heightened for this group due to concerns around water bill increases.

Based on CCW's 2025 Customer Priorities Report: There is broad support for smart water meters however there may be more resistance and scepticism among certain customer groups – so understanding the nuance in perspectives and considering a more tailored approach could be beneficial to boosting engagement.

Previous research - Hypothesis

The affordability of bills and changes to the price of water remain top of mind and discussions about potential savings from smart meters continue. Scepticism persists among those doubting the financial benefits, and who remain doubtful of remote meter readings.

Having their water provider switch their household to a smart water meter is considered important to about half (51%) of the population. However, there is criticism around unprompted smart meter installations and concern about unexpected bill increases.

Evolving theme: Discussions are evolving from viewing smart meters as a potential cost-saving tool to questioning their fairness and suitability for all households.

Questions

What are the main concerns around smart meters, and how do they vary by household type, financial situation, or confidence with tech? How can these be addressed?

How do past experiences with energy smart meters shape attitudes towards smart water meters? How can the customer journey for smart water meters be optimised?

How can engagement strategies and communications around smart meters be tailored to different groups to encourage behaviour change and water conservation?

Key Findings

Overall, most customers acknowledge that tracking water usage could help detect unusual consumption patterns, but engagement is likely to be passive.

Without proactive nudges and incentives from water companies, customers appear unlikely to monitor their usage regularly.

Key findings

Engaging with smart water meter data is a difficult ask if there is no engagement to begin with – building a stronger customer relationship starts with water providers **offering something besides water data and convincing the customer there are benefits for them.**

Overall, most customers acknowledge that tracking water usage could help detect unusual consumption patterns, but attention paid to, and engagement with data from smart water meters remains largely passive.

Household customers will likely need stronger incentives than solely the provision of water usage data to show more than a passive interest in their water meter data.

Water is perceived differently from energy and the expectation of savings is low, posing a challenge for engagement – further complicated by the limited sector trust and bill-centric communication.

Customers are more interested in checking their water usage against their past use, rather than comparing their household usage to other households.

Communicating through a digital-first approach is expected, but all touchpoints could be used to build trust and a more reciprocal relationship with water customers.

People want to see their water usage information expressed in monetary terms rather than in water volume (e.g. litres or cubic metres), the latter of which is less relevant and meaningful to customers and can also be more difficult to understand intuitively.

Customers perceive domestic water use in a different way to energy use, posing a challenge for potential engagement with household water consumption data

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Unlike energy, which people actively manage, water is seen as low-cost and essential, leading to a more passive relationship with their water usage and consumption data.

Most consumers don't see themselves as '*high*' water users and assume they are already managing their usage responsibly.

Unlike electricity, which is used consistently during colder months **water use is more variable and is tied to essential needs,** including hydration, hygiene, cooking, and wellbeing. Therefore, most customers struggle to anticipate how they might substantively reduce water use.

And even in the event of reducing water, only minimal financial savings are expected, reducing the perceived value of frequent tracking
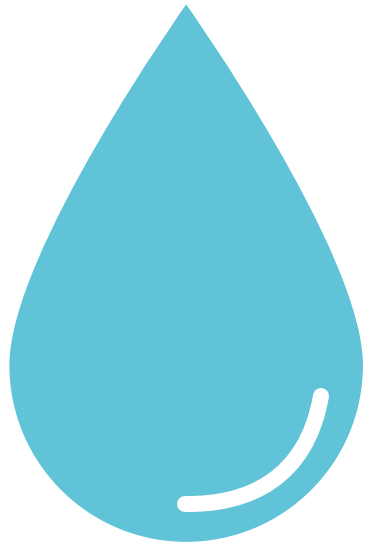
Whilst individuals are mindful of not *wasting* water (e.g. turning off taps) compared to gas and electricity and other essential services, water is considered a low-cost utility, making it a lower priority for monitoring.

Many customers believe their ability to reduce water consumption and lower costs is limited, making tracking less appealing

There is some appetite for increased control (e.g. visibility into water consumption before receiving a six-monthly bill), **but engagement appears likely to be reactive -** primarily focused on **identifying unusual spikes** rather than optimising daily usage.

Prior CCW research aligns with this sentiment, showing that a significant proportion of customers do not expect to make large savings on water or are uninterested in doing so – given the perceived limited financial impact on their water bill.

The exceptions are **financially vulnerable customers** who closely track their spending across utilities and **environmentally conscious** consumers who already prioritise water efficiency.
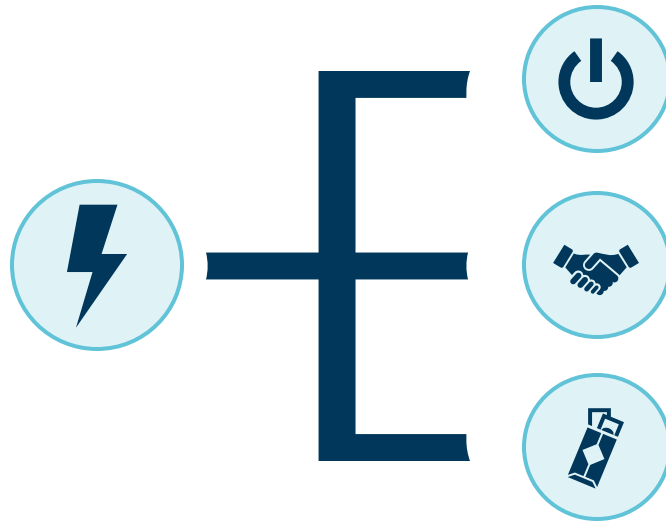
Furthermore, the relationship with water providers is seen as purely transactional, compared to other utilities where there seems to be more 'added value' and more frequent contact

Expectations for customer relations and the 'perks' of being with a certain provider have been set by other utilities/services categories.

Energy and Telecoms providers utilise deals, offers and partnerships to keep customers engaged and incentivise them to 'stay'

However, customers have a more functional and transactional relationship with their water provider – i.e. does not go beyond expectations of providing water as an essential utility:

- There are no 'rewards', benefits or partnership deals or offers (e.g. 'free energy hour')
- Water companies have limited direct interaction with customers beyond billing – which can be relatively infrequent (e.g. twice annually for some).

As a result, water account management can be more **passive and lack engagement**, than with other services. So, driving engagement with smart meter data will require proactive nudging, and a shift in the customer relationship management approach.
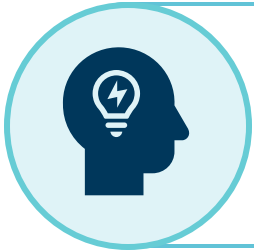
Water usage, billing, and account management are low-priority 'life admin' tasks, so minimising time and effort for customer engagement will be key

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Across the board there is a preference for information to be presented in ways that prioritise **simplicity and directness.**

Make it make sense – Show *and* **Tell with the headlines up front:** Customers overwhelmingly prefer information to be presented in the simplest possible format, ideally through visual iconography, to eliminate the need for interpretation (active reading).

Use customer-friendly language to make the data more meaningful – Money first: Units displayed as monetary costs (£) are significantly more relevant and meaningful to customers than volumetric data (litres or cubic metres).

Customers don't actively compare their water usage to others: The most meaningful comparison for customers is personal past usage rather than benchmarking against similar households. Where household customers have shown interest in tracking data, past usage trends and behavioural spikes take precedence.

Digital and numerical confidence does not significantly change engagement behaviour – the picture is consistent across all segments

Customers with lower digital and numerical literacy **do not have fundamentally different expectations; they simply take longer to adapt to technology.**

Navigating bills and utilities online can be challenging, and for some less tech-savvy consumers it may take more time to find their way around an online environment: Some may struggle with certain digital interactions (e.g. navigating webpages) and this can be a barrier to adoption and engagement with smart water meter data.

To make this more accessible for those with less digital experience water providers could consider providing clear and prompted guidance, for first-time users who may be less clear on where to click (e.g. with a virtual tour / guided walk-through). This could help aid adoption and engagement with smart water meters and usage data for those who are not digital natives.

Whilst digital interfaces can be seen as complex, apps are seen as more 'intuitive' and easier to use

Within the sample studied, many of these customers preferred engaging via mobile apps, which they found more intuitive and user-friendly than websites and traditional paper-based communication.
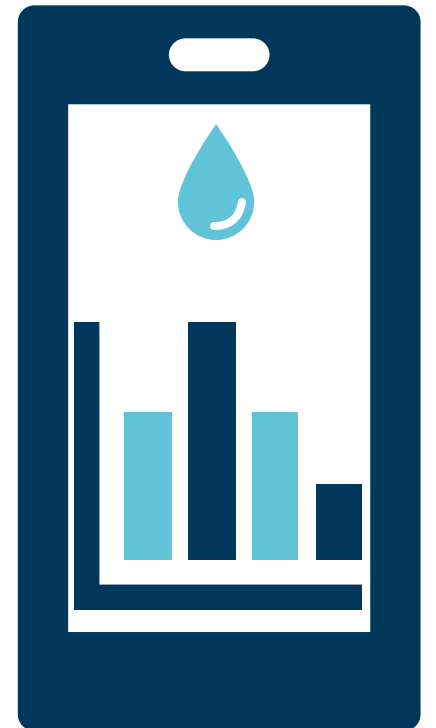
Expectations about smart water meters
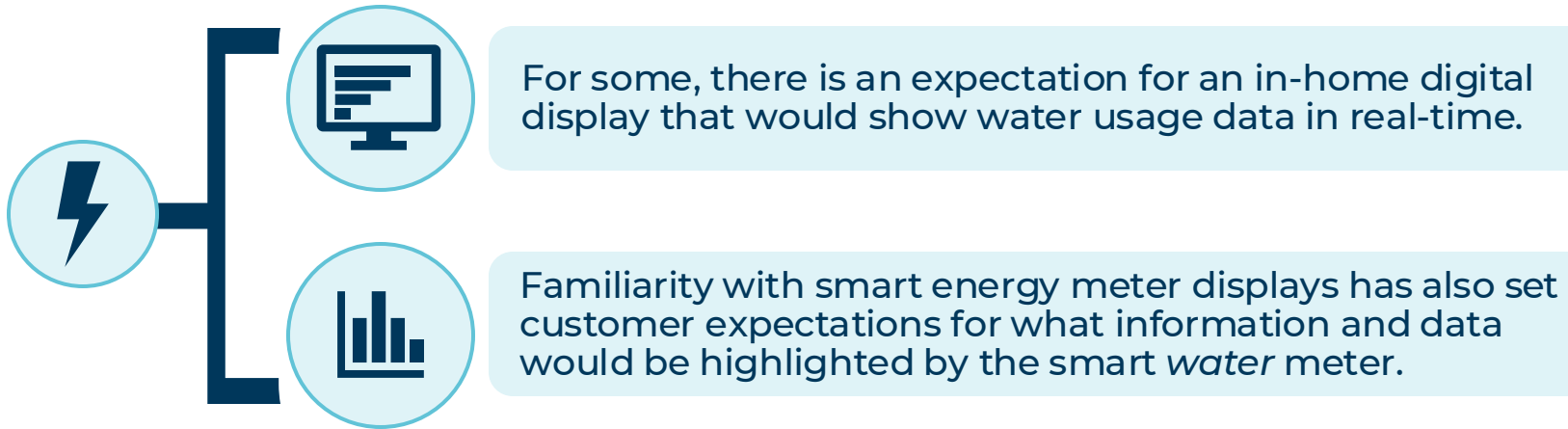
Overall, there is widespread acceptance of smart water meters among both metered and unmetered customers.

However, some scepticism exists regarding the extent to which smart water meters deliver tangible cost savings to consumers.

Overall, customers who already have a water meter are largely receptive towards smart water meters and their associated benefits

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Awareness and expectations of smart water meters have been shaped by customers' familiarity with personal tracking tools in other sectors such as smart *energy* meters which for some skews their perceptions.

Perceived benefits may differ by region and customer type:

For some, there is an expectation for an in-home digital display that would show water usage data in real-time.

Familiarity with smart energy meter displays has also set customer expectations for what information and data would be highlighted by the smart *water* meter.

- In regions where water leaks outside of the home are perceived to be common, smart water meters are intuitively associated with leak detection and water conservation.

- While some customers acknowledge the potential for cost savings, the primary perceived benefit is increased **control and visibility over water usage.**

Those who already have and actively use 'smart' tracking tools to manage utilities and services may be more receptive to adoption but may have higher expectations.

Both metered and unmetered customers are open to smart water meters and acknowledge their *potential* benefits

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With near real-time updates and proactive leak detection drawing appeal, these benefits are recognised to be unique and specific to 'smart' metering technology – thus, allowing for greater visibility and household budget control.

"It could say like £4 used today. And I don't know if that could break down further so I could see between this hour and this hour, a bar chart or pie chart of your water use, just something easy so you can see where a load of water's being used."
Unmetered, aged 45-54, Male, England

"I can see the benefits though because if you're getting a live update of how much water you're using, you can see there's a leak. So that's the main benefit, as well as having an accurate bill all the time."
Traditional Water Meter, aged 55-74, Male, Wales

"They're certainly easier to use. With my gas and electric meter, at the end of each day, I can literally press a button and see how much of each I've used. You do tend to regulate your use based on that because you can set a budget on it for example and try and stay within the budget you've allowed for each day or each week."
Traditional Water Meter, aged 55-74, Male, Wales

Cost savings emerge as the top-of-mind benefit to metered and unmetered customers, but most <u>do not</u> realistically expect these to be at all significant

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Of the benefits associated with smart water meters, cost savings are among the most compelling – however, the perceived financial impact varies depending on customer type (i.e. metered or unmetered) and existing billing structures.

Metered customers already feel they "pay for what they use" – even if it is on a six-monthly billing cycle.

- For these customers, the benefit lies more in the perception of control that smart water meters can provide.
- Giving greater transparency over water consumption (e.g. for monitoring for household budgeting and account management) but not necessarily notable cost reduction.

Unmetered customers and some financially vulnerable customers: may already be on a reduced water bill or social tariff so are **sceptical of the potential financial benefits of moving to a smart meter**.

- For these groups, they may rely on the predictability of their lower water bill and may have concerns about their water bill going up which can be a barrier to more proactive adoption and installation.
- These customers may need more reassurance and convincing of the potential benefits to them.

*Exceptions exist for certain households such as those unmetered households with more bedrooms than occupants, or those that have above average rateable values, as these customers are more likely to gain from switching to metered charging.

Leak detection is seen as an appealing benefit of smart water meters for all customers and ties to the 'added value' over a regular water meter

Leak detection is a lesser-known but widely understood benefit of smart water meters:

- For most customers supporting proactive leak detection is a benefit unique to smart meters (i.e. over standard water meters), helping both individuals and water companies minimise water loss and wastage.

- This association is largely driven by increased media attention on leaks and infrastructure issues in recent years.

For families with young children and home-owners leak detection may be an appealing benefit in terms of offering a tool for greater visibility and home security.

Customers in perceived **high-leakage areas based on what is seen outside of the home or those who have personally experienced leaks in their home** see strong value in smart water meters as a tool for identifying and reducing water wastage.

"I'd want to know about a leak. The sooner you act the less damage there is." - **Unmetered, aged 18-24, Female, England**

However, focusing communication solely on leak detection carries risks

Many customers operate under the assumption that, in most cases, there are no leaks in their home – making it less relevant as a benefit for the most part.

For others leak detection may be seen as a benefit primarily to the water company rather than for customers themselves, **making it less compelling as a reason to engage, especially if communicated in isolation.**

Whilst leak detection is a useful feature of smart water meters – it should be considered and communicated more as a co-benefit rather than the sole reason for adoption.

"I think the leak one's quite appealing to me because I've had that in the past...you'd be losing money and it has an impact both internally and to those that live above and below you." – **Traditional Water Meter, aged 25-34, Male, England**

'Paying for what you use' and leak detection benefits appeal but are *more* compelling to specific groups so targeting communication of benefits should be considered

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Leak detection and 'pay for what you use' billing can appeal but these benefits are *more* compelling to certain households.

However, for many, these are not compelling enough to prompt installation.

"I'd like it [water meter data] to be available through an app where you can act straight away, you know if there's a leak at home or something else. We've experienced a burst pipe outside. Luckily, we spotted it quickly, but if I wasn't able to, that would have been running for a long time."
Smart metered, aged 35-54, Male, England

"Well, I'm presuming it will track your consumption. It would also obviously be able to flag up any leaks."
Unmetered, aged 35-54, Female, England

"I knew about tracking water usage. I wouldn't generally associate it with helping me save 'Pay for what you use'. I mean I think we would only ever really pay for what we use."
Unmetered, aged 25-34, Female, England

Water conservation in terms of reduced waste is widely accepted as a relevant goal, however, the framing of 'water efficiency' and responsible water consumption can be challenging

The goal of reducing water waste is universally appealing – however, the framing of this message requires tact and consideration as most households do not view their current water use as 'wasteful'.

Customers view reducing water waste and being water efficient as being subjectively different:

- While everyone values responsible water use, the motivation to further improve efficiency can vary, especially for those who *already* feel they use water responsibly.

- So, communication should consider avoiding overly conflating the two concepts - **messaging must be carefully positioned to recognise customer priorities.**
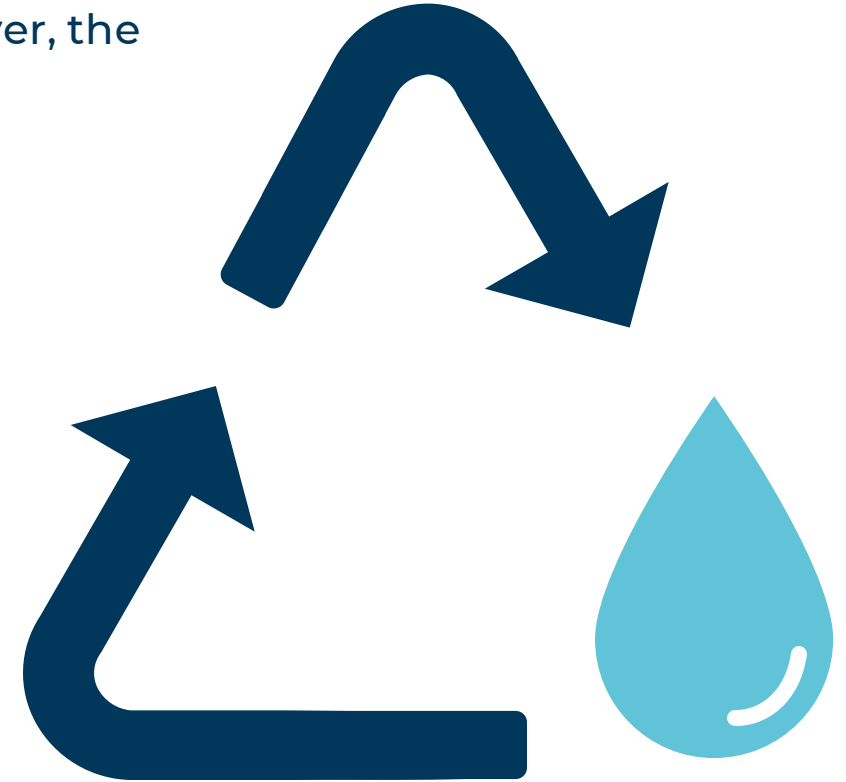
Even among existing smart water meter customers who had asked to have a smart water meter installed, active engagement with usage data remains low

Some existing smart water meter users were initially drawn to the notion of cost-saving however actual engagement appears low

Customers primarily see the value in exception-based monitoring - checking data only when prompted by an unexpected spike in usage rather than through regular interaction.

For these customers, leak detection and receiving updated information on household water usage enabled through smart metering is appealing – however the frequency and level of engagement are low, and usage data is checked only around billing periods rather than proactively.

For financially vulnerable customers – engagement with metering data may be **slightly more proactive**,

- the increased visibility and awareness of their usage imparts a degree of control and a sense of security – empowering them to make decisions that influence their water bill.

For many, smart water meters and other 'smart' tracking tools (e.g. mobile banking apps, energy tracking apps) **provide reassurance and a sense of control** and are seen as effective and user-friendly ways to **proactively manage household finances and resources**, even if direct cost savings are not the primary driver.

"I don't expect to save money, but if there was a spike in usage, I'd want to know."

Unmetered, 25-34, Male, England

Existing smart water meter customers described the installation process as smooth, simple and non-intrusive; however more could be done around the installation process to drive engagement

Existing smart water meter customers who had asked to have a smart meter fitted have described the process as **simple and easy** with **cost savings as the primary reason for installation**, especially with water affordability as a key customer priority.

Pre-installation: The cost-saving benefits appeal to those on a meter

Customers are drawn to the cost-saving benefits of smart water meters – with certain households more likely to prompt installation – smaller homes, those living alone

Installation: Smooth and seamless causing minimal home disruption

The water supply is briefly turned off, but as installation occurs externally, most customers experience no inconvenience unless unexpected issues arise.

Post-installation: Engagement with data can be limited

A more proactive approach to onboarding at all stages including informing customers **'how to' engage with their usage data** to demonstrate **benefits post-installation** may boost engagement.
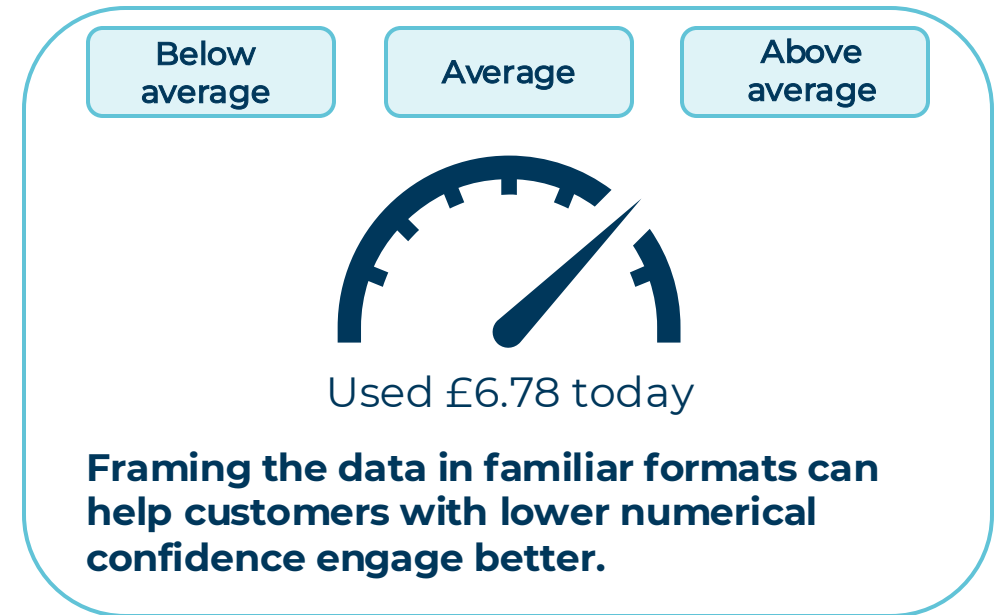
Existing smart water customers struggle to maintain interest in their water usage data; more could be done to make it more engaging and intuitive

The preference for visual, simplified data presentation is clear:

- Customers prefer **intuitive visuals** that utilise existing billing formats of communication
  - resembling their water bill but with more up-to-date, accurate usage information shown in a more engaging way,
  - intuitive framing such as a simple dial colour-coded based on usage over detailed consumption reports.

- Other customers referenced familiar utility data apps, such as Octopus Energy's and Utilities Warehouse, as effective examples of data visualisation.

| Below average | Average | Above average |

Used £6.78 today

Framing the data in familiar formats can help customers with lower numerical confidence engage better.

"When I get my bill, it shows me the usage really well...So what helps me is to say this is what you used versus last three months or last year... That's what helps me." **Smart metered, 25-34, Male, England**

How water customers want data presented

Digital channels, particularly apps, are becoming the standard for managing utility consumption.

Consumer expectations have been set by other categories and inform their perceptions of the user experience including online tracking and monitoring features for utility consumption management

Digital channels, particularly apps, are becoming the standard for managing utility consumption

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Ensuring a clear, simple user interface that aligns with consumer expectations of intuitive, user-friendly interactions is key.

- Engagement is improved when ease of access is prioritised and there is a consistent preference for apps over websites / online portals.
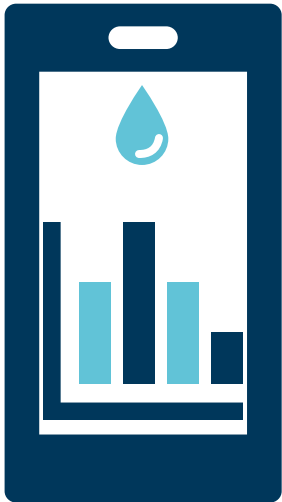
Apps signal smooth and 'stress free' and frictionless access to personalised tracking data

- Compared to online portals, apps are seen as a shortcut to personalised household water usage insights, bypassing complex log-in procedures and more general 'water provider comms' thus making tracking easier and more intuitive.

- While digitally disadvantaged groups may take longer to adapt to new technologies, apps are still perceived as more intuitive than online portals.

- *In our sample, even individuals with lower digital confidence were smartphone users, reinforcing the growing expectation that water data should be accessible via mobile apps.

Digital is dynamic, interactive and user-centric vs. paper-based which is associated with billing and a one-way relationship with water providers

Apps and online portals align more closely with consumer expectations for 'smart metering' technology – with a preference for online interfaces even among the digitally disadvantaged group

Apps and online portals provide a dynamic and accessible platform for engaging with meter data giving customers 'live' updates allowing more accurate tracking

- **Ease of access**—can be checked anytime, anywhere on the go with minimal effort.

- **Perceived real-time updates (e.g. every 24 hours)**—users expect information to be dynamic rather than static.

- **Engagement-friendly**—more interactive, visually engaging, and user-centric.

Apps and online portals signal 'information at your fingertips' and can help customers experience the benefits of having a smart water meter better

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"Well, if I've got the app, it should be quite obvious from the app, if it's the same as the energy companies, you get an app and it shows your usage. So, you'll be able to see and track." **Traditional Water Meter, aged 55-74, Male, Wales**

"My understanding is that I'd have better access to my water consumption, which means it's now in my pocket. Of course, there's like some kind of application or there is a web-based stuff that I can log on to using my mobile phone so wherever I am, I can log into the app or the website and see my live consumption." **Traditional Water Meter, aged 35-54, Male, Wales**

"I'd like it [meter data] to be available through an app. I'd like it to give notifications and updates on the app as it's more real-time...if there's a leak at home or something else. If I had an app, I'd get a notification that there's some kind of continuous use in the house."
Smart metered, aged 35-54, Male, England

Given the existing relationship dynamic, many customers expect communication from their water provider to be bill-related so paper-based formats may lead to lower engagement

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Paper-based communication is less dynamic, more formal and more likely to lead to 'passive engagement'

Letters are more strongly associated with billing and formal notifications, they feel less dynamic and risk blunting the benefits of having a smart meter installed in the first place (i.e. not faster than existing communications).

More likely to be passively received rather than proactively used for tracking - so it can be difficult to 'nudge' customers to action and engagement.

"If I got it in a letter, it's not environmentally friendly. I'm going to end up disposing of it, and I might not read it again. But if I saw it on an app, I know I can come back to it and it's something I can review and look at." **Traditional Water Meter, aged 18-24, Female, England**

"Letters are just silly these days. They're going to disappear eventually." **Unmetered, aged 35-54, Male, Wales**

Using simple icons and intuitive design can help minimise text and the cognitive load required for customers to engage with usage data

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Keep it simple and use icons to reduce the effort needed for customers to engage

SMART WATER METER MATE: 3 h ago

Your monthly water usage: You've spent £2.64 this month on water with a daily average of 0.8p.

Use visual indicators such as arrows and icons to summarise key points and indicate changes to make data instantly understandable.

Less is more: Deliver information in bite-sized chunks to aid interpretation and aid navigation, example above

Avoid technical jargon and explain what the data is showing in simple language (i.e. layman's terms) to ensure that the information feels accessible for all users.

Minimising text and providing clear, digestible insights ensures easier interpretation.
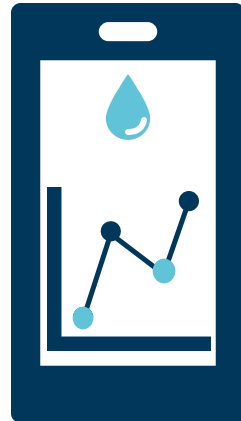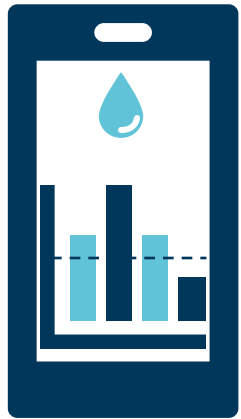
Graphs can contextualise use and summarise trends, adding credibility and making water data more visually engaging and easier to interpret

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However, choice of graph is important- bar graphs are more intuitive and easier to interpret than line graphs, which can appear complex and less engaging.

- **Colour contrast between bars improves readability** and helps differentiate data points in a clear and intuitive way.
- Depicting a household's 'average' water usage helps put data into perspective.
- **Bar graphs help identify trends** but people can quickly reach saturation point where detail heavy.

"Line charts almost take me back to Chris Witty and the Covid stuff – far too heavy"
Traditional Water Meter, aged 25-34, Male, England

Do not drain the brain: Use signposting and call-out boxes to highlight key information

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Providing a written summary highlighting key changes such as significant increases or decreases helps customers quickly understand trends without needing to analyse complex data.
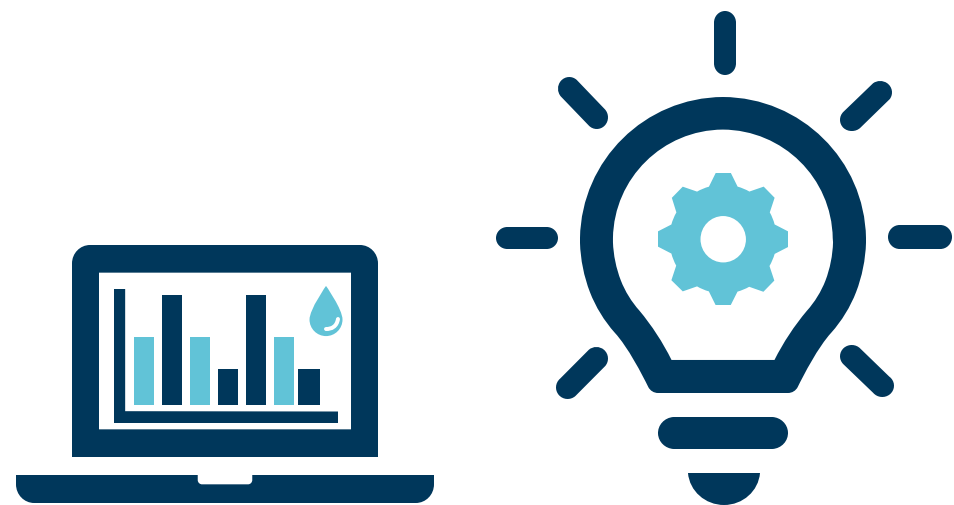
Water usage overview

Your average daily water usage in November was

198 Litres

↑ On average you've used 23% more water per day than you did in October

Bill me up to date

Click here for your latest bill

>

View billed usage and trends

>

Framing data and information in familiar formats can help customers understand information in a more intuitive and effortless way


Framing the data in familiar formats can help customers with lower numerical confidence engage better:

- Using a consistent colour scheme can indicate positive (e.g., green for efficiency) vs. negative (e.g. red for excessive use) trends.

Contextualising water use is important but standalone volumetric conversions with real life equivalents are less important:

- Whilst these are not disliked – customers including financially vulnerable groups, show a preference for all units to be in monetary terms with the option to switch to litres.
- Water conveyed as cubic metres was the *least* helpful and intuitive for most.
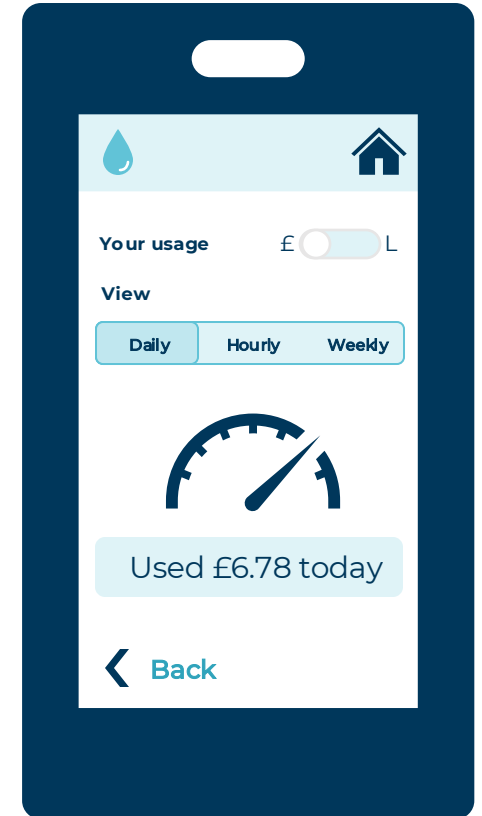
Customers find comparisons against personal past usage more meaningful than comparisons with 'similar households' or external benchmarking

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Make it personal to drive engagement:

Water efficiency messaging is harder to land as customers do not actively compare their water use to other households.

Customers don't compare their water usage to others; they focus on their own past usage. Interest in usage data is driven more by personal trends and spikes than by comparisons to similar households.

The 'similar household' comparison has mixed relevance—while some find it useful, others question its applicability and do not aspire to be more 'water efficient'.

Customers want to track their own usage rather than benchmark against others; for example, 'similar homes'.

Frame messages around water conservation more positively and constructively– avoid shaming people

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Focus on wins rather than losses— helping users understand optimal consumption rather than focusing on shortcomings.

Defer to neutral or constructive framing and tone of water use messaging even when usage has increased

Water usage overview

Your average daily water usage in November was

198 Litres

⬆ On average you've used 23% more water per day than you did in October

✓

Positive reinforcement drives behaviour change

—

framing improvements as success and cost savings encourages continued engagement

Water efficiency education should be a supplementary, not central, feature

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Avoid information overload - keep the portal focused on smart water meter insights

Embedding water efficiency education directly within usage data platforms may not be essential— the primary focus should remain on personal usage

However, **gamification elements such as quizzes, challenges, and incentives can be effective in encouraging responsible water use**.

Optional links to tips, educational resources, or personalised recommendations **allow users to explore efficiency improvements at their own pace.**

Do not drown people in information, streamline essential usage information and allow them to dive deeper upon request.
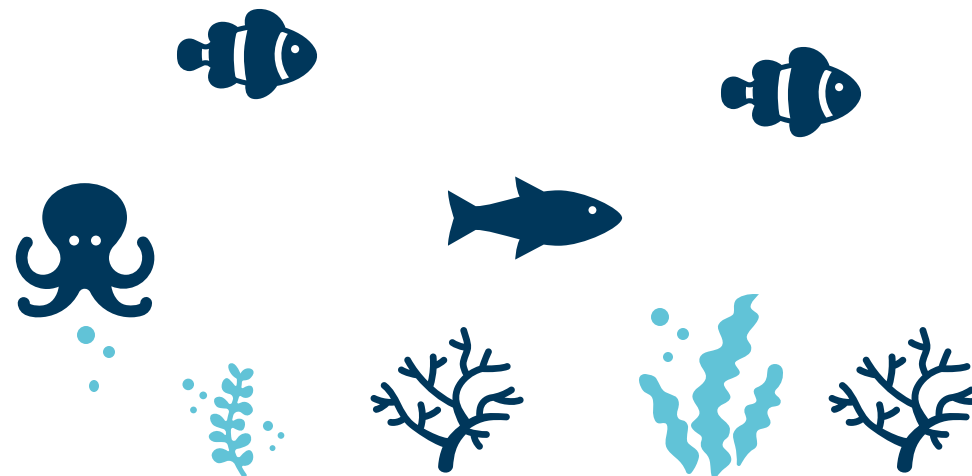
Dos and don'ts for communicating smart water meter usage data

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There is a preference for information to be presented in ways that prioritise **simplicity and directness.**

Give the people what they want –use signposting and call-out boxes for key information (i.e. water usage /time-period, £ / L); offer deeper insights on demand

Graphs add credibility – but keep the information streamlined and visual where 'bars' are seen as easier to interpret than 'lines' and tables

Avoid information overload keep the online portal focused – simplify the user interface and avoid overcrowding

Comparisons are useful to contextualise data when compared to previous month / years usage but 'similar households' is less relevant

Frame messages around water conservation more positively and constructively– avoid shaming people and use recognisable formats where relevant

Colour and contrast can make the data easier to read, the user interface more engaging and the data appear more accessible

Summary of findings

Getting customers to engage with the data requires a significant shift in the current relationship dynamic with water providers

Access to consumption data may prompt small changes in usage, but consumers primarily see data as a billing support, not a water efficiency monitor.

Show empathy and customer understanding to build trust and boost engagement within communications

Move beyond a one-size-fits-all approach – Consumers respond differently based on their circumstances. Messaging should be segmented to increase relevance and appeal:

In general, water efficiency messaging appears challenging to land but **increased control over bills** and **helping water companies conserve (not waste) water** does feel relevant.
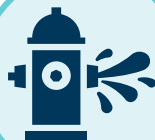
Customers in leak-prone areas and home-owners may be more receptive to the leak detection benefits of smart water meters which could appeal during pre-installation letters and communications.

Financially vulnerable and unmetered customers – Address cost-saving potential with tailored insights – reassure them of lowest bill guarantee promise if opting to trial, emphasise potential savings through switching – build credibility with stats based on savings from other households within their postcode.

Ongoing engagement requires innovation with nudges, gamification, and incentives to keep customers coming back

Energy providers, financial technology platforms and other utility sector services incentivise customers to stay through active, ongoing and rewarding customer retention efforts that **create a reciprocal relationship for their end-users and drive engagement.**
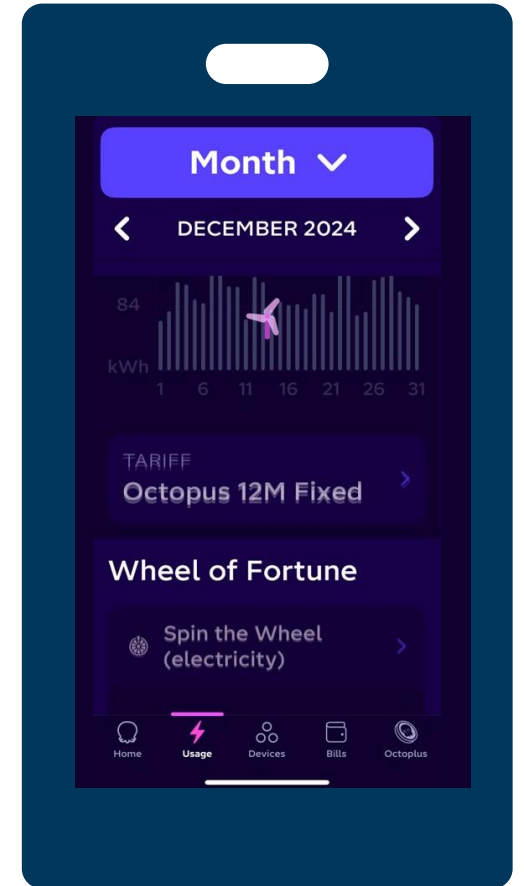
Over time this builds a stronger customer-provider relationship making customers more receptive to future communications and engagement efforts.

Energy providers incentivise customers to engage with their platform through gamification within their user experience e.g. 'Octopoints', 'spin the wheel', and offering customers tangible benefits such as Avios Points and opportunities to integrate insights with wider household utility management tools such as OVO Energy.

Retail partnerships and rewards programmes: Utility companies and financial technology platforms utilise cross-sector partnerships with retailers and other entertainment / service providers to activate cashback rewards, discounts or gamified savings challenges which can drive and reinforce behavioural change.

Octopus is hands on with their customers and it's working

Over time this builds a stronger customer-provider relationship making customers more receptive to future communications and engagement efforts.

"I'm thinking of Octopus Energy. I think they've partnered with Greggs or something like that. So, you get a free coffee."

Smart metered, aged 25-34, Female, England

"I wouldn't say it helps me save money but it shows me what I've used the offers where you can get free energy for a couple of hours if you opt in."

Smart metered, aged 25-34, Male, England

"Every time you send them a reading you can spin the wheel and get Octopoints which when they mount up can give £10 off your energy bill."

Unmetered, aged 45-54, Female, England

"Something that Octopus also do is like the free, like free energy hour. Like they'll occasionally just like WhatsApp you for example, and be like, it's free, free electricity."

Unmetered, aged 25-34, Female, England
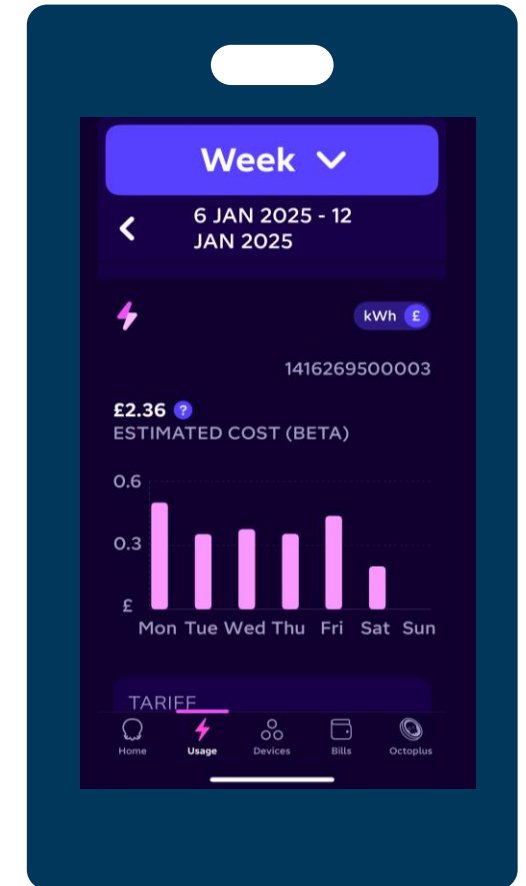
Consider partnering with trusted authorities in the 'money saving' space

How to build trust and drive engagement?

- Leverage strategic partnerships to enhance credibility – Given the low trust in water providers, collaborate with trusted third parties to amplify messaging.

Potential partners include:

- Moneysaving Expert (MSE) – A credible voice on financial efficiency, helping position smart water meters as valuable for cost-conscious consumers.

- This could drive appeal for financially vulnerable groups as well as sceptical water customers who do have hesitations around bill increases.
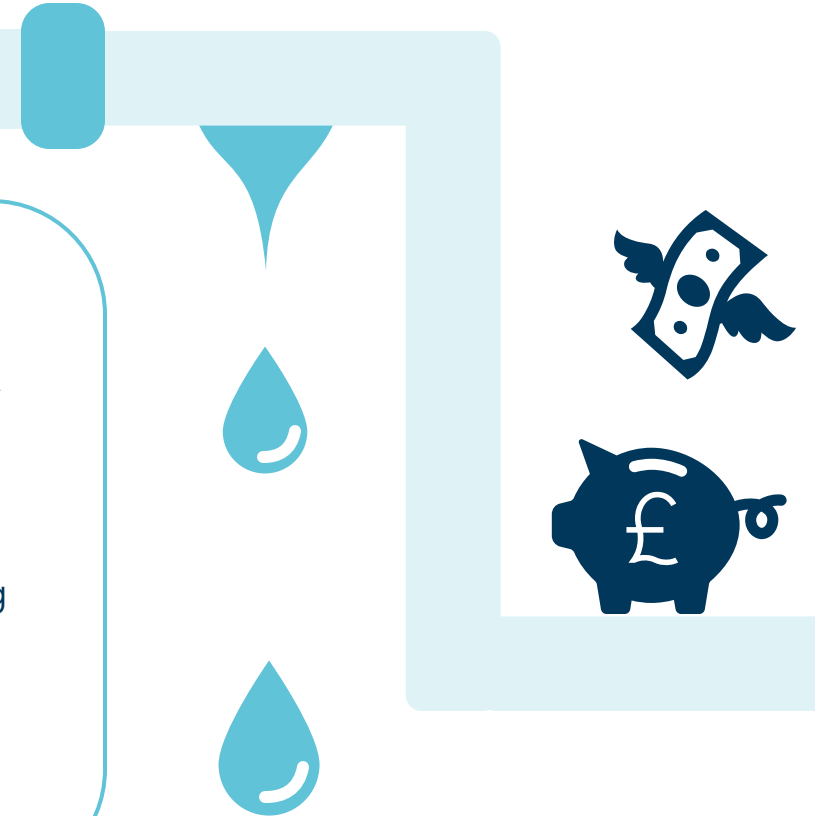
Building a stronger customer relationship means being more positive, making the first move and giving customers a reason to trust their water provider

First impressions matter – make every interaction count

- Address engagement from the first interaction – customers need a compelling reason to engage with their data.

- The first login experience should emphasise clear, immediate value, reinforcing why smart water meters matter to them personally.

- Consider other ways to create a more reciprocal relationship with customers offering mutual benefit.

- Leverage specificity to shift attitudes – generic messaging on benefits will not be enough.

- Data-backed claims, particularly around cost savings, must be integrated to resonate with different customer segments.

SMART WATER METER MATE: 6 h ago

You are saving on your water bill: You've used 10% less water this week compared to last week and saved £3!

Positive reinforcement and cost saving messages can help — Overcome scepticism by positioning smart water meters as tools that empower customers, rather than just benefiting water companies.

Getting customers to engage with smart water meters will take more than making the data engaging – but requires a shift in the current relationship dynamic

Given the current relationship, customers have expectations for communications from their water provider to be about bills and trust in the sector is low

Customers want more 'added value' from their service providers – the customer relationship should go beyond just billing.

- **Smart meter roll out could be used as an opportunity to rebuild trust in water providers**, restore their reputation and rebuild customer relationships

- **Every touchpoint should be utilised as an opportunity to bring value to customers and increase the likelihood of future engagement.**
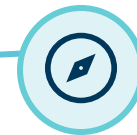
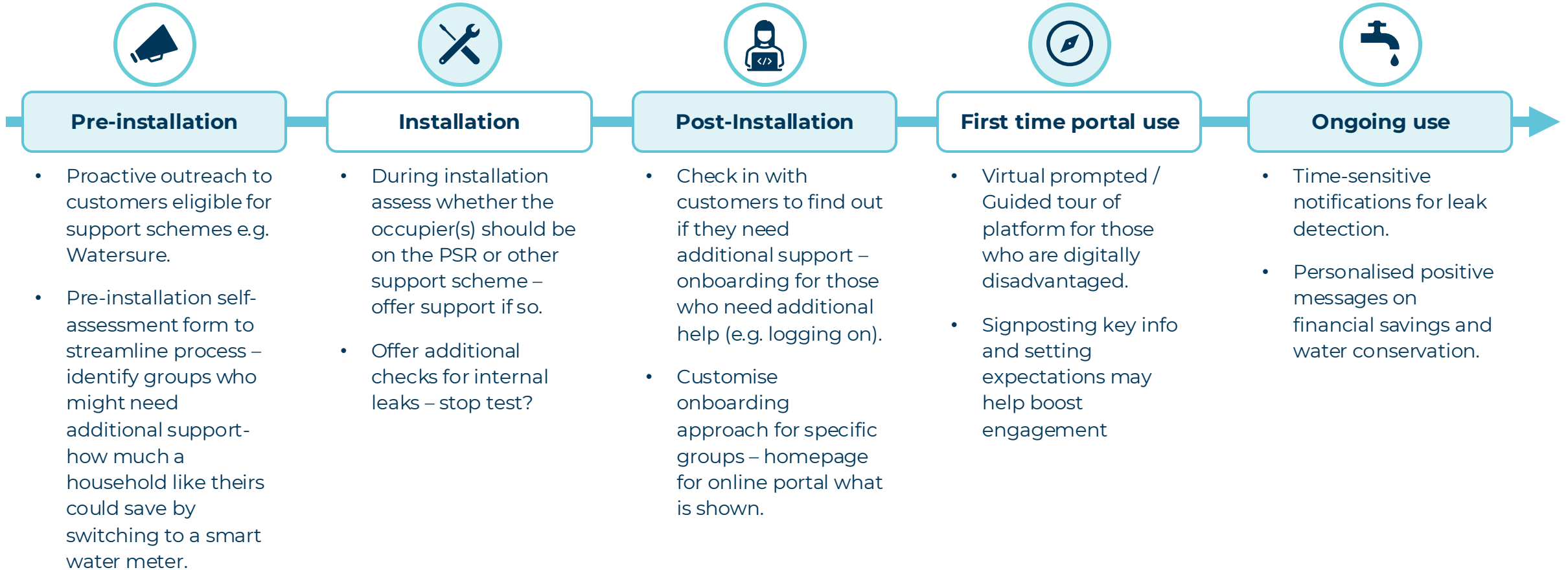**Pre-installation**　　　**Installation**　　　**Post-Installation**　　　**First time portal use**　　　**Ongoing use**

The smart water meter roll out could used as part of a wider strategic roadmap that prioritises customer relationship building with household customers

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An example of what this could look like: based on a customer who may be financially vulnerable

Pre-installation	Installation	Post-Installation	First time portal use	Ongoing use
• Proactive outreach to customers eligible for support schemes e.g. Watersure.	• During installation assess whether the occupier(s) should be on the PSR or other support scheme – offer support if so.	• Check in with customers to find out if they need additional support – onboarding for those who need additional help (e.g. logging on).	• Virtual prompted / Guided tour of platform for those who are digitally disadvantaged.	• Time-sensitive notifications for leak detection.
• Pre-installation self-assessment form to streamline process – identify groups who might need additional support- how much a household like theirs could save by switching to a smart water meter.	• Offer additional checks for internal leaks – stop test?	• Customise onboarding approach for specific groups – homepage for online portal what is shown.	• Signposting key info and setting expectations may help boost engagement	• Personalised positive messages on financial savings and water conservation.