

**Navigator**  
View things differently

# Smart meter longitudinal research

A collaborative shared learning project

**South Staffs Water: Phase 1**



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# 01

Background,  
objectives &  
method







# Background & approach outline

The water industry is rolling out smart meters across its customer base in AMP8. Companies will have more customer information on usage than ever before, enabling a broader understanding of water usage behaviours and patterns.

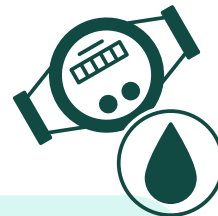
Through a collaborative programme we aim to carry out research that complements and helps make sense of bigger smart meter datasets, with insight on customers' perception, adoption and use of smart meters.

- We will illuminate the early consumer experience of smart water metering using ethnographic principles to understand the customer journey at an individual household level
- We will, through the collaborative nature, provide a comparative analysis of programmes

## Longitudinal design (1 year) following the journey

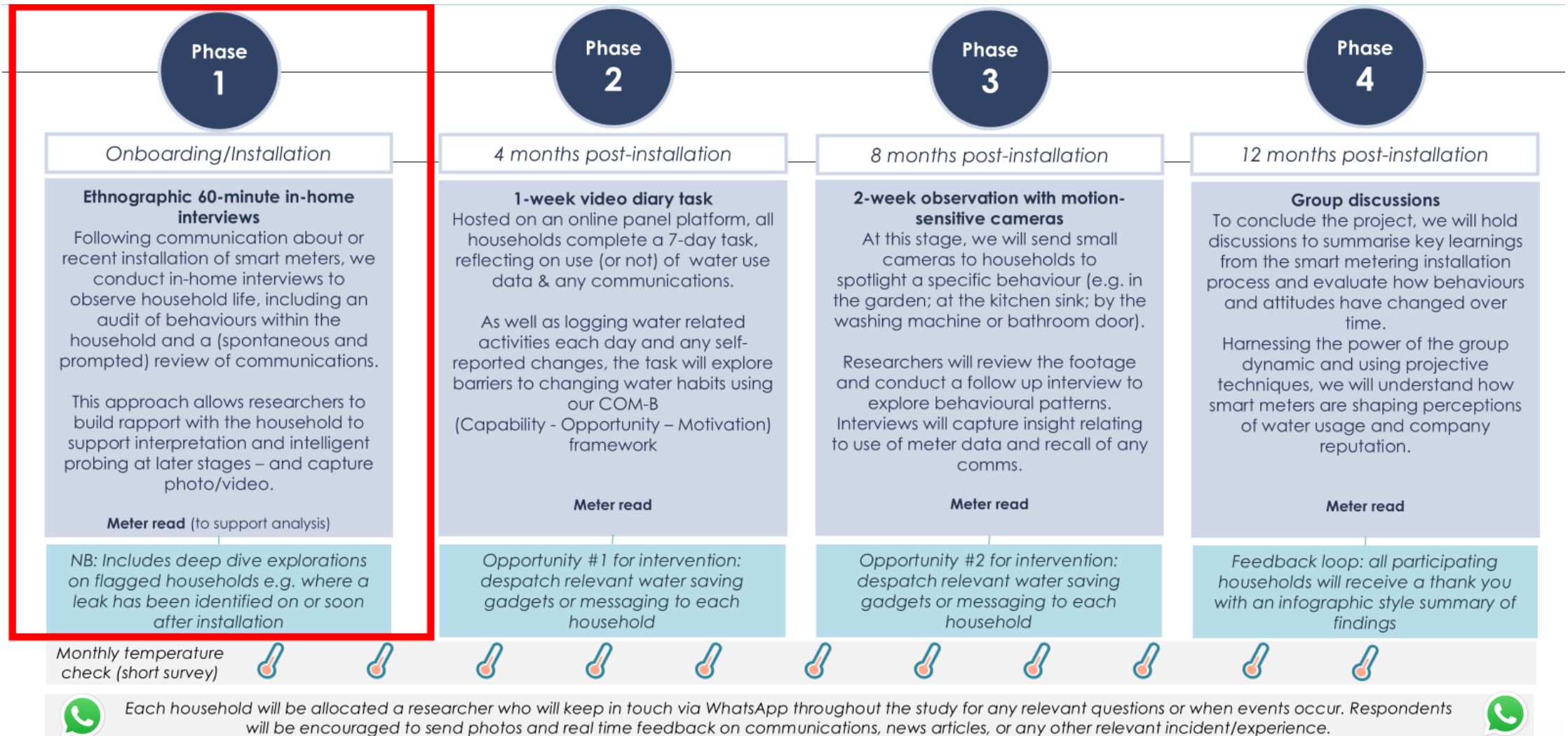
INSTALLATION	NORMALISATION		REFLECTION
<p>What attitudes, beliefs, experiences and lifestyles impact a person's or households' decision to embrace or resist smart meter technology?</p>	<p> What happens once a home is 'smart'?</p> <p> What behaviours change? Why? Do the changes last?</p> <p> How does this vary by household (or customer segment)?</p> <p> Variation by season?</p>	<p>Response to company-specific interventions or smart meter data</p> <p>Information usage? What platform/format works best for sharing data?</p>	<p>How does the transition to smart water meters impact consumer perceptions of their water company?</p>

 Response to company comms? What style, frequency or specific messaging has most impact?



As SSW have not started their smart metering journey yet, the programme focuses on understanding early experiences of moving to a water meter

# This report focuses on findings from Phase 1 of this research



# Phase 1: Qualitative sampling and objectives



## Method:

60-minute in-home interviews to observe household life, including an audit of behaviours within the household and a review of communications.



## Sample\*:

18 households who had their new meter installed between February and March 2026.

Throughout this report, qualitative insights are denoted by the icon:



## Objectives



Allow researchers to **build rapport** with the household to support interpretation



**Determine household baselines** to assess how household experience of having a water meter and its impact evolves over the next 12 months:

- ✓ perception of South Staffs Water
- ✓ water using attitudes and behaviour
- ✓ Immediate impact of having meter installed



Capturing photo and video evidence to support this



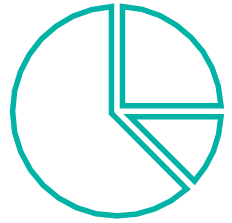
Gain insight into their **reactions to the communications** around the transition

- ✓ From recall of the communications, to reviewing its timeliness, helpfulness, clarity and tone

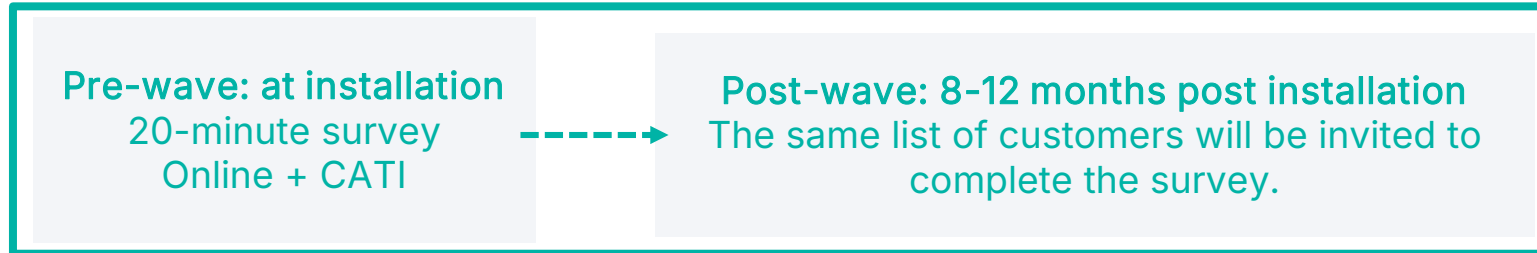


**Identify pinch points in the installation process**, and areas for improvement to aid the successful, smooth transition to water meters

# South Staffs Water enhanced this research with an additional quantitative survey



SSW also needs to understand how customers are responding to their new meter, so we ran a tracking survey of newly metered customers alongside the qualitative research. Because the qualitative sample is taking part in a year-long study and thus likely to be more informed and engaged, the survey helps identify any differences in views.



**Sample selection\*:** SSW provided customer lists of c. 3500 customers who had had their meter installed between 29 December 2025 and end of April 2026.



**Survey invitation:** An online survey was sent to customers. They were incentivised by 2 x £50 vouchers to be won by taking part. The survey was sent out in three batches, and the survey link was open from 23<sup>rd</sup> April to 25<sup>th</sup> May 2026. Customers each received one reminder to complete the survey one week after receiving it.



**Survey mode:** 280 customers completed the online survey, and 40 CATI surveys were completed using customer lists of those without email addresses, with a targeted approach to include around 50% PSR / social tariff customers to optimise inclusivity.

7 \*See full sample details in appendix

Throughout this report, quantitative insights are denoted by the icon:



# 02



## Key findings



Customers are, in principle, motivated to reduce their water usage but perceive limited room for reductions

Many have already adopted 'easy-win' reductions and see most of their remaining water-consuming behaviours as either negligible or essential.

There is also a strong sentiment that wellbeing deserves prioritisation, with many resistant to changes that would impact their hobbies or lifestyle.



Roughly a quarter of survey respondents report making more effort to reduce water consumption since having a water meter

The bathroom is a key area where customers are finding ways to reduce consumption (e.g. turning off the tap when cleaning teeth or shortening shower time).

Just under half of customers surveyed meanwhile have not felt any impact on their behaviour so far.



The key motivation to reduce water consumption would be a bill increase following metering

Many have not changed their behaviour as they have not received their first metered bill. Those who do not experience a change in bill will likely be less motivated to reduce their consumption.



Around half of customers recalled receiving the postcard on installation day

Communications are seen as timely but lacking information (e.g. reasons for installing meters, installation dates, estimated changes to bills, and how they are calculated).

Postcards are seen by some as “overly positive” and “patronising” in tone.

Larger households and those with financial concerns are more likely to react negatively to comms materials.



Customers have mixed sentiment towards metering – with bill impact being the deciding factor

Some support the concept of paying for what you use. Others are annoyed by the compulsory element and fear their household will be negatively impacted – particularly true of larger households and those struggling financially.

Bill impact is the primary driver of acceptance, with many waiting for their first metered bill before deciding whether they support the initiative.



There appears to be a strong link between level of trust in SSW and other key metrics/claimed behaviours

Those distrustful of SSW are:

- More likely to be dissatisfied with the value for money of services
- Less likely to be aware of current meter-reading processes
- Less likely to be making efforts to reduce consumption
- Less likely to recall comms, and react positively to them

# South Staffs Water should therefore consider...

Tailoring support to larger households (4+ people) and financially vulnerable customers

These audiences - compared to the average surveyed customer - feel:

- more concerned about bill increases
- more anxious about not being able to track usage data, and
- negatively about comms materials

These customers arguably require more support and guidance to alleviate concerns as impacts of metering begin to be felt.

Further explaining the reasons behind compulsory metering

Many customers express frustration about the lack of choice. The wide range of explanations given for meter rollout suggests gaps in understanding, and several customers suggested that comms should include messaging to explain this.

This indicates an opportunity for South Staffs Water to build trust by addressing misconceptions and reducing negative perceptions, particularly around assumed revenue-driven motivations. This could potentially be in the form of "myth-busting" comms materials.

Providing more practical information in upfront comms

Increased bills is the biggest reported concern among customers when moving to a meter.

There is strong appetite for practical information from the outset of the customer journey.

Communications should emphasise how bills are calculated, and, if feasible, estimated changes to bills for different households.

Promoting more innovative water-saving tips

Many customers are highly motivated to reduce water usage but feel they have already done all they can.

This perception may stem from limited awareness of lesser-known water-saving tips.

South Staffs Water has an opportunity to challenge this belief by offering tailored guidance on impactful actions customers may not be aware of, helping to dispel the myth that "there's nothing more I can do". This could, for example, involve frequent comms with tips to save water.

# 03

## Consumer context



# Customers' top priority is keeping bills down, which feeds into their motivation to save water



## Current concerns

- Customers' primary concerns revolve around **cost of living** and current **global conflict**
- **Anxiety around energy bills** play into these concerns, with many worrying about **further increases** to bills.



Customers with **larger families** continue to feel the strain of the cost-of-living crisis across their household bills.



## Back of mind awareness of water usage

- Most customers are **vaguely aware** of their water usage and try to **avoid waste by making small scale efforts** such as avoiding running water unnecessarily
- Although customers try to **use water wisely**, this isn't an issue they actively think about day to day, and limiting energy usage is often prioritised
- Most also **do not believe** that water scarcity is a UK issue due to the amount of rainfall they observe
- Views on **essential usage** are also **mixed**, with some arguing that using water to create memories and maintain good mental wellbeing is essential. This can act as a **barrier** when considering opportunities to cut down on consumption

# Nearly half of customers are satisfied with value for money, while a third agree clean water charges are affordable

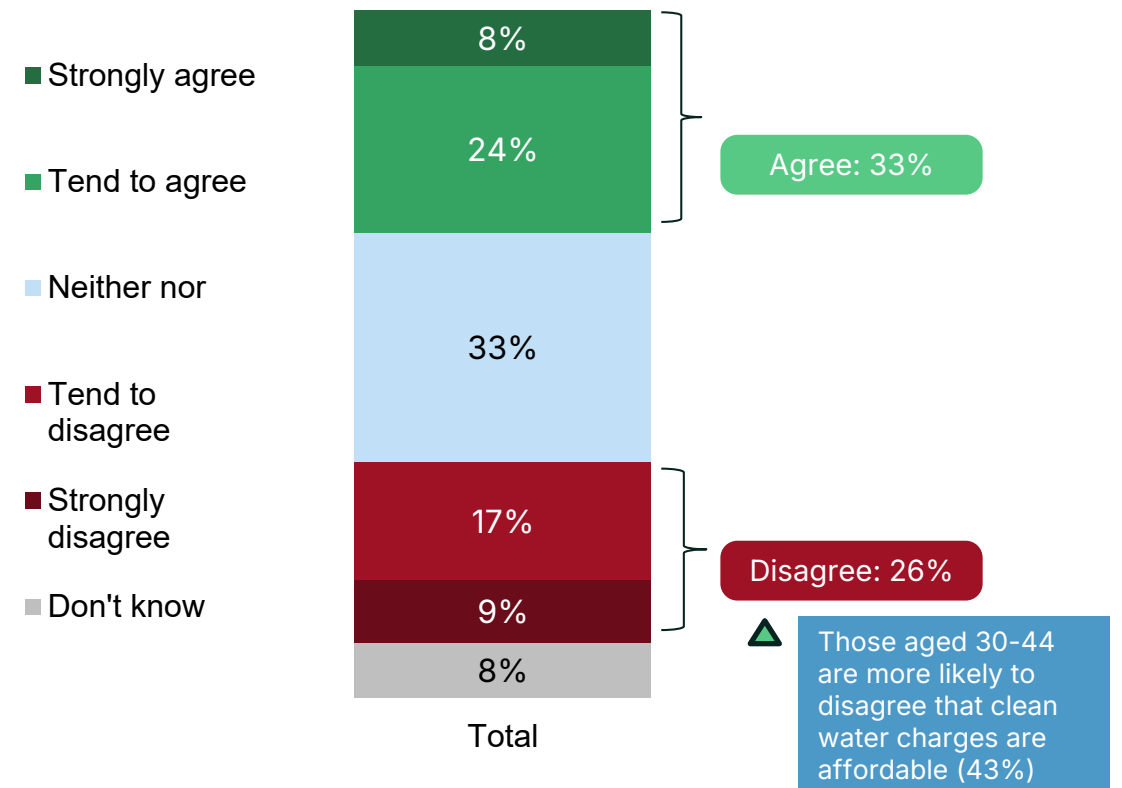


Those struggling financially are more likely to disagree that water charges are affordable.

## Satisfaction with the value for money of services



## Affordability of clean water charges



Q3. How satisfied are you with the value for money of the clean water supply and services you receive from South Staffs Water? *Base: All respondents (320)*

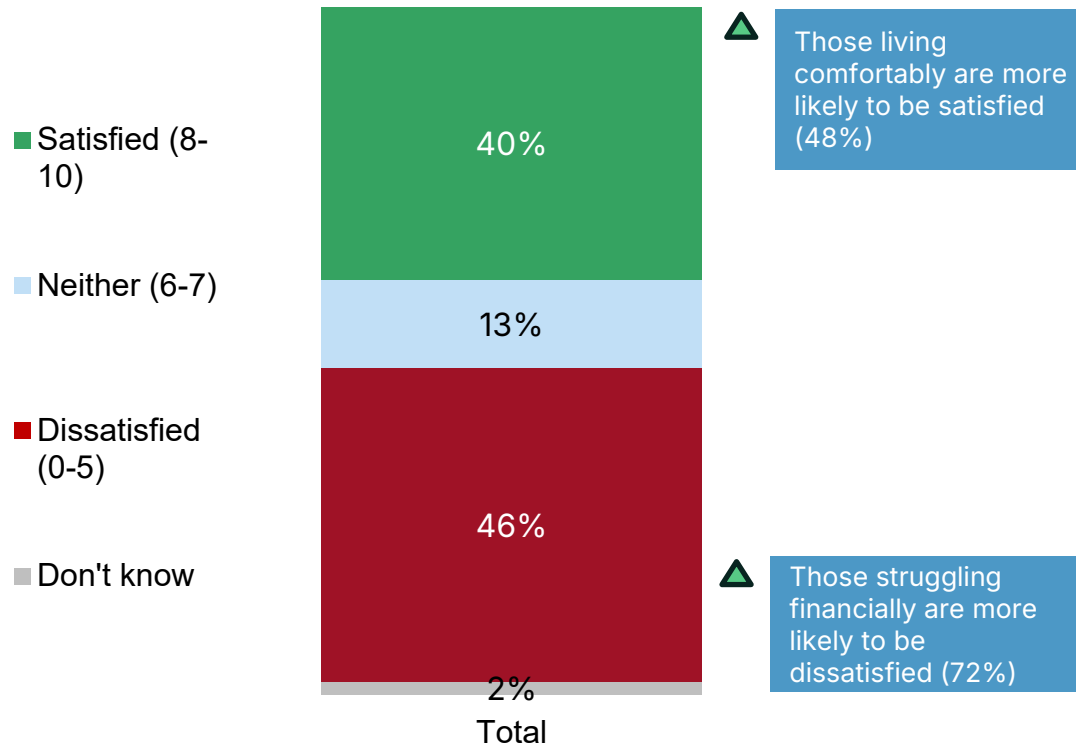
Q4. How much do you agree or disagree that the clean water charges that you pay are affordable for you? *Base: All respondents (320)*

Denotes sig diff vs. Total @ 95% CI

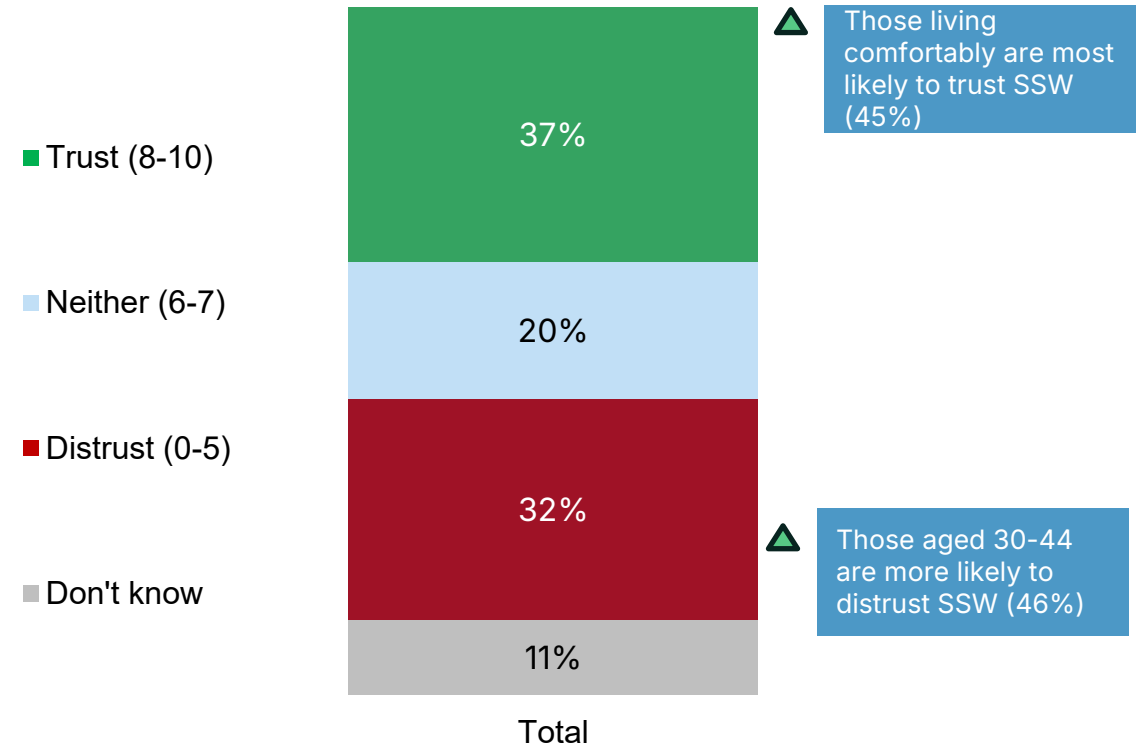
# Just under half are satisfied with SSW's service, mirroring overall levels of trust and VFM



Satisfaction with the service provided by South Staffs Water



Overall trust in South Staffs Water



Q1. How satisfied would you say you are with the overall service provided by South Staffs Water. When giving your answer, please think about all aspects of the service it provides, from the everyday supply of water through the tap to how customer service queries are handled. *Base: All respondents (320)* Q2. To what extent do you trust South Staffs Water? *Base: All respondents (320)*

Denotes sig diff vs. Total @ 95% CI

# Compared to recent tracker research conducted by South Staffs, scores for key metrics are notably lower with the universal metering sample



	South Staffs Online Tracking Survey (n=236)	Navigator Insight Additional Quantitative Survey (n=320)
Value for money (NET satisfied)	62%	46% ▼
Bill affordability (NET agree)	55%	33% ▼
Overall satisfaction (NET satisfied)	57%	40% ▼
Trust (NET trust)	51%	37% ▼



Differences in satisfaction / trust levels compared to previous quantitative insights may indicate a negative impact on company-related sentiments following meter installation.

However, it is important to note that there are differences in sample sizes here and that the Online Tracking Survey was representative and completed in February 2026 - before small inflationary bill increases.

# 04

## Water usage attitudes & behaviours



# The house tour: Deep dive on kitchen behaviours

There is high awareness of water use in the kitchen, but as this usage is seen as essential, there is limited perceived opportunity to save water.

**Most consciously avoid filling to the top; a behaviour driven by perceived efficiency**

- Customers habitually fill to 'about the second cup', as more feels excessively wasteful. Larger families are more likely to fill to the top but feel this is justified
- A few customers keep watering cans near the sink to be able to collect water while they wait for taps to heat, this water is recycled for activities such as water plants

**Water use during cooking is seen as low**

- Customers do not automatically correlate cooking with water usage and when prompted they feel they only use water 'as necessary' for cooking, seeing the amount as relatively insignificant

**Most customers use a dishwasher rather than handwashing, and few see room to reduce their water use for these activities**

- Customers typically wait for a full load to run, supplementing with selective handwashing of fragile items. Most users select an eco / fast wash setting, believing this can save energy and water
- For the minority who handwash, most have a washing up bowl. This is seen to be habitual rather than a method of saving water. There is also confusion amongst customers on whether handwashing reduces more water waste than a dishwasher

*"We don't put [the dishwasher] on until it's full, so that's a way of saving money."*

50-54, Couple Occupancy

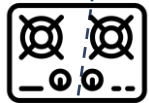


*"You've got to use water. There's only so much you can save. If you want to make a cup of tea, you've got to use water."*

55+, Couple Occupancy



Kettle



Cooking



Washing up

# The house tour: Deep dive on cleaning behaviours



Washing machine



Tumble dryer



Cleaning

**Water use for cleaning is seen as a necessity, with behaviours driven by hygiene and convenience.**

**Laundry is routinely done on full load, or when they run out of key items**

- Most run the washing machine around 3 – 4 times a week, which increases based on household size and lifestyle e.g. washing clothes after exercise. As usage is hygiene related, it is not a behaviour customers are willing to cut back on
- Although a minority opt for an eco setting to potentially save water and energy, many do not believe this washes clothes 'properly' due to the machine spinning too slowly

**All customers owned a tumble dryer, with frequency of usage reflecting washing machines and seasonality**

- No customers in our sample had a built-in condenser to collect water from the dryer, suggesting a lack of association made to water usage

**Most see water use for house cleaning as negligible, with many opting for cleaning wipes due to convenience**

- Mopping is limited to kitchen and bathroom floors, and water use for this is seen as limited (i.e. most have a spray mop)
- Surface wipes are used most for smaller clean ups – with water only seen as a necessity if an area needed a deeper clean

*"Sometimes [the washing machine] does get put on with smaller bits...Especially if they've come back sports gear, it goes straight in."*

50-54, Family stage



*"I use a bit of bleach...it'll just be literally a little bit of water to swill it off...So to be fair, how much water I use when I'm using it doing my cleaning is negligible."*

55+, Couple Occupancy

# The house tour: Deep dive on bathroom behaviours

## Navigator

There is high awareness of water usage in the bathroom, with many identifying opportunities to reduce usage.

### Shower length and frequency varies based on age and lifestyle

- Most customers feel they do not spend long in the shower (3-6 minutes on average), but report that their children take longer. For a minority, longer showers are seen as important for relaxation and wellbeing
- A minority of customers have devices here that they find useful e.g. attachments and timers. However, there is perhaps some confusion around what saves water, with a few adopting behaviours like brushing their teeth in the shower to reduce overall usage

### Baths are more frequent in households with children or customers with physical health conditions

- Some feel they could reasonably reduce their water use by taking less baths, viewing them as non-essential. Others feel strongly that taking a bath is an important personal comfort they are unwilling to give up

### Most turn the tap off when brushing their teeth and acknowledge that leaving the tap on is wasteful

- Despite this awareness, a few still leave the tap on - a long-term habit they struggle to change

### Awareness of 'if it's yellow let it mellow' is widespread, but most struggle with this advice

- Personal hygiene and social acceptability are strong barriers to adopting this measure, with the vast majority flushing after every use (overnight being an exception for many)

*"For the little man we do bath for him rather than shower because in the shower trying to pin him to be able to get him washed compared to here, he can have a bit more fun."*

30-34, Family stage



*"[The shower is] It's the only time I get to myself...I just stand there with the water running on my head until I feel ready to get out."*

40-44, Family stage



Shower



Bath

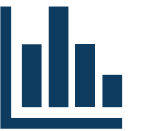


Basin

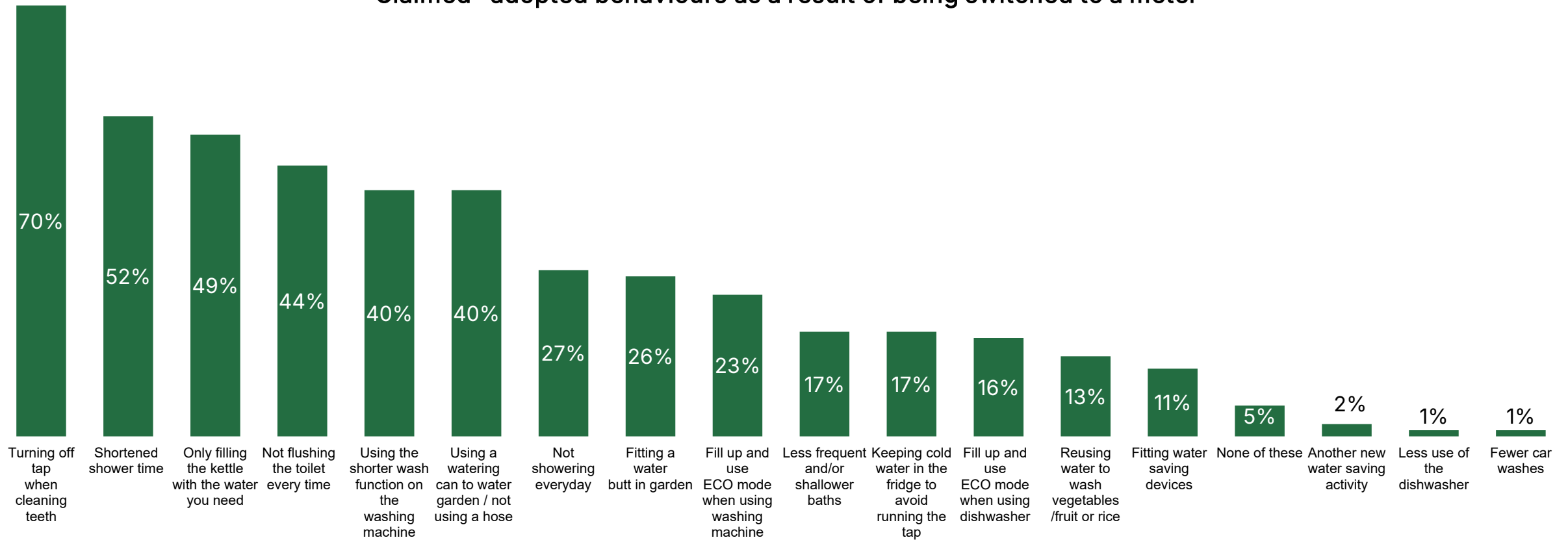


Toilet

# Survey findings support the observation that bathroom is the main area where customers are cutting usage



"Claimed" adopted behaviours as a result of being switched to a meter



Q12. Which of the following activities have you started doing as a result of having a new water meter installed? / Which of the following activities do you currently do? Base: Those making more effort to reduce consumption since having the meter installed (88)

# The house tour: Deep dive on garden/pet behaviours

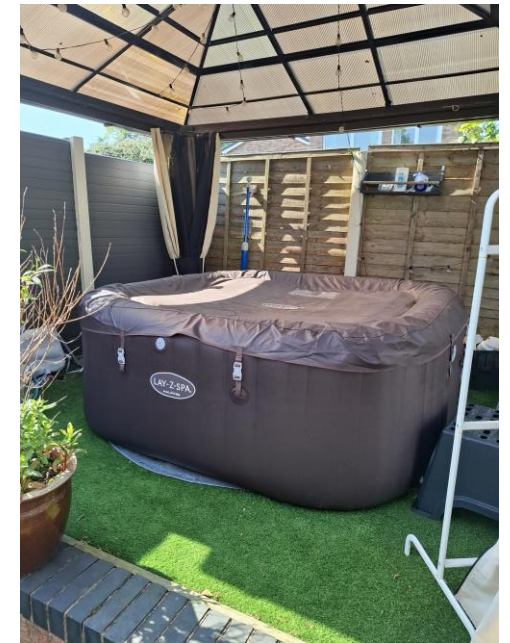
Customers see opportunities to cut down usage in the garden but are reluctant to make changes if this compromises their wellbeing.

*"Most people, when they come home from work, will just come and chill out in the garden...It's my relax time, it's my downtime."*

50-54, Family stage

Those with gardens see this as a place for rest and relaxation, and have hobbies that require water e.g. gardening

- Those with water butts commonly use these to harvest rainwater, and customers actively prioritise using this as the primary source for watering plants - only using water from the tap when water butts are empty
- Most have an outdoor tap but only some make use of it for watering plants / washing cars / pets, while others rarely ever need to use it
- Activities such as gardening, filling up paddling pools / hot tubs in the summer and water features are some areas where customers can identify opportunities to cut down. However, they are reluctant to do so as they do not feel they should have to give up their hobbies / methods of relaxation to save water



*"Everybody in this country should have a water butt if they've got a garden.. the water that comes out of the water butt can water the garden."*

55+, D, Family stage

When thinking about the water used to care for their pets, most only think of drinking water initially

- However, when probed further, answers illustrate a range of additional uses including baths, washing pet blankets, rinsing following muddy walks etc., which are less top of mind and, in any case, perceived to require negligible amounts of water



Garden



Pets

# Case Study: Megan



## Megan, 70

Megan lives with her husband in a social housing property, a two-bedroom bungalow with front and back gardens.

As her husband has been medically vulnerable and unable to work for many years, Megan budgets carefully as they have only her pension to live on.



Megan is keen on saving water and electricity day to day, mainly motivated by cost-savings. She fills the kettle for two cups only, keeps showers short, and uses collected rainwater in the gardens whenever possible, where she has installed three water butts over the years.

Megan proactively applied for a water meter right before the rollout, hoping to lower her bills. However, after two cancelled appointments her household was eventually picked up by the universal metering programme. Although she was happy with the installation, she was displeased by the amount of time it took for a meter to be fitted especially as previous appointments had been cancelled without notice.

*"The only thing I would say about [the meter] is it took a long time to come. Okay, we applied last year, then they were gonna come in January, then they didn't come, and they were going to come another date, they didn't come."*

Despite her support for metering, reducing further usage might be difficult for Megan. She has to clean the house everyday, as her husband is very sensitive to germs. The fact that she already engages in most of the 'easy win' behaviours also means it's harder for her to find room to cut usage further.



# What does the data reveal?

## Many see their water usage as essential

Most customers see themselves as using what they need, with limited perceived opportunity for further reductions.

For a minority, there are clear ways to cut down e.g. relinquishing water-based hobbies, but motivation to do so is often low as they prioritise wellbeing.

A few customers are already highly motivated to cut down, having installed water saving devices or getting rid of water-intensive devices.

## For a majority, adoption of water saving behaviours is subject to bill increases

For most customers, keeping bills down is a key motivator. They express that consistently higher bills as a result of having a meter would motivate them to adopt higher effort water saving behaviours (but would negatively impact their perception of South Staffs Water). But for many, they aren't yet sure what the bill impact is.

## Customers are more aware of their usage following the meter install and are beginning to consider adopting higher effort water saving behaviours

But there is limited perceived room for further reductions, due to:

1. a lack of awareness of how much water different behaviours use (i.e. a sense that it's negligible amount); and
2. a sense that certain behaviours are essential and are not subject to possible reductions in water use

This means that customers who do not experience a bill increase following their meter installation, are more likely to continue as normal, and not feel the need to reduce their water usage.

# What does this mean in terms of opportunity for meters to have an impact?



## Capability

- ✓ Customers are capable of changing behaviour physically and mentally; few need additional support
- ✓ Strong understanding of their energy usage data, via in-home displays
- ✗ Customers without previous experiences of smart meters may struggle to interpret what their usage data means, limiting their ability to act without guidance
- ✗ Customers lack a baseline reference point for what 'normal' consumption is for a household of their size

## Opportunity

- ✓ Customers believe that future access to real time usage data will allow them to spot further opportunities to save water
- ✗ However, without this real time data customers who feel they already save water struggle to identify ways to save
- ✗ Water usage for cooking and cleaning are seen as essential meaning customers find it difficult to identify ways to cut down here
- ✗ Those with larger families, children or vulnerabilities spot fewer opportunities to cut down, feeling that their circumstances offer them less control of their usage

## Motivation

- ✓ Most are motivated to save water to keep bills down
- ✗ Long-term habits and personal hygiene standards could pose motivation barriers for a majority
- ✗ There is openness to 'easy wins' but changes that feel like a sacrifice to living standard or convenience may face resistance
- ✗ There is a resistance to reducing water usage associated with hobbies, with many believing it is not fair to have to discard something that brings them joy

## Save water (further)

There appears to be some willingness and capacity to change behaviour. However, change is dependent on bill fluctuation, as well as receiving tangible examples of how to reduce their water usage without impacting their living standards.

# 05

## Experience and impact of meter transition

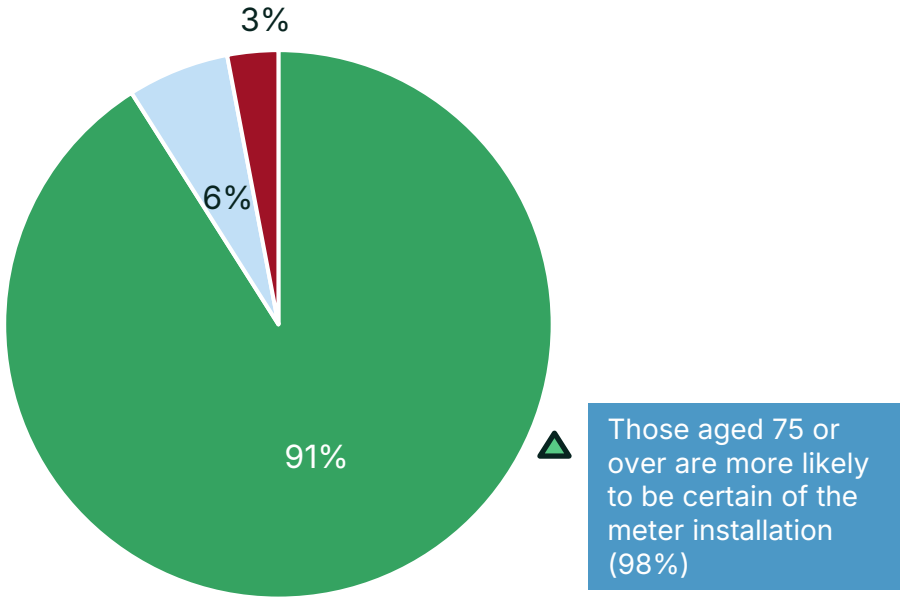




# Awareness of the meter installation is high

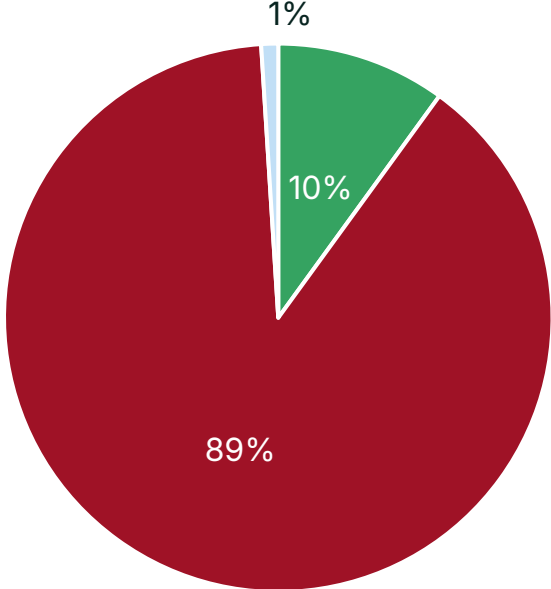
Almost 9 in 10 customers have never lived in a property with a meter before, an indication of the level of "the unknown" for these customers.

### Awareness of water meter installation



- Yes, I'm certain one has been installed
- Yes, I think it has been installed but not completely sure
- No, I was not aware that a water meter had been installed

### Previous experiences of water meters



- Yes, I've lived in a property with a meter before
- No, I've never lived in a property with a meter before
- Don't know/unsure

Denotes sig diff vs. Total @ 95% CI

# Installation experiences

Limited information throughout the process is a key issue among the qualitative sample

Navigator



## Recall of prior notice is high, with most spontaneously mentioning pre-installation postcards and emails

- While a small minority only became aware of the installation when engineers arrived or works began nearby, most recall receiving advance communication and feel they were given sufficient notice
- Where people recall several touchpoints, the amount of comms received feels adequate, and relayed the key point that they didn't need to do anything

However ...

- Several think there is a lack of information throughout, such as reasons for installing meters, installation dates, and most importantly, how bills are calculated
- Installation dates were not always adhered to, with some reporting they went by without the work taking place

## For most, the installation process was quick, with minimal disruption to daily life

- Installations went largely unnoticed and caused minimal disruption, and any interruption to water supply was brief and barely noticed
- Those who recall interacting with engineers report positive experiences, seeing them as helpful and able to answer questions, though this was infrequent
- A minority mention negative experiences such as water discolouration without advance notice, and minor property damage

## Door knocking was inconsistently provided

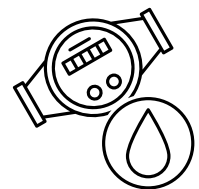
This has a low impact overall but can add peace of mind and reassurance during installation, especially to more vulnerable customers.

*"Reading isn't my strong point... so a bit of verbal information would have been much better."*

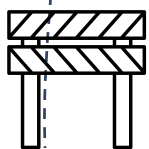
55+, Family stage

*"It didn't really affect the inside of my house. I didn't notice any brown water or low pressure or anything like that."*

55+, Couple occupants



Installation  
notice



Installation  
Works

# Case Study: Harry



## Harry, 55+

Harry lives with his wife and two children.

He does not work due to having a disability that has caused brain damage. This makes keeping finances low a top priority for Harry.

Harry is highly engaged with his utilities and is an inventive resource saver. He has reworked his home to be as efficient as possible including moving his boiler closer to the sink, installing automatic shut off timers on both the shower and extraction fan, and reusing water from his tumble dryer to fill the toilet cistern (pictured left). He says the main drivers are to avoid waste and keep bills down.

*"If I can spend some money to save money on a bill that's significant enough, then I will do it."*

Harry is very sceptical of water companies. He feels that metering is a way for water companies to make profits under the guise of safeguarding water.

*"They can charge me more at the end of the day, and that is the be-all and end-all. That's all they're interested in."*

This distrust has been compounded by his recent meter installation experience; he was dissatisfied with the disruption the install caused, which included water discolouration and equipment being left on his driveway which caused damage to his car. Communications also caused issues for Harry, due to his condition reading has become more difficult. He would have preferred a way to communicate verbally with a South Staffs representative as the written communications left him confused about billing and timelines.

Although Harry is a resource conscious customer who is motivated to save water, he feels that the metering process has confirmed his suspicions about water companies, thus negatively impacting his perceptions of metering and South Staffs Water.





There is a near-equal balance of positive, negative, and neutral sentiment among interviewed customers.

**Financial uncertainty** is a central factor shaping feelings about meter installations and is likely to affect acceptance and future behaviours.

## Key themes driving positivity:



- Potential savings (households often single or couple occupancy)
- Associating meter programme with wider environmental benefits
- Greater billing transparency; minority added that real time tracking has the potential to increase trust in billing
- Greater visibility of their consumption habits, as few have an accurate idea of their daily usage
- Fairness - a minority (mainly single occupants) requested a meter and suggest it is fair to pay for what you use

## Dissatisfied customers are more likely to:



- Have bigger families with perceived high-water usage
- Be financially vulnerable and concerned about bill increases
- Express negative perceptions about the underlying rationale for meter installations, attributing the decision to financial drivers rather than environmental needs
- Have poor installation experiences (e.g. damage to road or property)

**Compulsory metering** and **bad press** is also driving negativity, with customers feeling forced or annoyed by a lack of choice.



**Several customers felt they could not comment on overall sentiment until bill impacts are known.**

*"It's nice to know what your bills are going to cost each month, but with a water meter it's variable... the unexpected cost could then affect your ability to pay for other things in life."*

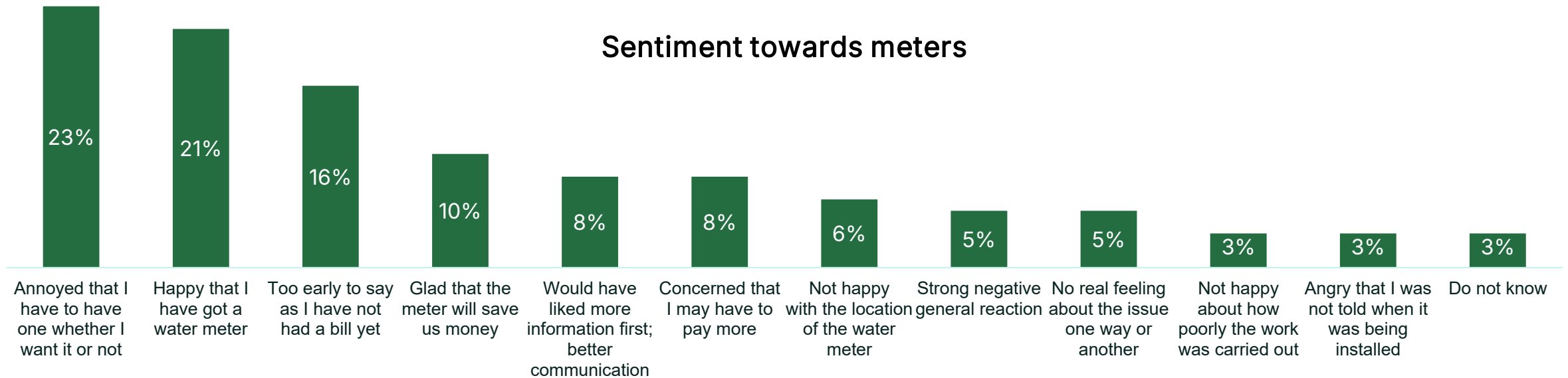
Under 35, Family stage


# Sentiment among surveyed customers is mixed and largely mirrors qualitative findings





Many are unhappy about the compulsory element, while several believe it is too early to judge whether meters are a positive development until changes to bills are known.


Sentiment towards meters



▲  Customer distrustful of SSW are far more likely to be annoyed about compulsory metering (41%).

▲  Customers who are comfortable financially are significantly more likely to be happy about having a meter (29%).

▲  Single occupants are significantly more likely to be happy about having a meter compared to households with 4+ occupants (29% vs 11%).

▲  Customers aged 65-74 are significantly more likely to be happy about having a meter compared to those aged 45-64 (27% vs 16%).

# Case Study: Leianne



## Leianne, 55+

Leianne works as a cleaner, and lives in a semi-detached, two-bedroom house with a garden.

She lives with her husband and two dogs. She also has a large fish tank that she maintains.



Leianne is a former competitive swimmer and a proud Pisces. She feels a deep connection to water and feels strongly about wellbeing of her fish and garden.

*"I'm a Pisces and I used to represent England...So, I do like water, anything to do with water."*

Although Leianne does not believe that the UK is facing water scarcity, she does care about the environment and acknowledges that she uses a lot of water. This motivates her to combat her high usage by regularly performing water recycling routines.

*"I collect the water that I take out of the fish tanks and put them in the water butt, and that's what I use on the garden as well."*

Leianne is worried about the impact her water meter will have on her bills and disagrees with compulsory metering as a principle. She believes she already reduces her usage where she can and does not believe she should have to stop keeping fish or gardening to reduce her usage.

Ultimately, Leianne believes she will have to wait for further bills to see the impact of metering and form a final opinion on this. As it stands, Leianne believes South Staffs Water are taking away customer freedom and expects that they will face reputational damage from this.



## Perceived reasons for the meter rollout:

- Many customers perceive meters as tools to decrease overall water use and encourage reduced consumption
- Several point to environmental rationale, seeing water as a limited and valuable resource, with metering a way to respond to water scarcity
- Some believe the metering programme intends to create a fairer system and is born out of a pay-for-use principle
- A minority are sceptical, viewing meters as a way for water companies to raise revenue; these participants also tend to worry about increased bills, and hold negative perceptions of metering overall

*"I think the main driver is almost certainly, I would bet on it, to reduce water usage, beyond which has happened already, and I guess the same kind of thing is happening in other areas."*

55+, Couple occupancy

## Experience and impact of smart energy meters:

- There is mixed engagement with smart meter devices; some check daily or multiple times a week, adjusting their behaviours in response to the data (e.g. turning off heating). Others only engage around price cap changes, or not at all
- Energy feel more controllable than water. A key reason that energy meters drive behaviour change is that specific actions, e.g. turning off appliances, have visible cost impacts. Some customers have smart radiator valves, allowing them to remotely switch off heating in certain rooms
- By contrast, water usage is generally seen as vital and necessary for a wider range of daily tasks, with fewer obvious levers to reduce usage

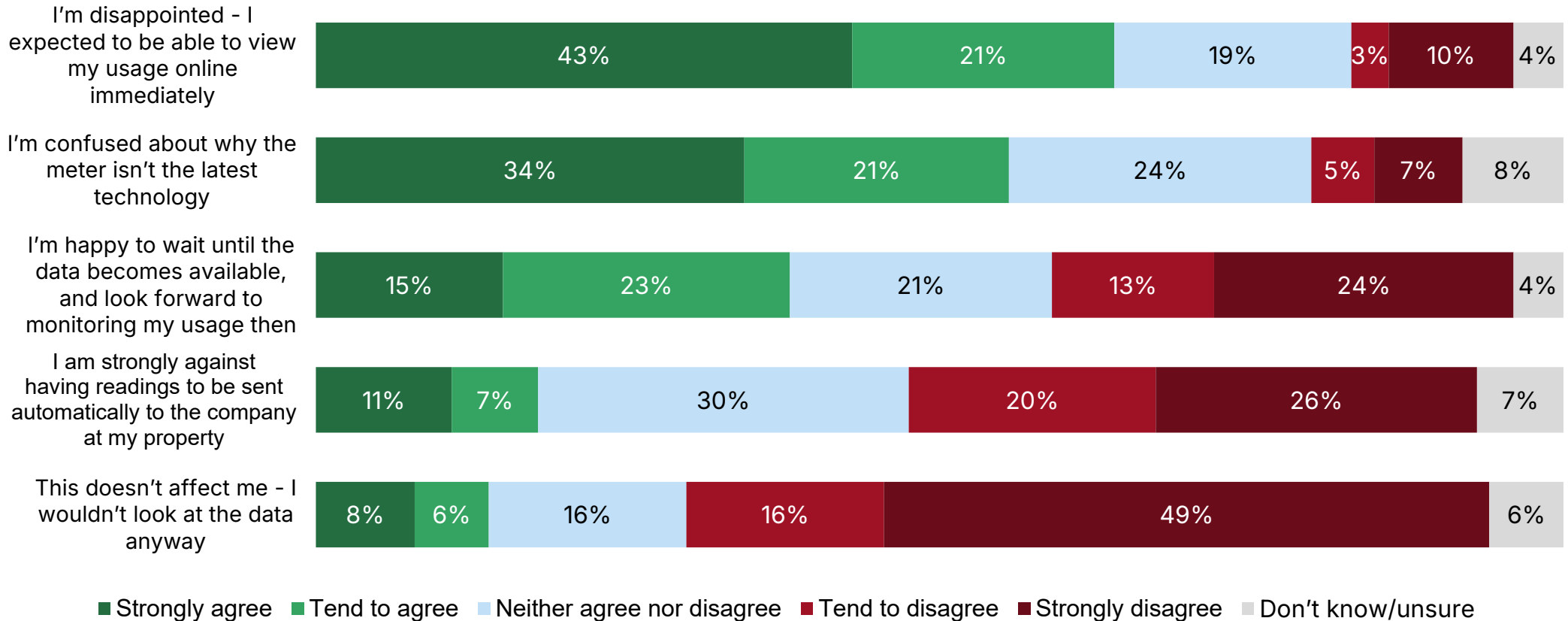


**Most customer are not aware that meters are not fully "smart", however there is strong appetite for real-time data which was described as the logical next step, affording customers more control over usage.**

# Appetite for access to real-time data is high

Most customers are disappointed they cannot access usage online and are confused about why the technology is not readily available.

## Attitudes towards lack of "smart" data access



## Navigator



Customers in large households (4+ people) are significantly more likely to be disappointed and expect to view usage immediately (80% agree)



Customers struggling financially are significantly less happy to wait until online data becomes available (59% disagree)

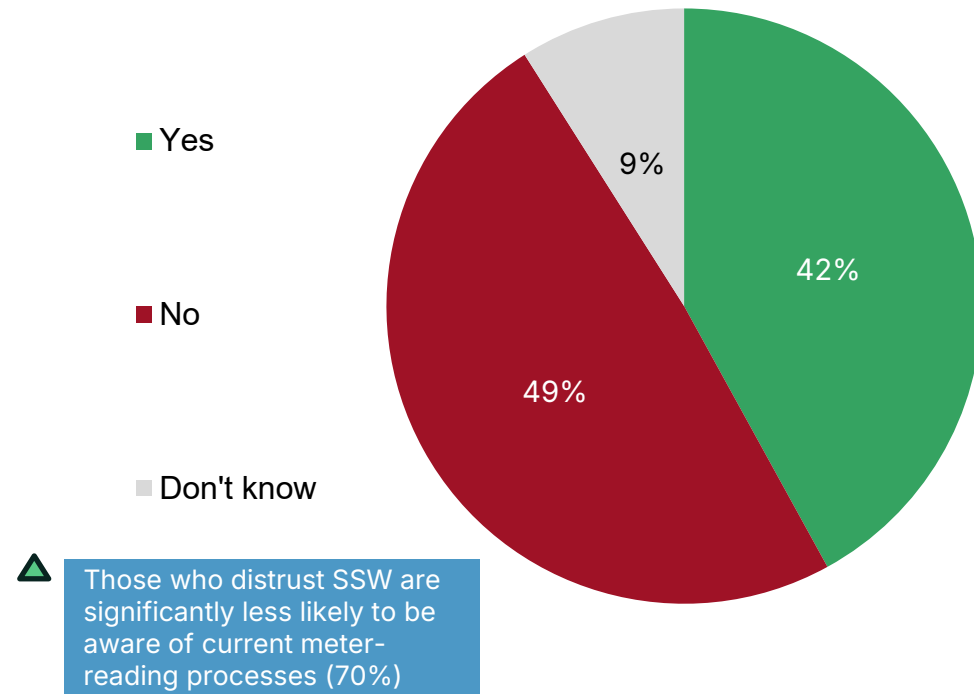


Denotes sig diff vs. Total @ 95% CI

# Half are unaware that meters do not automatically transmit readings; this rises to 7 in 10 among those who distrust SSW



Awareness that water meters being installed still need to be read by an employee with a device



△ Denotes sig diff vs. Total @ 95% CI



## Most have not felt any tangible impacts since moving to a meter

- However, several acknowledge water has become more top of mind, increasingly reflecting on when/how they use water
- Some mention small, “subconscious” adjustments to daily routines, for example not letting the shower heat up before stepping in, or ensuring they turn the tap off while brushing teeth
- The meter installation has had a significant impact on a small minority, who mention adopting multiple water-saving practices, such as ordering water butts, and getting rid of water-intensive devices such as pressure washers

*“We’ve had it just shy of a month, and straight away we said, right, we’re not going to wash dishes every single time... We’ll wait and either do it once or twice a day.”*  
55+, Couple occupancy

## Anticipated behaviour change will depend heavily on how bills are impacted

- Several envisage cutting down on water usage *if* meters increase household bills
- Visible costs (i.e. through real-time data) may prompt greater reflection on everyday actions, for example noticing which activities cost more and reconsidering wasteful behaviours
- However, most do not think it will stop them from enjoying non-essential activities, such as filling a paddling pool. Several believe wellbeing benefits trump additional costs
- Some express a desire to cut usage but struggled to identify how they could
- A minority are firm in their resistance to change, and do not see the meter having any impact on behaviours - typically higher income households

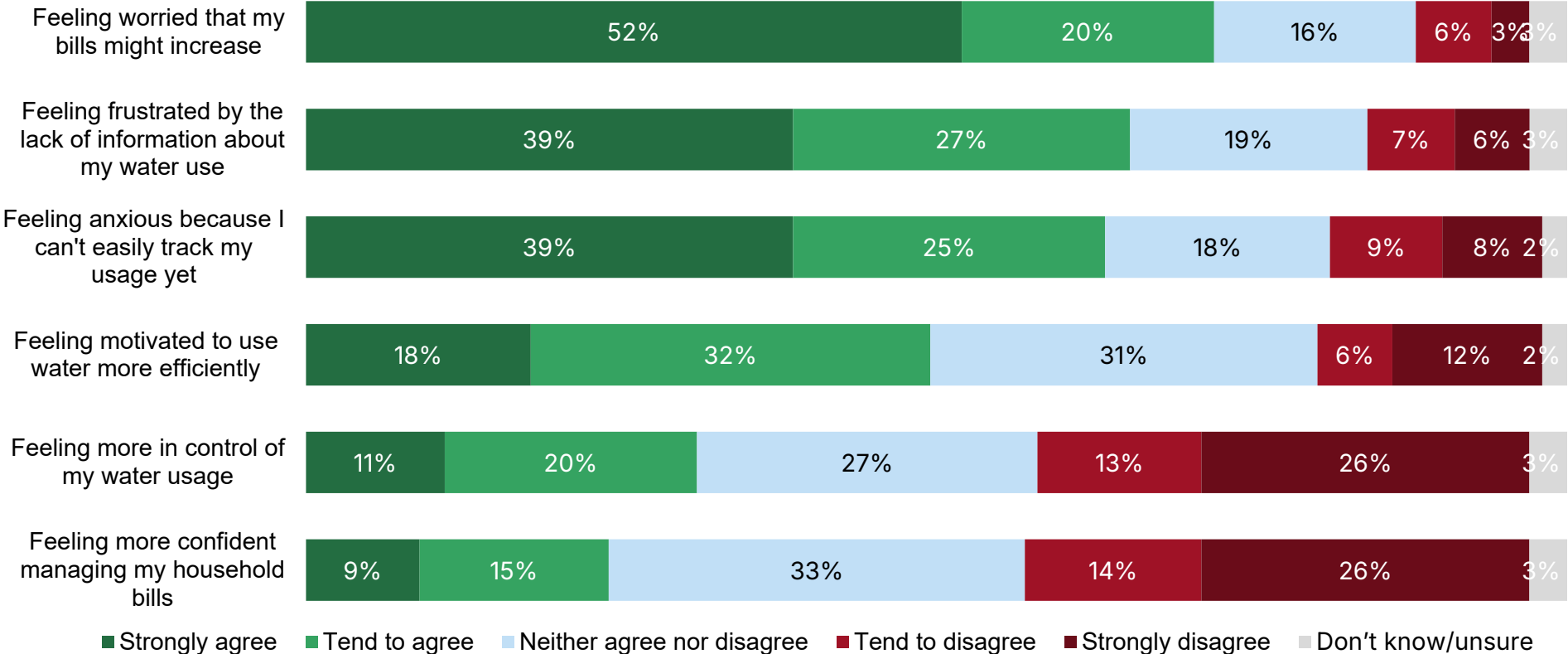
*“I’d like to think I could, but I’m not sure how much more I could save... It’s not like I just leave the tap running and walk off.”*  
35-54, Family stage

# Increased bills are a key concern for survey respondents

Two thirds are frustrated by a lack of information regarding water usage and the ability to track it.



## Attitudes towards the impacts/potential impacts of metering



Customers in large households (4 or more people) are significantly more likely to feel anxious about not being able to track usage yet (85% agree), feel worried their bills might increase (91% agree), and less likely to feel more confident managing bills (63% disagree).

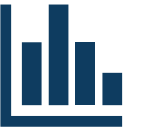


Customers struggling financially are significantly less likely to feel more confident managing their bills (70% disagree).

Denotes sig diff vs. Total @ 95% CI

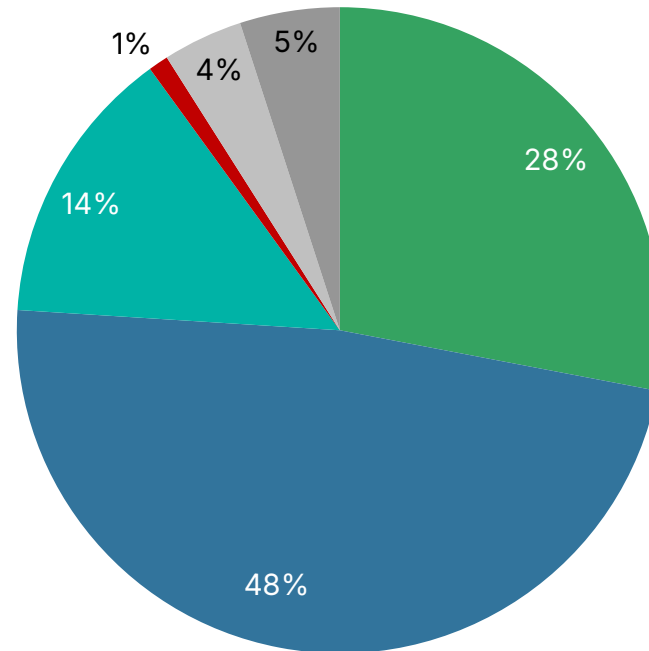
Q10. To what extent do you agree with the following statements about the impact having a water meter has had on you? / To what extent do you agree with the following statements about the impact having a water meter may have on you? Base: All respondents (320)

# Just over a quarter report making more effort to reduce their water consumption, while almost half have not noticed an impact



- Making more effort
- Making the same level of effort (already making lots of effort)
- Making the same level of effort (wasn't motivated to reduce before and am still not)
- Making less effort
- Other
- Don't know

Extent of effort to reduce consumption



Customers who trust SSW are more likely to be making efforts to reduce water consumption (40%).

Denotes sig diff vs. Total @ 95% CI

# Those making efforts to reduce usage are motivated by financial and environmental factors



Barriers to motivation include feeling like they should be able to use water how they want, or level of control over others in their household.

## Making more effort to reduce water consumption (28%)

- Those making a stronger effort to reduce water consumption are concerned about bill increases (52%)
- A minority feel that having a meter makes you more aware of your usage as you pay for what you use (9%)
- Therefore, using less has a direct incentive in the form of a cheaper bill

*"Having any sort of meter makes me more aware of waste. I'm more careful with gas and electric because my smart meter shows me what I'm spending. I think this will be relevant with water too."*

## Making same level of effort (already making lots of effort) (48%)

- Those who feel that they already make a strong effort to reduce water consumption are motivated by an awareness of waste (41%)
- As these customers have been motivated by reducing waste rather than specific trigger events, like a high bill, they express long standing water saving habits (41%)
- A minority have a stronger awareness that water is finite and find it sensible to reduce waste (13%). A select few understand the implications of water scarcity and view this as a current issue (1%)
- A few feel they would struggle to reduce usage further due to health conditions like incontinence (5%)

## Making same level of effort (wasn't motivated to reduce consumption) (14%)

- A minority of customers are actively demotivated to save water due to feeling that they have a right to use the water they pay for as they wish (22%)
- A fraction of customers also feel that having a meter will impact their quality of life, as reducing water usage will lead to improper personal care (22%)
- A smaller proportion of customers are demotivated due to having large families. They feel it will be too difficult to manage other occupants' behaviours and feel that they are already doing all they can (9%)

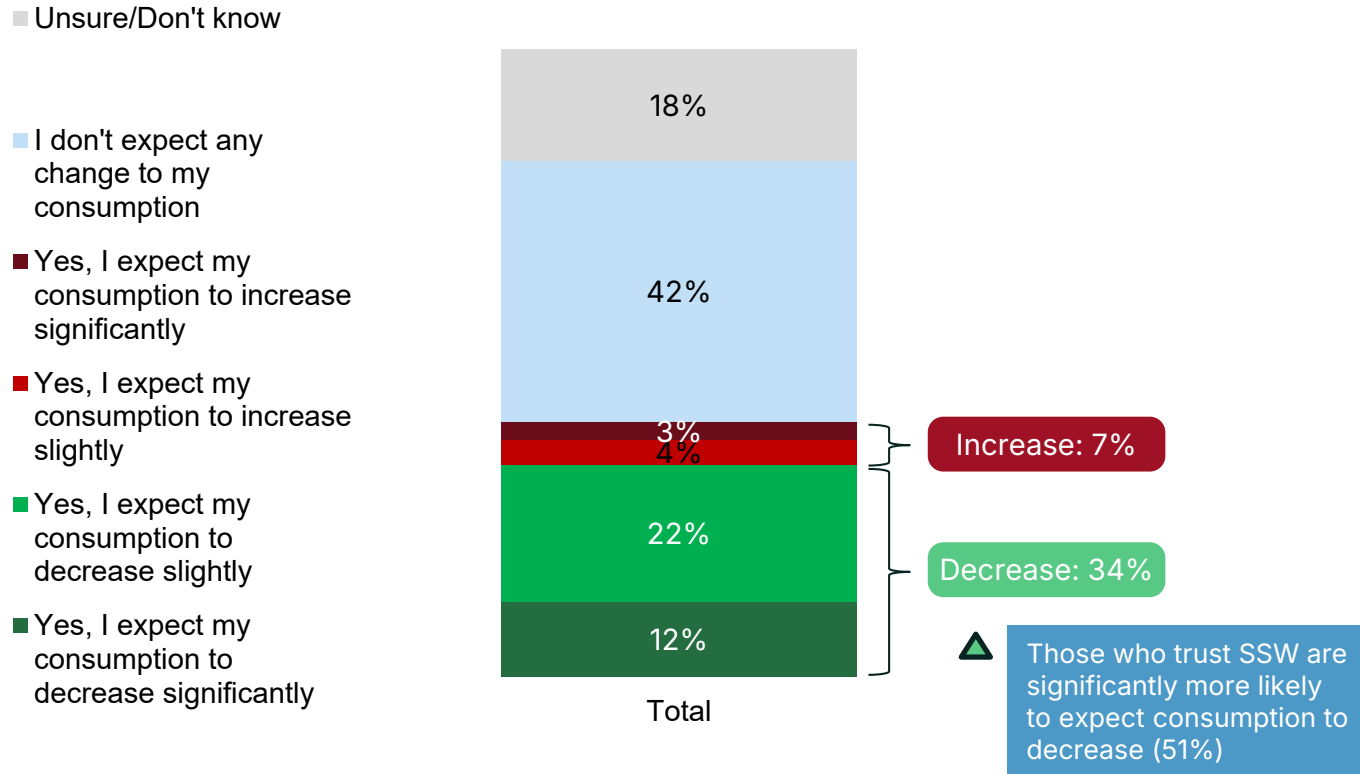
*"The water "I pay for" is mine to live with and to do as I please with."*

# Roughly two fifths do not expect consumption to change



These customers believe they are already doing what they can to save water and only use what they need.

## Expected change to water consumption



## Reasons behind expected change to water consumption

*"Water isn't a luxury item which we can stop using to economise, it is essential."*  
**I don't expect any change to my consumption**

*"I'm a person who likes a deep hot bath...now I'm not! I also use the garden hose whenever needed, I've now got a water butt front and back and use a watering can."*  
**Yes, I expect my consumption to decrease significantly**

*"It's summer time. So You consume more water and shower more."*  
**Yes, I expect my consumption to increase slightly**

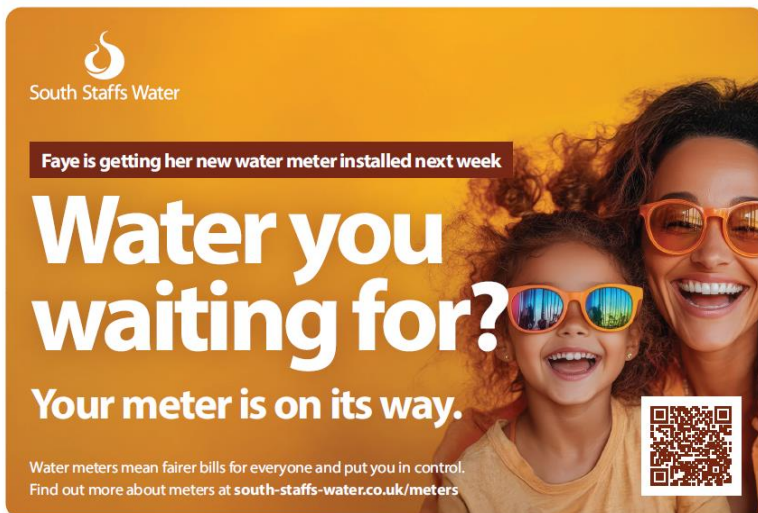
# 06

## Response to communications

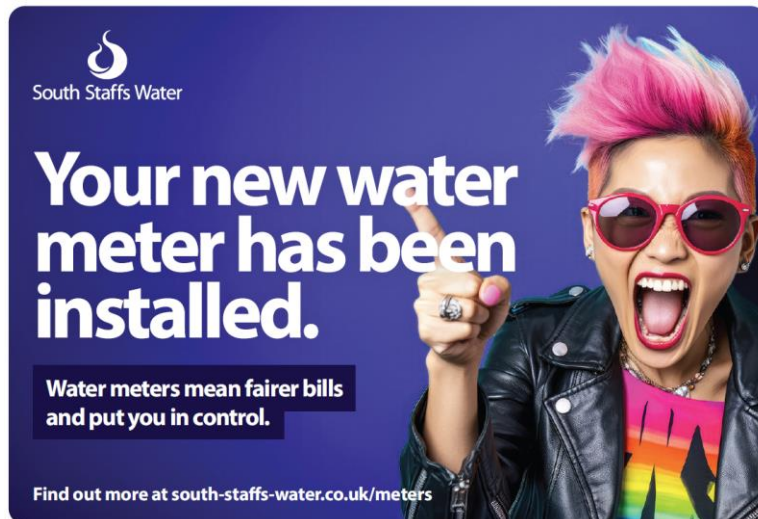


# Testing priority communications

Three pieces of communication were tested during qualitative interviews.




A postcard/email 4 weeks prior to installation – raising awareness of the meter fit and providing link to find out more info/FAQs.



A postcard/email on the day of the installation – updating customers of the meter fit and providing advice if any supply issues caused.

Hi



**Customer Reference:**  
**Supply address:**

**Your new water meter is now installed**

We're pleased to let you know your new water meter has been fitted. From now on, your bills will be based on the water you actually use.

**What happens next?**

- Your new charges will start from 00/00/00.
- Within the next xxx days, you'll get a final statement for your unmetered charges
- Your meter's serial number is xxx and it's located xxxx.

A final email/letter 7-10 days post-installation – providing more details, advice and resources about customers' move to metered charges.

# Sentiment among qualitative respondents



Reactions to comms are mixed, often influenced by sentiment towards meters



Customers who are more positive about having a water meter tended to be receptive to comms

- Postcards described as "modern", "fun", and "friendly"
- Post-installation letter seen as "professional", "informative", and "effective"

*"I think this (2<sup>nd</sup> postcard) is very positive. It's clear, it's concise."*

35-54, Single occupancy



Those who opposed the introduction of water meters tended to perceive the comms more negatively

- Postcards are often seen as "overly positive" and "patronising" in tone. This reaction is particularly strong among customers who are already dissatisfied with compulsory metering, as the upbeat messaging feels misaligned with their concerns

*"It (1<sup>st</sup> postcard) seems too happy, like it's a really great thing. It's not going to save me money, so it's not going to make me that happy."*

Under 35, Family stage



Timing appropriate, but important details lacking

- Customers appreciate receiving advance notice and feel the comms arrived with enough time to prepare for the change
- However, a key concern is a lack of practical information prior to the meter installation. Customers would have liked more information on reasons behind compulsory metering, estimated changes to current bills, meter location, and how bills are calculated
- It is acknowledged that the post-installation letter contained some of this information, but there is strong appetite to receive it earlier in the journey

*"There's no information on how your bill might change, it could be dramatic or just about the same... I just found it all quite vague."*

35-54, Family stage

*"Being told after makes it feel like this information is a bit hidden."*

Under 35, Family stage

# Additional themes



## Recall is generally high

- Most customers remember receiving at least one of the priority comms, with several remembering multiple over time. Only one customer had no recollection of receiving any of the three comms
- The two postcards are recalled most, with customers highlighting the vibrant colours and photographs
- However, recall is often vague - several could not remember the specific contents, and some mention discarded the letters/postcards shortly after reading them
- The post-installation letter is seen as most practical, with some filing it for future reference

## Comms perceived to resonate differently across demographics

- Some note that postcards may resonate more strongly with younger customers, who are seen as more accustomed to informal or visually led comms
- Multiple customers feel older demographics would be more likely to view the style as less relatable
- By contrast, the post-installation letter is seen as neutral and catering to all generations

*"This is exactly how it should look, standard email with no thrills."*

Under 35, Family stage

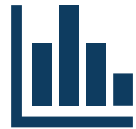
## Customers want to hear about the tangible benefits of meters

- Regardless of their attitudes towards meters, customers feel that the current comms are vague on what they gain from having one installed
- Several have concerns about finances and feel the messaging should explain more about likely changes to billing
- A few customers also express desire to hear more about future access to smart data, and what they can expect going forward

*"I would prefer to have access to real time data. How can I be expected to cut down if I can't see exactly how much I'm using?"*

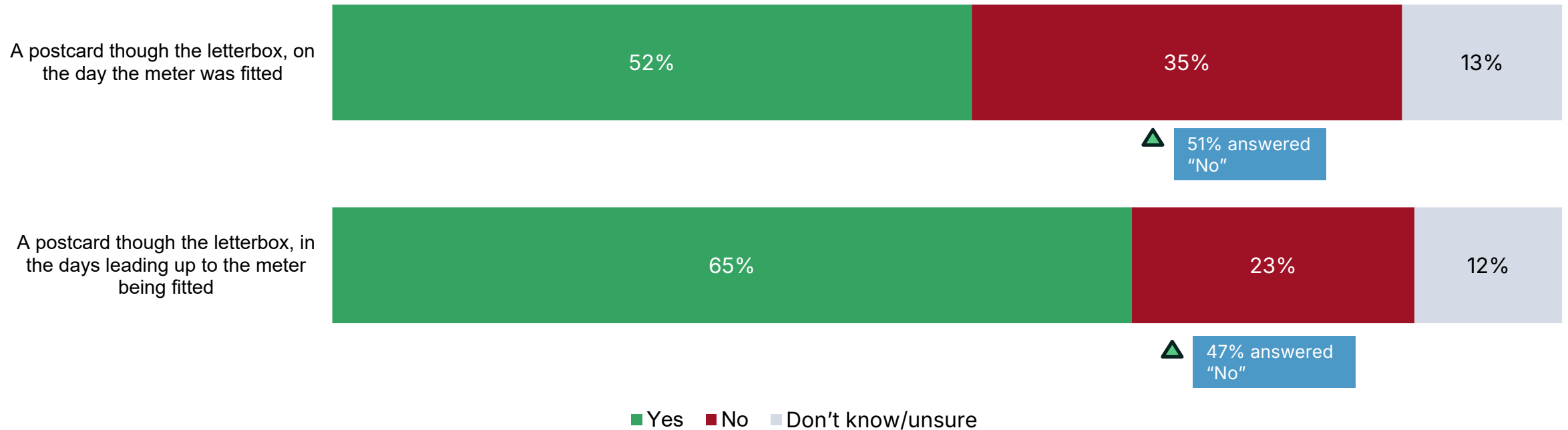
55+, Couple occupancy

# Recall of the pre-installation postcard is highest, while only half recall receiving a postcard on the day of installation



## Recollection of metering communications

Customers who distrust SSW are significantly less likely to recall the two postcards

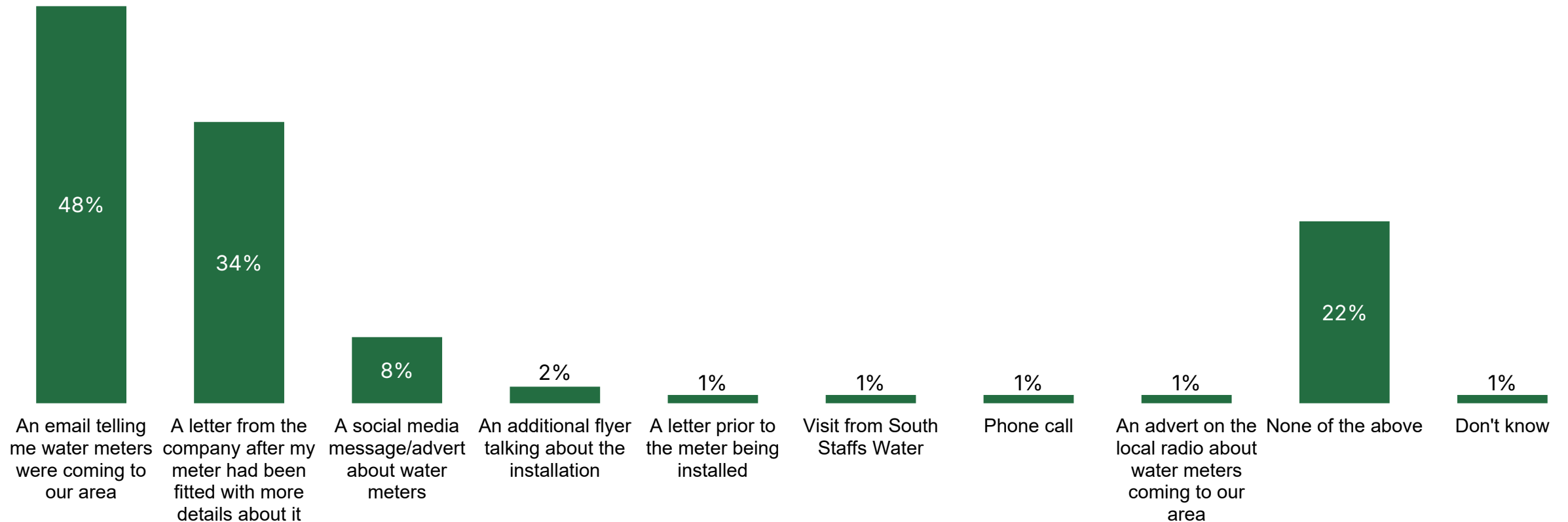


Denotes sig diff vs. Total @ 95% CI

# Roughly half also recall getting an email about meters coming to their area



Recollection of wider metering communications



# Deep dive: Pre-installation postcard

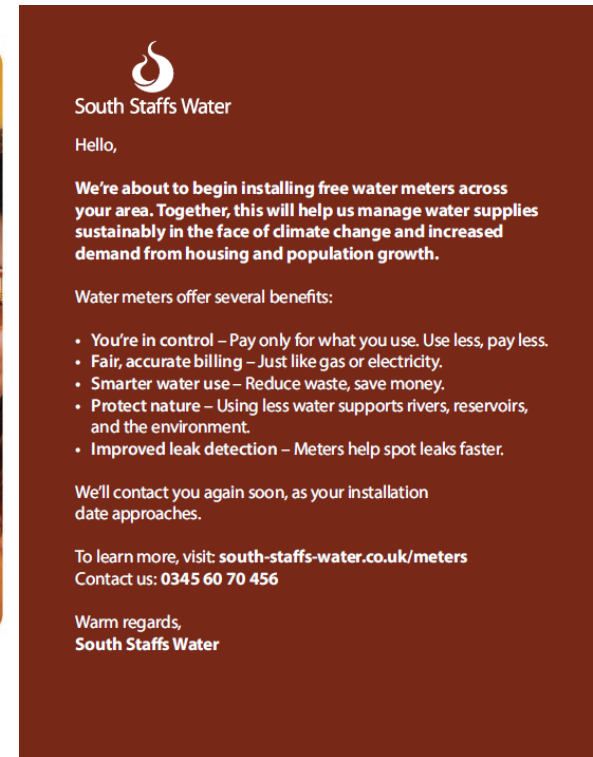
Postcards are recalled most among customers, particularly the front pages.



The colour scheme is seen as eye-catching, vibrant, and modern.



Several feel the tone is too cheery, not matching the seriousness of switching to a meter, particularly given the potential for some households to experience bill



Recall of this page is generally low, but customers acknowledge information about benefits is useful.

Customers want to see more practical information about tangible impacts of meters from the outset, particularly estimated changes to billing.

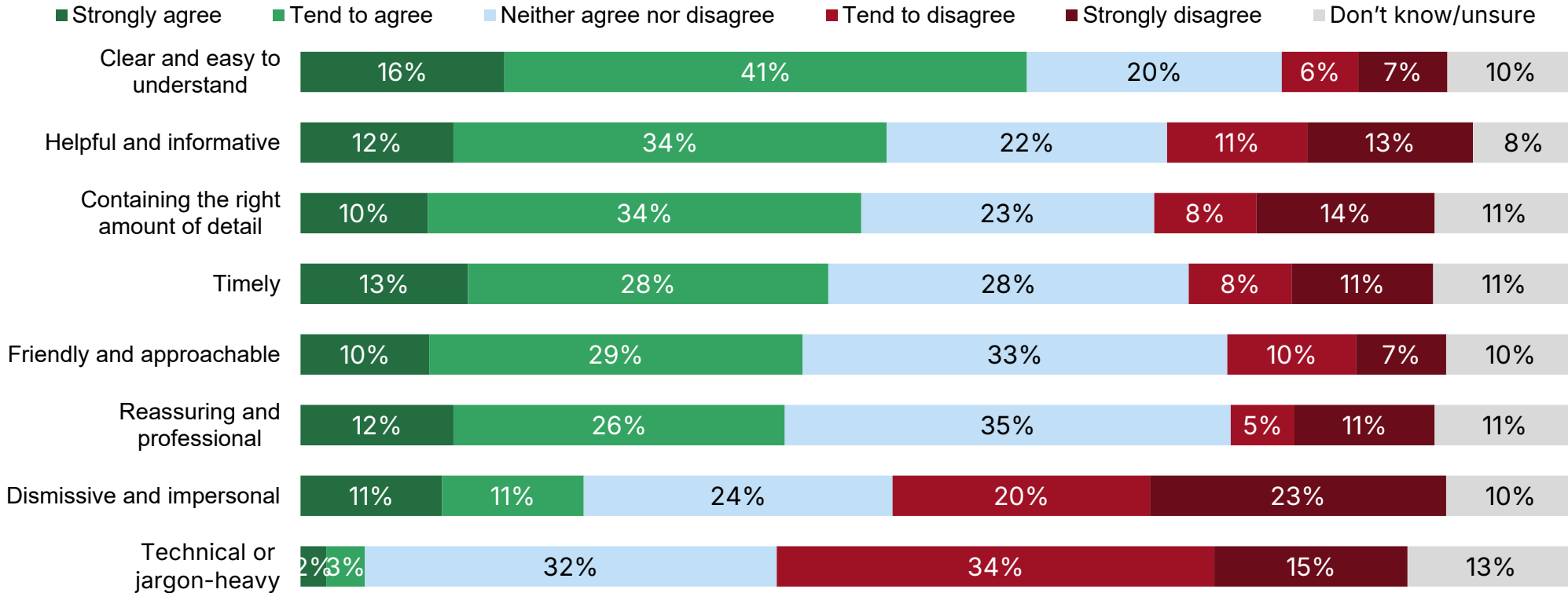
# There is a mixed, but relatively positive response to the pre-installation postcard among survey respondents



Over half feels it is clear and easy to understand.



## Attitudes towards pre-installation postcard



Customers who received the day of installation postcard are significantly more likely to agree that the postcard is clear and easy to understand (78% agree), and containing the right amount of detail (63% agree).



Denotes sig diff vs. Total @ 95% CI

Q16. To what extent do you agree with the following statements about this particular postcard you received? / This is an example of a postcard you should have received from South Staffs Water. After seeing this, to what extent do you agree with the following statements? *Base: 176 respondents*

# It nonetheless leaves a third of respondents wanting to avoid having a meter

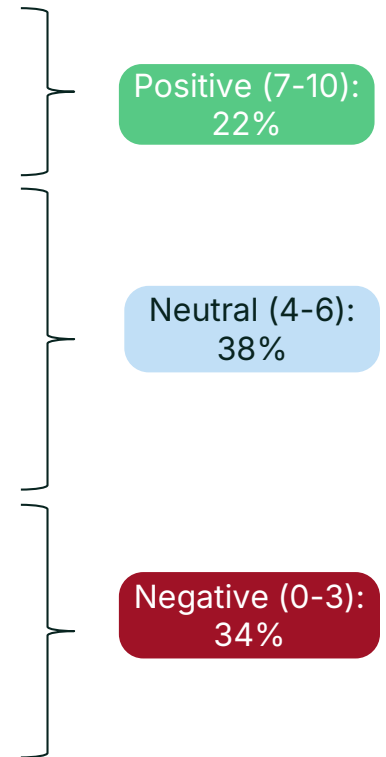
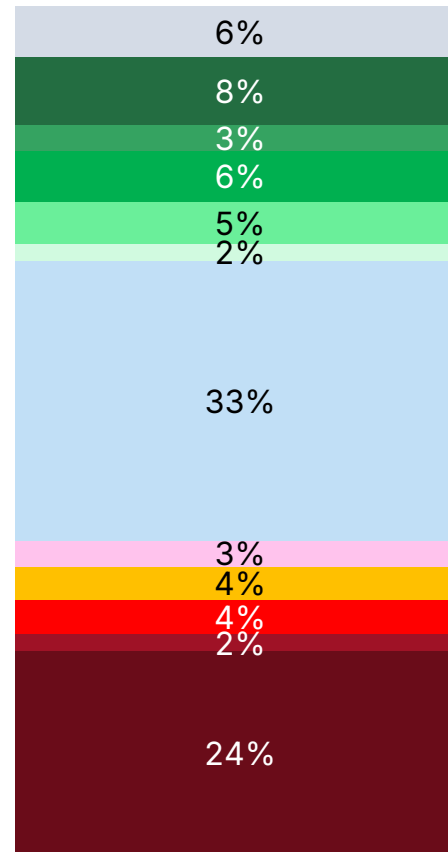
This figure is significantly higher among those struggling financially.

Impact of comms on meter sentiment: pre-installation postcard



Mean = 4.3

- Prefer not to say
- 10 - Makes me feel drawn towards having a meter
- 9
- 8
- 7
- 6
- 5 - Makes me feel neutral about the idea of having a meter
- 4
- 3
- 2
- 1
- 0 - Makes me want to avoid having a meter



The pre-installation postcard had a more negative effect on customers struggling financially (50%)

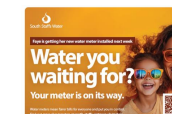
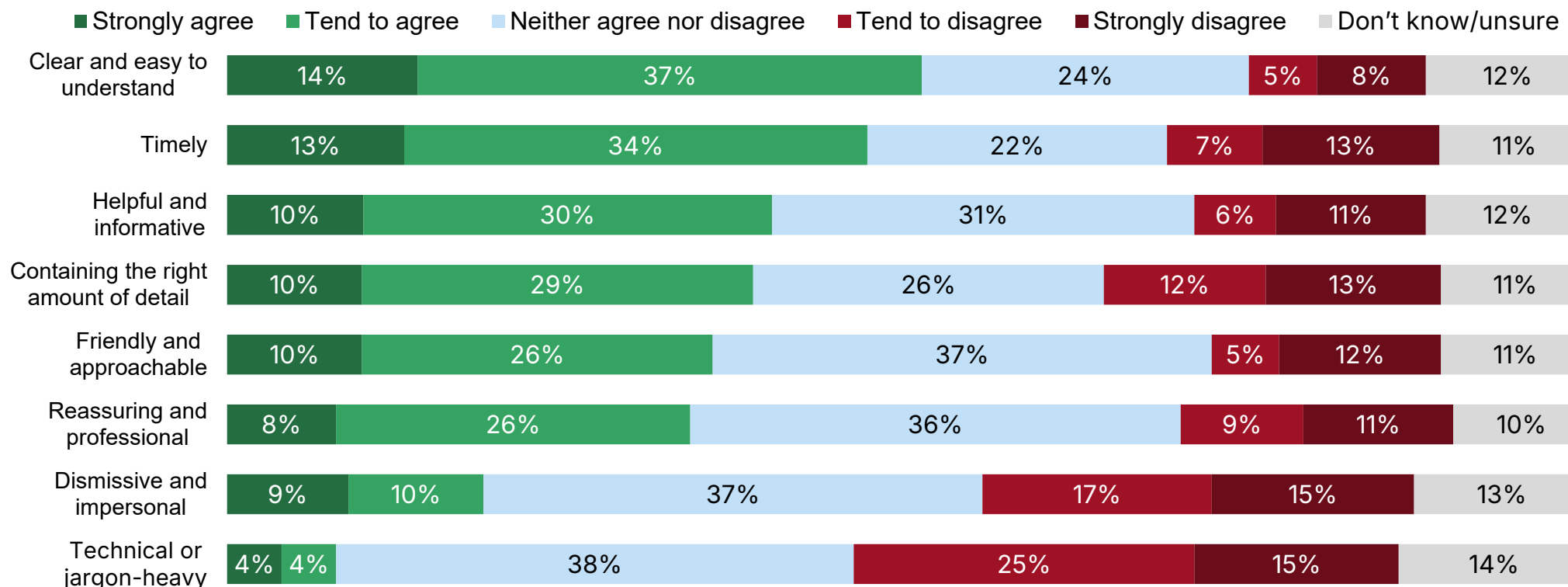


Denotes sig diff vs. Total @ 95% CI

# Overall reactions to the day of installation postcard are broadly similar to the pre-installation postcard



Attitudes towards day of installation postcard



Customers who received the pre-installation postcard are significantly more likely to agree that the postcard is clear and easy to understand (70% agree), and timely (69% agree).

Denotes sig diff vs. Total @ 95% CI

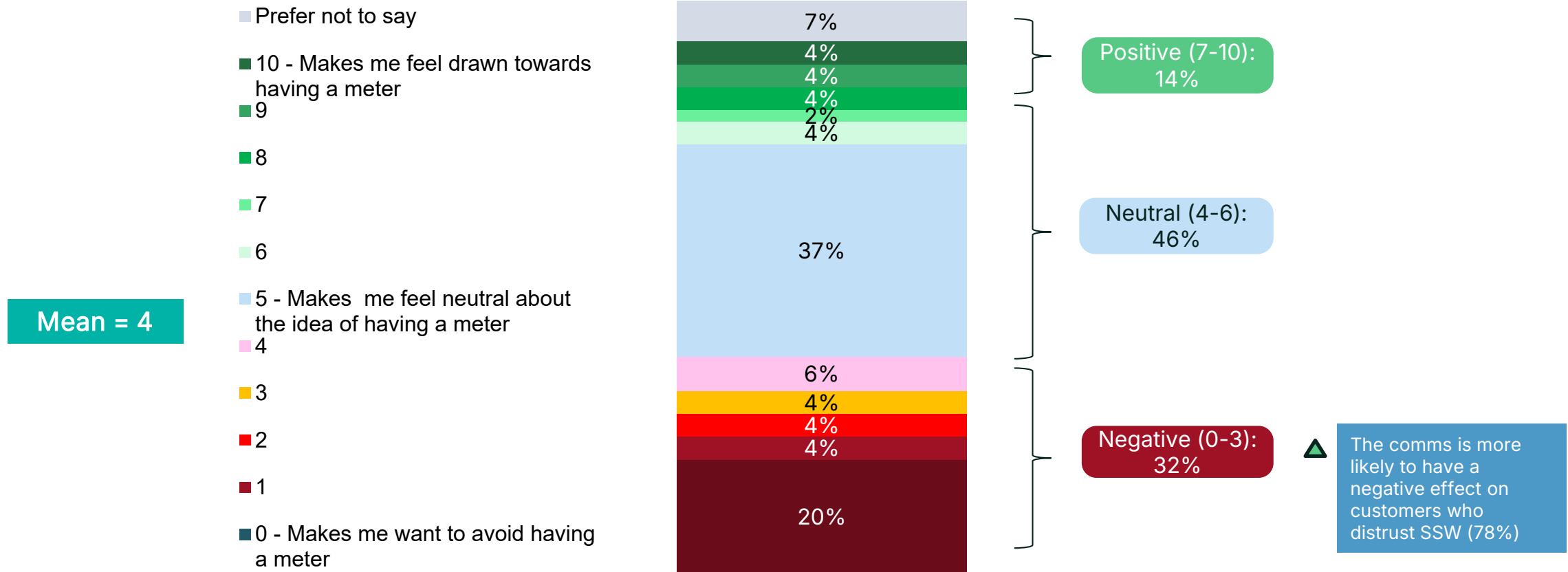
Q16. To what extent do you agree with the following statements about this particular postcard you received? / This is an example of a postcard you should have received from South Staffs Water. After seeing this, to what extent do you agree with the following statements? Base: 136 respondents

# The day of installation postcard also had a similar impact on views towards water meters

Those already dissatisfied and distrustful of South Staffs Water are more likely to react negatively.



Impact of comms on meter sentiment: day of installation postcard



# Deep dive: Post-installation letter

Information contained in the letter is seen as useful, and the tone is what customers expect from water company comms. The level of detail is preferred to that of the postcards, with customers wanting more of this information earlier in the journey.



The letter is generally received positively; customers see this type of comms as standard and practical, and are more likely to retain a copy for future reference.

There is strong appetite among customers for information related to billing, as concerns over finances has driven negative sentiment about meters.

## Your new water bills

You'll get two bills each year - one in <insert month> and one in <insert month>. Both bills will need to be paid in full.

We aim to read your water meter at least once every year. Your next meter reading is due in XXX. One of your bills will be based on this reading, and the other will be estimated.

You can also send us your own meter readings at any time. For help with reading your meter, visit <https://www.south-staffs-water.co.uk/meter-reading>. Reading your meter regularly can help you track your water use and spot wasteful leaks early.

## How your charges work

You're charged for each cubic meter of water you use. One cubic meter is 1,000 litres, that's about 12 full bathtubs. Find out more about metered charges on our website: Find out more about metered charges on our website: <https://www.south-staffs-water.co.uk/metered-charges>

Your bill also includes:

- A standing charge for maintaining, and reading your meter
- Charges for used water, sewerage services, surface water and highways drainage, which we collect on behalf of Severn Trent.
- We want this letter to be clear and helpful. Please tell us what you think about it [here](#).

The use of comparisons (e.g. 12 bathtubs) is seen as helpful for visualising overall water usage.

While helpful, many believe billing information should be more prominent across earlier comms.

NB. The post-installation letter was tested in the qualitative interviews, but not in the main survey

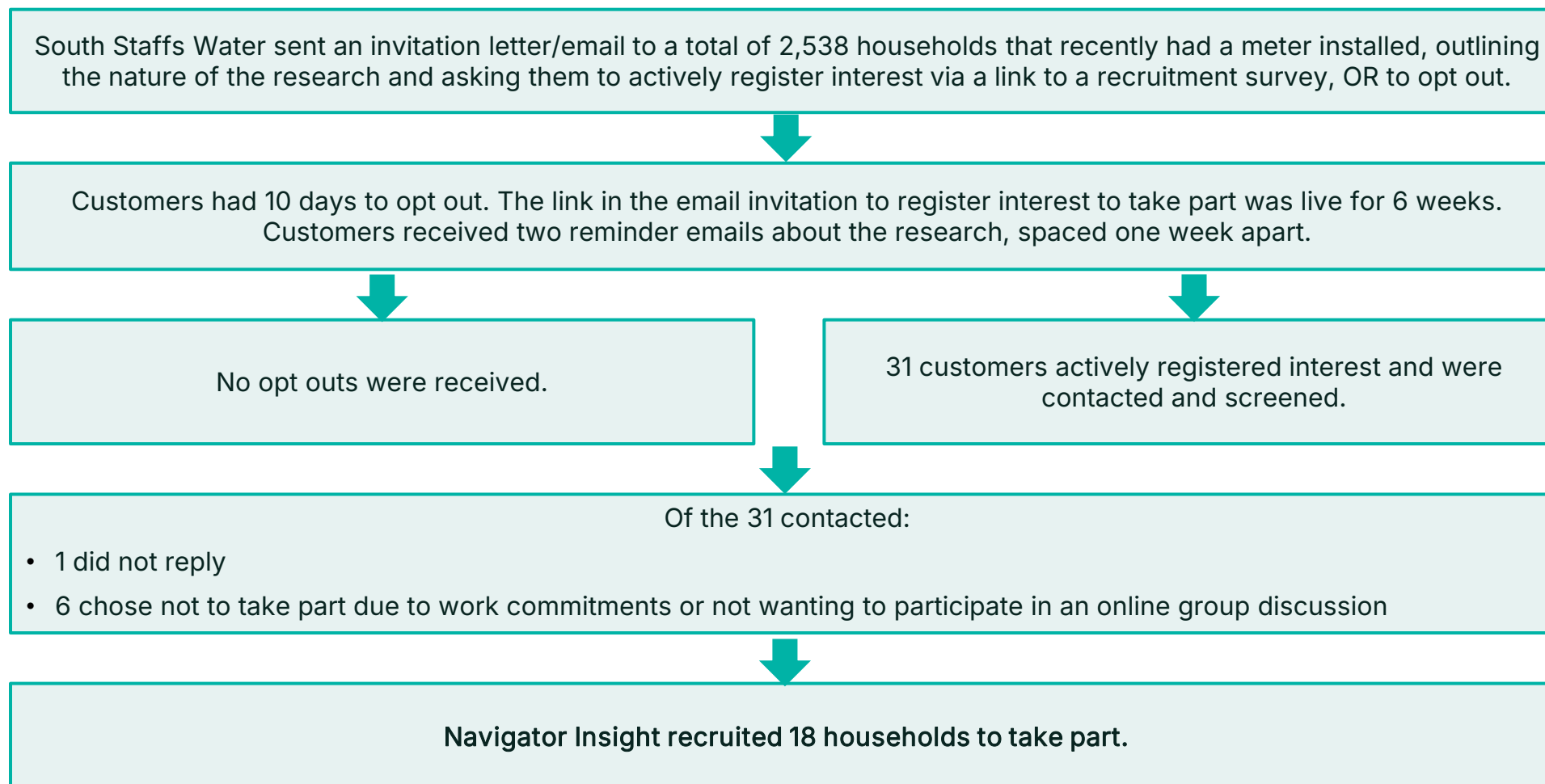
# 07



# Appendix

# Recruitment approach

## Recruitment via customer lists



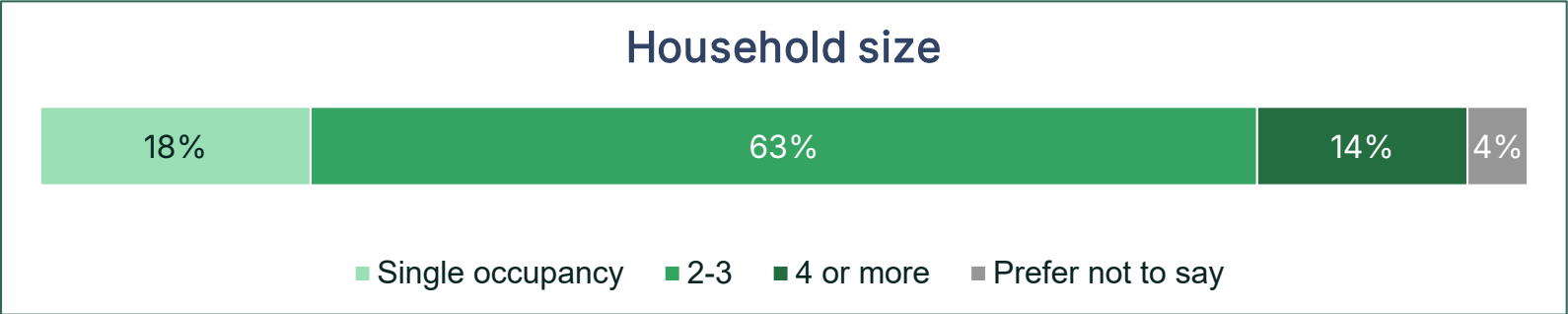
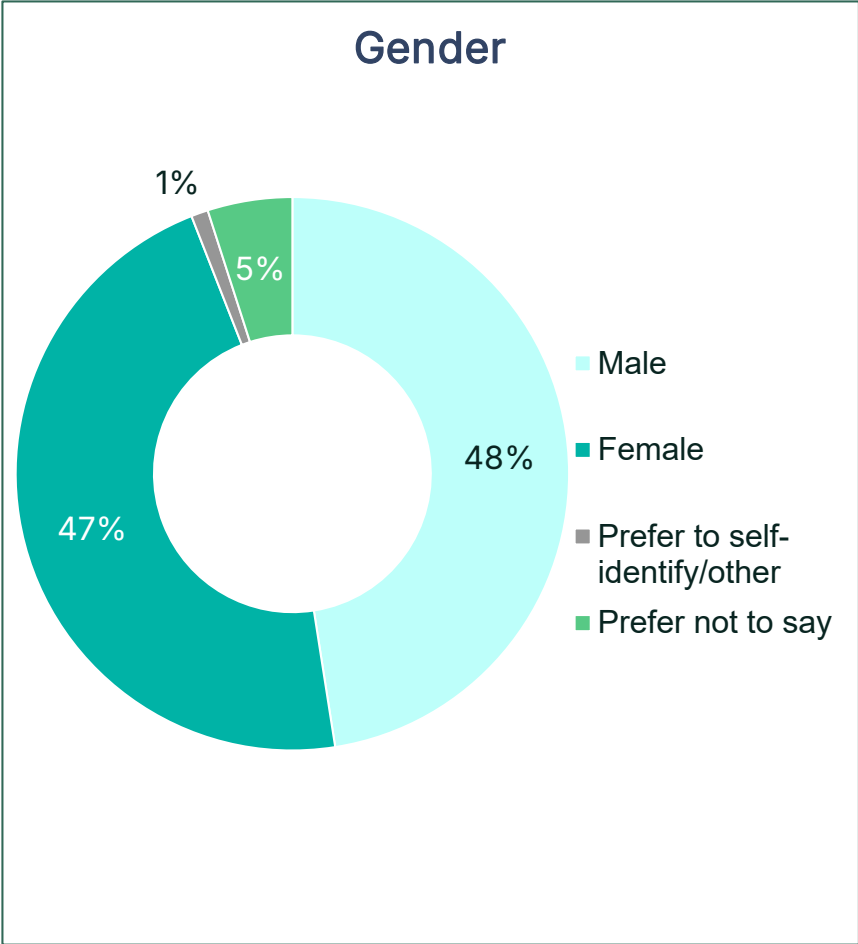
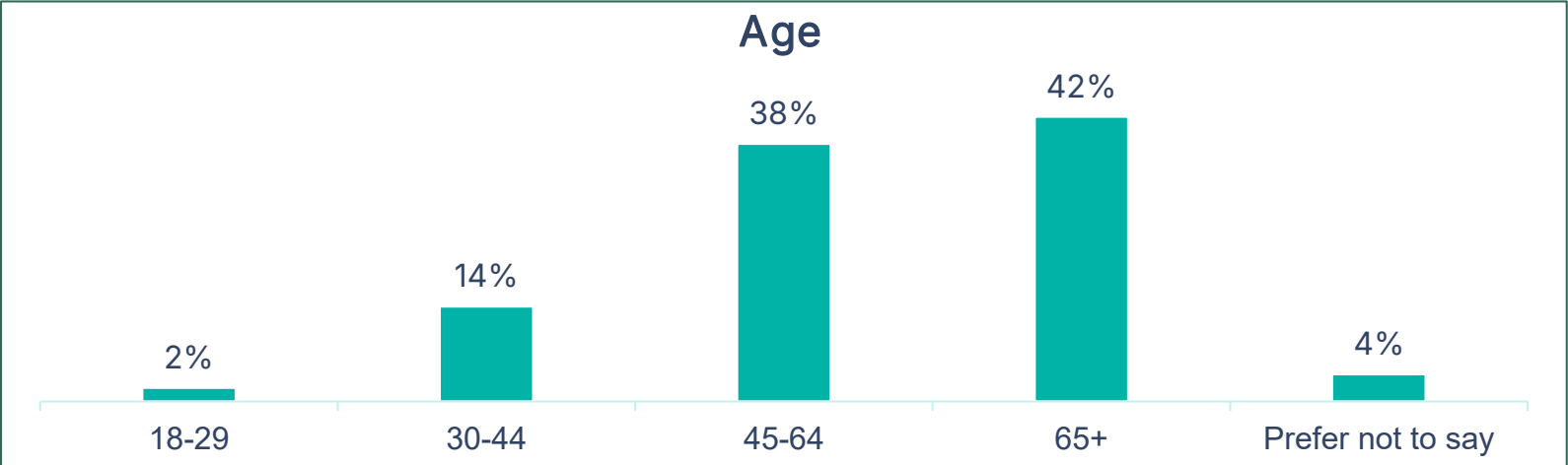
## Sample spread

		18 households
<b>Occupancy / Life stage:</b>	Single occupancy	2
	Couple occupancy	10
	Family stage	6
	Multiple occupancy (3+ people)	0
<b>Housing circumstances:</b>	Own with or without mortgage	16
	Tenants	2
<b>Household type:</b>	Flat/no garden	0
	House/small/medium garden	14
	House/large garden	4
<b>Vulnerabilities</b>	In vulnerable circumstances/PSR eligible	8
	Just about managing to pay bills	10
	Very difficult to manage unexpected bill increase	2
	Benefits claimants	2
<b>SEG</b>	AB	8
	C1	6
	C2	1
	DE	3
	Don't know/prefer not to say	0
<b>Age</b>	Under 40	3
	40-54	6
	55+	9

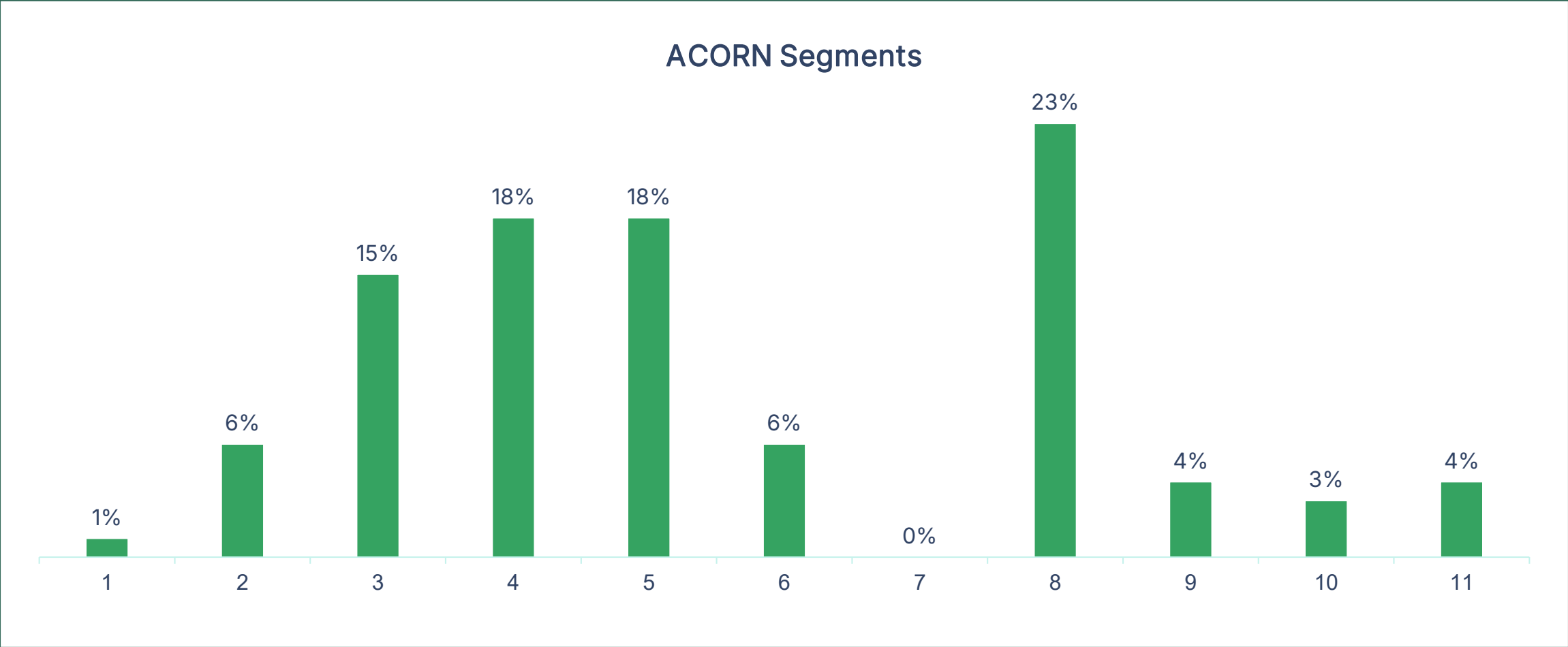
## Sample notes

- Due to recruitment challenges, and the fact the research is self-selecting, it was agreed with South Staffs Water that hard quotas would not be imposed.
- Despite this, a good spread was achieved across most of the sample criteria.
- A key customer segment for South Staffs Water is those that may require “hand holding” support. These are customers who experience higher bills on metered charges, are more likely to be in debt/struggling to pay household bills, and who may have PSR health needs
- At this stage of the research, it is not possible to say if any participants fall into this category, as changes to bills/usage are yet to be determined, and no customers stated they were struggling to pay bills.
- However, as shown in the sample table, several customers are close to this position; ten just about manage to pay bills, two are benefits claimants, and another two would find it very difficult to manage unexpected bill increases.
- Subsequent waves of this research will allow us to better understand how customers manage the move to metered billing and whether any fall under the “hand holding” segment.

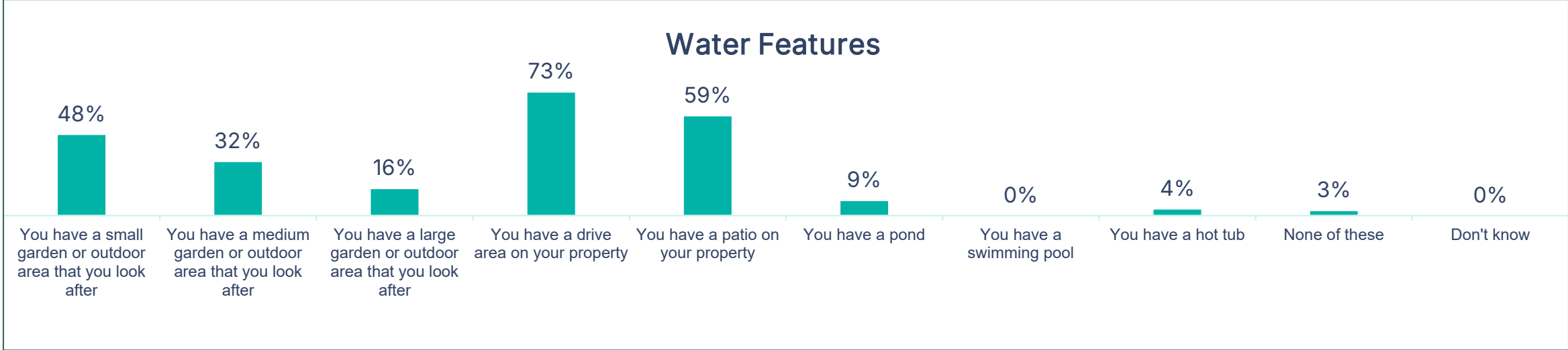
# Quantitative sample selection



# Quantitative sample selection

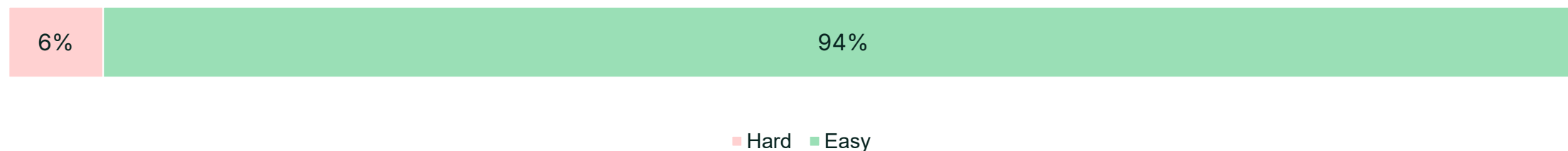


# Quantitative sample selection

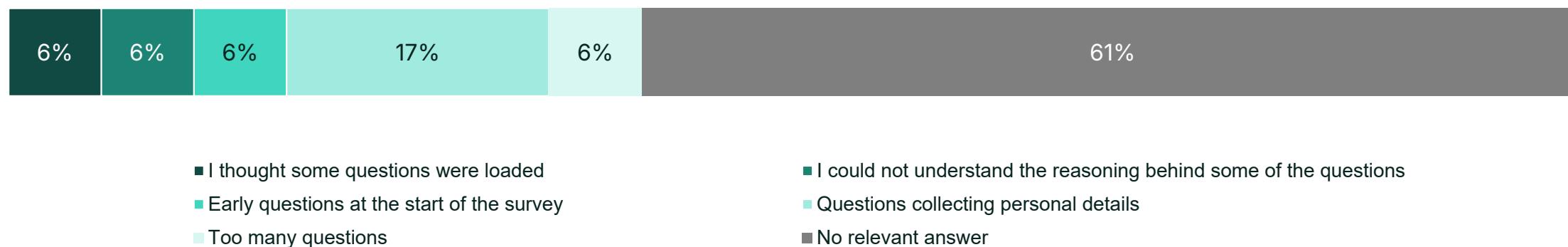


# Quantitative sample selection

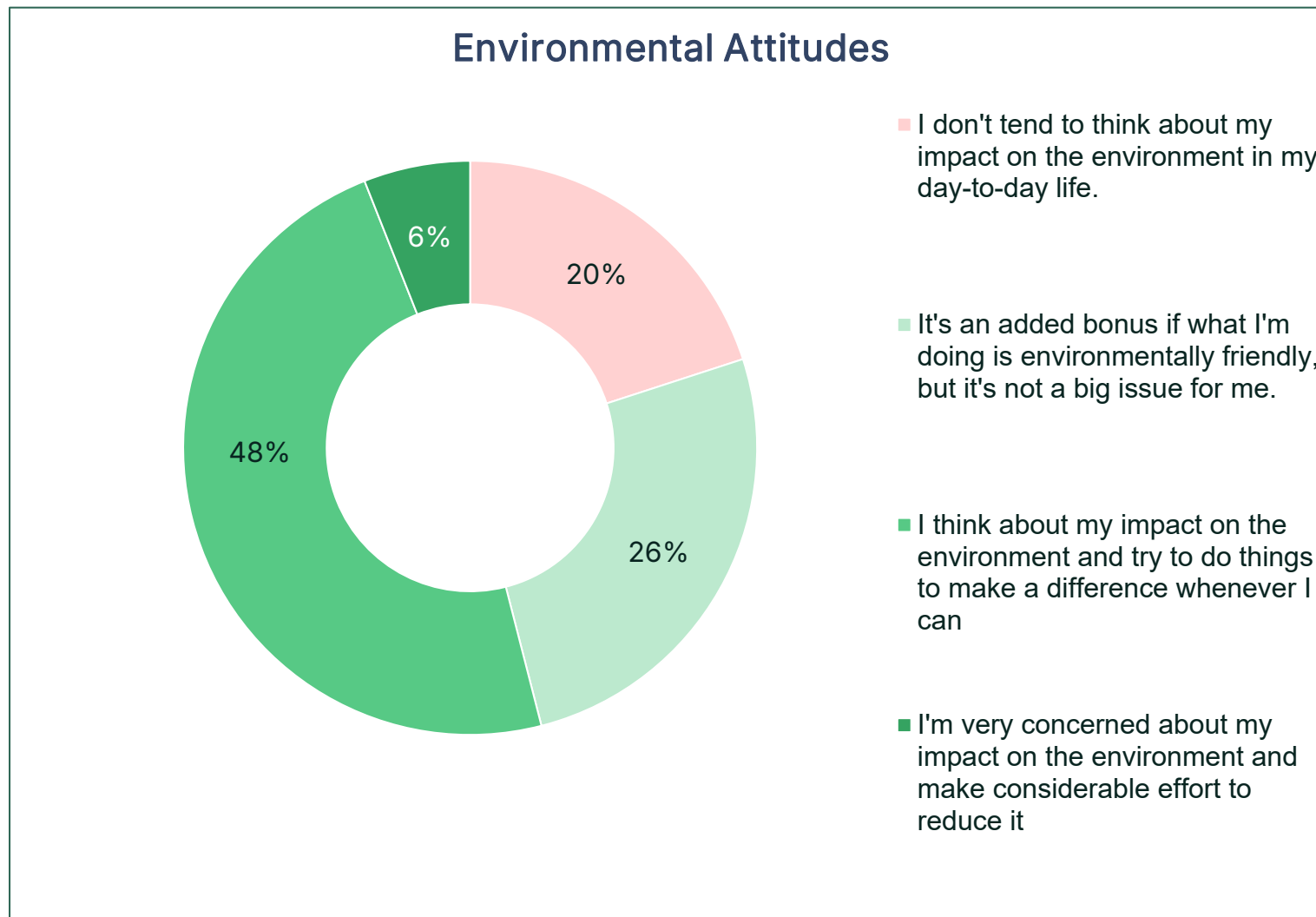
### Difficulty of questionnaire



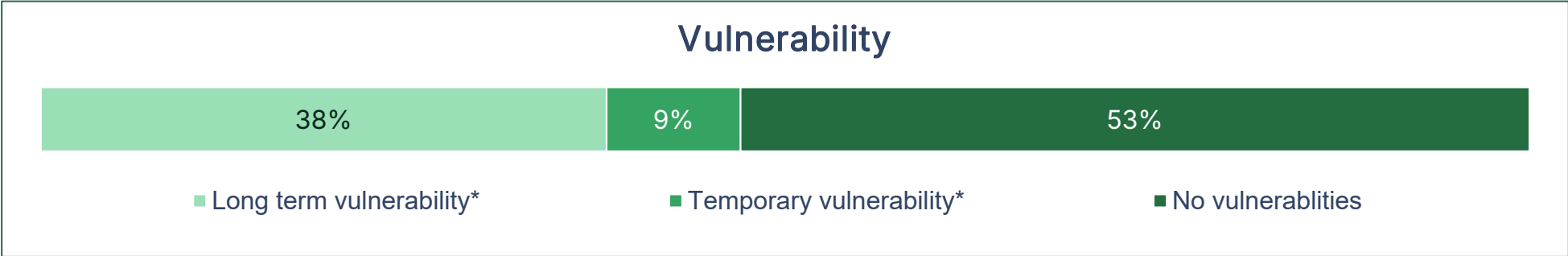
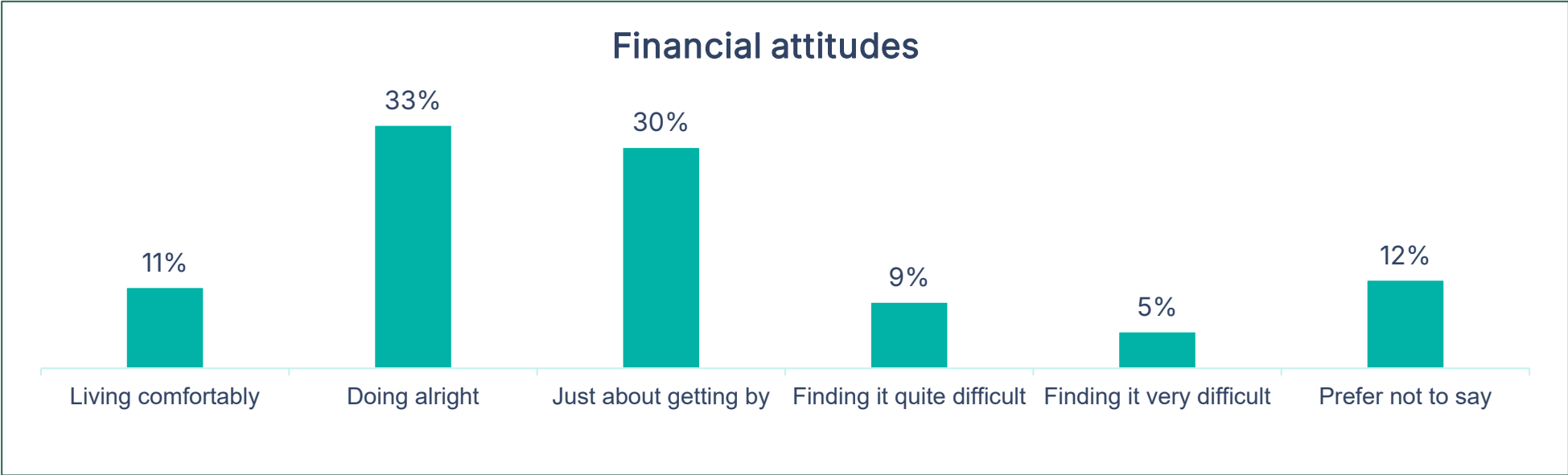
### Reasons for difficulty



# Quantitative sample selection



# Quantitative sample selection



\***Long-term vulnerabilities** include health conditions impacting daily life, mental health conditions, physical disabilities, and conditions that specifically rely on using water.

\***Temporary vulnerabilities** include sudden loss of household income, short-term health problems (e.g. injury or surgery/post op recovery), having a newborn baby in the home, bereavement, and relationship breakdown in the past year.

**Navigator**  
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**Thank you**

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# Navigator

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