Customer Segmentation

Wessex Water

October 2024

Photo by Pixabay on Pexels

Contents

Photo by Magda Ehlers on Pexels

Objectives & methodology

Photo by Pixabay on Pexels

Background and objectives

This segmentation provides an updated to the simple segmentation currently being used in the Wessex Water Tracker

Background

Wessex Water is looking to refresh their customer segmentation to better align with the evolving needs of the business. This updated segmentation will be designed to more effectively support behaviour change campaigns, as well as marketing and communication efforts.

While the current segmentation has served valuable purposes, Wessex Water is now aiming to develop a model grounded in robust statistical analysis, allowing for deeper insights and a more strategic understanding of their audience

Research objectives

To create a dynamic segmentation that empowers Wessex Water to better understand their diverse customer base and tailor strategies for engaging with different audience segments.

This research aims to uncover key insights into:

- Customers' environmental perspectives
- Their patterns and habits around water usage
- Their openness to adapting behaviours
- Their media consumption habits, including news and broader media engagement

Methodology

1 Quantitative phase

Online survey

1053 Wessex Water sewerage customers from across the three regions took part in the survey.

The demographic profile of the data was **weighted** to match ONS (2019-20) for Wessex Water region.

Modelling process

Following data collection, a **cluster analysis** was carried out to segment the audience.

The final solution produced **6 different customer segments**, based on a mix of attitudes, behaviours and metering.

2 Qualitative phase

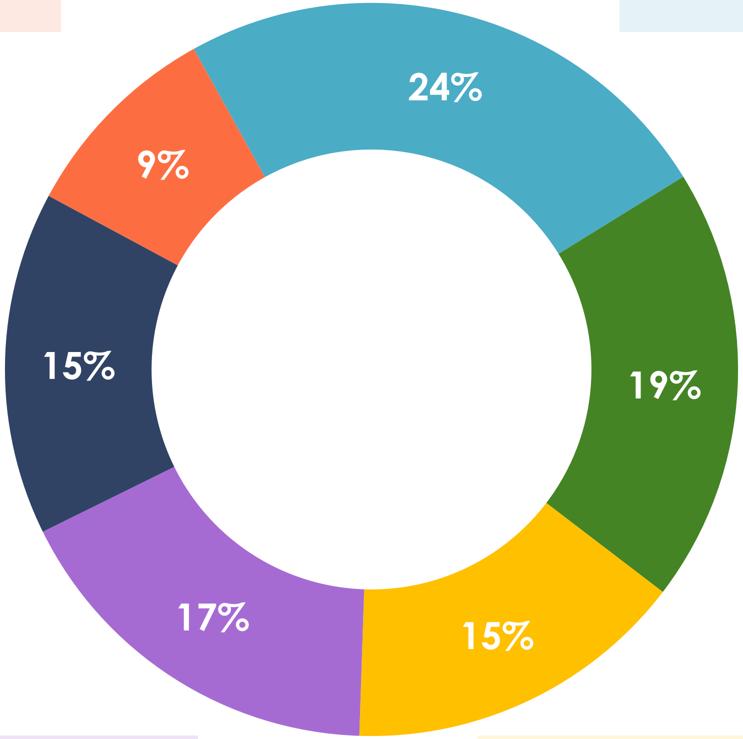
Focus group discussions

- We conducted **10 focus groups** to explore the reasoning and motivations underpinning the segments. Each focus group was made up of participants from the same segment.
- Responsible Environmentalists, Lifestyle Empowered, Convenience Cost-Savers, and Pro-Planet Advocates were identified as **priority segments**, with two focus groups for each. Frugal Traditionalists and Care-Free Consumers had one group each. Each segment was recruited to reflect the demographic characteristics identified in the quantitative stage. While the groups added valuable flavour to the data, the sample sizes were small – especially for the lower priority segments.

Segments Overview

Photo by Pixabay on Pexels

The Segments



Segment 1: Responsible Environmentalists
Action-oriented environmentalists – passionate about making eco changes and are likely to already be taking steps to reduce consumption. Knowledgeable on the topic and more positive company outlook.

100% have a water meter

Segment 2: Lifestyle Empowered
Comfortable, information driven, more families – fairly concerned about the environment, willingness to put money into water saving devices, prioritise values of hygiene and relaxation. Diverse media consumption, using many sources.

100% have a water meter

Segment 3: Convenience Cost-Savers
Younger, occupied, more families – enjoy relaxing and daily bathing, some environmental concerns but less proactive, feel a bit more negatively/less trusting towards Wessex Water.

0% have a water meter

Segment 4: Frugal Traditionalists
Disengaged and lacking concern – environment isn't top priority though and have some scepticism and budget concerns. *Some* openness for change due to having less water-intensive behaviours already.

75% have a water meter

Segment 5: Pro-Planet Advocates
Climate anxious, company criticals – strongly pro-eco action and feel it's important we all do our bit. Would be prepared to do more, negative company outlook but has room to know more about Wessex Water.

0% have a water meter

Segment 6: Care-Free Consumers
Climate change sceptical – unwilling to make changes for the environmental purposes, does not believe in or care about the issues and is negative about bills. High water consumption and uninterested in changing.

62% have a water meter

BLUE MARBLE

Deep dive - Responsible Environmentalists

Responsible Environmentalists make proactive efforts for the environment

Photo by Arthur Ogleznev

This segment are action-orientated, environmentally conscious, socially responsible households

Mostly older adults (esp. 65+), living in smaller households, all have water meters.

- Strong sense of social responsibility and deeply concerned about climate change and sustainability. They feel the most connected to their region among all the segments.
- Have already made significant efforts to reduce water and resource use.
- Cost-of-living pressures matter, but willing to spend more if it benefits the environment, especially when there is a tangible impact. Eager to learn how to further reduce their environmental footprint but frustrated by the slow pace of broader climate action.
- Relatively well-informed about Wessex Water and generally positive about the company. However, there is some scepticism about Wessex Water's spending, and a feeling that upgrades, (e.g. sewerage system) should be the company's responsibility.

"I think it's the single biggest threat facing civilization."
M, 18-34, Responsible Environmentalists

"It's the biggest issue we have on the planet... It's going to be the death of people from here on out."
M, 18-34, Responsible Environmentalists

BLUE MARBLE

Responsiveness to behaviour change campaigns

Responsible Environmentalists are already managing their water consumption but are still open to learning about how to further improve

- One of the most permeable segments of Wessex Water customers and likely to be responsive to behaviour change campaigns. They have different veins to tap into:
  - **Stewardship for the planet:** they see the value in individual actions driving change but feel large companies should do their bit too. Since they also show high levels of environmental concern, this trait pushes them to self-adjust where they can (e.g. less water for showers).
  - **Responsible and frugal:** careful not to waste money or natural resources, this includes water usage (e.g. collecting rainwater for gardening)
  - **Proactive action:** most have already made several changes, showing a 'real world' willingness to adjust their behaviours. See themselves as making a great effort to be sustainable day-to-day
  - **Neutral perception of Wessex Water:** view their relationship with Wessex Water as purely transactional, with few negative associations. Sentiment towards Wessex Water is not a hurdle to address before they receive or engage with onboarding campaign information.
- Some question whether there's scope to do more, but when presented with some specific examples such as shorter showers or collecting rainwater for the garden they do show willingness to learn more.
- Focus groups revealed a slight gap between stated environmental concern and real-life behaviour – while participants care and want to do more, cost must still be balanced in many decisions.

How to target this segment

Emphasising carefulness and stewardship will likely appeal to their conscientious nature.

While environmental motivations are strong, the cost savings to be made from being on a water meter should also be highlighted to encourage more mindful usage.

As this group already conserves water, with most not bathing daily, the focus should be on introducing lesser-known water-saving methods they may not yet practise.

"We all want to be part of this environmental drive, but it appears we all also want to save."
F, 65+, Responsible Environmentalists

Responsiveness to smart water meter roll outs

Smart water meters appeal to this metered segment and the majority are keen to have one at home to try save money

Smart water meters are seen as familiar, reliable and a 'no brainer'. Cost-savings are still the primary win

- Accustomed to using meters, so monitoring water usage and managing costs is not a new concept for them.
- Strong interest in smart meters, many see them as a practical and valuable tool – including for leak detection. The additional data and insights they offer are seen as beneficial and, some believe, more accurate.
- Some initial anxiety around smart meters anticipated but feel that the benefits will outweigh any challenges.
- Cost-saving is a key driver for adoption, alongside environmental concerns. However: many feel they have already taken significant steps to conserve water and may struggle to reduce consumption further without information/education.
- Most see no downside to having a smart meter, even if they are unsure where additional savings could be made.

How to target this segment

A relatively 'easy target' for a smart meter rollout, as they already understand the value of monitoring usage. Would likely respond to multi-message approach since they will be motivated by cost savings, accurate data, and some environmental concerns. The main barrier is feeling they may have limited capacity to reduce usage further, so accompany with information about where they might see noticeable reductions on their meter. encourage them.

BLUE MARBLE

Media channels and consumption

Responsible Environmentalists are more traditional in their media consumption compared to other segments, favouring national TV and radio sources such as the BBC

- **Strong preference for traditional media**: prefer traditional media such as TV and Radio, less likely to use online or social media sources.
- **High national news engagement:** prefer traditional news sources like BBC, ITV, and Channel 4, which are relatively highly trusted and widely consumed. Local papers and news websites are the best ways to reach them for local stories.
- **Concerned about media bias & overload:** trust the BBC but wary of biased reporting. Feel overwhelmed by news, sometimes struggle to keep track of environmental stories amid other global events but aim to be informed on all fronts.

"I do read BBC. Yes. They may be political… but they do verify their sources often."
F, 35-54, Responsible Environmentalists

"I think anything that's reported by anyone will always have a certain level of bias... it's almost impossible to avoid any bias."
M, 35-54, Responsible Environmentalists

Top 5 news sources consumed weekly	Segment %	Average %
BBC News (NET)	86%	79%
ITV News (NET)	50%	46%
National BBC radio stations	47%	43%
My local newspaper or news website	39%	41%
Channel 4 News (NET)	32%	25%

BLUE MARBLE

Deep dive - Lifestyle Empowered

Lifestyle Empowered are information-driven and metered, trying to find a balance

This segment includes a higher proportion of families compared to other groups, particularly those with children under 16, as well as many middle-aged individuals.

- Highly informed, live in metered homes, and actively seek out a wide range of news sources to make well-thought-out decisions, especially around household water use and sustainability.
- Willing to invest in water-saving devices, as they clearly see the impact of their water meter on their bills.
- Rising living costs - especially energy and childcare - a major concern, creating anxiety about the future. Broader global issues like climate change, artificial intelligence, and international conflicts also contribute to their stress. Show slightly lower levels of connection to their region.
- Trust Wessex Water but expect improvements in services, particularly sewage management, without a rise in prices.
- Water meter motivates many in this group to make small but effective changes to reduce water usage. Some need clearer information or guidance to do more. Despite financial pressures, remain committed to staying informed and making thoughtful decisions that balance household needs and sustainability.

"We tend to have showers, kids have baths... It's difficult because with kids you've got so much washing, so you're constantly doing washing..."
F, 35-54, Lifestyle Empowered

BLUE MARBLE

Responsiveness to behaviour change campaigns

Although trying to ‘do their bit’ matters to Lifestyle Empowered, they prioritise costs even further and have stronger hygiene barriers

- **Already incentivised:** already made small changes, primarily driven by the desire to save money on their bills. Some may feel they've already maximised their savings and need additional motivation to make further changes.
- **Challenges for families:** open to reducing water consumption, families with children, especially young ones, but limited by their household routines and finding it harder to cut back.
- **Need guidance:** open to adopting other water-saving measures but need practical guidance on how to implement these changes effectively.
- **Hygiene is a barrier:** this group is less willing to compromise on hygiene-related habits, such as showering or flushing less often (in contrast to Responsible Environmentalists). Prioritise daily bathing as part of their routine but are receptive to convenient solutions, like water-efficient appliances and eco-friendly practices, particularly when these changes make life easier.

“I'm trying to keep the cost down, obviously. Three kids, showers every day.”
F, 35-54, Lifestyle Empowered

“It's constantly in the news, isn't it, to cut back on the water. So generally we do.”
F, 55-64, Lifestyle Empowered

How to target this segment

Focus on cost-saving and family-friendly solutions, highlight measures that won’t disrupt routines.
Emphasise that every drop counts when you're on a meter. Make it clear that it will be easy for them to reduce bills (rising costs a key worry).

Receptive to clear, actionable advice, need to feel informed and empowered by offering steps they may not have considered.
Reassure them they don’t need to compromise on hygiene - simple, convenient solutions like water-efficient appliances can make a difference.

Responsiveness to smart water meter roll outs

Lifestyle Empowered are strong candidates for smart meters since they are metered households with lots to gain by using less water

Already engaged with smart data and worried about bills, this segment are a natural fit for smart meter uptake

- Keen on smart water meters, seeing them as useful tools for tracking spending and saving money. Already used to the idea of monitoring and see added value in understanding detailed usage data.
- Strong interest in leak alerts and tracking water usage. Already uses smart data more than average, making them more likely to adopt this information to guide their lifestyle choices, which aligns well with smart metering roll-outs. In fact, many participants find a mobile app for tracking water usage more appealing than a physical device, reflecting their preference for digital solutions.
- Smart meters seen as beneficial for identifying wasteful habits, understanding high water-usage activities, and promoting more responsible consumption through real-time cost insights. Being on a meter means this segment have a greater stake in the data.
- Convenience at home is a query for some, with some expressing concerns about available socket space in their home and how this might affect how readily they are able to see and use the data.

How to target this segment

For this group, cost and practicality will be major factors in deciding to adopt a smart water meter. Communications should highlight how the meter can quickly detect leaks, helping to avoid costly water waste, while also saving money on bills. Emphasising convenience and ease of use will further appeal to their needs, making the switch an attractive, stress-free option.

Media channels and consumption

This segment consumed the widest variety of news sources, showing an appetite for information

- **Highly informed, regularly consuming**: this segment get news from a wide range of sources, including traditional media like TV and radio, as well as newer platforms such as online and social media.
- **Variety of sources:** compared to other segments, engage with the most news sources weekly, with national outlets being popular.
- **Strong engagement with local news:** among the most likely to use local newspapers, websites, and Facebook feeds and groups. Higher reliance on Facebook for local news than other segments - Facebook Newsfeed stands out as their main source of local news.
- **Trusting and receptive:** slightly above-average trust in their preferred news sources, less sceptical of information sources and likely more receptive to targeted communications, making them open to learning and engaging further.

"Ten minutes of news in the morning, half an hour, lunchtime, half an hour, sort of, you know, evening news."
M, 55-64, Lifestyle Empowered

"I read the news every day."
F, 18-34, Lifestyle Empowered

Top 5 news sources consumed weekly	Segment %	Average %
BBC News (NET)	83%	79%
National BBC radio stations	50%	43%
ITV News (NET)	46%	46%
Facebook newsfeed	43%	35%
My local newspaper or news site	42%	41%

Deep dive - Convenience Cost-Savers

Convenience Cost-Savers are unmetered, mindful of expenses but keen to take more eco steps

Photo by Seth Reese On Pexels

This segment consists of larger-than-average households, with a higher-than-average number of young people aged 18-34, likely reflecting younger families.

- Skew slightly more female, tend to have higher-than-average incomes, and feel a stronger connection to their region compared to other segments. None have a water meter.
- One of the segments that is relatively more connected to their region.
- Have made lifestyle adjustments due to the rising cost of living. Despite awareness of rising costs, less likely to invest in water-saving devices or efficient white goods (which are seen as too expensive).
- Tend to be less positive and trusting toward Wessex Water. However, willing to pay more for improved for sewage disposal services.
- Hesitant about environmental spending but recognise importance of the climate crisis and show openness to behaviour change. Could be encouraged to adopt more sustainable practices with targeted, practical information on water usage and its impact, particularly when aligned with their lifestyle preferences and financial concerns.

"I think personally we've all got to do our bit. However, my personal opinion is that it's like, going to be big corporations, which are mostly impacting the environment the most."
F, 18-34, Convenience Cost-Savers

BLUE MARBLE

Responsiveness to behaviour change campaigns

Convenience Cost-Savers show some willingness to change their behaviours – though bathing habits will be more challenging

- Recognises the growing importance of environmental concern as an aspect of modern lifestyles but cost remains their main motivator, with the cost of living being a key worry frequently mentioned.
- Open to eco-friendly behaviours but willingness to reduce water usage is mixed. Receptive to changes only if they are clearly cost-effective and easy to implement.
- Convenience plays a significant role. Some resist change out of habit, believing they already use water efficiently and avoid waste.
- Scepticism about the effectiveness of water-saving measures, and an appetite for more information and education to be convinced of their impact.
- Resistant to reducing daily bathing routines but are more open to making changes in other areas.

"Trying to make ends meet and living on a very tight budget, it's a big concern at the moment."
F, 55-64, Convenience Cost-Savers

"There's definitely things I would want to do. I could do to cut back on the amount of water we're using. But, like I say, I still want to shower..."
F, 18-34, Convenience Cost-Savers

How to target this segment

Environmental benefits can be used to support but focus convenience, especially since financial messages may be less applicable. Highlight how individual actions can positively impact the environment, offering free, easy methods to drive change. Emphasise solutions that work for larger households.

While costs will be harder to make relevant for this group, messages should highlight how small actions could still positively impact bills, even with set prices, through collective effort.

Given their lower sentiment and trust towards Wessex Water, this segment may be a good candidate for financial messaging from other trusted organisations.

Responsiveness to smart water meter roll outs

Although less relevant to these unmetered households, they recognise other benefits of smart meters besides cost savings

Practical benefits around leak detection and easier access appeal to this segment

- Strong interest in having a smart meter to monitor water usage, believe it would help them reduce consumption. Appreciate the ability to know what to expect at the end of the month, which helps others with budgeting.
- Increased awareness and control provided by a meter is viewed positively, it shows how it would help manage monthly bills, encourage conservation, detect small leaks. Already above average in their use of smart data in daily life, this aligns well with the adoption of such technology.
- Convenience of an in-home meter is highly appealing, it avoids the issues associated with traditional meters, which are often located outside and difficult to access.
- Concerns about the stress of constantly monitoring usage, and ability to change ingrained habits. Feel they are already making efforts to avoid wasting water.

How to target this segment

To effectively target this unmetered group, communications should highlight both the environmental benefits and practical advantages of a smart meter, such as detecting leaks and preventing water waste or potential damage to their home. Emphasise that the smart meter is free, easy to install, and introduces them to the idea of monitoring their usage, promoting a more sustainable future. Seeing low prices may help some convert to becoming a metered household.

Media channels and consumption

Social media and online platforms are key for this younger segment, with Facebook being a top source of local news

- **Diverse consumption:** like Lifestyle Empowered, this group consumes a wide range of news sources each week, with a particular preference for online platforms and social media, likely reflecting their slightly younger demographic.
- **Enjoy social media:** many prefer platforms like YouTube and TikTok because they enjoy following trending topics. Some also trust these unconventional sources, believing they reveal 'the real story.'
- **Trusting of their source:** generally trust the platforms they regularly use, shaping their news consumption around these trusted sources.
- **Environmental news:** while not their a primary focus, they recognise its significance when it appears within broader news coverage.

Top 5 news sources consumed weekly	Segment %	Average %
BBC News (NET)	75%	79%
National BBC radio stations	44%	43%
My local newspaper or news site	43%	41%
ITV News (NET)	40%	46%
Local Facebook groups	37%	35%

"I only watch the news if it comes up on my TikTok 'For You' page."
F, 18-34, Convenience Cost-Savers

"I guess most of my news, you know, my news input, rather, would come through the news bar within YouTube."
M, 35-54, Convenience Cost-Savers

BLUE MARBLE

Deep dive - Frugal Traditionalists

Frugal Traditionalists are environmentally disengaged - cost of living is at the front of their minds

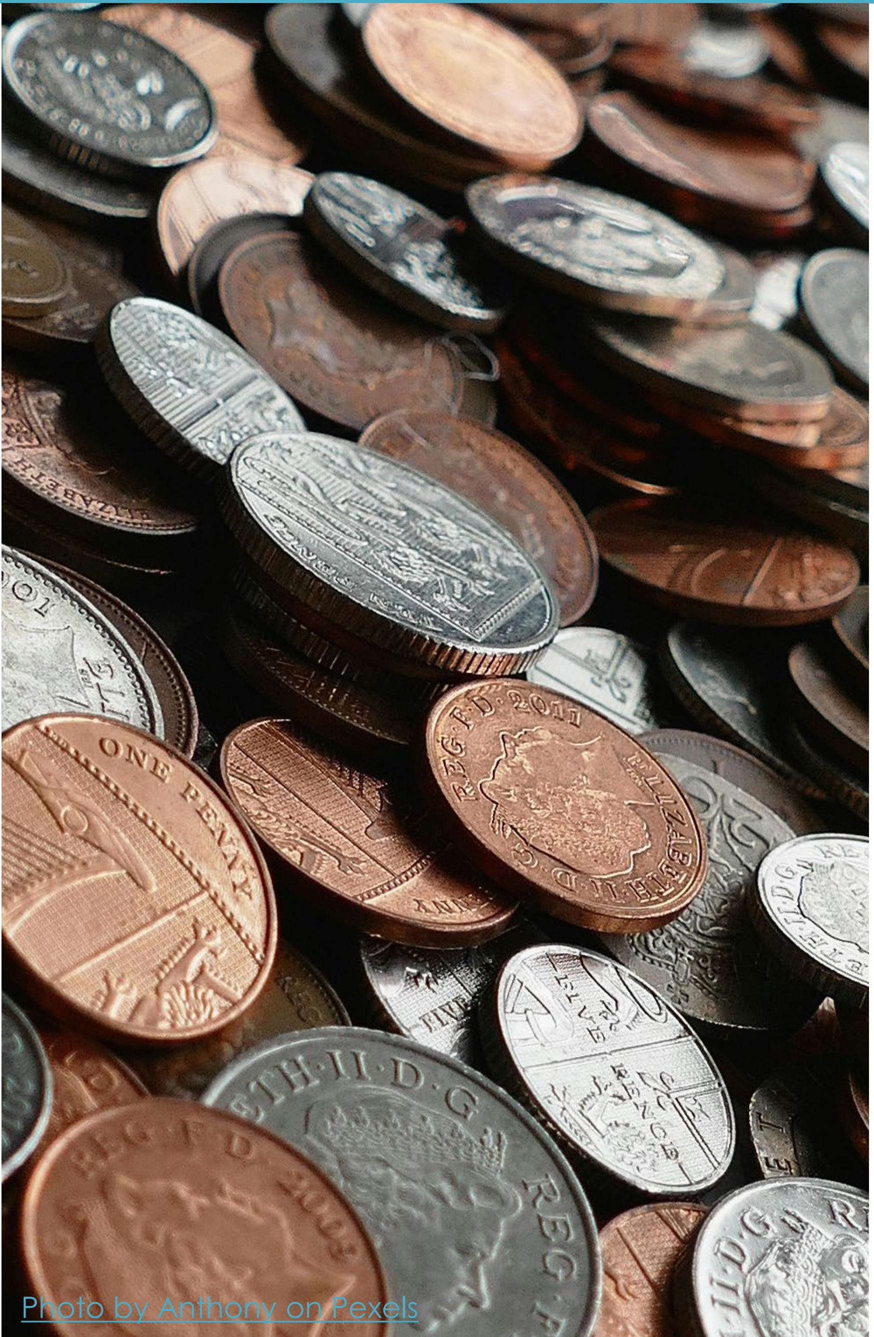


Photo by Anthony on Pexels

This segment is made up of older, smaller-than-average households, with fewer young people and children under 16.

- 75% on a water meter.
- Below-average household incomes and leaning towards right-wing politics, with higher-than-average support for Reform UK and the Conservative Party.
- Less likely than others to feel a strong connection to their region.
- Lower water usage (less likely to be daily bathers) but this is unrelated to eco behaviours.
- Some concern for the environment, but financial considerations drive actions, and many feel powerless to make a meaningful impact, believing it is the responsibility of governments and businesses.
- Sense of futility means environmental issues are often deprioritised in favour of immediate financial concerns, though some do believe in doing their part for future generations.
- Systemic challenges (like the high cost of being environmentally friendly) make it difficult for them to prioritise this over the rising cost of living.

"Why worry about something you can't control? I don't think me making decisions is going to... is going to make any difference."
M, 35-54, Frugal Traditionalists

BLUE MARBLE

Responsiveness to behaviour change campaigns and smart water meter roll outs

This lower income segment will be receptive to cost savings, though have lower levels of motivation to do so

Behaviour change:

- Limited openness to behaviour change, related to low concern for the environment and a lack of urgency to reduce consumption. Have much lower anxiety about the planet's future.
- Cost-saving is primary motivator, especially as they have below-average incomes and often face greater social disadvantages, so prioritise more immediate, personal concerns.
- Engage less with information and prefer simple, quick solutions that don't require much education or learning. Minimal effort and clear benefits are key to driving action.
- May feel they already have a low water usage and may struggle to see further opportunities for savings.

Smart meters:

- Some scepticism about cost savings but open to the value of smart meters. Believe Wessex Water should offer or install them proactively (like electricity companies).
- Fairly low awareness of smart water meters though, suggesting a need for clearer communication from Wessex Water.

How to target this segment

Behaviour change:
Focus on cost-saving benefits, especially for the majority who are metered. For unmetered individuals, engagement will be more challenging, as they may show less interest in water-saving. Indirect savings – like avoiding pipe damage by not pouring fats and oils – could resonate effectively.

Smart meters:
Emphasise cost savings and provide clear information on associated costs. Highlight that smart meters are free, as they have above-average concerns about water-saving devices. Additional information may encourage uptake. Most are keen to receive usage by letter or email, so consider this for follow-up to engage.

Media channels and consumption

This segment is one of the most disengaged when it comes to the news, finding it negative and repetitive

- **Low news consumption:** many follow the news sporadically, consuming the fewest variety of sources per week of all the segments.
- **Uninterested and turned off:** often cite cost conversations and content repetition as reasons for reduced engagement. Find news quite negative and depressive, and concerned about bias – reflected in their below average trust.
- **Facebook is valued:** for local news, although below average for preferring social media sources, use Facebook to stay updated on their area's news and community events. Felt to be convenient for quick updates and community-specific information.

"I just find all news depressing, negative, horrible, miserable."
M, 35-54, Frugal Traditionalists

"I suppose if I do find stuff out, it's on Facebook... But apart from that, there's nothing else that I would ever look on."
F, 35-54, Frugal Traditionalists

Top 5 news sources consumed weekly	Segment %	Average %
BBC News (NET)	73%	79%
ITV News (NET)	46%	46%
My local newspaper or news site	38%	41%
Local Facebook groups	38%	35%
National BBC radio stations	36%	43%

Deep dive - Pro-Planet Advocates

Pro-Planet Advocates value sustainability and are conscious protecting our planet

Photo by Creative Commons on Pexels

This group has below-average incomes, unmetered and a slight female skew. They tend to lean politically left and are highly socially conscious.

- Environmental concern is a key priority, with significant anxiety about the future of the planet, particularly regarding the impact on future generations.
- Compared to other segments, more eco-conscious in their daily lives, making efforts to shop locally, reduce carbon footprint, and limit flying.
- Relatively high levels of connection to their region, with a sense of engagement with local issues.
- Environmental concerns are often just as important as cost considerations, and in some cases the environment takes priority.
- Believe in "doing their bit" for the planet, but there is scepticism about the impact of individual actions/ More critical of companies and the government, feeling that these entities could do more.
- Awareness of Wessex Water is limited, mainly bill payments and waste services, and trust and sentiment towards Wessex Water is lowest of all the segments. Open to learning more and willing to change behaviours if it aligns with their environmental values.

"I do feel extremely worried about what's going to happen, you know, for our grandchildren, for my great grandchildren."
M, 65+, Pro-Planet Advocates

BLUE MARBLE

Responsiveness to behaviour change campaigns

Since Pro-Planet Advocates are unmetered households, targeting their desire to reduce their environmental impact will be key

- Willing to change behaviours. Many already practise low water usage habits like re-wearing clothes, avoiding daily showers, and not pouring excess water, with others open to adopting similar actions.
- Highly aware of how mindful water usage contributes to reducing environmental impact and clearly see the benefits of conserving water.
- With no direct cost savings (as they are unmetered), financial incentives are less of a driver, making environmental motivators more important to emphasise.
- Some hesitation to reduce usage further, stemming from belief that they're not wasting much, or that companies should step up. Would benefit from clear information on why further reduction is necessary, tapping into their desire to be well-informed.
- Slightly less positive company outlook, but knowledge is also lower about the company. More education about Wessex Water's environmental efforts will appeal.

"I don't bath. So I think, you know, bathing, using a bath, using more water. So I have a shower, so I wouldn't want to cut down on having a shower."
F, 54-65, Pro-Planet Advocates

How to target this segment

Focus on environmental values. They care deeply about the planet's future, making environmental benefits more relevant than direct cost savings. Highlighting Wessex Water's environmental efforts could also improve sentiment and knowledge, encouraging change even further.

Though they already avoid daily bathing, targeting them with other water-saving tips would likely resonate, as they are open to adopting new behaviours.

Given their less positive sentiment and lower trust towards Wessex Water, they may benefit from 'how to improve' messaging from other trusted companies, but may be less necessary since they are engaged with eco issues independently.

Responsiveness to smart water meter roll outs

While unmetered, this group recognise the benefits of smart meters and do not show resistance to having them at home

Smart water meters have less direct appeal for this segment, but there is room to tap into conscientiousness

- Variety of reasons why this segment are not on a meter: some have not got round to asking for one, others are more intentional. Some felt it made no difference to their behaviour when they had one previously.
- Average when it comes to their appetite for a smart meter and current engagement with other smart data in their lives. The use of this data won't be as difficult for them as it might be for less data-focused groups (like Frugal Traditionalists and Care-Free Consumers). However, they also won't be as drawn to it as groups where the cost data is more relevant.
- No explicit resistance (and recognition of benefit for others) but less enthusiasm as a smart meter wouldn't directly benefit them. Sense that if they can see what they're wasting they may cut down, but some have these for other utilities and don't engage with these.

How to target this segment

The environmental angle will resonate most with this group, offering them greater control over their personal impact. Emphasise that smart meters do not only track costs but also show water usage, helping them set responsible consumption goals. As a conscientious group, highlighting leak detection benefits, for example, may also appeal, framing the smart meter as a tool for protecting their household.

Media channels and consumption

Trust in reputable, non-sensationalist outlets like the BBC and local news drives the bulk of this segment's consumption

- **Fairly traditional:** Consumes a range of sources, but top preference is for traditional media (TV) news sources. Less likely to use social media for news updates.
- **Scepticism towards sensationalism:** Trust in reputable sources reflected by preference for established outlets like the BBC and Reuters. Sceptical of news sources perceived as biased or sensationalist, such as the Daily Mail, which many deliberately avoid.
- **Local news:** On a weekly basis, engage most with local newspapers and news websites, with nearly half regularly consuming content from these platforms.

"Obviously Reuters is the main news, so the only real news that you should be listening to... it's, you know, reported by Reuters. Everything else is just made up, tosh, isn't it, really?"
M, 35-54, Pro-Planet Advocates

"If I read something like the Guardian, to me, I would probably trust in something like that or the times much more than I would like the Daily Mail, you know, and I'd hope like the BBC is that much more."
F, 35-54, Pro-Planet Advocates

Top 5 news sources consumed weekly	Segment %	Average %
BBC News (NET)	84%	79%
ITV News (NET)	50%	46%
My local newspaper or news site	47%	41%
National BBC radio stations	46%	43%
The Guardian	35%	22%

Deep dive - Care-Free Consumers

Care-Free Consumers are climate dismissive, showing a lack of concern for environmental issues

This segment is defined by a generally pessimistic outlook, driven by concerns over the cost of living, financial security, and political instability both in the UK and globally.

- Skewing slightly younger people but spans a wide range of ages and tends to lean politically to the right. Consumption of news and information is among the lowest, with limited variety in their sources.
- They are most detached from their region and feel less connection.
- Most sceptical about climate change and environmental issues, which are not seen as personal concerns, showing little interest in adopting eco-friendly behaviours.
- Cost-saving is a stronger motivator than environmental impact. High water consumption is typical, many being daily bathers. Despite rising bills, largely resistant to changing their habits even though frequently frustrated over utility and water costs.
- Minimal interaction with and awareness of Wessex Water. Unlikely to engage with sustainability initiatives, primary focus is financial pressures. However: low engagement with Wessex Water means they have lower expectations and apply less pressure for the company to act.

"At the end of the day, I'm paying for water, so I wish to use water in volumes and at times that suit my and my wife's lifestyle. Given that I'm paying for that, I'm not likely to go out of my way to change my routines and habits to, for the benefit of Wessex Water…"
M, 65+, Care-Free Consumers

BLUE MARBLE

Responsiveness to behaviour change campaigns and smart water meter roll outs

This segment are likely to show the most resistant to behaviour change, especially for those unmetered

Behaviour Change:

- This segment is largely indifferent to environmental concerns and sceptical about the impact of human activity on the planet, making it difficult for Wessex Water to inspire change. Water shortages may be the only issue that prompts action.
- Their focus is on convenience, hygiene, and relaxation rather than environmental responsibility. Daily bathing is viewed as a routine enjoyment, not a problem.
- For those on meters, reducing costs is a stronger motivator for change. Unmetered individuals, however, often feel entitled to use more water, with the attitude, "I pay for it, so I'll use it." This group is the most resistant to changing their habits across all segments.

Smart Meter:

- A general lack of interest in resource management reduces their likelihood of acting on data from smart meters.
- They are less inclined to use smart data in other areas of life and show little interest in features like leak detection compared to other segments.
- Metered individuals are more open to smart meters, recognising the benefit of tracking spending. However, due to their general lack of attention to utility usage, it's uncertain how frequently they would utilise the data.

How to target this segment

Behaviour change:
A multi-pronged approach is needed. For those on a meter, focus on cost savings and ease, emphasising low-effort changes. For unmetered households highlight financial benefits of switching to a meter with possible incentives. Once metered, may be more open to reducing water usage.

Smart meters:
Emphasise that smart water meters are free and have no impact unless used, allowing them to choose their level of engagement. Offering incentives could help overcome any resistance here too. This group is more distrustful, raising the question of whether other organisations can actually help.

Media channels and consumption

This segment distrusts most sources (especially those more centrist or left), keeping their breadth of new sources narrow

- **Minimal News Engagement:** consumes a limited range of news sources with low overall interaction.
- **Less strong preferences:** below-average preference for all channel types, especially traditional ones like TV and radio, except for online (which ranks second in popularity).
- **Lower trust for BBC:** BBC remains the most consumed national news source but consumption and trust in the BBC are noticeably below average. News sources like GB News appeal more to this segment more than most.
- **Local online sources:** for local news, local news websites favoured, demonstrating slightly higher engagement with online sources.
- **More distrusting:** generally distrust most news outlets, especially for sources like Channel 4 News. Even top-consumed sources like the BBC and local papers rank well below average in trust. Place higher-than-average trust in outlets like Heart FM, The Daily Mail, and The Sun.

"It's all about internet news."
M, 65+, Care-Free Consumers

"I've really got into podcasts in the last couple of years like 'The News Agents'...a bit more time to talk about certain issues."
F, 35-54, Care-Free Consumers

Top 5 news sources consumed weekly	Segment %	Average %
BBC News (NET)	64%	79%
My local newspaper/news site	39%	41%
ITV News (Net)	36%	46%
Local Facebook groups	36%	35%
GB News NET	31%	17%

Summing up

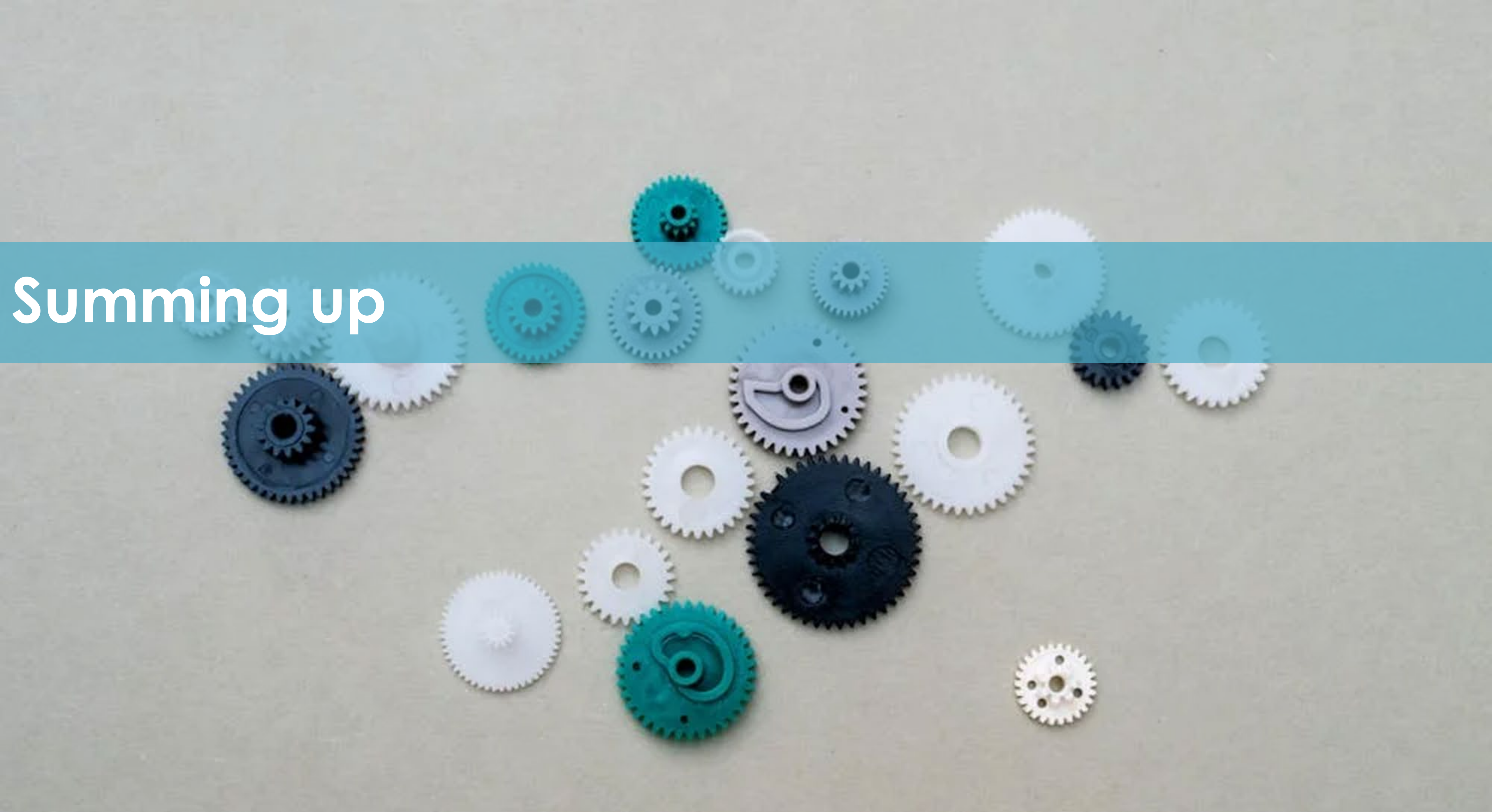


Photo by Dan Cristian Paduret on Pexels

Summary

Certain segment pairs are very similar in attitude, so with future metering rollouts, we expect some shifts between them

Qualitative phase provided valuable insights into the diversity within each segment, revealing subtle nuances to build upon the quantitative findings.

No major differences emerged from this second phase, but a slight softening in the polarisation of environmental views across the segments.

Metering status proved to be a key factor in distinguishing segments. This means there is some attitudinal overlap between them. Particularly between Responsible Environmentalists and Pro-Planet Advocates, as well as Lifestyle Empowered and Convenience Cost-Savers. Frugal Traditionalists also shares some alignment with Care-Free Consumers, although Care-Free Consumers exhibits more extreme, polarised views on environmental disengagement and dismissal.

Given the critical role of metering in defining these segments, there are likely to be future shifts in segment sizes. For instance, customers in the 'core' of Pro-Planet Advocates may gravitate towards Responsible Environmentalists once metered, while those in Convenience Cost-Savers could shift towards Lifestyle Empowered. This highlights the dynamic nature of the segmentation as metering status evolves over time.

BLUE MARBLE

www.bluemarbleresearch.co.uk

MRS Evidence Matters™ Company Partner