WaterVoice
Views of current and future water bill payers

Summary report

February 2021

The voice for water consumers
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Contents

Background, objectives and methodology

Background and Objectives

Key objective – Understand the attitudes and behaviour of water bill payers (current and future) towards aspects of water company services, including preferences for payment, contact, technology, water use and drinking water preferences. Identify some wider environmental behaviours and expectations for businesses to provide information related to corporate social responsibility and environmental impact.

This research looks to answer four key objectives which have been outlined below:

1

To profile future water bill payers (future customers) and how they differ to current bill payers (current customers)

2

To explore the issues facing current and future customers and how these are prioritised

3

To determine the environmental attitudes and behaviours of current and future customers

4

To examine the use of technology and contact/ payment preferences among current and future customers

Methodology

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Overview

Online survey of 1,902 adults (aged 16+) in England and Wales

Fieldwork conducted 13-15th November 2020

Sample representative of the total population

Approach

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

Yonder own and manage a highly engaged online panel of 180,000 UK adults and this resource was used as the primary source of sample for the online survey.

Yonder conducted 1,902 online interviews with consumers in England and Wales. The first question in the survey identified responsibility for paying water bills. All respondents, with or without responsibility, were asked all questions in the survey.

Sampling

A stratified sampling technique was employed using multiple demographic groupings to select respondents randomly from Yonder's online panel. This approach helps to minimise selection bias and ensure certain segments of the population are not over- or under-represented.

Quotas were set on age, gender, region and social grade. The data was then weighted to the known profile of Great Britain using age, gender, government office region, social grade, taken a foreign holiday in the last 3 years, tenure, number of cars in the household and working status.

Sub-group analysis

Customer group analysis

Throughout the report data is analysed by current water bill payers (current customers) and future water bill payers (future customers). The group was assigned based on responses to the following question:

Which of the following household bills and other services do you personally pay for now, or expect to in the future?

I pay for this personally or jointly	Current customers
I expect to pay for this in the future when I have my own place to pay household bills for Included in my rent currently – but I could be personally responsible in future	Future customers
It's unlikely I'll ever pay for this personally someone else would do this	
Included in my rent currently – I don't expect to be personally responsible in future	

Current customers: those who currently pay their water bill personally or jointly
83% of total sample (n=1,599)

Future customers: those who do not pay their water bill at present but expect to in the future
12% of total sample (n=216)

Age group analysis

The findings are also analysed by generational age groups:

Generation Z: those aged 16-24
12% of total sample (n=206)

Millennials: those aged 25-38
24% of total sample (n=429)

Generation X: those aged 39-54
29% of total sample (n=527)

Baby Boomers: those aged 55-74
30% of total sample (n=623)

Silent Generation: those aged 75+
6% of total sample (n=117)

Scope and Limitations of this Report

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Scope

This report aims to establish attitudes and behaviours of the overall England and Wales population, as well as current/ future customers and generational age groups. It provides a robust sample to be able to analyse the data on this basis.

The statistical reliability of the data at 95% confidence level is outlined below:

Sample Size	Margin of Error for response of 50%
Total sample 1,902	+/- 2.2%
Current customers 1,599	+/- 2.5%
Future customers 216	+/- 6.7%

Limitations

The categorisation as a future water bill payer is based on future claimed behaviour and therefore may not provide a truly accurate representation of those who will go onto pay for their own water bill.

This research was completed online. In general, online respondents are more technically knowledgeable and are more likely to be early adopters of new technology products and services. This should therefore be taken into consideration when assessing specific survey results around the use of smart technology at home.

Online survey respondents are also incentivised to complete surveys. To counter this, rigorous quality control procedures were implemented to maximise the attention paid by respondents when participating in the survey and avoid 'happy clicking' or rushing through surveys to reach the reward at the end.

Executive summary

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Key insights

• **Understanding current and future customers**	• Four-in-five consumers in England and Wales report that they pay for their water bill personally or jointly (current customers). • Just over one-in-ten are future water bill payers (future customers) – those whose water bill is included in their rent at present or live in a household where someone else pays the bill. • Current customers look similar to the general population, but are slightly older, more likely to be retired and more likely to own their own home. • Future customers are much younger. They are less likely to have children and more likely to be renting or living rent free. • Awareness of water providers is much lower among future customers – with close to a third unsure who currently provides water services for their household. The overwhelming majority of current customers claim to know who their water provider is.
• **Technology usage**	• The majority now have smart technology in their home and ownership is relatively consistent across both current and future customers. While future customers are more likely to have an Apple Home kit, current customers are significantly more likely to have a smart energy meter. • One-in-three think that smart technology will have a big role in the way that they manage their water use in the future. This sentiment is particularly strong among younger age groups and future customers. • Despite differences, both the groups appear relatively tech-savvy indicating an appetite for both these groups to accept and use services that include smart technology.

Executive summary

Key insights

• **Importance of current issues**	• The impact of COVID-19 is the most important issue at present across customer groups. Health care, taking care of loved ones, personal finances and the general economy are also important. • The importance of getting a job and education is significantly higher among future customers, while current customers are more concerned about health care, taking care of friends/ family and the general economy.
• **Attitudes towards the environment**	• Few consumers currently pay more for environmentally friendly products or services, although this is higher among the Silent Generation (aged 75+). Some participants spontaneously mention gas, electricity, food and cleaning products as areas where they currently spend more for products and services that are better for the environment. • Close to half report acting in an environmentally friendly way – including spontaneous mentions of recycling, reducing single use plastic, drinking tap water and energy saving actions in the home. • Current customers are more likely than future customers to claim to be taking water saving actions at home – turning off taps when not in use, taking showers over baths and limiting toilet flushes. • A fifth think that the environment isn't particularly affected by water used in homes and businesses as water use is managed by water companies. When asked about how water use is likely to affect the environment, people were most likely to rank the statement that 'water companies manage water use so the environment won't be affected' first (19%) followed by 'could mean water shortages/hosepipe bans' (16%) and 'if water companies need to treat and transport more water it increases carbon emissions' (15%). Current and future water bill payers had similar views.

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Key insights

• **Expectations of water companies**	• By far the most important issue for water companies is said to be providing reliable, clean drinking water, followed by keeping bills as low as possible. • Future customers are significantly more likely to prioritise planning and investing for the longer term to keep services reliable in response to climate change and more demand for water from a bigger population. • Future customers also place significantly more emphasis on helping people access help and support in a way that suits them, considering language, access to the internet, or needing information in a certain format.
• **Tap vs. bottled water**	• Overall, use of tap water is high when at home and at work, particularly among Generation Z (aged 16-24). Consumers are most likely to drink bottled water when out and about. • The majority of future customers take a refillable bottle with them for tap water when out and about either all or most of the time. They are significantly more likely to do this than current customers.

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Key insights

• **Communication channels**	• Email is the most used contact method when contacting companies or organisations with questions or complaints, used by half of all customers. • Future customers are significantly more likely than current customers to have contacted an organisation through social media or an app. They are less likely to have called a company on a landline or filled out a contact form on a website. • In terms of contact specifically with utility companies, email remains important but the proportion who would contact them using a mobile phone increases. Future customers are significantly less likely than current customers to contact a utility company via live chat or on a landline. They are more likely to claim they would contact them through text or in person.
• **Data sharing**	• Two-in-five think it is acceptable for a water company to share their data with third parties. This is relatively consistent across age groups
• **Payment channels**	• Direct debit is by far the most popular payment method for current customers when paying their water bill. This method is also most often used by future customers when paying for other services, although to a lesser extent. • A quarter report having ever fallen behind on a bill payment. This figure is consistent between both current and future customers. Millennials (aged 25-38) and Gen X (aged 39-54) are most likely to have defaulted on payments in the past, while the Silent Generation (aged 75+) and Gen Z (aged 16-24) are least likely to have done so.

Understanding the key target audience – current and future water bill payers

General profile - Current customers look similar to the general population, but are slightly older, more likely to be retired and more likely to own their own home. Future customers are much younger. They are less likely to have children and more likely to be renting or living rent free.

83% of the total population are current water bill payers

Total   Current customers

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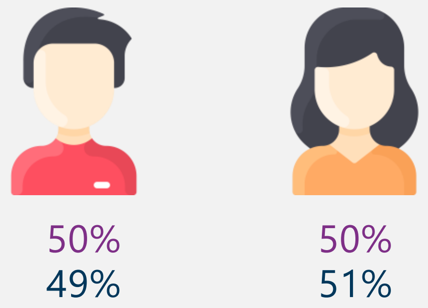
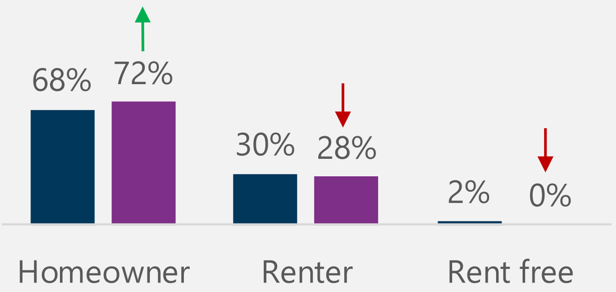
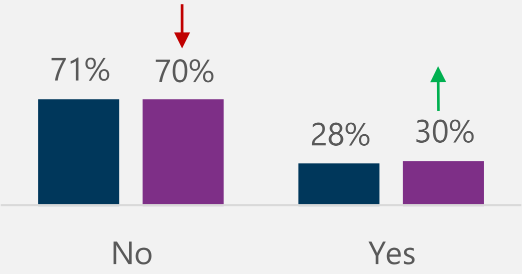
Gender



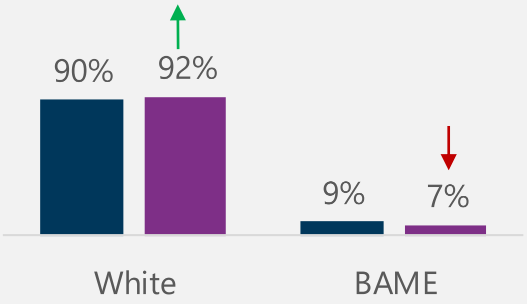
Home ownership



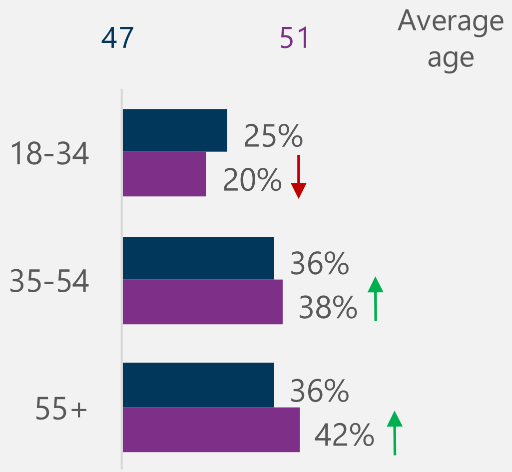
Children in household



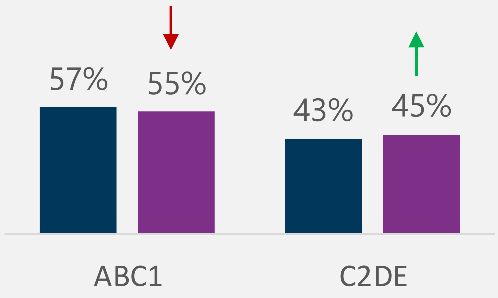
Ethnicity



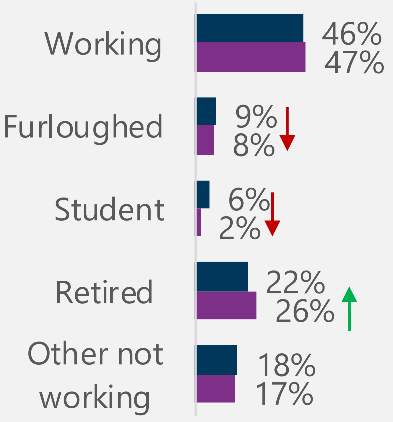
Age



Social grade*



Working status



Current customers are more likely to be older, homeowners and retired

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

↑↓ Significantly higher / lower than future customers

Base: Total (1902), current customers (1599)

12% of the population expect to pay water bills in the future

■ Total ■ Future customers

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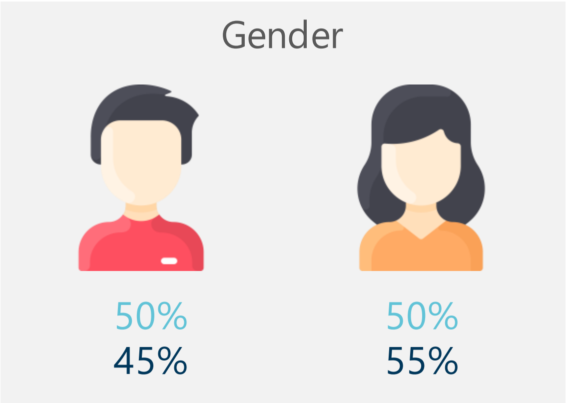

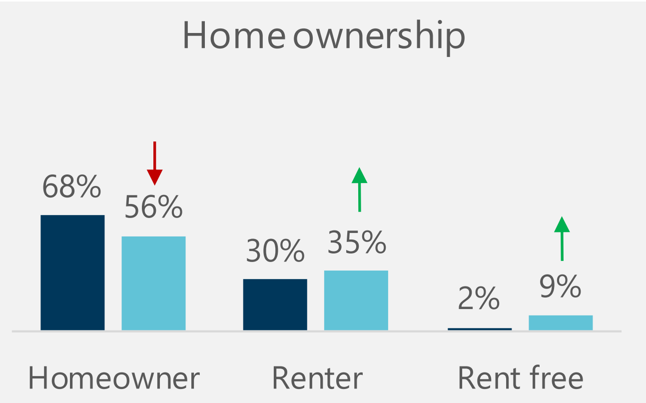

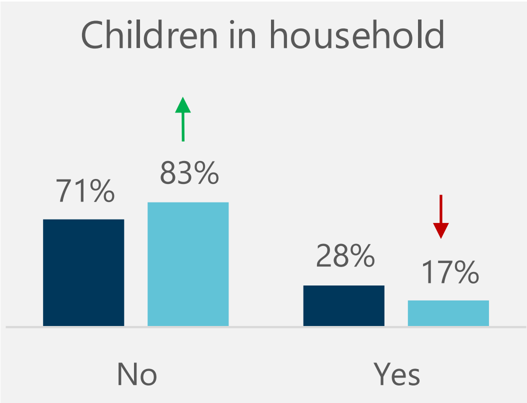

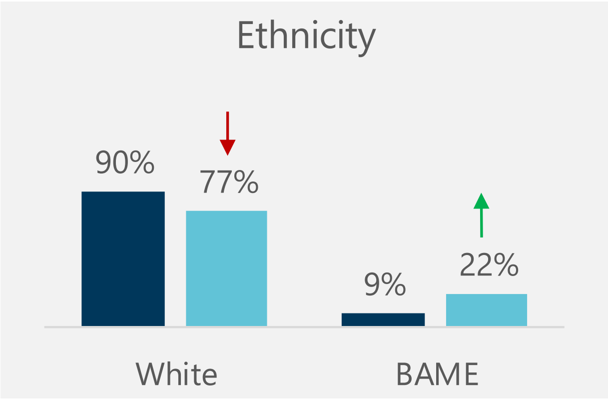

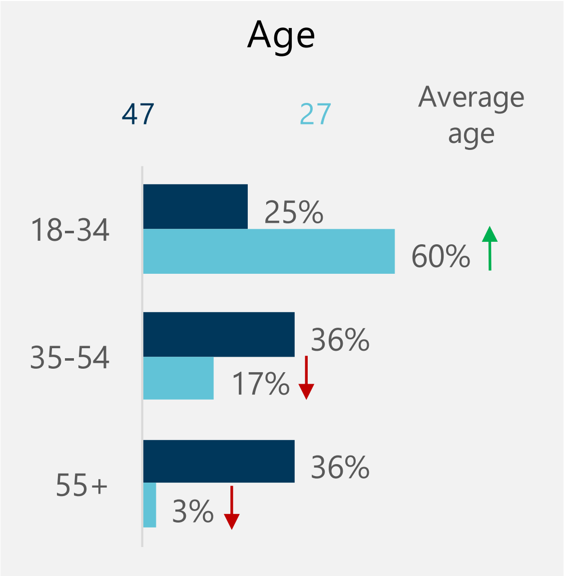

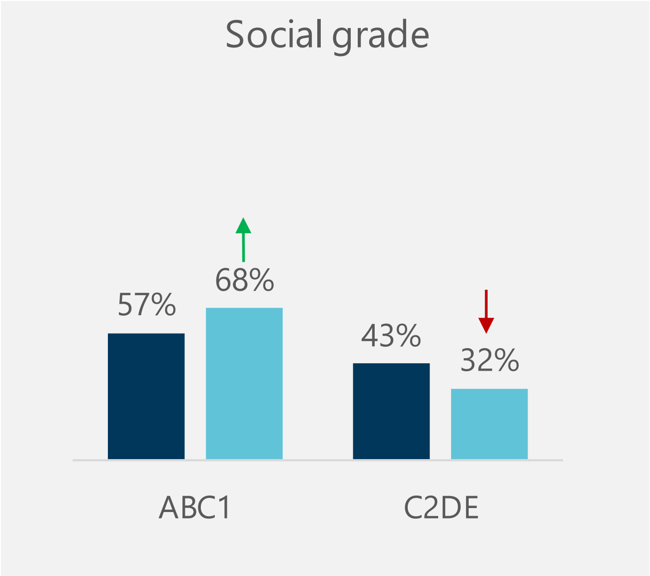

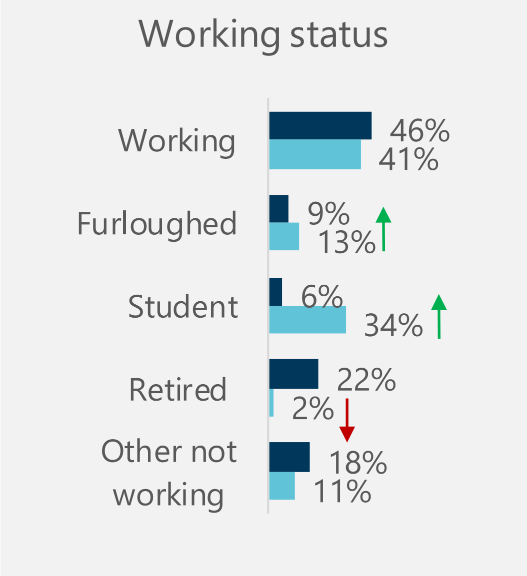

Future customers are more likely to be younger, from social grades ABC1, child-free, students, living rent free and from minority ethnic groups. They are less likely to be homeowners.

↑↓ Significantly higher / lower than current customers

Base: Total (1902), future customers (216)

Awareness of water provider is much lower among future customers – with close to a third unsure who currently provides water services for their household

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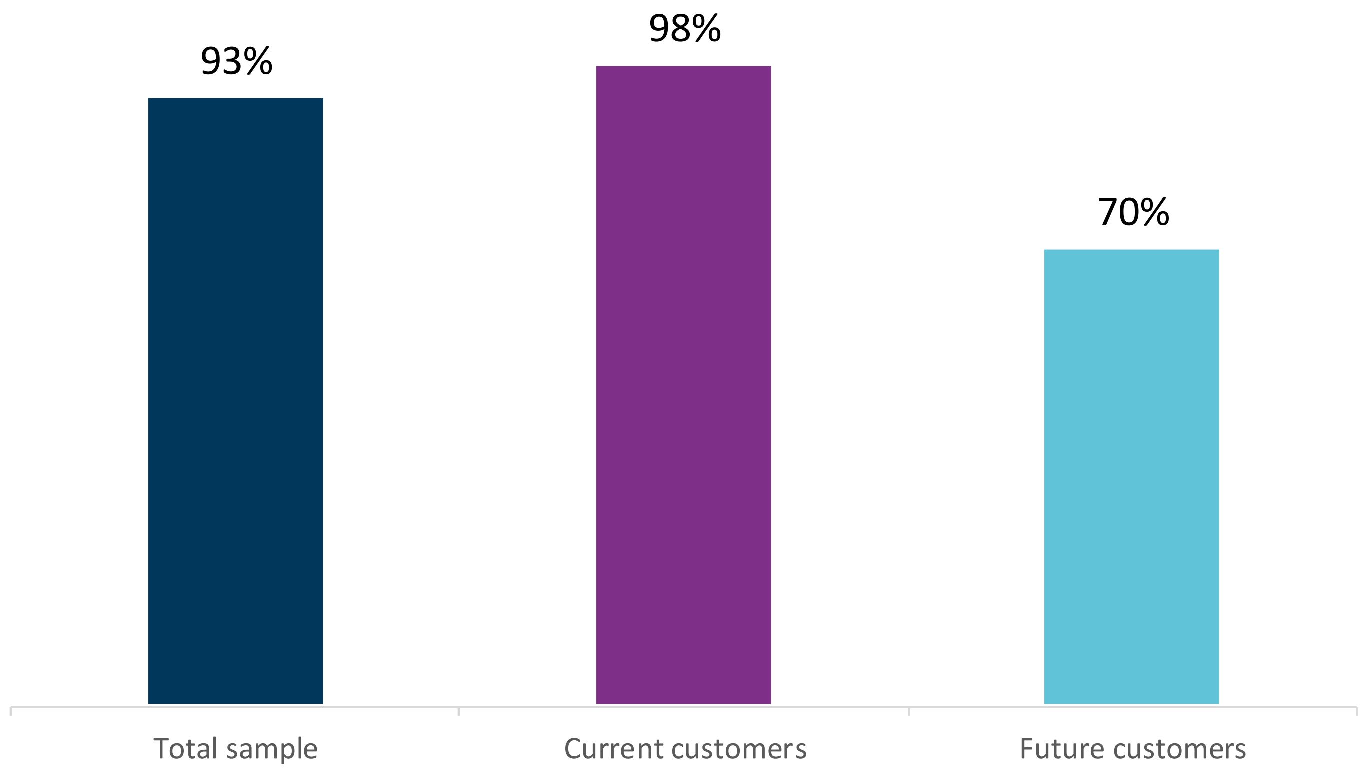
Claimed awareness of current water provider:



Q.8 Which water company provides water services for your household?
Base: Total (1902) Future customers (216) Current customers (1599)

Technology usage – The majority use smart technology at home, with Amazon Echo and Smart Meters being the most commonly owned. Future customers are slightly more engaged with smart technology and are likely to use the same to manage water usage in the future

Majority have smart technology in their homes. Future customers are slightly more likely than current customers to own this

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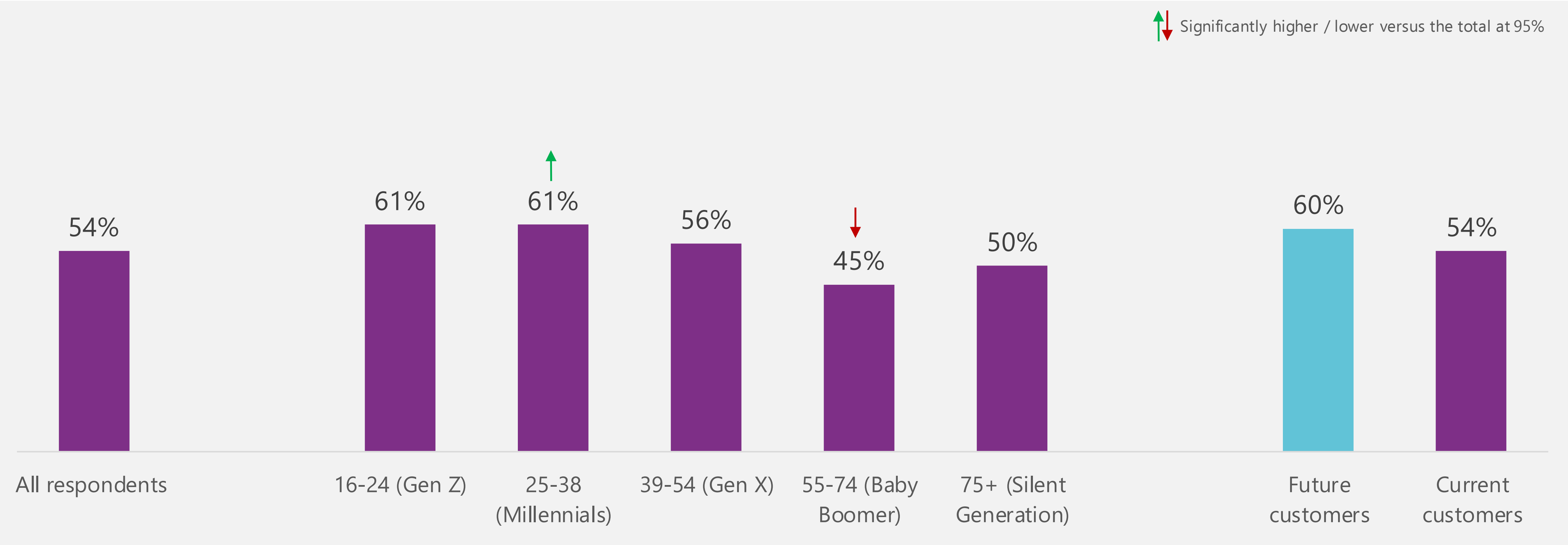
% who have any smart technology in their home



Q.10 What, if any, smart home technology does your household have? Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Amazon Echo and smart energy meters are the most commonly owned smart technology

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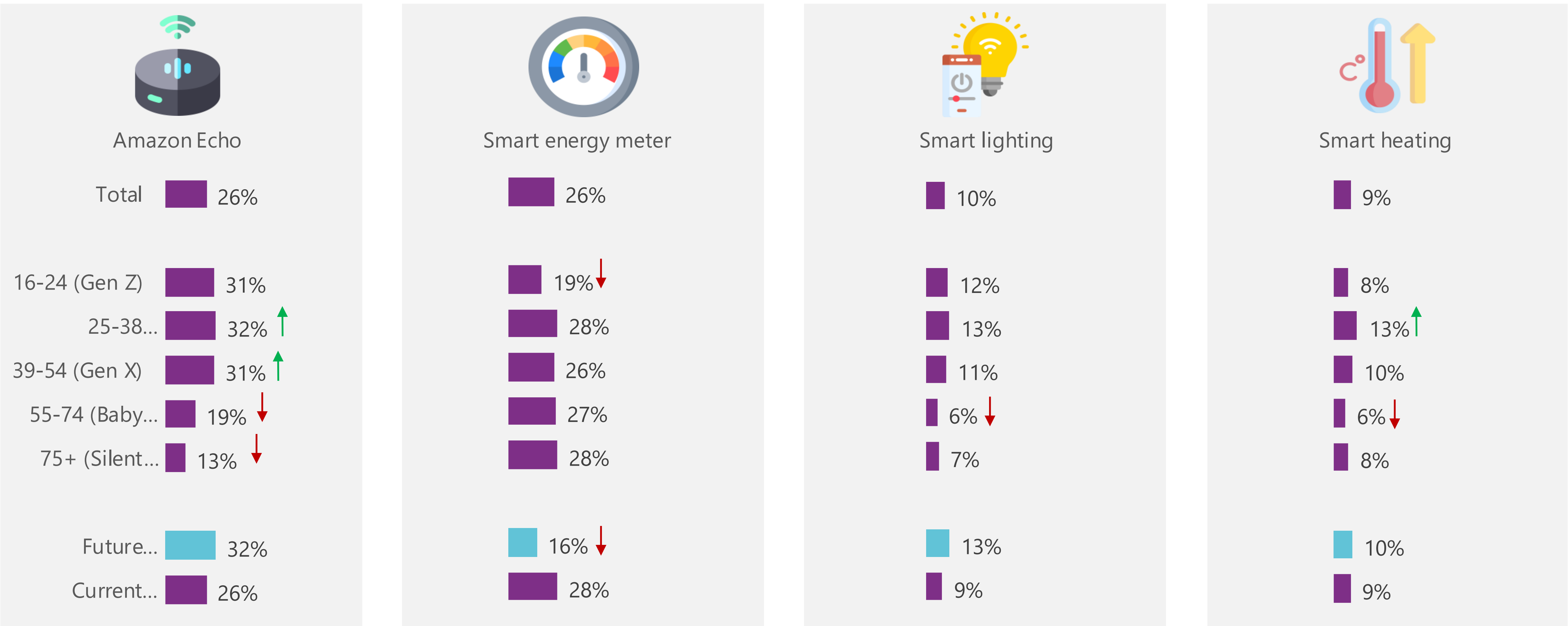
% who have each smart technology in their home by age group and customer status

Significantly higher / lower versus the total at 95%



Q.10 What, if any, smart home technology does your household have? Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Future customers are significantly more likely to expect that smart technology will help their household manage their water use

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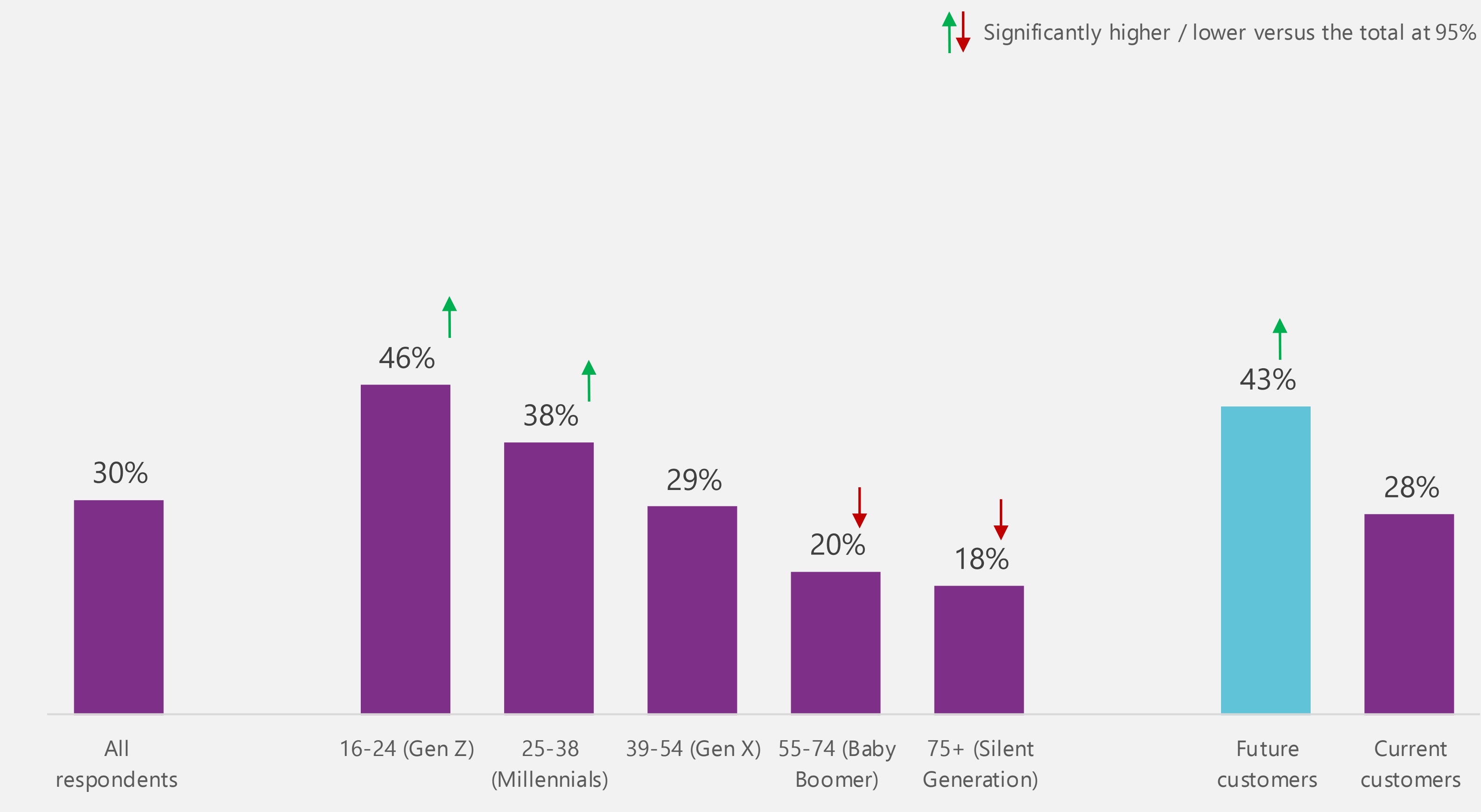
% who think smart technology will have a big role in managing their water use



The following definition of big/ small role was included in the survey to inform responses:

Big role (e.g. tell me how much water I use for different things and how much it costs, send a warning if there seems to be a leak, let me know when demand for water is high and how my use compares to similar households)

Small role (e.g. the technology might be available to help me manage my water use but I wouldn't really expect to use it much)

Q11. In the next 5-10 years, do you expect smart home technology to play a big or small role in helping you manage your household water use?
Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Importance of current issues - While Covid-19 is the key issue cited by both groups, current customers are more concerned about healthcare, and taking care of friends and family. Future customers place higher importance on their careers i.e. jobs and education

Covid-19 is the most important issue today. This is followed by healthcare, care for friends and family, personal finances and economy

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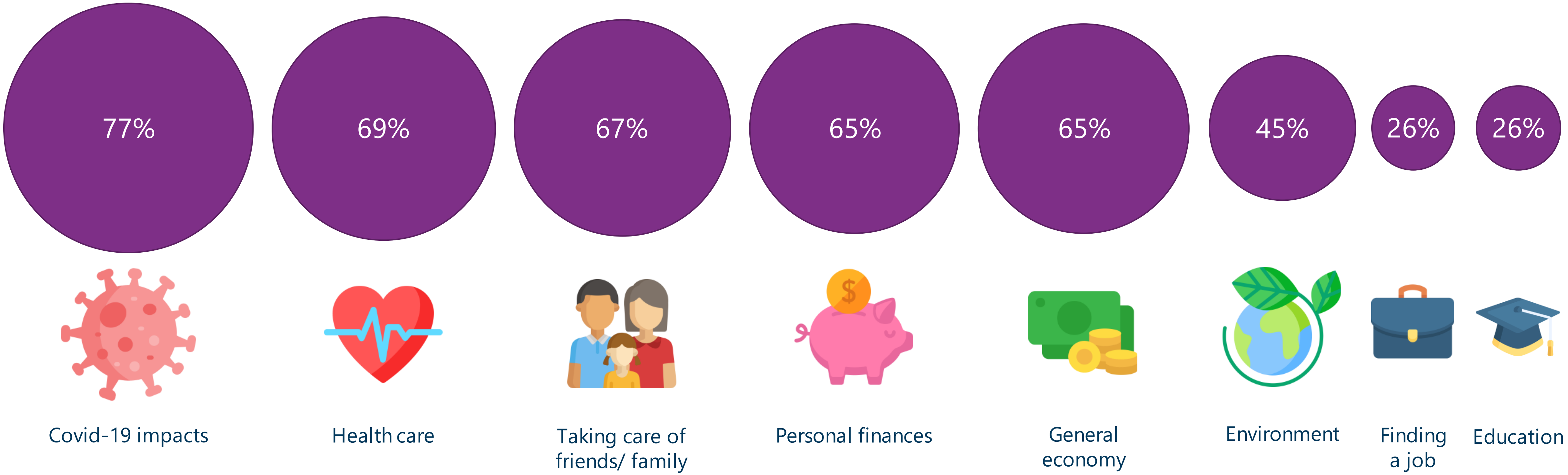
Most important issues – % rank in top 5 (all respondents)



Q2. The following question is in regard to important issues that may be affecting you today. Please rank these in order with1 being the most important issue affecting you today. Base: Total (1902)

Future customers place higher importance on getting a job in the current scenario and comparatively less importance on the overall economy

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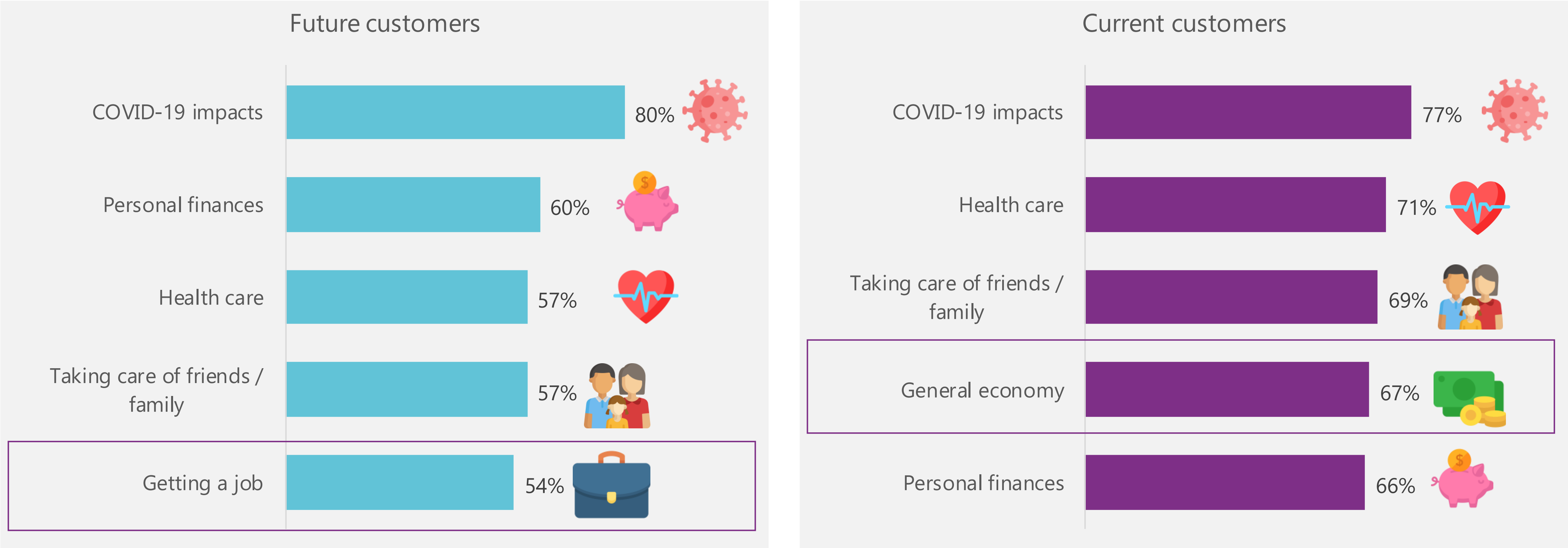
Top 5 most important issues by customer type – % rank in top 5



Q2. The following question is in regard to important issues that may be affecting you today. Please rank these in order with1 being the most important issue affecting you today. Base: Future customers (216), Current customers (1599)

Future customers also place less importance on healthcare and caring for friends and family as compared to current customers

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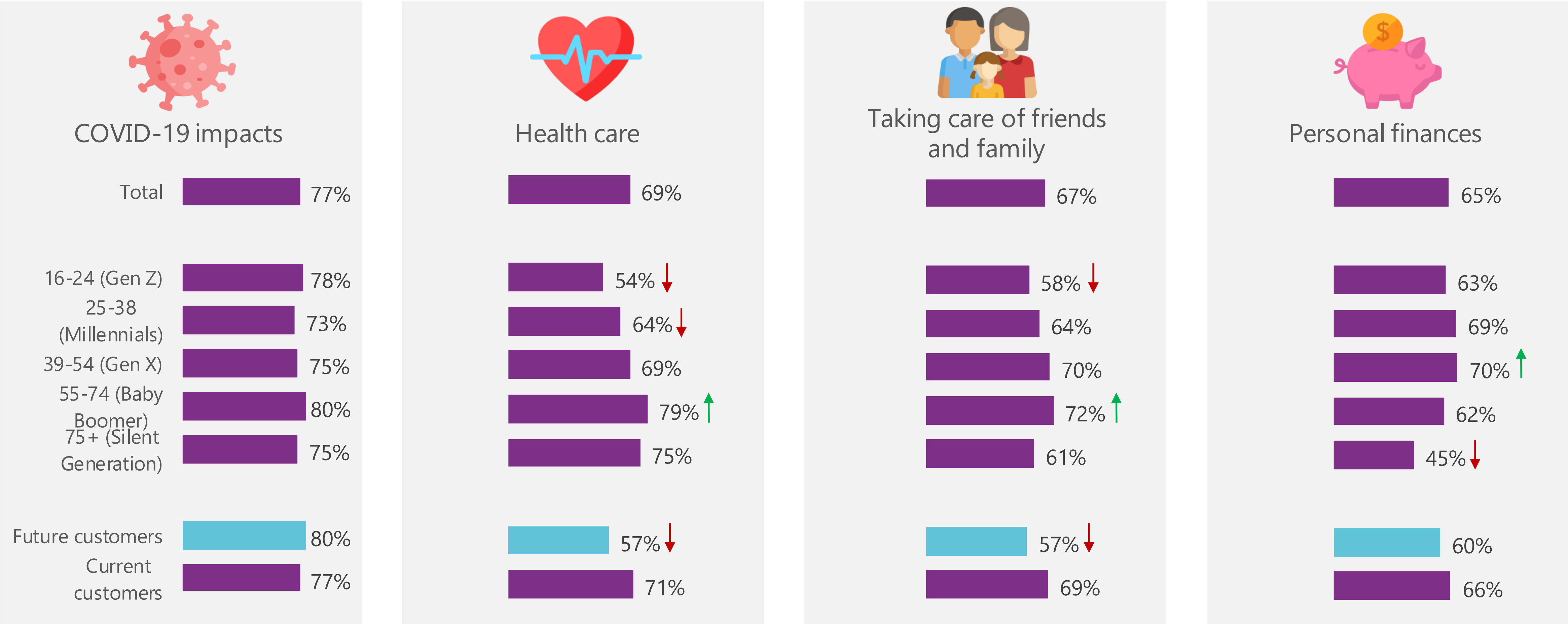
Most important issues by age group and customer status

Significantly higher / lower versus the total at 95%



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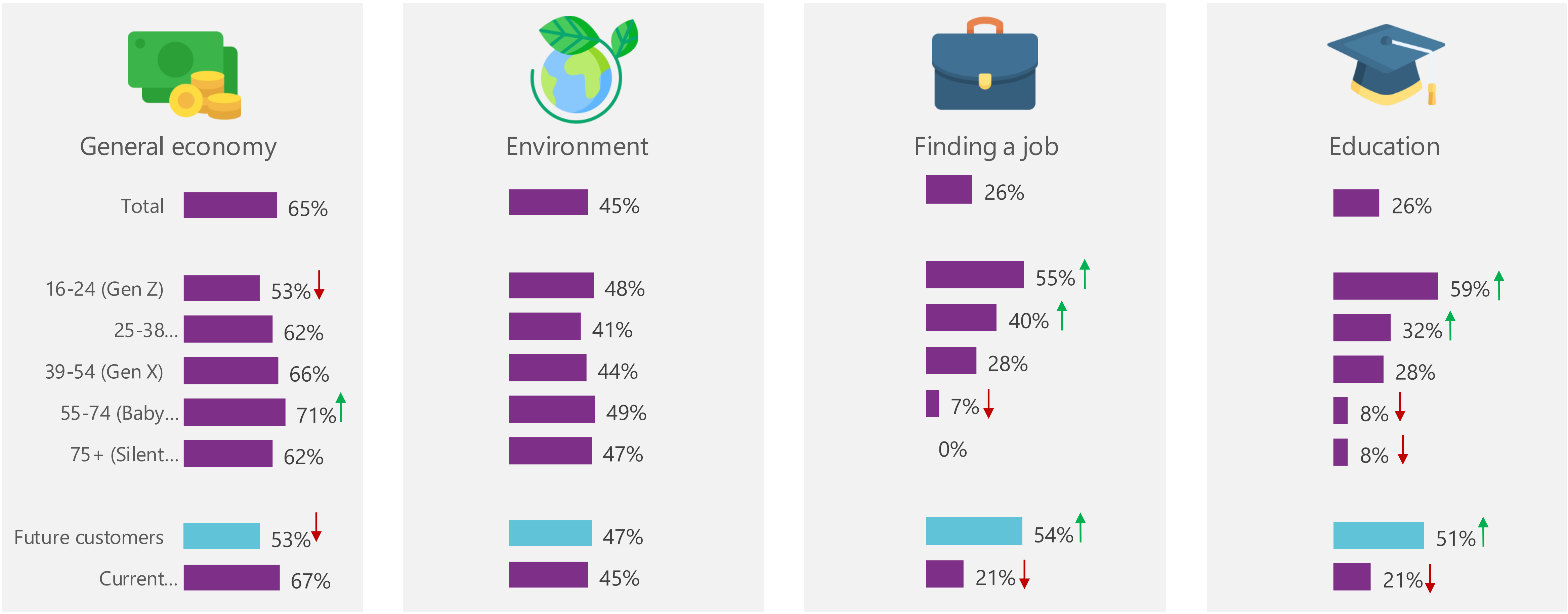
It is their career i.e. finding a job and education that is of higher importance to future customers as compared to the current ones

Most important issues by age group and customer status

Significantly higher / lower versus the total at 95%



Q2. The following question is in regard to important issues that may be affecting you today. Please rank these in order with1 being the most important issue affecting you today. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Attitude towards the environment

Close to half of all the customers claim they act in an environmentally friendly way. They also claim to think about the environmental and social impact of the products and services they buy. They seek reassurances from business on the said impact. However, price of the product is equally important to them so there may be some hesitation around paying more for environmentally friendly products

Close to 1 in 2 claim that they do something because it's better for the environment

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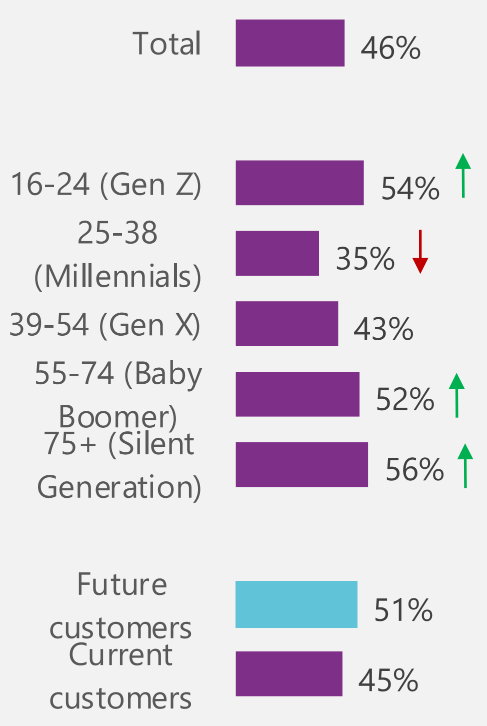
% who behave in environmentally friendly way



Recycling, reducing single use plastic, drinking tap water and energy saving actions in the home are all spontaneously mentioned as environmentally friendly behaviours taken by participants:

"I recycle everything I can and put all food waste in a composter"

"I've stopped buying bottled drinks when at university and now use a metal water refillable bottle to try and reduce my use of single use plastics"

"Have bought reusable water bottle, bamboo toothbrushes"

"Water reducer in the toilet cistern; low energy lights; double glazing; loft insulation; radiator thermostats; recycling as much as possible"

"Avoid plastic bags to put fruit and veg in, choose paper products where possible"

↑↓ Significantly higher / lower versus the total at 95%

Q.13 And do you currently do anything in a certain way, because it's better for the environment, such as changing your behaviour to use less of something, or go out of your way to buy. OPEN END. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

However, price is important and there may be some hesitation in paying more for environmentally friendly products and service

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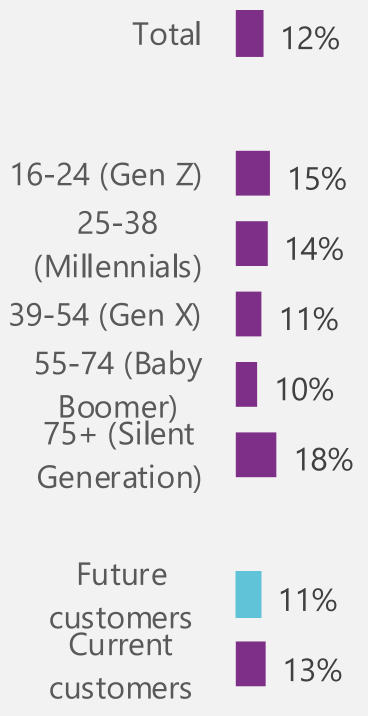
% who pay more for more environmentally friendly products and services



Participants spontaneously mention gas, electricity, food and cleaning products as areas where they currently spend more for products and services that are better for the environment:

"Green Energy for all my gas and electricity which is all produced from totally renewable means"

"We pay more for electricity and gas to have them from 100% renewable sources"

"I buy more expensive cleaning and laundry products to have recyclable and plant-based products"

"A lot of the food I buy, I try to buy from more responsible sources and where less packaging is involved"

"I will pay more for locally produced food products like meats, fruit and veg but with the added reason to support my local community"

Q.12 Do you currently pay more for a product or service because it has less of an impact on, or is better for the environment than alternatives? OPEN END. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

While price remains important, customers seek reassurances from businesses on their contribution towards environment and society

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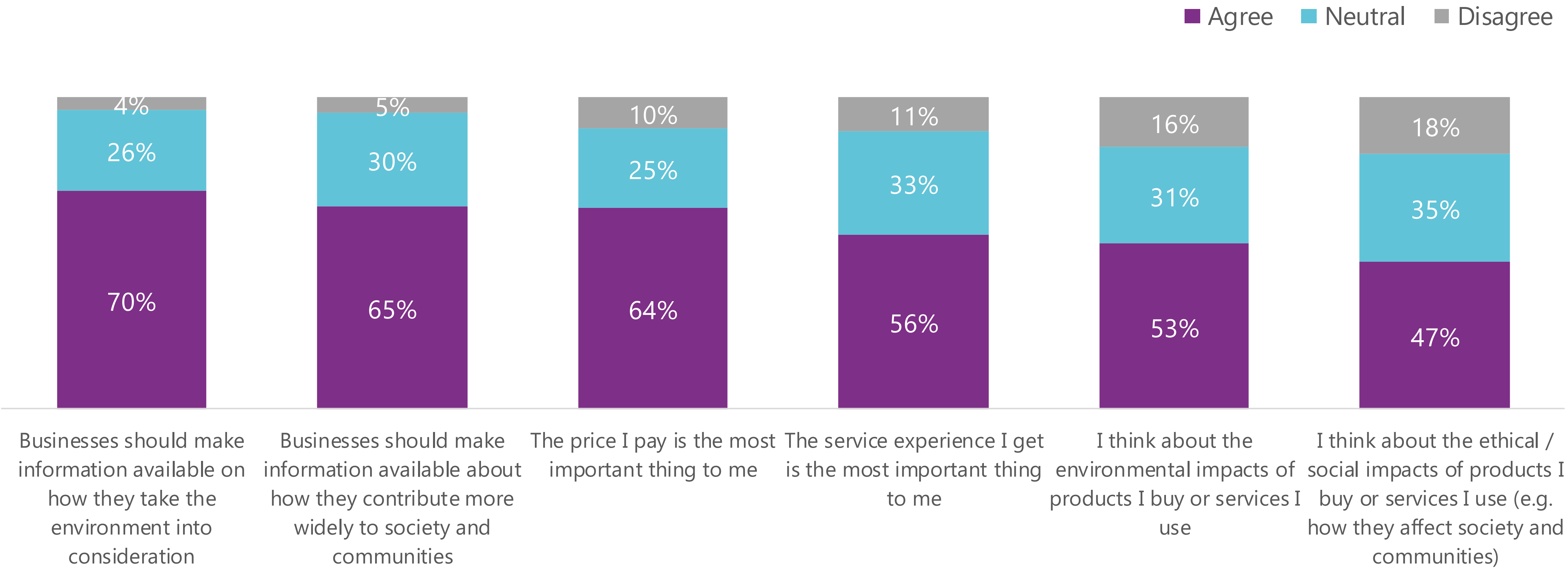
Agreement with attitudinal statements about service providers



Q.16 To what extent do you agree or disagree with the following statements in regard to your service providers (e.g. water/mobile etc) or products you may have? Base: Total (1902)

Customers think it is important for businesses to provide information on their environmental and social impact regardless of age and customer type

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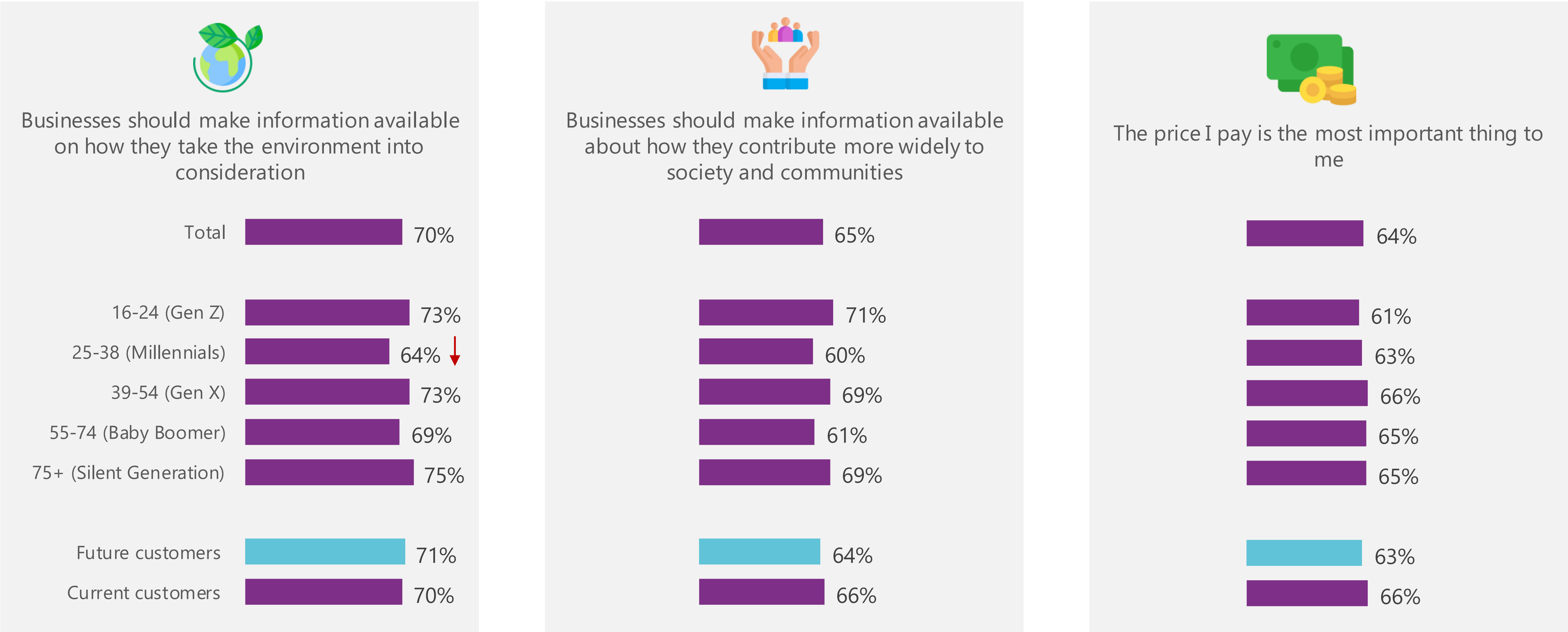
↑↓ Significantly higher / lower versus the total at 95%



Q16. To what extent do you agree or disagree with the following statements in regard to your service providers (e.g. water/mobile etc) or products you may have? Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Close to 1 in 2 consider the environmental and social impact of the products and services they buy

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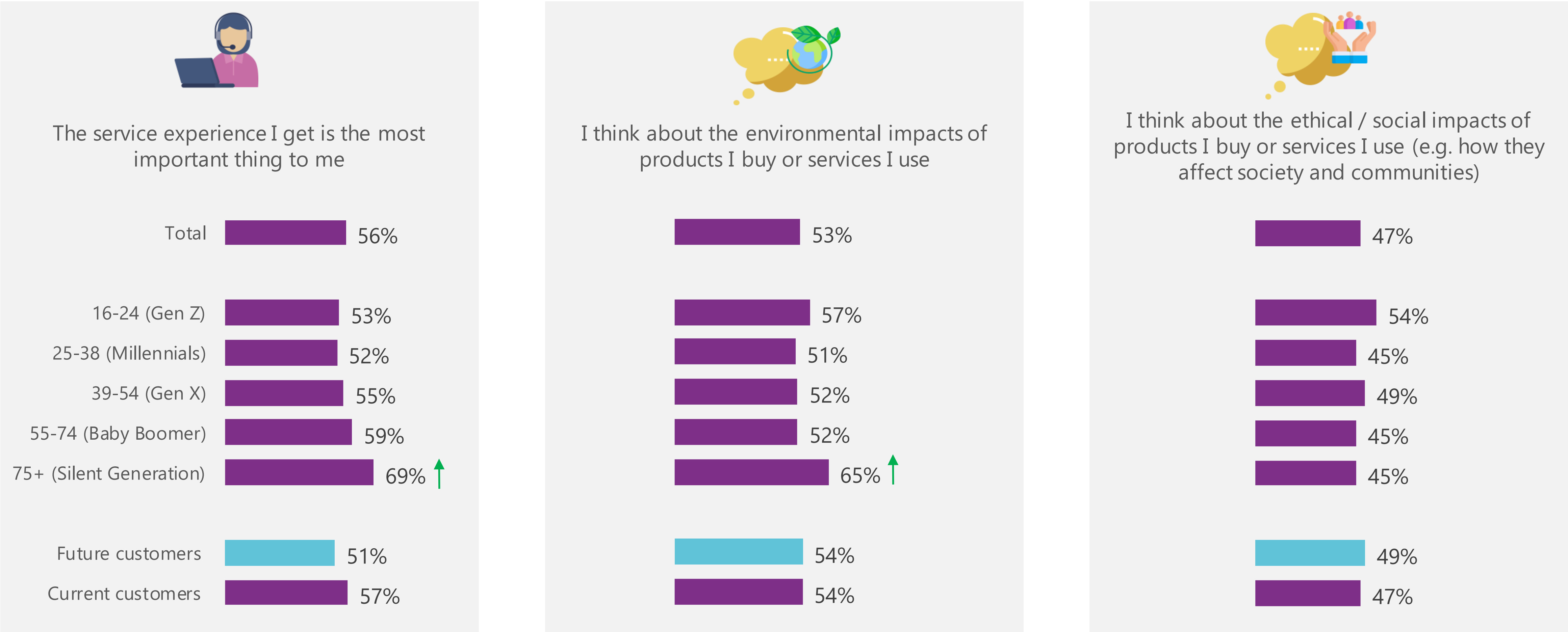
Significantly higher / lower versus the total at 95%



Q16. To what extent do you agree or disagree with the following statements in regard to your service providers (e.g. water/mobile etc) or products you may have? Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Expectations from water companies

Providing clean water and keeping bills low is expected from water companies. There are low levels of engagement with the potential effect of water companies' activities on the environment. Having said that, over half of the customers are actively trying to save water.

Providing reliable clean drinking water is expected from water companies, followed by keeping bills low

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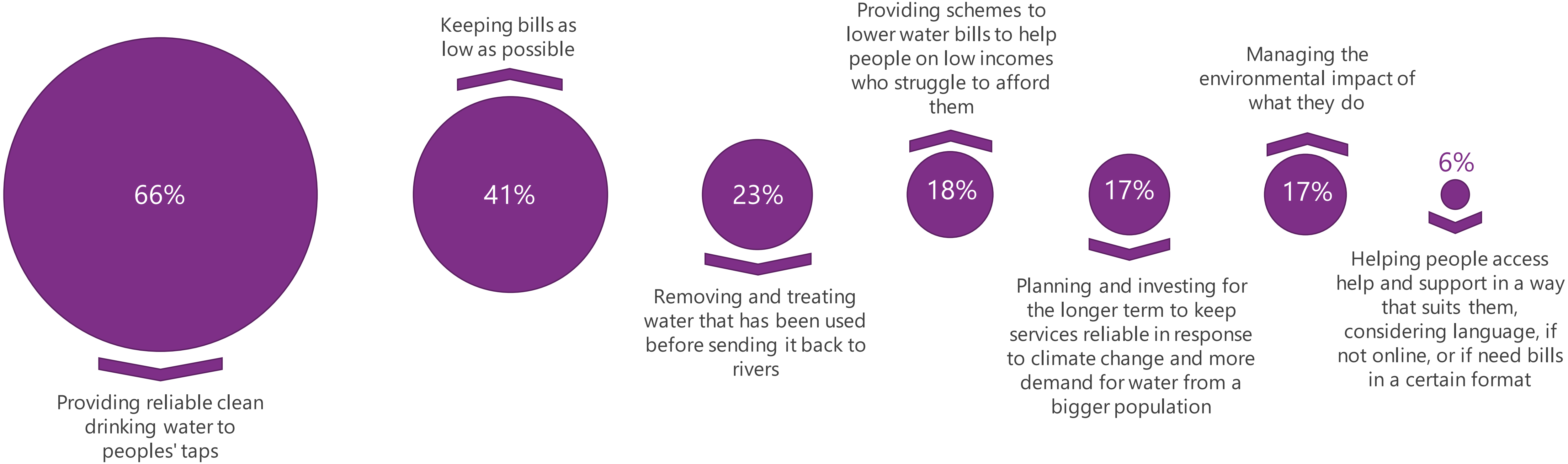
Most important issues – % rank in top 2

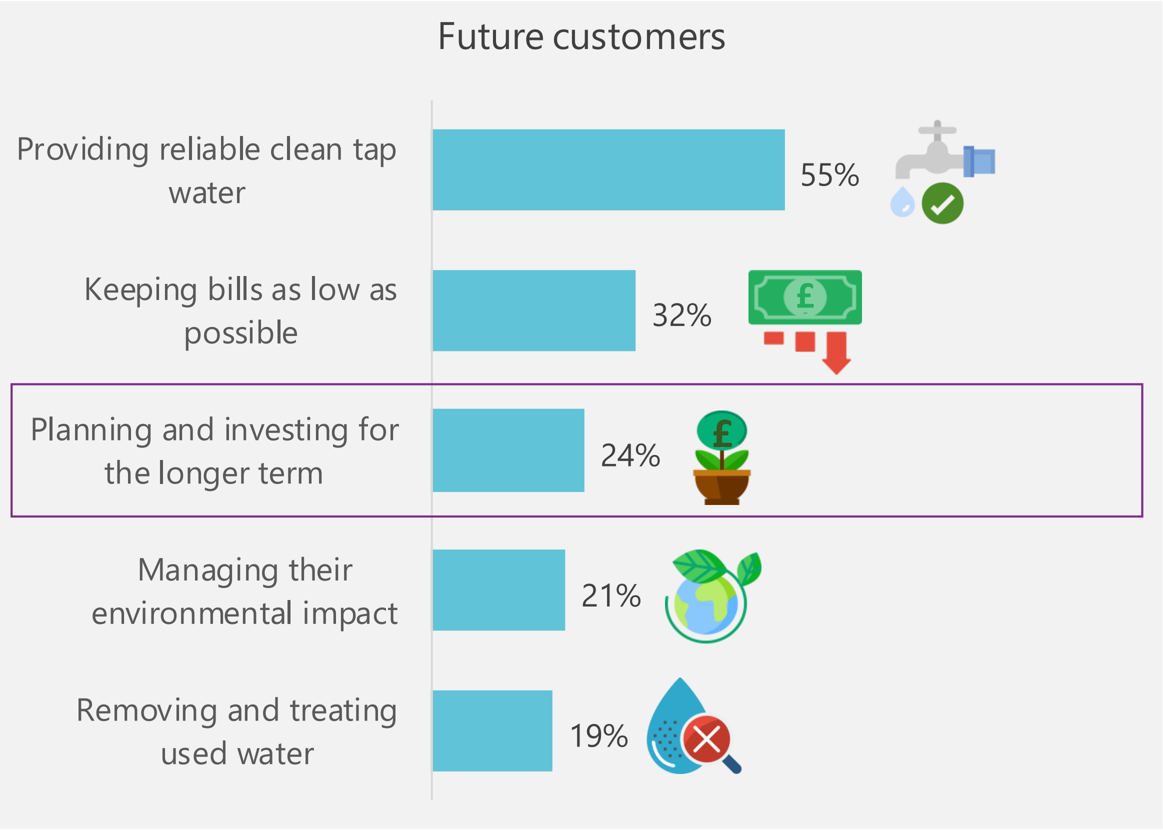


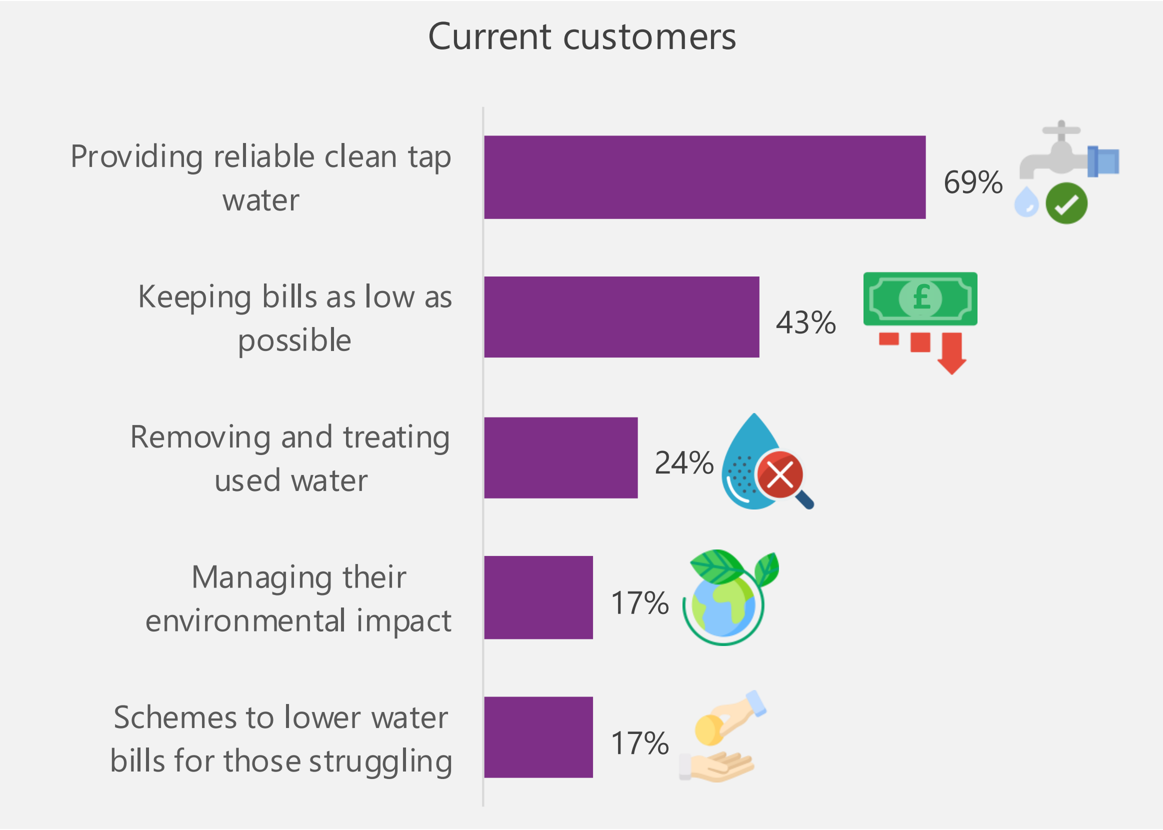
Q.9 Below are a list of statements relating to services, environmental and social aspects of what water companies provide. Please rank these in order of importance to you, where 1 is the most important and 7 is the least important - NET: Top 2.
Base: Total (1902)

Both future and current customers place most importance on providing reliable drinking water and keeping bills low

Top 5 most important issues by customer type – % rank in top 2

Future customers are more likely to prioritise planning and investing for the longer term to keep services reliable in response to climate change and more demand for water from a bigger population





Q.9 Below are a list of statements relating to services, environmental and social aspects of what water companies provide. Please rank these in order of importance to you, where 1 is the most important and 7 is the least important - NET: Top 2.
Base: Future customers (216), Current customers (1599)

Older and current customers are likely to rank water services higher i.e. providing clean water and keeping bills low…

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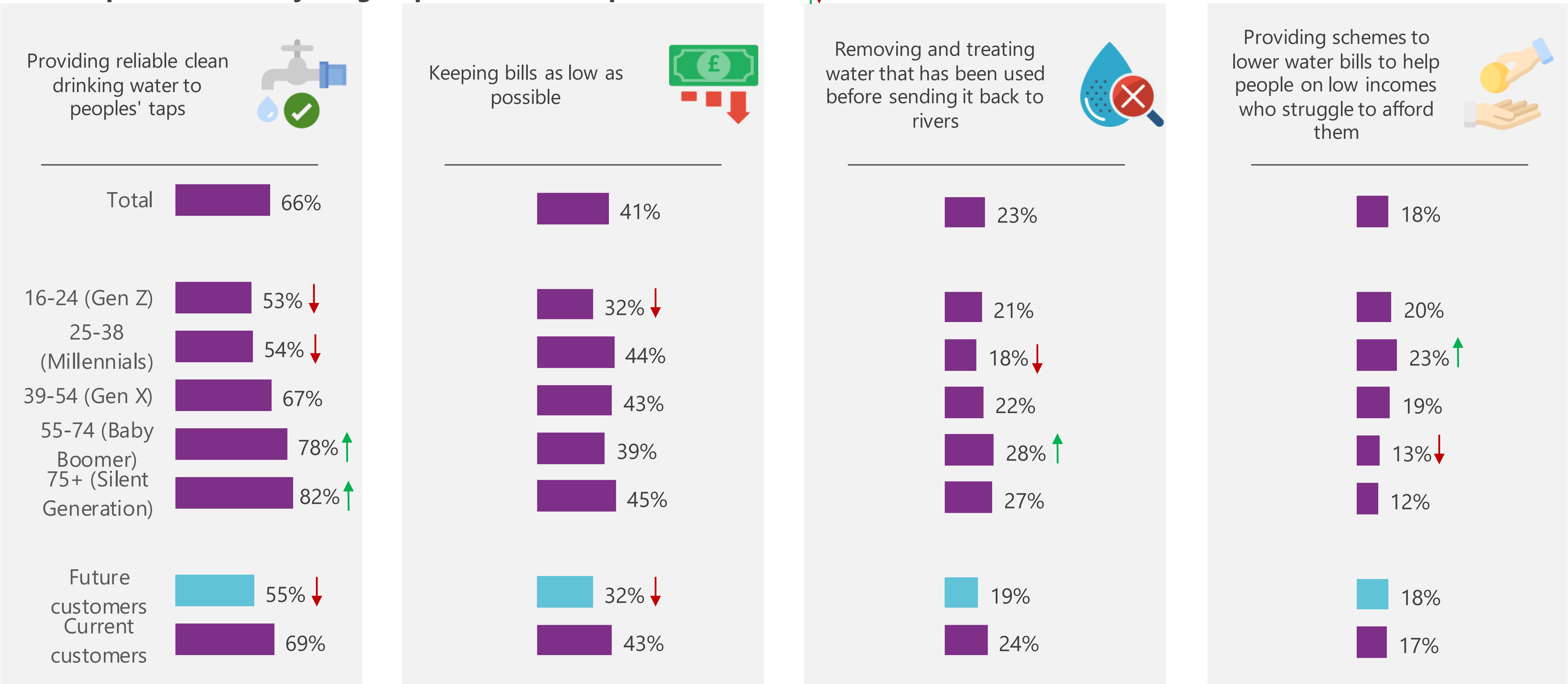
Most important issues by subgroups – % rank in top 2

Significantly higher / lower versus the total at 95%



Q.9 Below are a list of statements relating to services, environmental and social aspects of what water companies provide. Please rank these in order of importance to you, where 1 is the most important and 7 is the least important - NET: Top 2. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

..while younger and future customers are likely to rank environment (planning and investing for longer term) and accessible services higher

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Most important issues by subgroups – % rank in top 2

↑↓ Significantly higher / lower versus the total at 95%

	Planning and investing for the longer term to keep services reliable in response to climate change and more demand for water from a bigger population	Managing the environmental impact of what they do	Helping people access help and support in a way that suits them, considering language, if not online, or if need bills in a certain format
Total	17%	17%	6%
16-24 (Gen Z)	24% ↑	24% ↑	10% ↑
25-38 (Millennials)	16%	17%	12% ↑
39-54 (Gen X)	13% ↓	19%	6%
55-74 (Baby Boomer)	19%	13% ↓	1% ↓
75+ (Silent Generation)	22%	12%	
Future customers	24% ↑	21%	12% ↑
Current customers	16%	17%	5%

Q.9 Below are a list of statements relating to services, environmental and social aspects of what water companies provide. Please rank these in order of importance to you, where 1 is the most important and 7 is the least important - NET: Top 2. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

A fifth think that the environment won’t be affected by water used in homes and businesses as this is managed by water companies

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How water use is most likely to affect the environment – % rank first

19%
Water companies manage water use so the environment won't be affected

Could mean water shortages/ hosepipe bans
16%

15%
If companies need to treat and transport more water it increases carbon emissions

Might be/ would be a problem in a drought
13%

10 %
Could mean less water in rivers etc

There are no significant differences between current/ future customers

Q.14 In which of the following ways do you think that water used in homes and businesses is most or least likely to affect the environment? % ranked first. Base: Total (1902)

Close to 3 in 5 claim to save water at home. Older age groups and current customers report more water saving activities

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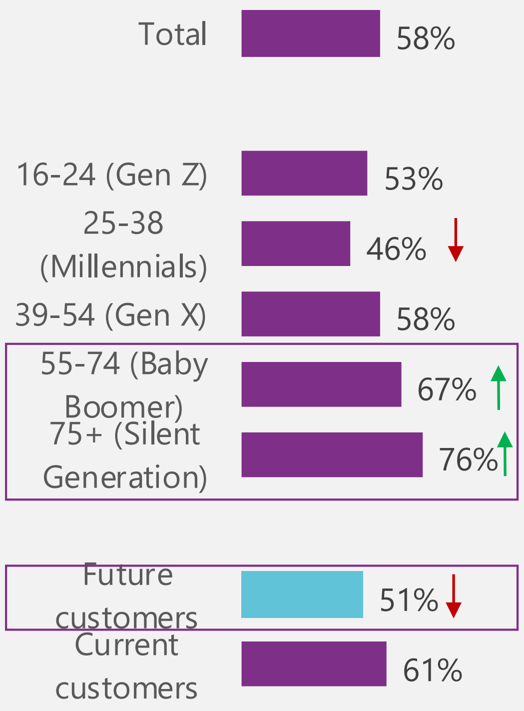
% who do something to use less water at home



Top 3 water saving actions – spontaneous mentions

Future customers

30% turn off taps when not in use

14% spending less time in the shower

8% take showers instead of baths

Current customers

23% turn off taps when not in use

20% take showers instead of baths

9% limit toilet flushes

"Turn water off and on when brushing teeth or having a shower"

"Limit time in shower, don't have baths too often"

"Water reducer in the toilet cistern; flush toilet only when necessary"

↑↓ Significantly higher / lower versus the total at 95%

Q.15 What, if anything, do you personally do to use less water in your home? OPEN END. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Tap vs bottled water

Gen Z are more likely to drink tap water irrespective of the location (i.e. at home versus outside). The older you get the less likely you are to take refillable bottles for tap water. Future customers are the most likely to use such bottles

Tap water is favoured at home and work – but bottled water is more popular when out and about on the move

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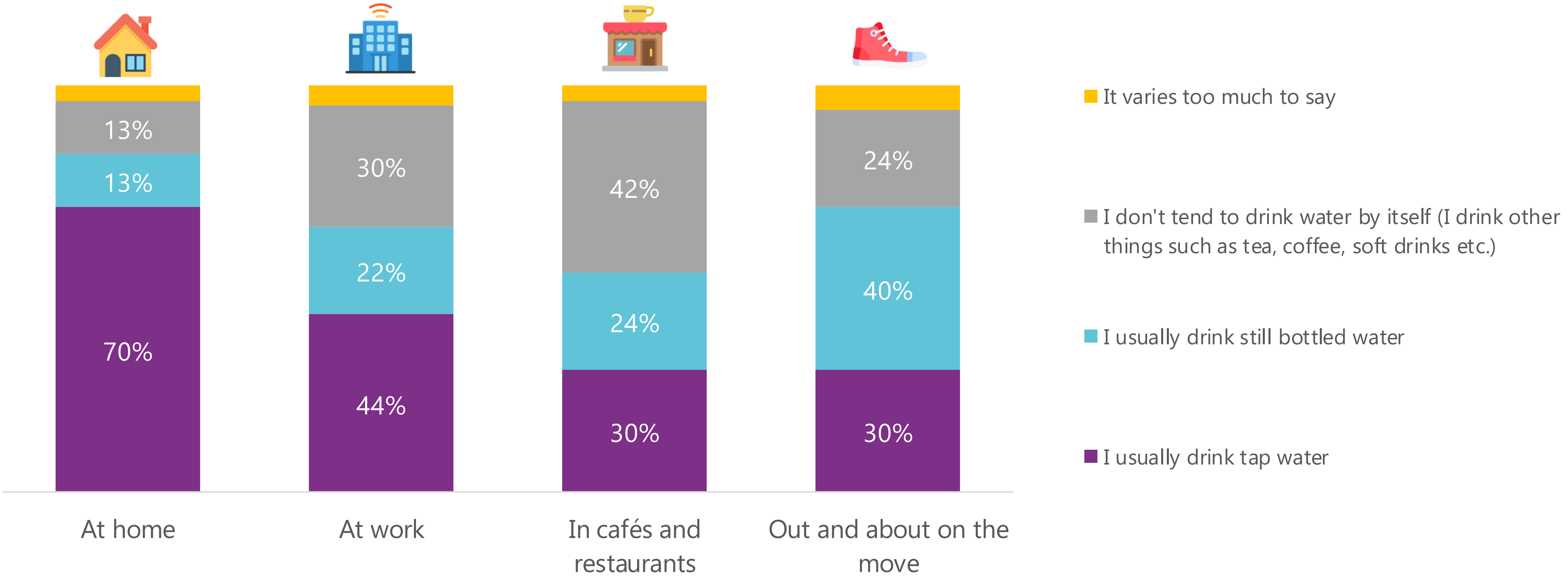
Use of tap or bottled water



Q.20 Thinking about when you may drink tap water or still bottled water at each of the following places, which do you usually drink? Base: Total (n=1902)

Generation Z are more likely to drink tap water in all locations, particularly when eating out or on the move

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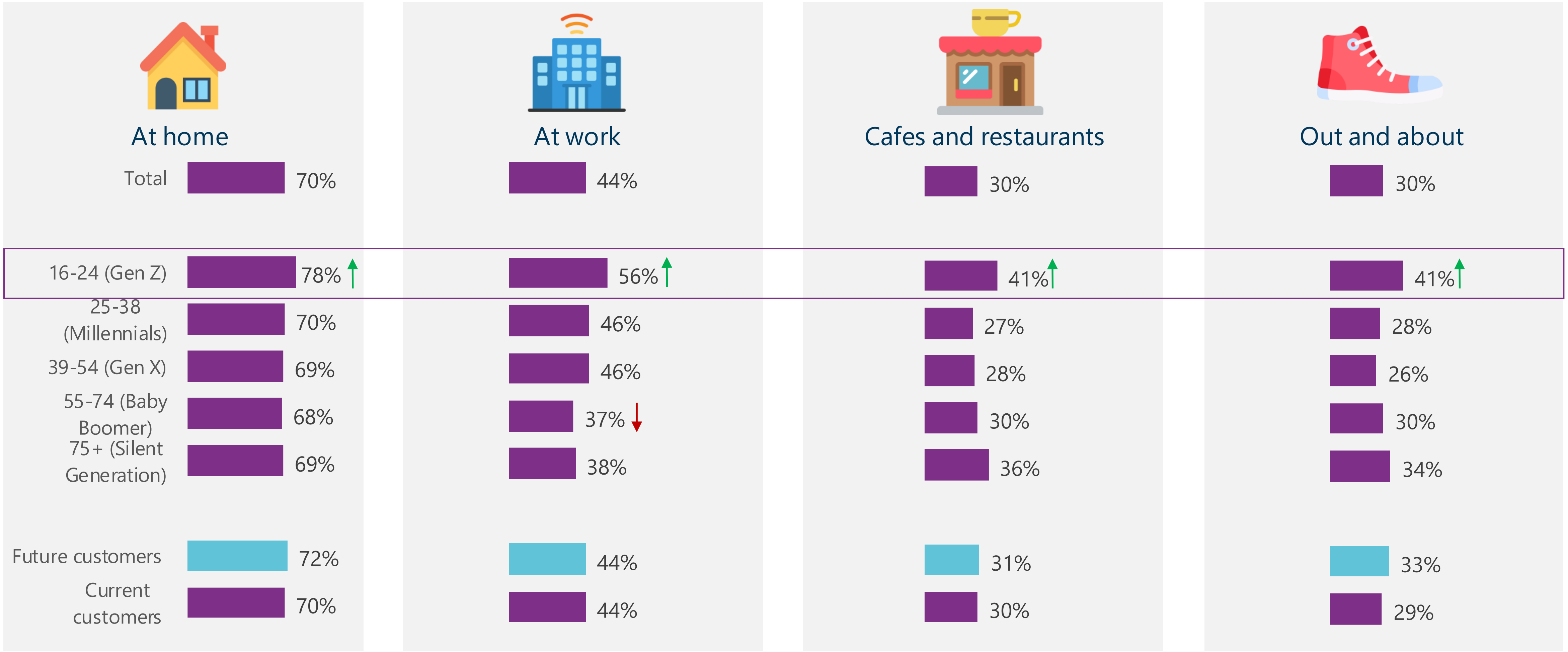
% who usually drink tap water in each location

↑↓ Significantly higher / lower versus the total at 95%



Q.20 Thinking about when you may drink tap water or still bottled water at each of the following places, which do you usually drink? % who drink tap water. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Future customers are generally more likely to drink bottled water when not at home

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% who usually drink bottled water in each location

↑↓ Significantly higher / lower versus the total at 95%

	At home	At work	Cafes and restaurants	Out and about
Total	13%	22%	24%	40%
16-24 (Gen Z)	10%	30% ↑	24%	37%
25-38 (Millennials)	18% ↑	31% ↑	34% ↑	46% ↑
39-54 (Gen X)	15%	24%	24%	45% ↑
55-74 (Baby Boomer)	11%	13% ↓	17% ↓	34% ↓
75+ (Silent Generation)	9%	3% ↓	16% ↓	30% ↓
Future customers	16%	37% ↑	27%	45%
Current customers	13%	19% ↓	22%	40%

Q.20 Thinking about when you may drink tap water or still bottled water at each of the following places, which do you usually drink? % who drink bottled water. Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Likelihood of taking a refillable water bottle when out decreases with age. Future customers are more likely to take a refillable bottle

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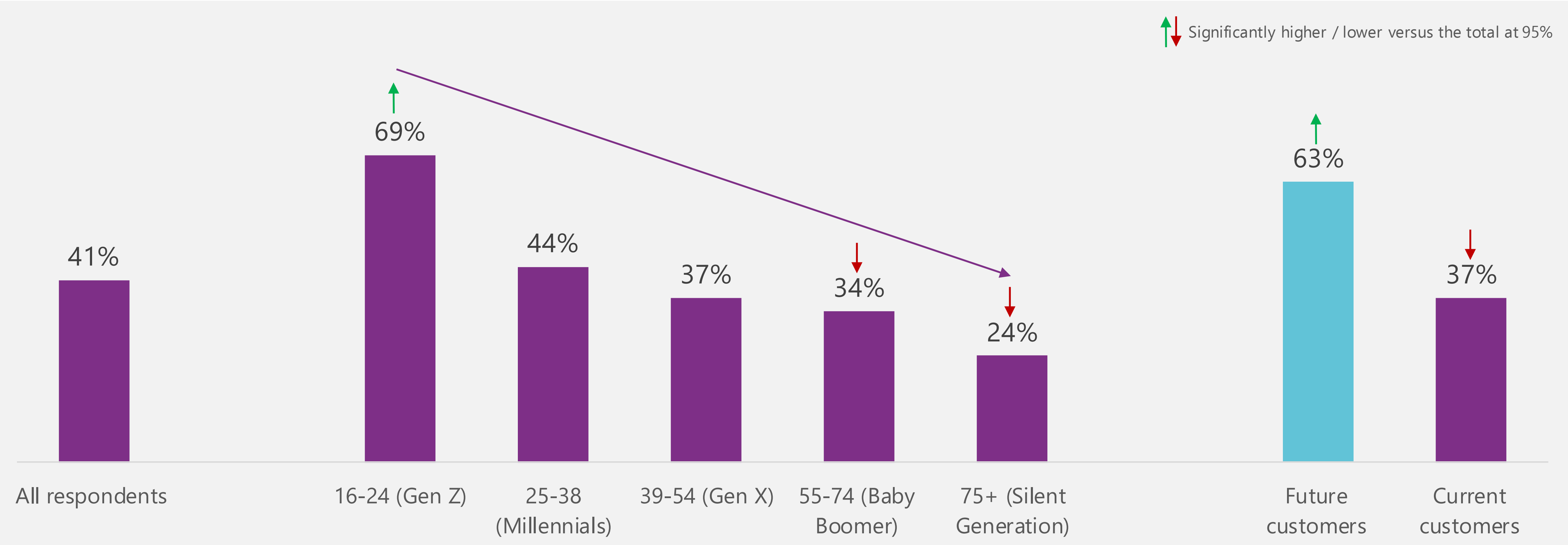
% who take a refillable bottle for tap water with them all/ most of the time



Q.21 How often do you take a refillable bottle for tap water with you when out and about? Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Communication and payment channels

Contact preference - Contact channels show a distinct age profile and hence a need to tailor communication for different channels

Email is the most popular contact method regardless of customer group. Future customers are more likely to contact via social media or an app

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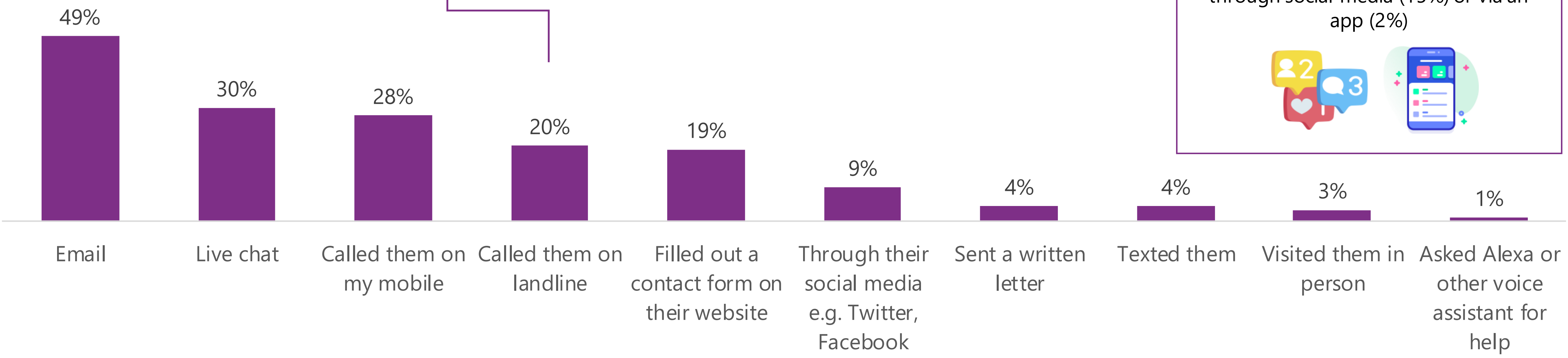
How last contacted a company with a question or complaint

Baby boomers (31%) and silent generation (46%) are significantly more likely to have called the company on a landline



Future customers are less likely to have called a company on a landline (7%) or filled out a contact form on a website (12%)

They are more likely to have contacted through social media (15%) or via an app (2%)

Q.3 Thinking about the last time you needed to contact an organisation or company with a question or a complaint, in which of the following ways did you do this? Base: Total (1902)

Email and mobile calls are the most popular methods for contacting a utilities provider

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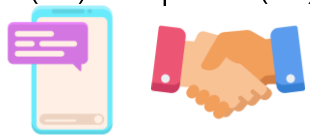
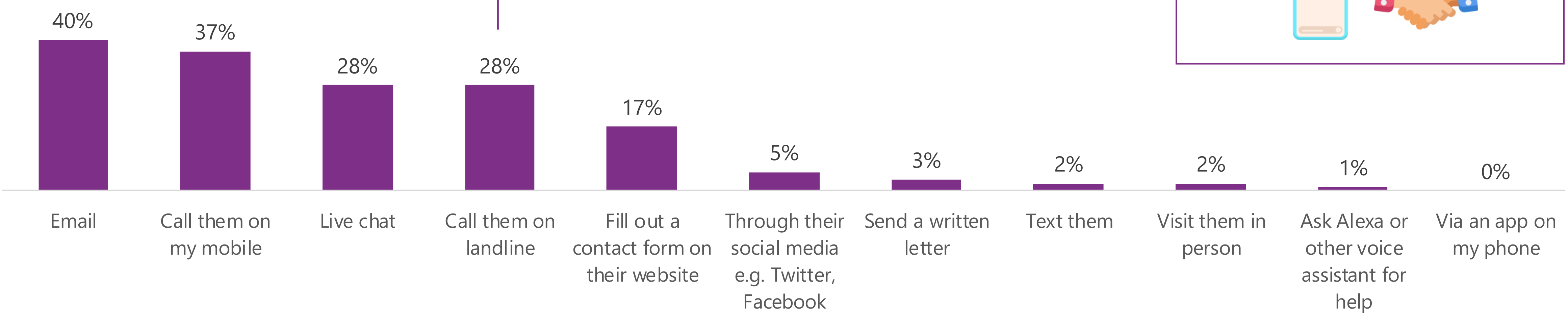
How would contact a utility company e.g. a water or energy service provider

Future customers are less likely than current customers to contact a utility company via live chat (20%) or on a landline (15%)

They are more likely to contact through text (4%) or in person (5%)



Baby boomers (41%) and the silent generation (60%) are significantly more likely to contact using their landline



Q.4 And if you wanted to make contact with a utility e.g. a water or energy service provider, how do you/would you do this? Base: Total (1902)

Two-in-five think it is acceptable for a water company to share their data with third parties. This is relatively consistent across age groups

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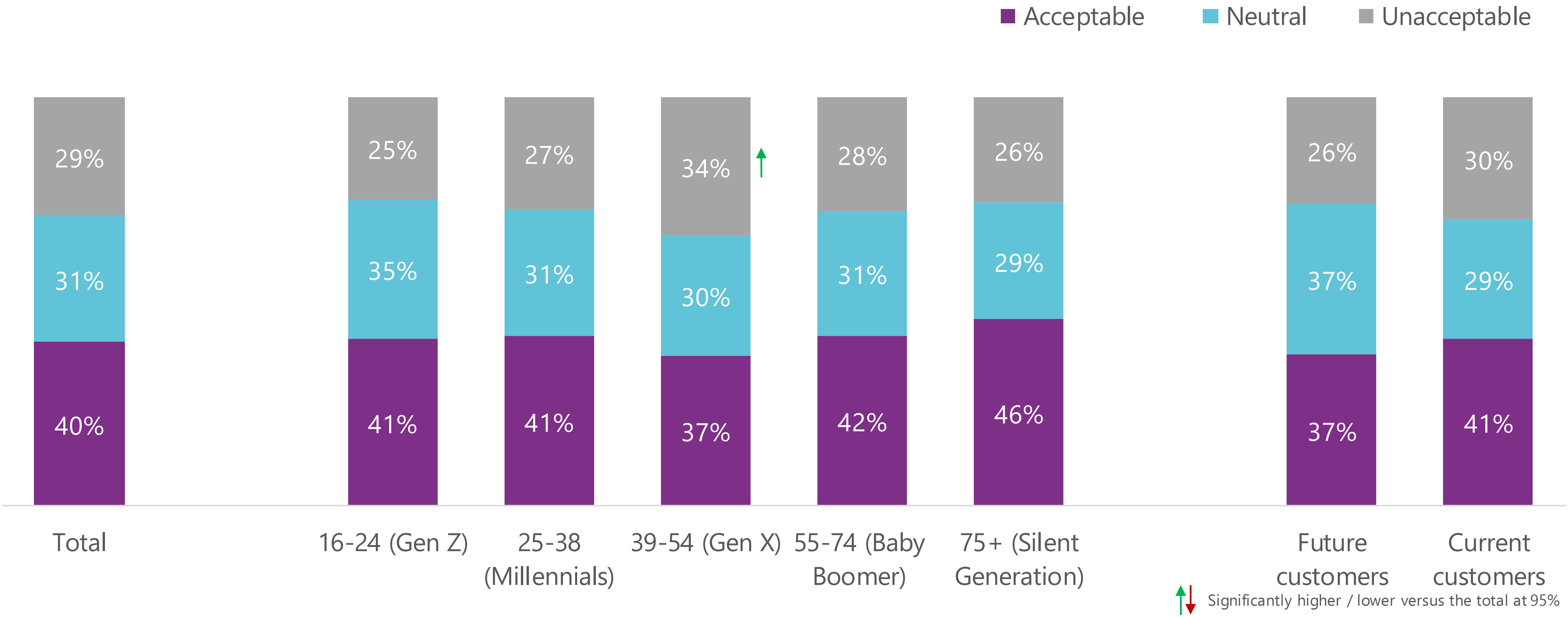
Acceptability of water company sharing customer data with third parties



Q22. To what extent would it be acceptable or unacceptable for your water company to share your data with third parties, and other service providers, in order to offer you a better service that's adapted to your needs? Base: Total (1902), 16-24 (206), 25-38 (429), 39-54 (527), 55-74 (623), 75+ (117), Future customers (216), Current customers (1599)

Payment preference - Older age groups are more likely to pay their water bill automatically by DD than younger groups. Generation Z and Millennials are more likely to use online credit/debit card payments each time they receive their bill. This could mean that in the future, fewer people pay by DD and more by online credit/debit card

Direct debit is by far the most popular way for current customers to pay for their water bill

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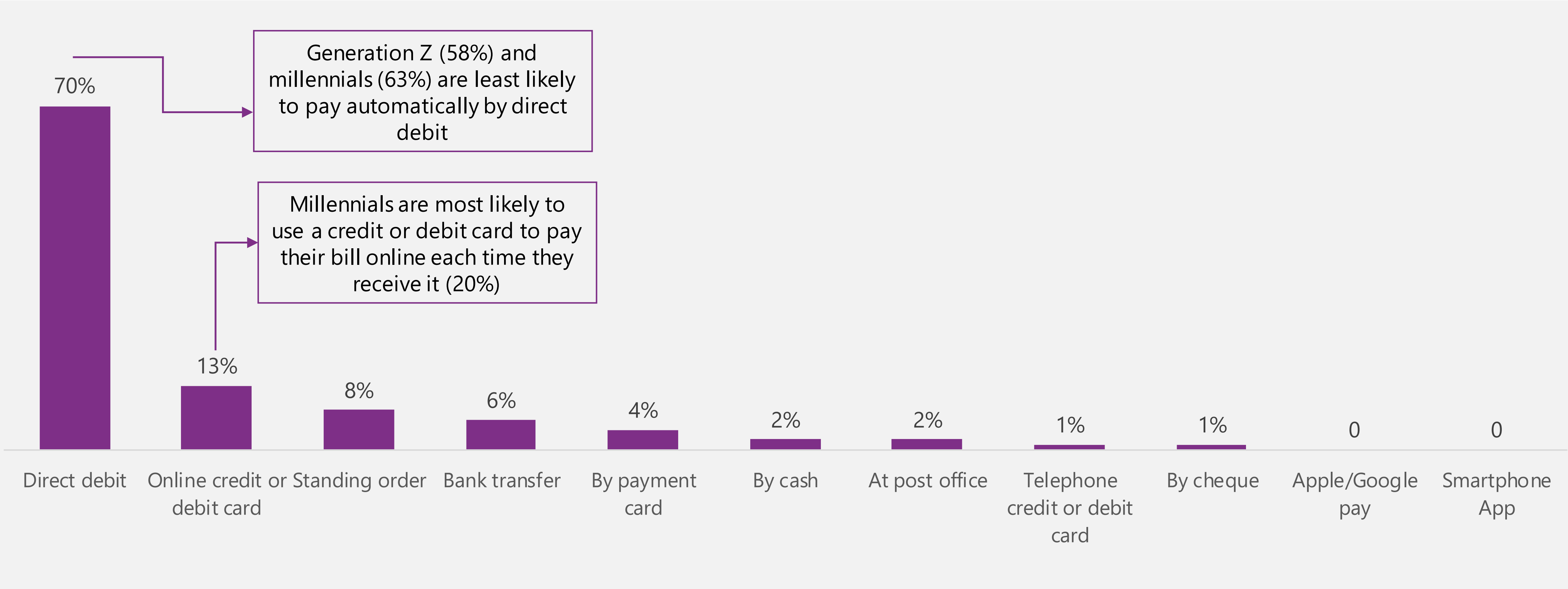
How normally pay for water bill – current customers



Q.5 In which of the following ways do you normally pay for your water bill?
Base: Current customers (1599)

More than half of future customers normally pay for services by direct debit. Paying for services online by credit or debit card is also popular

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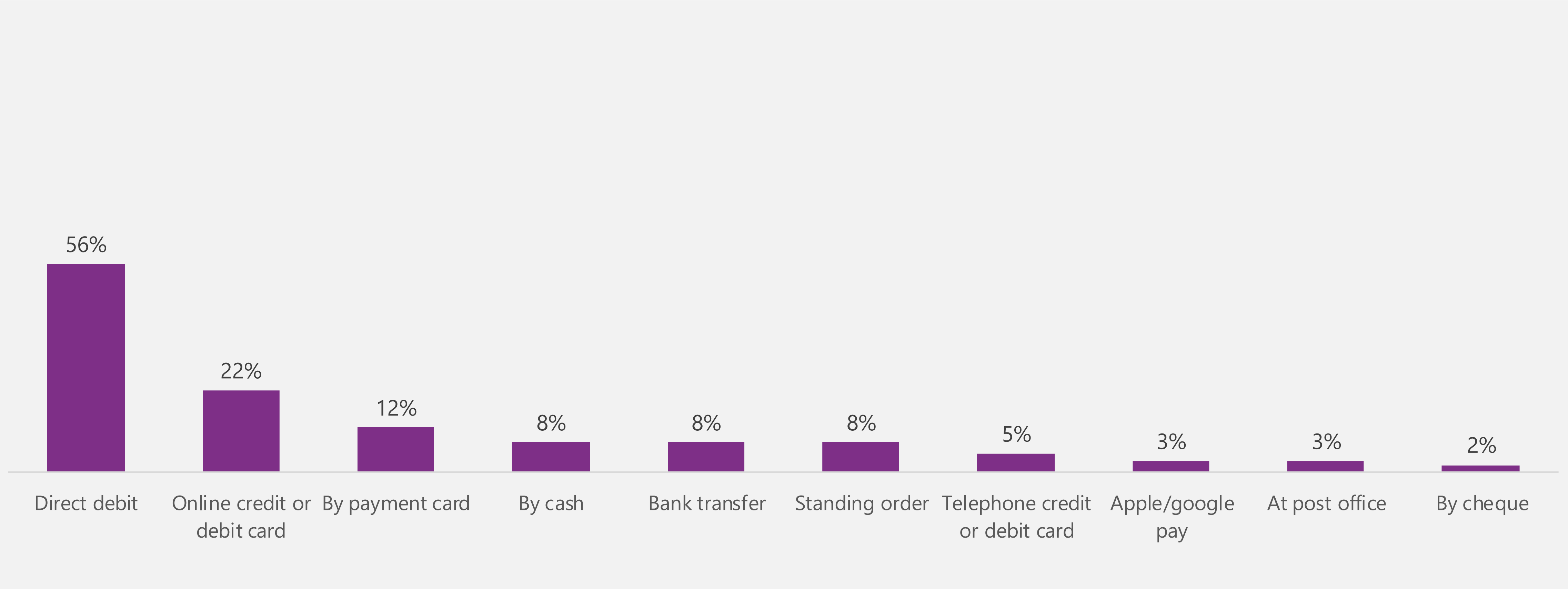
How normally pay for services – future customers



Q.6 In which of the following ways do you normally pay for your services?
Base: Future customers who pay for other services (170)

A quarter have fallen behind on bill payments. This is highest among Millennials and Gen X

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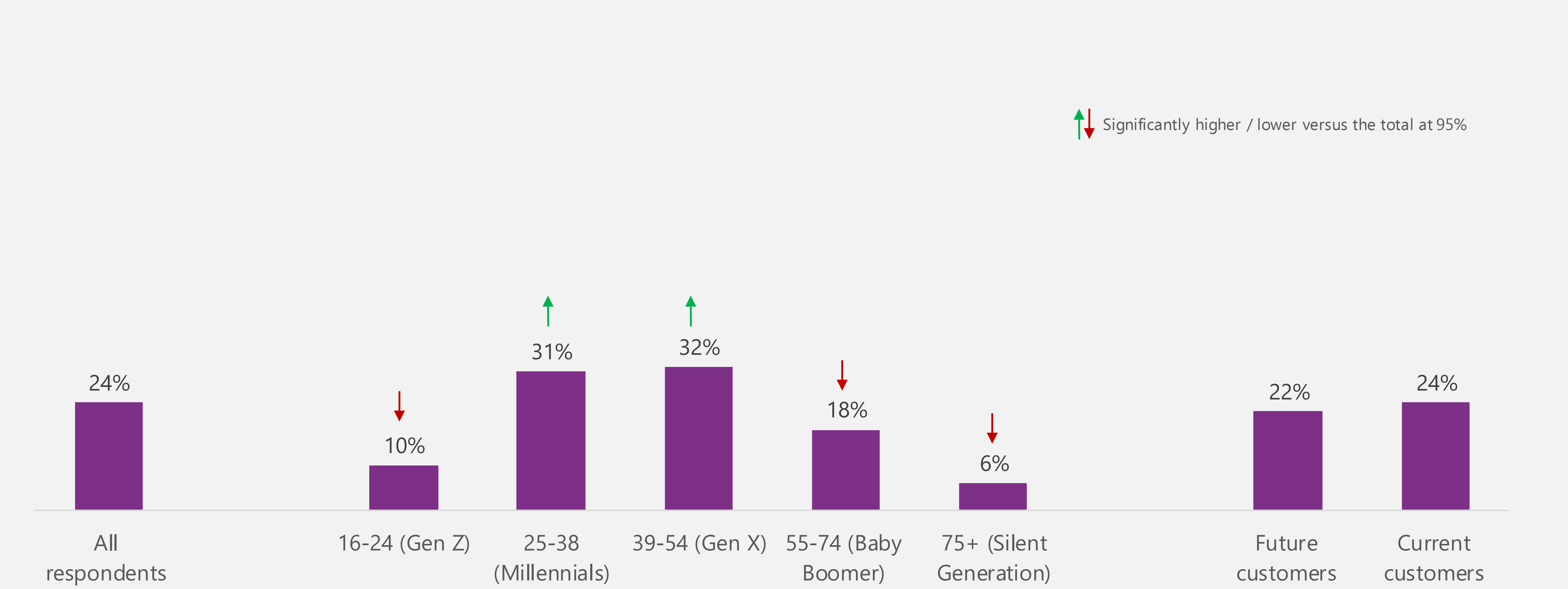
% who have ever fallen behind on bill payments



Q.17 Have you ever fallen behind on any bill payments?
Base: All who pay for a bill (1836), 16-24 (165), 25-38 (417), 39-54 (520), 55-74 (617), 75+ (117), Future customers (170), Current customers (1599)

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Appendix

Differences between future and current water bill payers

Differences between future and current customers (1)

Significant differences between future and current customers are outlined below:

Differences in priorities

Future customers are more likely to prioritise getting a job and education

54%
(21%)

51%
(21%)

And less likely to prioritise health care, the economy and taking care of their friends and family

57%
(71%)

57%
(69%)

53%
(67%)

Water company priorities

Future customers are more likely to think water companies should prioritise:

- Planning and investing for the longer term to keep services reliable in response to climate change and more demand for water from a bigger population
- Helping people access help and support in a way that suits them, considering language, if not online, or if need bills in a certain format

24%
(16%)

12%
(5%)

And less likely to think they should prioritise:

- Providing reliable clean drinking water to peoples' taps
- Keeping bills as low as possible

55%
(69%)

32%
(43%)

Use of refillable water bottles

Future customers are more likely to use refillable bottles for tap water when out and about all or most of the time

63%
(37%)

When at work they are significantly more likely than current customers to drink bottled water

37%
(19%)

Figures in brackets refer to current water bill payers

Figures in brackets refer to current customers
Q2, Q9, Q15, Q21 Future customers (216), Current customers (1599)

Differences between future and current customers (2)

Significant differences between future and current customers are outlined below:

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Method of contacting companies in the past

Future customers are more likely than current customers to have contacted companies by social media

15%
(8%)

And less likely to have contacted by a contact form on their website or landline

12%
(20%)

7%
(22%)

How would contact utility company

Future customers are more likely to say that they would text a utility company or visit them in person

4%
(2%)

5%
(1%)

They are less likely to say they would contact a utility company by live chat or a landline

20%
(30%)

15%
(30%)

Smart technology

Future customers are more likely to think that smart technology will have a big impact in helping them manage their water use in the future

43%
(28%)

More likely to have:

Apple home kit

4%
(1%)

Less likely to have:

Smart energy meter

16%
(28%)

Figures in brackets refer to current customers
Q3, Q4, Q10, Q11 Future customers (216), Current customers (1599)

Differences between England and Wales

Differences between England and Wales: Total sample

Significant differences between respondents in England and Wales are outlined below:

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Differences in priorities

Those in Wales are less likely than those in England to prioritise getting a job/ career

16%
(26%)

Contact preferences

Those in Wales are less likely to have contacted a company or organisation by live chat

20%
(30%)

Payment preferences

Those in Wales are less likely to pay for their water bill by online credit or debit card

5%
(13%)

They are more likely to use standing order

15%
(7%)

Water company priorities

Those in Wales are more likely to say that none of the statements relating to services, environmental and social aspects of what water companies provide are important to them

16%
(5%)

Corporate Social Responsibility

Those in Wales are more likely to agree that they think about the ethical / social impacts of products I buy or services I use (e.g. how they affect society and communities)

59%
(46%)

They are less likely to agree that the price they pay for services is the most important thing to them

65%
(54%)

Figures in brackets refer to respondents in England

Figures in brackets refer to respondents in England
Q2, Q3, Q5, Q9, Q16 England (1798), Wales (104)