



The voice for water consumers  
Llais defnyddwyr dŵr

# Business customers' smart water meter communication

April 2026

[ccw.org.uk](http://ccw.org.uk)

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# Foreword

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In 2024, water companies committed to install around 800,000 smart meters for non-household customers over a five-year period. This represents a challenge for the industry but provides a major opportunity to increase engagement and customer awareness about the water retail market and inform businesses about their water use.

As these smart meters are rolled out, we want to explore the service businesses receive from water companies and retailers before, during and after installation. The timing of this research – doing it relatively early in the rollout – means we gain important evidence to help shape future communications. It allows us to identify what is working well for businesses and what areas need improving or changing before routine around the smart metering programme beds in.

We want to understand how customers navigate the information and the support they receive at each stage of the smart meter journey, and whether this aligns with their expectations.

When businesses hear the word ‘smart’ they expect insightful information about their water use and a significant improvement in the accuracy of their bills. Their expectations have been shaped by energy meters and wider digital services.

The research shows that, in practice, many businesses do not fully understand what they will get, when they will get it, or how smart metering will affect things like billing, data access, and day to day operations. We want businesses to have the information they need, at the right time, to engage with their smart meter data.

Recommendations from the research must be used to ensure the smart meter journey surpasses expectations – smart meters need smarter communications. Results of this research show the rollout itself is working and is accepted by the majority of non-household customers. The issue that needs be addressed now is the gap between expectation and reality, and what that means for trust at a time when this is already fragile.



# Background and research context, objectives and methodology

Research approach and who  
we spoke to



# Setting the scene for smart water meters and their rollout



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## At the start of the research businesses were advised that:

- **Automated readings:** A smart water meter eliminates the need for manual readings by transmitting consumption data to the water company (wholesaler) who then shares these readings with the water retailer.
- **Consumption data visibility:** Ideally, this enables customers to view current and past consumption data, track water usage and bills more accurately and potentially spot leaks sooner.



## The current landscape for businesses



- **A transitional phase:** While smart water meters are being rolled out, the digital infrastructure enabling visibility of consumption data is at varying stages of maturity. Not all retailers currently have established interfaces like portals or apps to access consumption data.
- **The consumption data gap:** Consequently, while some businesses with smart meters have visibility and a way to view their consumption data, others have their smart water meter installed but cannot yet engage with their consumption data.
- **Future outlook:** From conversations with CCW, we understand that there is an expectation that the smart meter read hub will enable consumption data to be shared between wholesalers and retailers in the latter part of 2026.
- **Our sample:** Reflecting this mixed landscape, our SME audience included businesses with active data access as well as those with smart meters but no current visibility. Even among those claiming access, there was confusion regarding the specific data available. Broadly, less than one-third of the sample appeared to have access to usage data of any kind.

# Research aim, approach and objectives



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**Research aim:** The aim of this research is to map business customers' experiences and expectations of the smart meter rollout. In addition, it aims to identify opportunities to enhance communication touchpoints, engagement with data and water-saving behaviour.

CCW aim to understand how water usage information from smart water meters can be best conveyed to business customers, including awareness, understanding, expectations, and attitudes and any takeaways or nuances for specific groups.

## Research objectives:



**Explore business customers' expectations and real-life experiences of smart meter (AMI) installation,** including those recently metered and those awaiting installation.



Understand **how business customers experience information and support** at key stages of the installation process, and **whether this aligns with their expectations.**



**Identify opportunities** for wholesalers and retailers to **improve the installation journey and communication touchpoints.**



Gauge what businesses yet to have a smart meter **expect in terms of information,** advice and engagement before and during installation.

# Core business sample and approach



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**An overview of our approach:** We conducted 32 x 45-minute one to one depth interviews conducted via Zoom with water /utility decision makers / recipients of communications who do not have an account manager with their retailer.



Criteria	Category	N=
<b>Water meter status</b>	Traditionally metered (with a meter that is manually read) awaiting upgrade to smart	14
	Current smart water meter business customers, metered within past 12 months	18
<b>Business size</b>	Small	19
	Medium	13
<b>Water critical vs non-critical</b>	Core to operations	15
	Non-critical	17

## Recruitment context:

- **While some participants were recontacted from a short survey**, the majority were sourced through **targeted external recruitment** using a specialist recruitment agency, based on specific criteria.
- To support this, recruitment was **guided by CCW data on installation numbers by postcode**, allowing us to focus on high-density regional areas with **higher installation rates**.
- To ensure accuracy, **participants were required to confirm they had official smart meter documentation** from their wholesaler before the interview.

## Sample:



**Mix of business type and industry** including hospitality, education, manufacturing and healthcare



**A spread of regions across the UK** including South West, East Midlands, Yorkshire, North West and London



**Businesses were customers of a mix of retailers** including Castle Water, Wave, Water Plus, Veolia, SES Business Water, Everflow and Business Stream



Consideration for different **business locations** including high street, business park, office towers, retail park and industrial estate

# Major Energy User Council sample and approach



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We spoke to Major Energy Users' Council (MEUC) member contacts\* to provide high level insight into communication needs of larger business needs regarding smart water meter transition, identifying key differences and similarities with the SME audience.



## An overview of our approach and methodology:

- 4 x 45-minute online interviews with a mix of MEUC contacts across the UK, all who are jointly or solely responsible for managing water at their organisation.
- Given the small sample size, any quotes from MEUC contacts have no quote attribution to preserve the anonymity of participants.



\*MEUC contacts were provided by CCW.

Sector	Water criticality	Smart meter status
Rail	High (large sites/ depots, underground leaks are costly)	No true smart water meters; uses external data loggers
Retail	Low (staff use only) / High at depots which use 100x more	A mix of smart meters and traditional meters (which are manually read) with 5-10 smart water meters, installed by wholesalers, 66 stores use 3 <sup>rd</sup> party camera tech to log meter readings
Education	Moderate (School operations, hygiene)	Lacks visibility of which sites have smart meters installed
Retail	Low (staff use)	A mix of smart meters and traditional meters (which are read manually) installed by wholesaler



# Core audience stimulus



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**The approach:** SMEs were shown a range of communication examples during the interview, covering the smart water meter installation journey: pre-installation, during the actual installation, and post-installation.

This stimulus was shown to both those with smart water meters and those traditionally metered (with a meter that is manually read) but awaiting an upgrade to smart.



**The objective:** These materials were used to stimulate discussion regarding ideal content, formats, and information needs at each stage; alongside comparing communication received for those with smart water meters.

Not all pieces of stimulus were shown in each session, instead the idea was to cover each phase of the journey.



**The materials:** All materials were unbranded to ensure neutrality. Stimuli included anonymised screenshots from various sources, such as Severn Trent, Southern Water, Yorkshire Water, Wave, Business Stream, and Anglian Water, alongside custom mock-ups developed by Yonder in collaboration with CCW.

# Core audience stimulus



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## 1. Pre installation communication

## 2. During installation communication

### Before meter installation

#### Smart metering

##### How businesses can help

Across our region, businesses can expect 2.6 million litres of water every day. That's enough to fill over four million bathfills. However, we know some of this water usage is down the drain.

We're upgrading smart water meters on businesses to help us find and fix leaks more quickly. Working 24 hours a day, smart water meters are great at telling us when a business might have a leak on the premises.

A smart water meter on your premises means more water for your homes, businesses, schools, and hospitals. Better for you, better for the environment, or better for your whole region, one step for the future.

If your business uses water, there are other things you can do to help us.

**Water saving tips**

### Before meter installation

#### Any questions?

When will you start collecting smart data?

**Already have a water meter, smart or not?**

**How do I know if my premises has a smart meter?**

**I've had a smart meter fitted, will my billing change?**

**What information do smart meters collect?**

**Can I see the data collected by my smart meter?**

**Are smart meters safe?**

**What sort of energy is emitted from the device?**

**Will it be getting in the way to show my usage like my energy smart meter?**

**Can I opt out of smart metering?**

When will you start collecting data?  
We'll start collecting data once our smart infrastructure is set up - this could be up to 6 months after your smart meter is installed.

### During meter installation

#### What you need to know

Before we install your smart water meter, some customers can experience water disconnection. Any disconnection or murky water after our work is usually caused by disrupted customers in the water pipes and is nothing to worry about. We recommend turning the cold tap for 20 minutes. If this happens again, please call our meter fit team on 0300 300 3000.

**What it means for you and your business**

Smart water meters are better things. They cut off all cold water and are great at showing if there's a problem with your water supply. If you get a leak, connecting a smart water meter can help you find it so you can get fixed as soon as possible.

**Why we've upgraded your meter**

Smart water meters are better things. They cut off all cold water and are great at showing if there's a problem with your water supply. If you get a leak, connecting a smart water meter can help you find it so you can get fixed as soon as possible.

Being smart with how we use water means more water for our homes, businesses, schools and hospitals. Better for you, better for the environment, or better for your whole region, one step for the future.

Your meter details	
Water supply location	0000000000000000
Water supply address	0000000000000000
Water supply postcode	0000000000000000
Water supply phone	0000000000000000
Water supply email	0000000000000000
Water supply fax	0000000000000000
Water supply website	0000000000000000
Water supply social media	0000000000000000
Water supply other	0000000000000000

### During meter installation

#### Hi,

Before you'll find some handy information about your smart meter and your new one including where your meter is and the measures we took from both your old meter and your new one.

**Old meter serial number:** [input field]

**New meter serial number:** [input field]

**Water supply location:** [input field]

**Water supply address:** [input field]

**Water supply postcode:** [input field]

**Water supply phone:** [input field]

**Water supply email:** [input field]

**Water supply fax:** [input field]

**Water supply website:** [input field]

**Water supply social media:** [input field]

**Water supply other:** [input field]

**Important**

You might find your meter is installed at a different location to your old one. To check it, look at the meter and your new one for the identification number. To avoid metering water, let us know if a gas or contractor will be in the area for a while. If the smart meter is being replaced, it will be replaced by a new one.

### Before meter installation

#### Smart Meters

Everything you need to know about the roll-out of smart water meters

##### Frequently asked questions (FAQs)

**How is a smart meter different from a traditional meter?**

**Will the meter work as a smart meter right away?**

**Will it get my smart meter?**

**Is there cost to have my smart meter installed?**

**Do I have to sign up to receive a smart meter?**

### Before meter installation

#### What you need to know

Smart water meters are better things. They cut off all cold water and are great at showing if there's a problem with your water supply. If you get a leak, connecting a smart water meter can help you find it so you can get fixed as soon as possible.

Being smart with how we use water means more water for our homes, businesses, schools and hospitals. Better for you, better for the environment, or better for your whole region, one step for the future.

## 3. Post installation communication

### Before meter installation

#### Smart water meters are coming to help protect your water

Smart water meters are coming to help protect your water. They can help you find and fix leaks more quickly. Working 24 hours a day, smart water meters are great at telling us when a business might have a leak on the premises.

**What is a smart meter?**

**What information do smart meters collect?**

**Can I see the data collected by my smart meter?**

**Are smart meters safe?**

**What sort of energy is emitted from the device?**

**Will it be getting in the way to show my usage like my energy smart meter?**

**Can I opt out of smart metering?**

### Before meter installation

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**Can I see the data collected by my smart meter?**

**Are smart meters safe?**

**What sort of energy is emitted from the device?**

**Will it be getting in the way to show my usage like my energy smart meter?**

**Can I opt out of smart metering?**

### After meter installation

#### What you need to know

Smart water meters are better things. They cut off all cold water and are great at showing if there's a problem with your water supply. If you get a leak, connecting a smart water meter can help you find it so you can get fixed as soon as possible.

Being smart with how we use water means more water for our homes, businesses, schools and hospitals. Better for you, better for the environment, or better for your whole region, one step for the future.

### After meter installation

#### What you need to know

Smart water meters are better things. They cut off all cold water and are great at showing if there's a problem with your water supply. If you get a leak, connecting a smart water meter can help you find it so you can get fixed as soon as possible.

Being smart with how we use water means more water for our homes, businesses, schools and hospitals. Better for you, better for the environment, or better for your whole region, one step for the future.

# MEUC audience stimulus



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**The approach:** The MEUC contacts were shown a range of communication examples during the interview, covering the smart water meter installation journey: pre-installation, during the actual installation, and post-installation. This stimulus is based on the stimulus shown to our core SME business audience and streamlined for this MEUC audience.



**The objective:** These materials were used to stimulate discussion regarding ideal content, formats, and information needs at each stage; alongside comparing communication received for those with smart water meters.



**The materials:** All materials were unbranded to ensure neutrality. Stimuli included anonymised screengrabs from retailers such as Severn Trent, Southern Water, Yorkshire Water, Wave, Business Stream, and Anglian Water, alongside custom mock-ups developed by Yonder in collaboration with CCW.

# MEUC audience stimulus



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## 1. Pre-installation communication

WATER COMPANY NAME AND LOGO

Hello,

**Smart water meters are coming to help protect your water supply**

Smart meters have great benefits for customers and our environment. They help us to identify water leaks quickly. Plus, they help us to understand changes to the way businesses and communities use water so that we understand the most efficient way to keep clear, great tasting water flowing to everyone who needs it.

**What's in it for me?**

- ✓ Smart water meters are a great way for your business to monitor water usage and get regular readings.
- ✓ You will be able to keep track of what's being used and maybe even save money.

**What's in it for [Water Company]?**

- ✓ We will be able to see where water is being used across the region.
- ✓ We'll be able to make sure any leaks are detected quickly, so we don't lose precious water.
- ✓ The environmental benefits of having a smart water.

**What happens next?**

We will soon be installing a smart water meter for your business, when we install the meter, we may need access to the building or grounds surrounding it depending on where you meter will be fitted.

**We estimate installation will take place within the next two months (i.e. February 2026); however, this may depend on availability.**

There shouldn't be much disruption to complete the installation, but will have it.

As a business you can choose any retailer to from the business that currently look after

### Smart meter installation

## 2. During installation communication

**We've upgraded your meter.**

**During meter installation**

Hello

We visited your property today to upgrade the water meter for your business to a new smart ready water meter.

**What you need to know**

After we've installed your smart water meter, some customers can experience water discolouration. Any discoloured or murky water after our work is usually caused by disturbed sediment in the water pipes and is nothing to worry about. We recommend running the cold tap for 20 minutes, if the problem persists, please visit our website for more information.

[water.co.uk/dicoloured-water](#)

**Your meter details:**

Old meter serial number: N/A	New meter serial number: N/A
Meter reading on removal: N/A	Meter reading on installation: N/A
Size of old meter: N/A	Size of new meter: N/A
Logger present? Yes/No: N/A	Date of old meter removal/new installation: N/A
Logger removed? Yes/No: N/A	New meter radio serial number: N/A
Location of removed logger: N/A	New meter location: N/A

Please keep this information for your records. It may be helpful for future reference.

**What it means for you and your business**

You now have a smart ready meter. We're currently working on establishing connectivity in your area. Your Retailer will be in touch once the smart meter functionality is enabled.

- What do you need to do differently? **Nothing.**
- We're not changing the way we bill you, you'll continue to pay your water bills to your current water Retailer.

**Why we've upgraded your meter**

Smart water meters are clever things. They run all day and all night and are great at showing if there's a problem with your water supply. If you've got a leak somewhere, a smart water meter can help spot it so it can get fixed as soon as possible.

Being smarter with how we use water means more water for our homes, businesses, schools and hospitals.

Better for you, better for the environment, in fact better for your whole region, now and for the future.

## 3. Post-installation communication

WATER COMPANY NAME AND LOGO

Hello,

**Property: 1, Main street, AB1, 2CD**

**Account number: 1234567890**

**Thank you for your cooperation during the recent installation of your smart water meter at [Site Address]. Your smart water meter has now been installed.** We will start collecting data once our smart meter enabled infrastructure is set up - this could be up to 6 months after your smart meter installation. We will contact you to let you know when the smart meter is fully enabled and ready to send data.

**What does it do?**

Smart water meters connect to the water supply at a property, and they measure water usage just like a normal water meter.

They take a reading every hour and send them to us each day. This information will help us to better understand how communities and businesses use water to help us plan for the future of the water network.

**What this means for your business:**

**Know how much water your organisation is using:** Once the smart water meter and enabling infrastructure is fully set up, this will tell us how much water you're using without you having to submit a reading. This could help you save money, energy and water too.

**Billing:** Your future bills will be based on actual usage rather than estimates. Your first bill reflecting smart meter data is expected from [Month / Quarter]

**Visibility of usage:** You will be able to see more accurate and frequent information about your water use via [online account / customer portal / billing statements] once your meter is fully set up.

[address] Please have your account number [xxx] to hand.

Thank you again for your cooperation. We appreciate your help as we improve our network and service for businesses across the area.

Best wishes,  
[Water Company]

### Smart meter installation

our clean, clear, great-tasting

minuties, helping us to detect

protect against precious water

businesses, and the environment.

ter companies across the UK

rt meter data. But you will not

smart meter.

on [phone number] or [email

A large, stylized, light blue 'CCW' logo is positioned in the background on the right side of the page. It is rendered in a thick, rounded, cursive font, with the letters overlapping and having a slight 3D effect.

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# General views on water services

# Water is a fundamentally low engagement 'background' issue for most SMEs



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Whilst there is some variation in engagement levels, water services and related information is a **fundamentally low engagement issue** for SME businesses.



While larger business may have specific account managers, many responsible for utilities at SMEs are **wearing many hats**, particularly in smaller businesses.

- **Other business concerns**, like the day-to-day operations and core, more expensive bills, typically **take precedent over water with few active water saving behaviours reported.**



For those who are not in water-critical businesses, water is generally seen as a **'background' utility**, in part because of its lower cost, which does not require extensive management.

- **Smart water meter installations are not considered a priority or focus** for SME businesses.



As such, there is **widespread low recall of communication about water services** in general and smart meters in particular, suggesting **this information struggles to cut through.**

- Lack of engagement with smart meter communications means that some practical **information regarding installations can be missed or misunderstood.**

## What this means:

Smart water meter communications must:

- Work harder to signal relevance in a low-attention environment.
- Be simple, practical and logistics-led.
- Clearly emphasise minimal disruption.
- Signpost detailed information rather than overload initial messages.



## In their own words:

*"My focus is on earning money, making sure things get paid. I don't even check my water bill. It's just a direct debit."* **Metered, small business**  
*"To be honest I don't know much about water or my upcoming smart meter. I just read a letter about it, but I don't remember the exact wording or much detail."* **Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, medium business**



# Engagement with water utilities overall is low



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**The context: water as a low engagement category** → **The result:** appetite for smart water meters is largely pragmatic and situational rather than emotionally driven. There is a **spectrum of appetite** towards smart water meter adoption, but **most customers are lukewarm.**



**A fixed background utility:** water is almost considered an invisible expense with direct debit payments reinforcing this perspective.



**Poor brand recall:** most customers struggle to spontaneously recall who their retailer is, needing to check paperwork to verify their provider (also struggling to differentiate between retailers and wholesalers).



**The 'bin' mindset:** any water communication that isn't a bill is often viewed as marketing junk and discarded, forgotten or often lost.



**Friction-led interactions:** engagement typically only happens when something goes wrong such as an unexpected leak or high bill.

## Those with greater appetite (*sizable minority*)

Customers who are **engaged and proactive** around utility costs, **motivated by risk reduction and efficiency.** Often linked to active cost management or sustainability objectives. A few of these customers may proactively initiate their smart water meter journey.

## Those with moderate appetite (*the majority*)

Pragmatic customers willing to follow guidance, seeing smart water meters as a **logical next step.** Typically, will go with the flow and schedule installation once reached out to, but **lack urgency or desire to actively follow up.**

## Those with lesser appetite (*small minority*)

**Cautious and sceptical customers,** concerned about potential data privacy concerns and real **benefits,** preferring to keep their options open and wait for others to adopt first. As a result, may delay or postpone installation. Can sometimes correlate with lower water bills, but varies.

Business customer types identified

# From the perspective of business customers; hearing firsthand what drives their appetite



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## Customers with greater appetite *(sizeable minority)*

*"I phoned up my retailer and asked them for a meter as my friend recommended it to me. She said it would help me save money and I assumed it would be better for me based on this."*

**Smart water metered, small business**



*"I agreed to have a smart meter fitted because my business had issues with leaks previously, so I wanted to be able to detect leaks sooner and prevent future issues!"*

**Smart water metered, medium business**



## Customers with moderate appetite *(the majority)*

*"Water isn't a top priority for us; we only really use it for staff purposes, so we aren't quite sure what the meter will be useful for. That said, we received communication saying the meter installation is coming."*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, medium business**



*"A while back, we got smart meter for our gas and electric, so when our retailer said we were going to get the water one, we thought we may as well get on with it."*

**Smart water metered, small business**



## Customers with lesser appetite *(small minority)*

*"I was a bit suspicious when I was first contacted about the meter installation. It made me wonder, why is this being pushed upon us; it feels like yet more technology that helps the retailer, but is it helping me?"*

**Smart water metered, small business**



*"We have a few questions; like how meter data would be processed, are there any reviews from other businesses who have switched and how many people have switched so far. It just feels very pushy currently."* **Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**



# Smart water meter appetite intersects with multiple needs and factors, which shape engagement with communication



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## Factors shaping greater appetite and interest



**Water is critical** to the day to day running of the business e.g. used for core service delivery.

Operational desire for a **joined-up view across multiple sites** (more likely for medium sized businesses).

**Active business objectives** relating to **reducing utility costs, sustainability goals/ 'green' credentials** e.g. for B-Corp status (a certificate that meets the highest standards of social, and environmental performance, accountability and transparency) and **government tendering requirements** such as for manufacturing.

**Tech trusting optimists** who view 'smart' technologies as intelligent and a natural progression.

**Operational roles** whereby detail and data, such as monitoring information around utilities, is a core focus of the job.

## Factors shaping lesser appetite and interest



**Smooth experience to date**, with a **'don't fix' what isn't broken' mindset** due to no past issues such as leaks.

**Limited capacity to consider new solutions and technologies**, particularly amongst smaller business decision makers juggling many roles.

**Operationally concerned about impact of changes**, for example about site downtime, restricted access, disruptions to ongoing work and potentially an increase in water bills - more likely amongst those with lower water usage and bills.

*"I do **get quite overwhelmed with all the bills I have to manage** and so I **don't really want to switch things up** or take on a new stress by trying out something new."*

**Smart water metered, small business**



# Fundamentally, SMEs who have a smart meter fitted do not differ hugely from those traditionally metered but awaiting an upgrade to smart



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**There did not seem to be a large difference between those with a smart water meter and those awaiting installation in terms of attitudes towards smart water meters.**

For most SMEs, smart water meters are not front-of-mind at any stage of the journey, and communications receive limited active attention.

When prompted, customers who are traditionally metered awaiting an upgrade to a smart meter focus primarily on ensuring installation is seamless and non-disruptive, while those who have already had a smart meter installed seek clearer understanding of the meter's benefits.

- However, **appetite for ongoing water services and related information such as on smart water meters remains low in both groups.**
- **Variations in response are more strongly shaped by business context** (e.g. water criticality, operational structure, customer-facing nature) than by meter status alone.
- As a result, the findings and implications apply broadly across both audiences.



**In their own words:**

*"I don't know how the installation will affect me as a business.*

*I am **worried about having the water off** for two or three hours!"*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**

*"I had this **vision in my head of the meter being a digital kind of thing.***

*But my initial impressions of actually having my smart water meter are a bit like **'oh, really? That's it?'***

**Smart water metered, small business**

## **What this means:**

Going through the smart meter journey has **not** materially shifted overall engagement with water. **Installation alone does not appear to deepen understanding or activate sustained interest**, highlighting the need to set clearer expectations and reinforce post-install value communication.



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# Smart water meter expectations and understanding

[ccw.org.uk](http://ccw.org.uk)

# Awareness of the smart water meter rollout is vague, with most viewing smart meters as a low priority inevitability



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## The 'background noise' reality

Business customers have **variable awareness that a smart water meter rollout is happening**; some have high level awareness, whereas others are less sure.

- **The rollout of smart water meters is somewhat unsurprising** to business customers when prompted on their awareness, given the broader societal efforts to reduce water consumption and the parallel introduction of smart water metering for some domestic consumers.
- This audience is **generally aware that saving water is a driver for smart water meter rollout**.
- Consistently, however, business customers **lack specific knowledge around the rollout** (and generally the headspace to contemplate this) **and hold no awareness around water sector or Defra targets to reduce water use**.
- Therefore, **unknowns persist** around the smart water meter rollout including:
  - *Is the rollout mandatory? - Is there government funding?*
  - *What are the timeframes?*



### In their own words:

*"I don't have a great deal of knowledge on the rollout of smart water meters. I looked it up briefly when we got the notice that it was happening but didn't know anything before"*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, medium business**



### What this means:

Consequently, **there is no sense of urgency** around smart water metering.

To turn passive acceptance into active readiness, communication should clearly explain **why the rollout is happening, what it means for businesses, and whether action is required**.

Linking to government targets may also help by contributing to sense of needing to keep pace with changing policy and emphasising societal role.



# Though currently rare, this passive acceptance creates risks of installation postponement as the rollout expands



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The 'receptive but passive' mindset can lead to postponement and delays, due to a few compounding factors



- **Competing priorities:** smart meters are viewed as a 'nice to have' rather than a critical necessity. Focused on core operations, businesses can neglect or forget to schedule in their installation simply because **other tasks feel more urgent.**



- **Perceived friction:** the administrative effort to arrange an appointment, for those who are asked to do so, combined with fears of operational disruption, creates a "**hassle factor.**" This perceived effort can outweigh the theoretical, future benefits of the meter.



- **The 'window' paradox:** while an installation window (e.g. "We are coming between X and Y") technically sets a deadline, **the flexibility signals a lack of urgency.** From a behavioural perspective, this allows customers to psychologically justify deferring the task, risking postponement and eventual delays.



**In their own words:**

*"I have a to do pile, and I think the water meter letter I got went in there... I don't think I paid too much attention to it for a while."*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**

*"If I am very honest, I very lightly skim read water communication like meter comms because I guess it didn't feel as a business like we were that concerned by the meter rollout.. It just feels like another thing."* **Smart water metered, medium business**

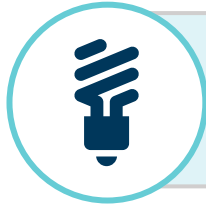


# Energy sector experiences with the smart energy meter have set clear expectations



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## Business customers expect more than just a meter



The word "smart" creates a firm expectation that water metering will match the standards set by energy metering.



This includes a "digital ecosystem" expectation, with customers anticipating a digital interface (app or portal) for tracking real-time data. This is **appealing for budgeting and resource management. Significantly though, information around this ecosystem is not being clearly set out in smart water communication.**



The end of estimation: beyond digital tools, the core **functional demand is for automation, specifically the guarantee of accurate bills and the end of manual meter readings** (typically monthly).

### In their own words:

*"It is definitely something that would just **make our life easier and it would just mean that we're being billed accurately**, and we don't keep getting these emails saying can you give us meter reading."*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**

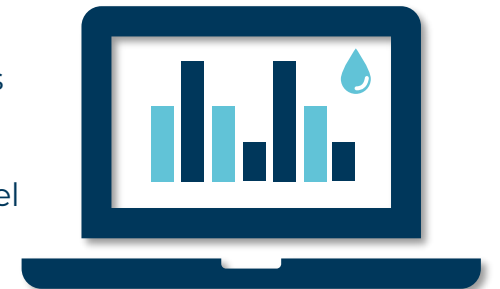
*"If there was a leak, you'd be able to see it [with a smart meter] because obviously the consumption would be running wild."*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**



### What this means:

Currently, there is a risk of disappointment driven by inconsistent retailer capabilities e.g. an interface to access data, and unclear communication regarding data access. Many feel that the technology they have had installed falls short of the 'smart' promise.



# Before installation, appetite is driven by perceived functional benefits, predominantly bill accuracy and cost management



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## The appeal of smart water meters

1

**Automated billing and accuracy:** customers consistently mentioned the appeal of no more manual meter readings and estimated bills as a result of having a smart water meter, speaking to their desire to only pay for their actual usage.

2

**Real time oversight and cost control:** greater usage visibility such as via a dashboard, to enable accurate budgeting (hope of saving money) and identify wasteful patterns.

3

**Sustainability credentials:** a secondary benefit, seeing smart water meters as a means to support green credentials and objectives.

4

**Leak detection & risk mitigation:** less of an urgent benefit, but more of an insurance benefit to be alerted to any potential leaks and high bills.

### In their own words:

*"I am interested in **only being charged for what I use**; the main thing for me right now is **saving on costs** and making sure I am not paying more than what I need to."*

**Smart water metered, small business**

*"We want to **show our clients we are sustainable**; to **win government contracts** and tenders they ask us about sustainability and so a smart water meter will help us evidence that"*

**Smart water metered, small business**



### What this means:

One of the primary drivers for adoption is currently a **misconception for many**. Customers believe smart water meters will allow them real time access to their data and enable them to save money. The lack of consistent retailer infrastructure and unclear timelines around accessing consumption data creates a significant risk and expectation gap that needs to be addressed.



# Business customers expect a frictionless installation with minimal disruption



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## The installation checklist

### Speed: Under 1 hour



Installation is expected to take **under 1-2 hours** in most cases and should be stated ahead of time.

### Minimal downtime



Water shut-off is expected to be kept to a minimum, with an expected period of 15-60 mins. It is believed that **communication should be transparent about this time** from the offset.

### Flexible scheduling



The ability to **choose both the installation time and date** is actively sought after, and at minimum, businesses feel they should be able to select a suitable time window from a date specified by their retailer.

### Advanced notice: 2-4 weeks



**Adequate notice** of when the installation will be taking place is expected so that businesses can **make arrangements within the time**.

### Post-installation: accessible data

A day or two after installation, most expect data to be made available to monitor usage and curtail manual meter readings



### In their own words:

*"Ideally, a **couple of weeks at least would be useful because a lot of the staff can work remotely.***

*So, if we are going to be without water, we can send them off home.*

*But it's just useful for the disruption because **we don't want clients in the office if it's going to be torn apart.***

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**



# Overall, businesses have several remaining questions about the whole process



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**Critically, many businesses aren't actively thinking about these questions until prompted.** Instead of seeking answers, businesses make assumptions - which are often wrong and can be unhelpful.



## Pre-installation

- **Is smart water meter installation mandated**, why am I being encouraged to do this?
- **What's the cost** of this?
- **What's the disruption like**; will I lose my water supply? For how long?
- Do I need to be **physically present** on site?



## Post-installation

- Is there **longtime maintenance cost** for the smart water meter?
- **How do I actually access the data** in real time? Can I see a dashboard?
- **Who do I call** if something goes wrong?

*"I'd need to know **how much disruption there would be**; how long the water will be off and **what would happen if I couldn't get the water back on.**" Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, medium business*

*"Is there **any hidden cost**? Would we be **paying a subscription to some sort of cloud or information storing?**" Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business*

*"They **didn't specify a deadline** so I want some more clarity on **how long you've got until you have to install one anyway.**" Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart medium business*



## What this means:

Communications need to clearly set expectations about process, disruption, costs and data access, aligning perceived benefits with actual capabilities to avoid confusion or disappointment.



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# The operational journey

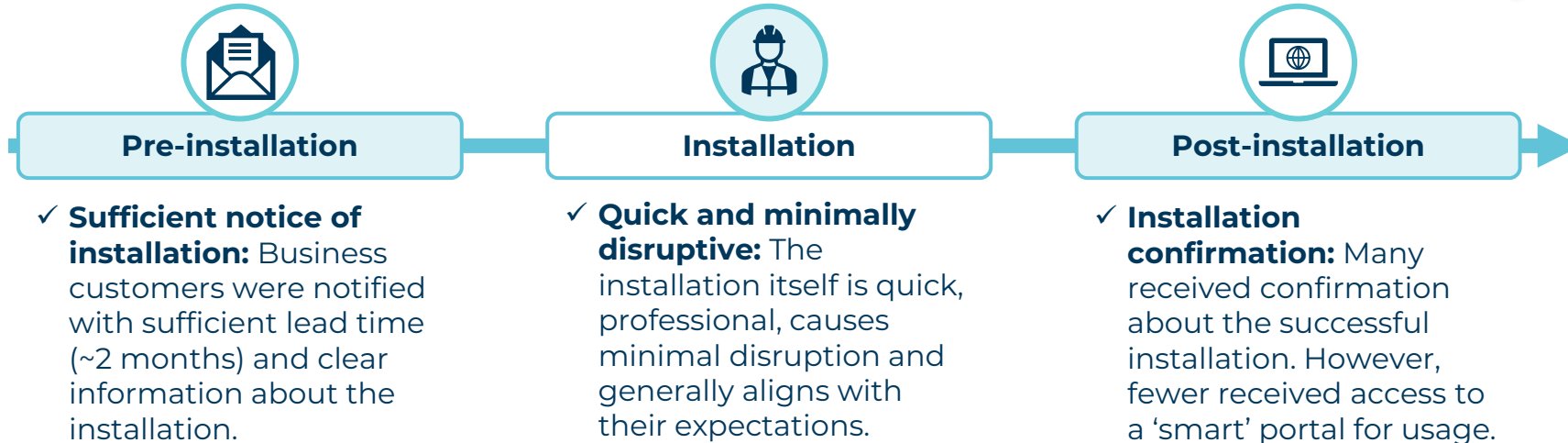
[ccw.org.uk](http://ccw.org.uk)

# The metering journey and rollout experience works overall, but falls short of 'smart' for most



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**The "Good enough" reality:** The journey is broadly meeting basic expectations. Overall, the process works. **Most customers feel informed** and receive the right information at roughly the right time. However, given low awareness of comms and understanding of smart meters, risks remain and opportunities are missed to build trust.



Given that engagement is low at baseline, and there are often no tangible changes for business customers post-installation, **customer recall and engagement with the overall journey and comms drop off almost immediately after their meter has been installed.**



*"It's not disruptive and there's no effort in actually having it done."* **Smart water metered, small business**

*"It almost feels like to me like this [smart meter] is working unless it stops working. It's really bad. I shouldn't say that but I don't really care about it."* **Smart water metered, medium business**



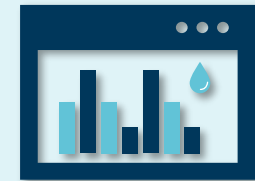
## What this means:



The current approach achieves basic compliance but **misses the crucial opportunity to build trust and engage customers in water efficiency.**

As it stands, current comms and the rollout experience is failing to deliver the 'smart' promise and its potential value.

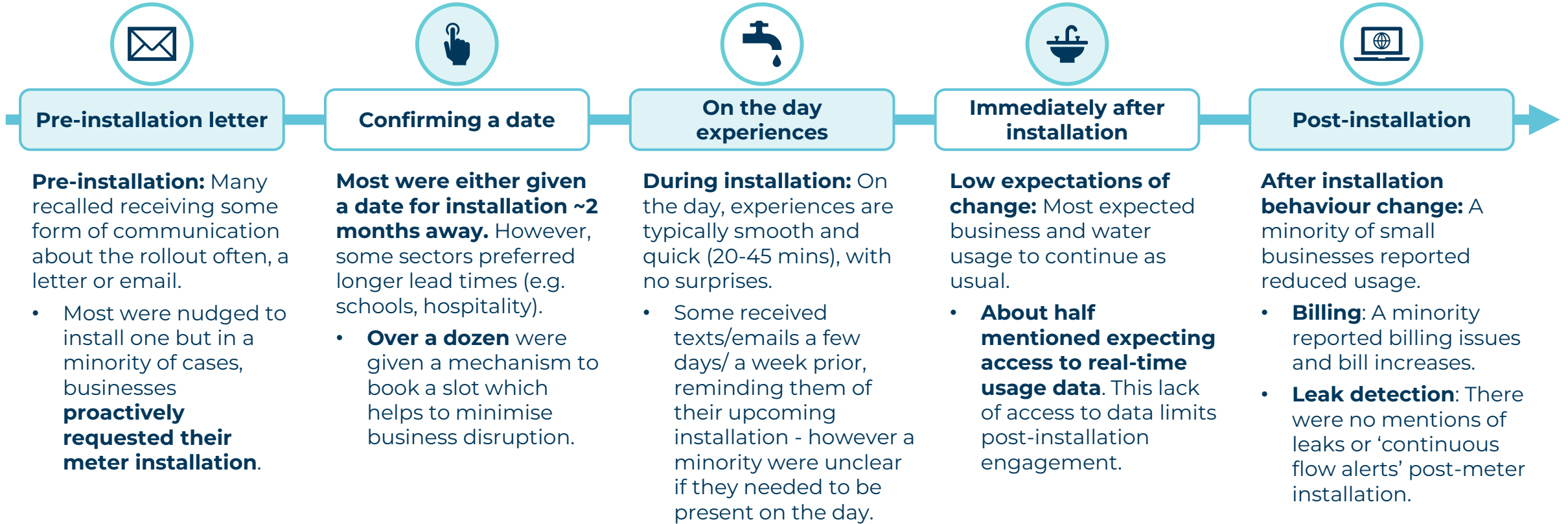
The industry's focus must **shift from simply installing hardware to actively informing and onboarding customers.**



# The installation journey is broadly consistent with expectations, if not a little underwhelming. For most, life post-installation remains largely the same



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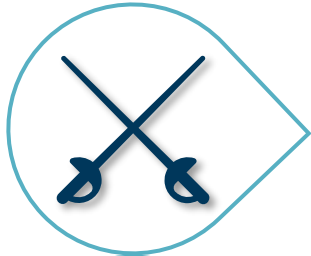
**What this means:** Overall, installation experiences **broadly line up with expectations.** However, there is room for improvement, specifically around **managing expectations** and addressing confusion around how 'smart' the meter will be and **data availability.**



# The post-installation experience is divided, acting as a catalyst for engagement for some, however, a passive reality for most others



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## Billing Reality: A Double-Edged Sword of Accuracy

- For many, accuracy delivers on its promise, eliminating estimates and leading to cost savings.
- For others, it creates "bill shock" as low historical estimates are replaced with actual usage, causing initial scepticism.



## Behaviour Change:

- **The Proactive:** For a minority, access to consumption data acts as a catalyst, driving both staff awareness (e.g. turning off taps) and installing new hardware.
- **The Constrained:** A larger segment cannot change their usage due to fixed operational or regulatory needs (e.g. hygiene, manufacturing formulas).



## Meter Engagement: Active Monitoring vs. Passive Reliance

- **The Active:** A minority engage with consumption data via portals, primarily to track trends, verify bills, and identify leaks.
- **The Passive:** The majority, who do not have access to consumption data and some who may not even be aware that they may have data in the future, adopt a "set and forget" mindset, viewing the smart meter as an automated bill calculator, not a tool for active management.

*"The original concern was only, **are we going to end up with a bigger bill? Which we did.** We thought we could compensate by using that to help us reduce use. But **there's a limit to what we could do.** It has offset some of it, but not all of it." **Smart water metered, medium business***

*"They're really useful because **they show you how much water you're currently using so you can identify any leaks.**" **Smart water metered, medium business***

*"**I just would love to know how much I'm saving.** I just assumed it would be better." **Smart water metered, small business***



**What this means:** The post-installation experience is deeply divided. While a **proactive minority unlocks the meter's value**, the passive majority only receives **billing accuracy**, leaving the full potential for water efficiency untapped.



# From the perspective of business customers



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## Pre-installation letter

*"The letter said that it wouldn't take much longer than an hour and the water would be off."*

**Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**

*"If they will eventually do the job, I just need to know if it's going to be a big disruption or not. And nobody was able to answer that question."*

**Smart water metered, small business**



## Confirming a date

*"I got a phone call saying, this is the agreed time. I said yes quite quickly. Then, we had an installation booked about four weeks, five weeks in advance."* **Smart water metered, medium business**

*"They sent a link and we did it through that. The turnaround was quick, in terms of logging and securing an appointment."* **Smart water metered, medium business**



## On the day experiences

*"The installation took around 45 minutes. He said, if you don't think anything is correct or if you need anything else, just give us a shout."* **Smart water metered, small business**

*"I was **surprised** when I first saw it. When I realised **how rudimentary it looked** compared to a household energy smart meter."* **Smart water metered, medium business**



## Immediately after installation

*"I don't recall there being anything left. I could be wrong but I don't think so."* **Smart water metered, medium business**

*"They sent us another leaflet saying congrats on the meter, successful meter installation and that they're glad that we're with them and we can contact them if there are any issues."* **Smart water metered, small business**



## Post-installation changes to usage

*"I am thinking that we will have a portal and we will access that portal anytime... so we know exactly how much water we have, how much is the cost."* **Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**

*"The biggest thing, is that it's definitely brought the bill down, but it also makes us aware of water."* **Smart water metered, small business**



# Proactive initiators are driven by compelling benefits from a reliable source, whereas the rest are driven by credible benefits and easy call-to-action / next steps



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## Routes to installation:

Business customers were either **proactively empowered to book, passively assigned slots** or given **mechanism to book a slot** in the next few months.



**Customer-Led Booking (The Proactive Path):** A proactive minority (n=4) contacted their retailer first, unprompted after hearing of the benefits of smart water meters from personal connections.

**Key Motivations:** Their action was driven by specific, high-value business needs including

- **Financial Control:** To replace inaccurate 'guesstimates' with precise billing (thought to be similar to a smart energy meter) and potential cost savings.
- **Risk & Sustainability:** To meet green credentials or use continuous flow data to prevent catastrophic events (e.g. flooding).



## Retailer-Led Booking (The Reactive Path):

Over a dozen business customers were prompted to book via:

- **Digital Self-Serve:** Email links or barcodes for quick, convenient booking.
- **Phone Consultation:** A direct line for businesses with complex scheduling needs (e.g. schools, hospitality).

**What this means:** Highlighting **other businesses experiences** within comms may be a **useful tool to build interest in smart water meters** and getting business 'buy in'. **Financial and 'eco' benefits feel more compelling and convincing from other businesses**, over a water retailer.

To overcome customer passivity, **communications must activate a clear set of business drivers** (e.g. financial, reduced admin), reassure of benefits with **'free installation'**, and provide a **clearly streamlined process** to reduce the mental effort required to take action.



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# The communications journey

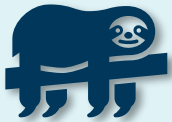
[ccw.org.uk](http://ccw.org.uk)

# Communications could be clearer and more reassuring. It will also need to manage expectations around how 'smart' the meter will be



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Communications are generally in-line with customers' expectations however, this is mainly because expectations around the experience are very topline. When businesses look back on the process and consider what could have been done better, misunderstandings emerge thus pointing to communication gaps that should be addressed.



## The 'urgency gap':

- While the benefits are understood, the messaging often fails to make the installation a priority, in some cases, leading to customer inertia.



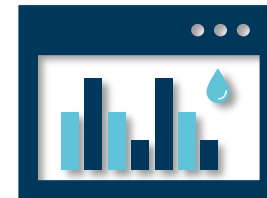
## Misconceptions unaddressed:

- Transparency around how 'smart' the new meter will be, what it will look like and what to expect in terms of data visibility is important.
- This should come earlier in the journey, to ensure informed consent and avoid customers feeling over-sold on the benefits.



## An undercurrent of scepticism:

- Concerns about "hidden fees" and whether the benefits are genuine persist.
- This is fuelled by a lack of proactive, reassuring communication and worsened by the low trust in the sector and amid rising costs of essential utilities.



## What this means:

### There is a significant 'value gap'

- Ultimately, a post-installation "silence" means the 'smart' promise of data and engagement feels entirely unfulfilled.



*"When you go into something, it's good to know all the cons. I hate hidden costs. The full costs need to be specified immediately before you even book someone in to come in."* **Smart water metered, small business**



*"I was surprised when I first saw it and saw how rudimentary it looked compared to a household energy smart meter.[...] They're deceptively old fashioned in appearance, but 21st century in operation."* **Smart water metered, small business**

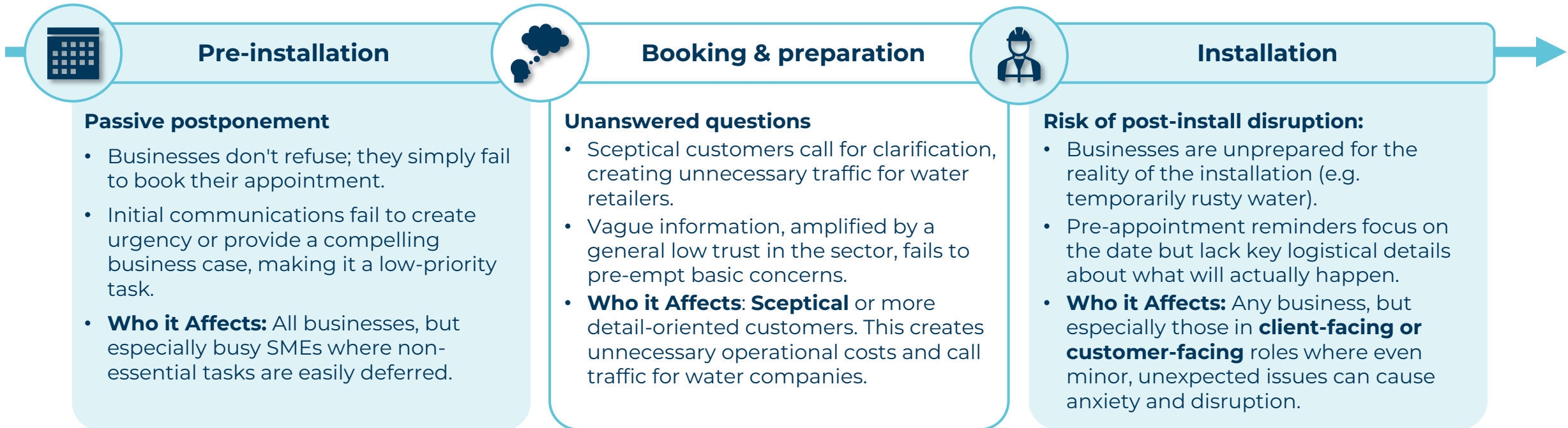


# The overall journey is satisfactory, however there are key friction points for business customers and water companies



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While the physical installation is **generally smooth**, several **friction points** in the communication journey create **delays, unnecessary effort, and anxiety** for both businesses and water companies.



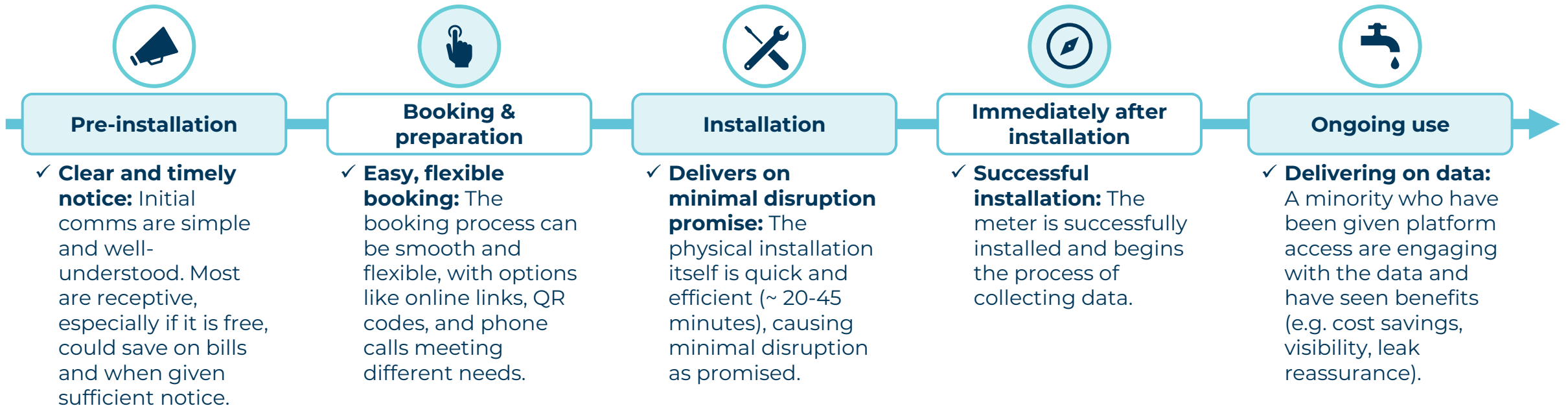
**What this means:** These friction points are **not process failures**; they are **communication failures**. Proactively addressing these common questions and concerns in the initial communications will significantly reduce delays, operational costs, and customer anxiety.



# The overall communication journey generally meets expectations, however, this is attributed to low overall engagement and vague expectations for installation



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*"It was fine. They just came along and did the thing [installation]. It took slightly less time than they said it would. So, I think we were without water for maybe an hour."* **Smart water metered, small business**



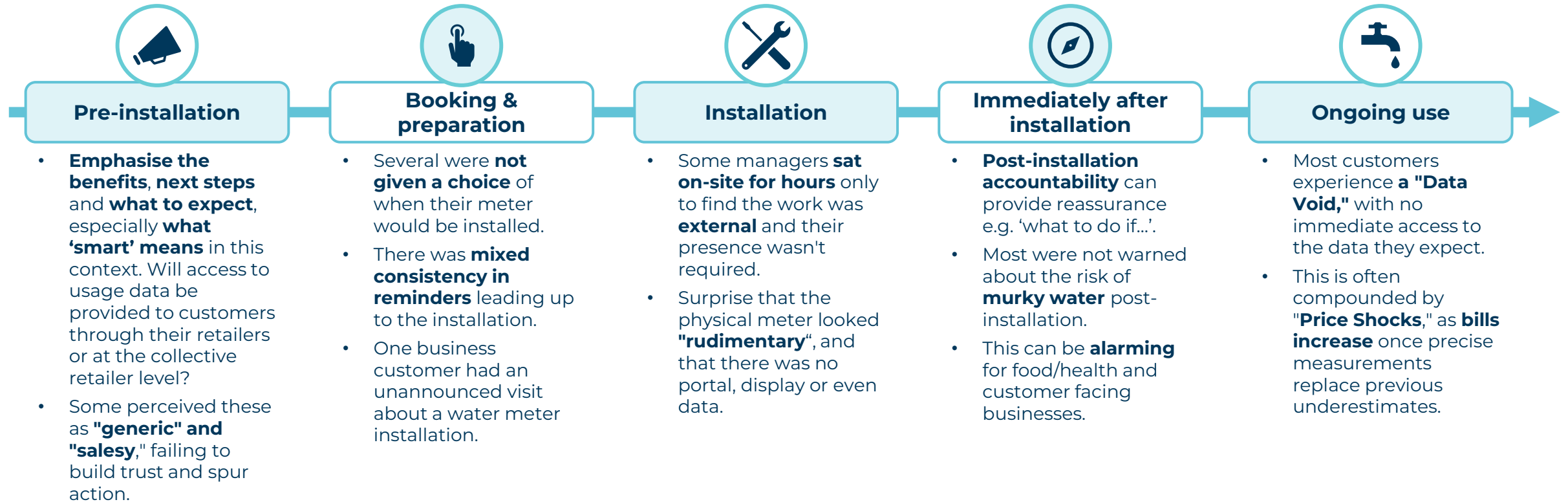
**What this means:** Generally, **the installation process is communicated well and goes 'to plan'**. Customers appreciate when the process feels **collaborative** and when their time is respected. Communications that are **short, simple, and staggered across the installation journey** are better for engagement. Business customers like to feel **informed of changes, next steps, and any key considerations, before they happen**. This is key for ensuring **informed consent and sustained trust**.



# Further probing reveals multiple points of misalignment and areas where communications are less clear



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**What this means:** These friction points are **not process failures**; they are **communication failures**. Proactively addressing these common questions and concerns in the initial communications will significantly reduce delays, operational costs, and customer anxiety.

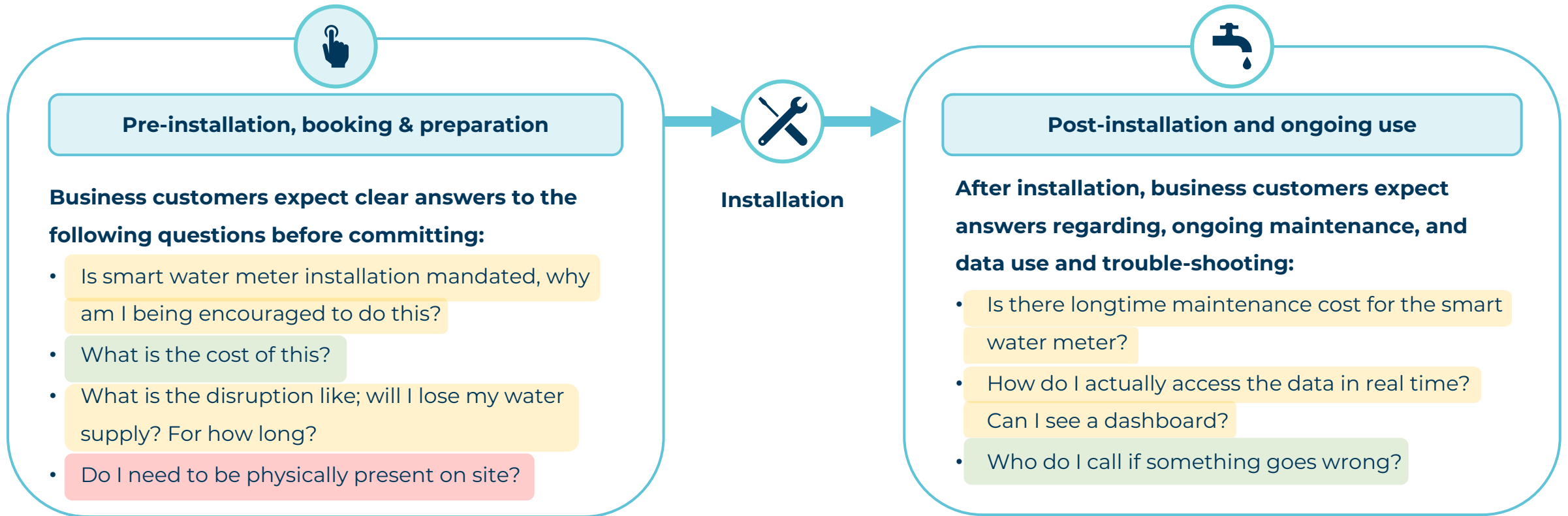


# Key questions that business customers expect answers to throughout the installation journey and how these have been addressed



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Questions highlighted in **red** are currently unclear to most business customers, questions highlighted in **amber** are partially unclear for most business customers, whereas questions highlighted in **green** are understood and answered within existing comms tested.



# Key frequently asked questions from businesses are addressed to varying degrees within the journey, with several remaining unclear in initial communications



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**What is answered:** Most communications successfully cover the high-level environmental and billing benefits (e.g. leak detection and accuracy)

**What is missing:** Practical, logistical specifics are the primary weakness; **more specifically, businesses want to know:**



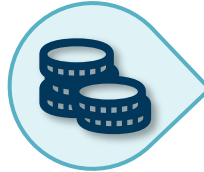
**Exact duration of water shut-off** (rather than "brief"). Quantifying this exact time was often missing from initial notices, causing **high anxiety for water-critical businesses**.



**Are these mandatory?** Most participants were **uncertain if the rollout was legally mandatory**. While some comms mentioned a "national rollout", others felt the tone was optional or a "sales pitch".



**Access requirements:** Does the engineer need to enter the building? If engineers are performing external work businesses should be notified.



**Is this free?** Many comms stated the installation was "at no cost" or "free" which can help **'derisk' the decision** to commit for businesses. However, some remained sceptical of "hidden costs" or sudden bill spikes once estimates were replaced by actual reads.



**Data enablement:** Data enablement is **not consistently communicated**; and often customers do not know that "smart" data access may take up to 6 months to activate. This is rarely mentioned until after installation, leading to post-install disappointment.

**What this means?** Answering questions on the logistics, government's support and emphasising the 'no cost'/ free installation with no hidden costs, could help to **reassure customers of concerns, address hesitations, encourage adoption and build trust**.



# Initial comms should speak to businesses' desire for financial control, operational convenience and the sense that regulatory change is on the horizon



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## Financial accuracy and cost control

The most significant driver is the desire to move from estimated billing to accurate billing.

- Businesses are motivated by the prospect of only paying **for exactly what they use**, rather than a "guesstimate" based on past averages (e.g. to ensure they aren't overcharged).



## Operational ease and time savings

The "hassle factor" of manual meter readings is a key pain point that the first letter effectively addresses.

- **Eliminating manual readings is appealing**, especially for those with meters in awkward or external locations or managing multiple sites.



## Risk mitigation (leak detection)

Leak detection is a compelling motivator for those who have **first-hand experience with flooding**.

- **Preventing property damage:** Continuous flow alerts or for spikes helps provide businesses reassurance to "future proof" their sites against traumatic and costly events like flooding from leaks.



## Inevitability and governance

Some were more **receptive** to the first letter because they **perceived the rollout as mandatory** or a "national direction" that could not be avoided.

- **Non-negotiable change:** Some felt that since it was a national rollout, there was no point in resisting, as it would have to be done eventually.



## Ease of action (the "call to action")

The inclusion of a **booking link or barcode in the first letter triggers immediate action** allowing customers to self-serve.

- **Frictionless booking:** Simply clicking a link and selecting a convenient slot was highly valued by busy directors.

**In their own words:** "It would just mean that we're being billed accurately, and we don't keep getting these emails saying can you give us a meter reading." **Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, small business**



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# Different views from large businesses

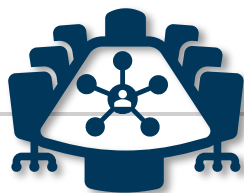
[ccw.org.uk](http://ccw.org.uk)

# Larger businesses have different needs and challenges to SMEs, and will therefore need a different approach



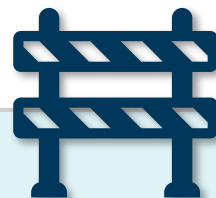
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While SMEs need a simple and reassuring **consumer journey**, large businesses require a **sophisticated and project-managed B2B partnership**. Their needs differ fundamentally in terms of data, logistics, and communication.



## Larger business needs:

- Sophisticated, project-managed B2B partnership with wholesalers and retailers.
- Comms that scale with a centralised network and information sharing system – dedicated point of contact.
- Site access protocols.
- Asset ownership clarity.



## Challenges for larger businesses:

- **Strained wholesaler relationship:** Lack of proactive communication and consent, and wholesaler's monopolistic behaviour.
- Operational complexity and difficulty maintaining visibility of sites including site water meters, locations and logistics.
- Data hoarding and the undelivered 'smart' promise.



## What this means:

Water wholesalers need to take a more **collaborative and customer-centric** approach, involving water retailers / larger businesses directly in the process from the start.

**Repairing existing relationships** with larger businesses will ease future communications and cooperation in the rollout.



**In their own words:** *"This single point of contact would be key because it's easy to get lost in translation. It's got to be a joint up process, especially for large businesses. I would split out obviously we've got three or four wholesalers on our patch. The wholesaler would liaise with our retailer as opposed to one big mass exercise, or they combine it all and it's like well is that Yorkshire Water."*



# Large businesses ultimately require a “project-managed” approach to communication, differing from SMEs



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## Strong B2B relationship and account manager relationship:

Large firms want a **dedicated contact** rather than a general call centre or individual letters sent to local shop managers who may not understand the context.



**Bulk communication:** Larger businesses see a better alternative to receiving individual letters or emails for each site, requesting one centralised spreadsheet per week/month instead to scale the rollout more efficiently.



**Site access protocols:** For rail and schools, site access is not just about "opening the gate." It involves **permits, health and safety checks** (e.g. asbestos), and **escorting engineers**, which must be arranged weeks in advance via email.



**Asset ownership clarity:** There is significant frustration that the wholesaler owns the meter but provides no **maintenance or visibility**. Large businesses expect clearer **Service Level Agreements (SLAs)** for when a smart meter stops transmitting.



**In their own words:** *"I'd want a single point of contact. Some of the other companies, you speak to a different person every time, you just go through to a **call centre... they start from the beginning each time on a complex query and just not getting it at all.**"*



**In their own words:** *"Just bear in mind **we've got a thousand stores so everything we do is times by a thousand.** So, we don't want one email before every store gets done, one email after and a piece of paper. Do it as a project and get it all done in one go."*



**In their own words:** *"Because we are schools, if anybody wanted to come and install a water meter on our site... that will have to be done by prior appointment... **they will have to be escorted, for safeguarding reasons** etc."*



**In their own words:** *"There was an actual read posted by the wholesaler, which is inefficient. **They won't give me access to CMOS\*, because I'm not a water retailer.** I have asked because to me it just makes sense if you want me to manage my sites properly."*

The Central Market Operating System (CMOS) is the core IT system for the non-household market. CMOS manages all the electronic transactions involved in switching customers and providing water usage data.

# Experiences with rollout and installation have been difficult and are worsened by a lack of visibility and strained water wholesaler relationship



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## **Wholesaler indifference:** Larger businesses report that wholesalers often **install smart meters without proactive communication or data sharing.**

- MEUC contacts acknowledge that wholesalers have a strong regulatory focus, however, at times it seemed that wholesalers were more focused on commercial outcomes than customer satisfaction, often managing to minimise MEUC contact involvement where possible.



## **Operational complexity:** Larger businesses with several sites require **longer lead times**, and **greater coordination** when **managing communications** and installations.

- Arranging site access can be more difficult when site-specific personal must be involved. For specialised sites like schools or rail depots, the "one hour" water shut-off is highly sensitive and can affect operations of the workplace.



## **The "Retailer Middleman" issue:** Large businesses often have a "strained" relationship with wholesalers because they must communicate through a retailer, which often leads to messages being lost.

- This is compounded further by the **low visibility issue** and **maintaining oversight of thousands of sites and meters** across the country.

*"If a water wholesaler wants to come to site to do a meter exchange, depending on the location of the meter... they can just come and do whatever... **Possibly would not communicate with us at all.**"*

*"It's a complete mystery what they [water wholesalers when installing a smart meter] do... They do it themselves. They don't tell us anything about it. They just do it if they want to."*

*"They see their relationship with... Ofwat as a regulator as the most important part of the relationship and their customers are just an **inconvenient necessity.**"*



**What this means:** Wholesalers are not collaborative when installing smart meters and do not seek consent or 'buy in' from the relevant contacts at large businesses. More could be done to involve them from the start, either through their retailer or directly. Repairing this strained relationship with streamlined communications and the intention to **inform and collaborate** could ease the rollout process, future communications and business cooperation needs (e.g. arranging site access, and information on logistics).



# Wholesaler data hoarding and lack of visibility blunts the benefits of having a smart water meter installed in the first place



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**The key difference:** For large businesses, the value is not in a simple app; it's in the raw data itself. Similar to the core business audience, there is a sense that these new meters are not 'smart'. However, for the MEUC group they want more than portal access. If the water retailer is not sharing data with them, the meter is not 'smart', it is just digital.



## SME need vs. large business demand:

- SMEs hope for a simple, user-friendly portal to view basic usage.
- Large businesses demand raw data feeds (CSV/Excel) and access via APIs to integrate into their own multi-site management systems. They need to analyse, not just view.



## The centralised view is non-negotiable:

- Managing hundreds of sites requires a single, centralised platform. Receiving individual logins or communications for each site is seen as operationally unworkable.



## What this means:

CCW can champion the need for **open data standards** and **wholesaler/retailer portals** that are sophisticated enough to provide **raw data exports** and **API access**, ensuring the "smart" promise is fulfilled for all customer types. Enabling data access can be the first step in repairing the wholesaler, large business relationship.



**In their own words:** *"It's not smart if you don't share the data... it's just digital"*

*"If I'm getting a smart meter, that's great, but I want to see the data. I also would like **alerts** if there's a **constant flow**."*



*"I would like some sort of **portal where I can see all the data** so I can log in, download all the data. Just exactly that spreadsheet like I showed earlier."*

*I don't want fancy graphs or anything like that. **I just want numbers. I just want the raw data and capable of doing graphs myself, how I want.**"*



A large, stylized, light blue 'CCW' logo is positioned in the background on the right side of the page. The letters are thick and rounded, with a slight shadow effect, giving it a three-dimensional appearance. It is set against a dark blue background.

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# Opportunities and recommendations

[ccw.org.uk](http://ccw.org.uk)

# Key learnings



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## Operational baseline

- **Broadly, the smart water meter rollout is operationally effective**, with business customers accepting the process and reporting it to be quick, low disruption and largely friction-free.
- This means that the **logistical challenge of installing the smart water meters themselves is largely successful**.
- That said, **engagement with water utilities and water comms is low** for this audience and **remains low even amongst those who have gone through the journey**.



## Communication gaps

- **Current communication contains gaps and misunderstandings** that risk **undermining retailer and industry trust, delaying bookings and leaving some unprepared** for their installation.
- **Expectations regarding what 'smart' actually means**, e.g. data access, cost impact and post-install value, **are not being clearly set out**. **Indeed**, communication is **noticeably inconsistent**; with **some businesses not being told about data access**, or **timelines being undefined** as sometime in the future, or **critical information about being able to see data being shared only at the end of the journey** rather than upfront.



## The strategic consequence

**Installation is viewed as a low priority inevitability** rather than a meaningful business upgrade.

- **The promise of 'smart' can currently be misunderstood or overestimated without consistent consumption data awareness and capabilities**, leading to disappointment.
- **Lack of communication following installation creates a value gap**, exacerbated by a **delayed data access and unclear billing changes**.
- There is a **failure to fully activate the behavioural, financial and engagement benefits that justify the smart water meter**, missing the chance to build long term trust around water efficiency.

# A checklist of what is working well in smart water metering communications and what should be maintained



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Continue prioritising **flexibility, reassurance** and taking a **customer-centric approach** that emphasises 'what's in it for them' and 'derisks' decision-making.



- **Self-serve booking:** Over a dozen participants mentioned the ability to book via a link, barcode or digital mechanism, as a high-value feature that puts the business in control.



- **Proactive reminders:** Text and email reminders 24–48 hours before the visit are highly valued for "jogging the memory" of busy managers .



- **Customer-centric framing of 'what's in it for them':** Clear articulation of the business benefits of installing a smart water meter resonates, when mentioned, particularly in early-stage communication.



- **Clear "No Cost" messaging:** Explicitly stating the installation and maintenance are free, removes a major barrier for SMEs.

## In their own words:

*"It basically takes you to like the Water plus site and then it just gives you a few dates when they are available. Then they basically say that they'll confirm it to you via by email."*

### Smart water metered, medium business

*"Leading up to the actual day, I received two more texts confirming. The last text came the morning that the engineer was actually coming."*

### Smart water metered, medium business



## What this means:

The flexibility to book an installation date can help make SMEs more likely to concede to having a smart meter installed.

- **Multi-channel reminders build confidence.**
- Those most satisfied with their experience recall a **sequence of reassuring communications** from their retailer and mentioned receiving **reminder emails**, a day or more before their installation.



# A checklist of what is working less well in smart water metering communications and what needs to be carefully considered



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## Communication 'watch outs' for businesses regarding the smart water meter rollout:



- **Apathy and disengagement:** Customers see the rollout as a low-value administrative task, making future engagement on water efficiency much harder. Consequently, more could be done to make the benefits and call to action consistently clear.



- **Logistical clarity:** Ambiguity regarding the installation process and what is needed from the individual, for example if they need to be there for site access, currently creates friction. Without clear 'next steps', businesses may postpone phoning retailers for more info or finding out what to do next.



- **The promise of 'smart' is undermined:** The industry is investing heavily in technology which primary benefits (data access, leak alerts) are not consistently being activated or communicated to the end-user. This creates the perception that the smart metering programme is for the benefit of water retailers/wholesalers, not customers.



- **Risk of vulnerability to bill shock:** Without proactive education on how to use data or where to get support, customers who do have issues (e.g. a leak) are unprepared, risking complaints. This particularly affects water-critical businesses, where high usage is normal and a spike might not be immediately obvious.

*"I think the word **smart** in there. I've like got a smart [energy] meter that I use just domestically, **it's got a dashboard that shows how much I use and graphs** etc. So, I can just **picture it being quite similar** to how that would look." **Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, medium business***

*"**Annoyed that it's going to take six months to see data...** an advantage to them [the water retailer] that the data isn't being shared [with us]." **Traditionally metered (with a meter that is manually read) awaiting an upgrade to smart, medium business***



### What this means:

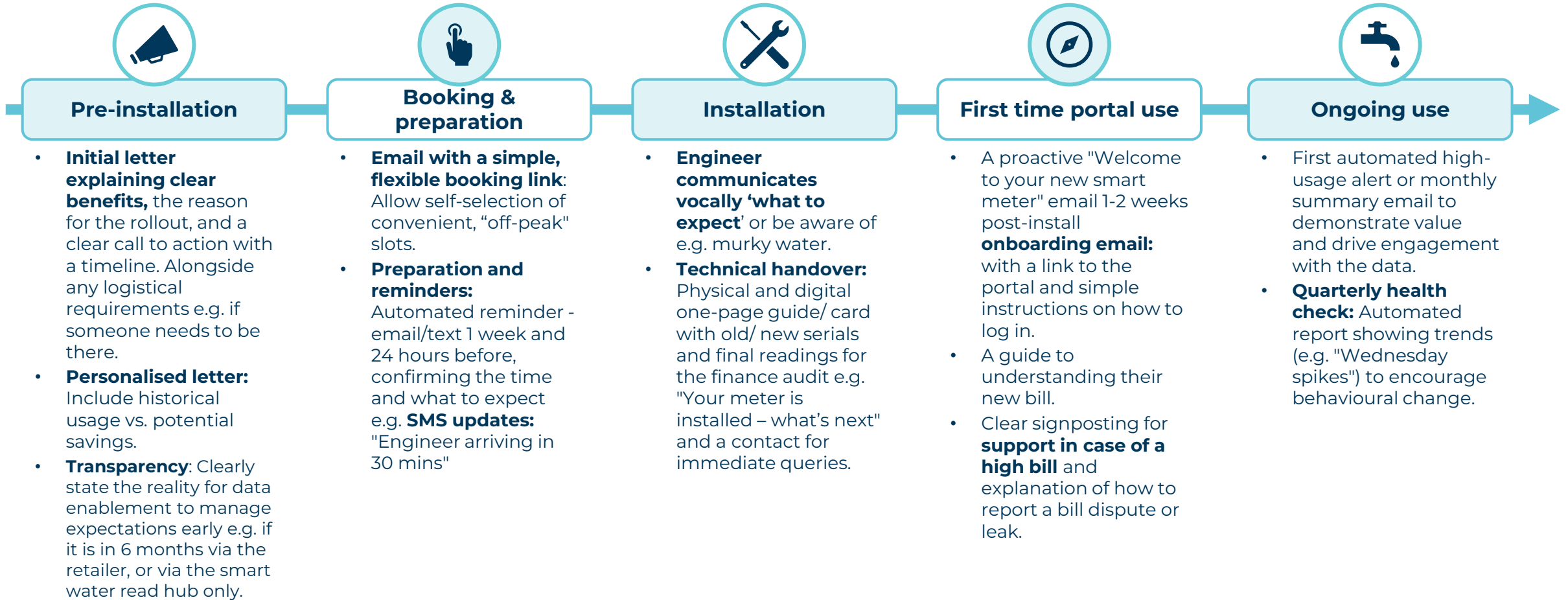
Managing customer expectations is key to meeting expectations. **Customers rely on their water retailer's expertise** and for them to **communicate relevant information in a timely manner**, including any considerations before and after installation, to ensure the process goes smoothly.



# The ideal communication journey takes business customers from a 'passive recipient' to an 'engaged and informed' meter user



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# Recommended principles for communications and optimising the smart water meter journey



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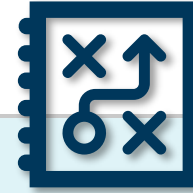
## 1. Comprehensive preparation:

Give customers everything they need to know to be operationally ready



## 2. Minimise the cognitive effort:

Make the process intuitive, visual and easily signposted



## 3. Emphasise value and benefits:

Shift the narrative from 'hardware' to 'business wins'



## 4. Transparency and expectations:

Build trust by aligning the promise with the reality



# Recommended principles for communications and optimising the smart water meter journey



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## 1. Comprehensive preparation:

- Provide clear explanations of booking pathways and process expectations to reduce confusion and likelihood of postponement.
- Provide explicit details on water shut off duration and site impact so that businesses can plan ahead effectively.



## 2. Minimise the cognitive effort:

- Don't make customers hunt for information, proactively notify them when data will be available and how they can access this, where relevant, rather than leaving it to them to discover it independently.
- Implement a structured email/communication sequence to maintain engagement during the 'silence' between installation and data activation.
- Ensure practical, easy to reference handover materials that customers can rely on after the installer leaves are shared such as via email (in case paper copies are lost).
- Maintain messaging and signposting with customers so they never feel lost about where they are in the process.



## 3. Emphasise value and benefits:

- Lead with business value such as bill accuracy and operational convenience rather than technical features.
- Position installation as risk management such as for leak detection and property detection.
- Emphasise "free installation with no hidden costs" upfront to lower barriers to acceptance and to alleviate concerns.
- Use personalised usage comparisons to make the value proposition offered relevant to the individual business.
- Showcase value immediately once data is live and consistently available e.g. with first usage summaries or example leak alerts!



## 4. Transparency and expectations:

- Clearly define what 'smart' means for smart water meters to avoid unrealistic comparisons to energy meters e.g. instant digital feedback won't be available for all.
- Be realistic about the potential data lag; explaining that data enablement can take up to 6 months post-installation, depending on the retailer, and in some cases will only be applicable via the smart water read hub, to prevent the risk of complaints and potential confusion.
- Clearly explain that value of the smart water meter comes in steps e.g. through installing, then you can later access your data and eventually become more aware of your usage and costs. This will help to explain that greater utility management will come from knowing actual usage rather than estimates.

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