Wessex Water 'have your say'

Online survey number 30

Smart Meters

July 2024

Prepared by Future Focus Research

Wessex Water
YTL GROUP

have your say...

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Innovation and Insight

Methodology

- The objective of this survey was to gather views on smart meters.
- 3,049 invitations were sent out to panel members on 14th June 2024.
- The first reminder was issued on the 17th June 2024.
- The second reminder was issued on the 21st June 2024.
- A third reminder was issued on the 24th June 2024.
- A final reminder was issued on the 28th June 2024.
- The survey was closed at midday on Monday 1st July 2024
- A total of 647 panel members completed the survey.
- The average time to complete the survey was 12 minutes.
- The breakdown by mode of completion was as follows:
  - Desktop/laptop 50%
  - Smartphone 46%
  - Tablet 3%

Executive Summary

- It is clear from the findings that a high proportion already actively manage their water use, but the vast majority could also be motivated to further reduce their consumption. These motivations do not need to be monetary and could be environmental or community based, although bill savings will motivate the highest proportion of customers. Alternative tariffs need careful consideration if these are to be used to motivate customer to reduce their water use.
- Customers could see the benefits of smart meters, particularly in relation to receiving notifications and alerts, but there were also concerns surrounding their use which need to be addressed.
- Customers are familiar with using digital platforms for other providers and like having instant access to information. There is interest in a digital platform for Wessex Water, providing that it gives them the information that they need at an appropriate frequency.
- Contact methods vary by type of query. There is still a high demand for traditional telephone contact, while there is also a need to continue offering more modern ways of contact such as email and online forms. Wessex Water's website is also key to providing customers with information about water services.
- Customers agreed that topics covered in the 'Have Your Say' Surveys were relevant to them, however, may need be a need for more communication on how the survey findings are actioned by Wessex Water.

SMART METERS

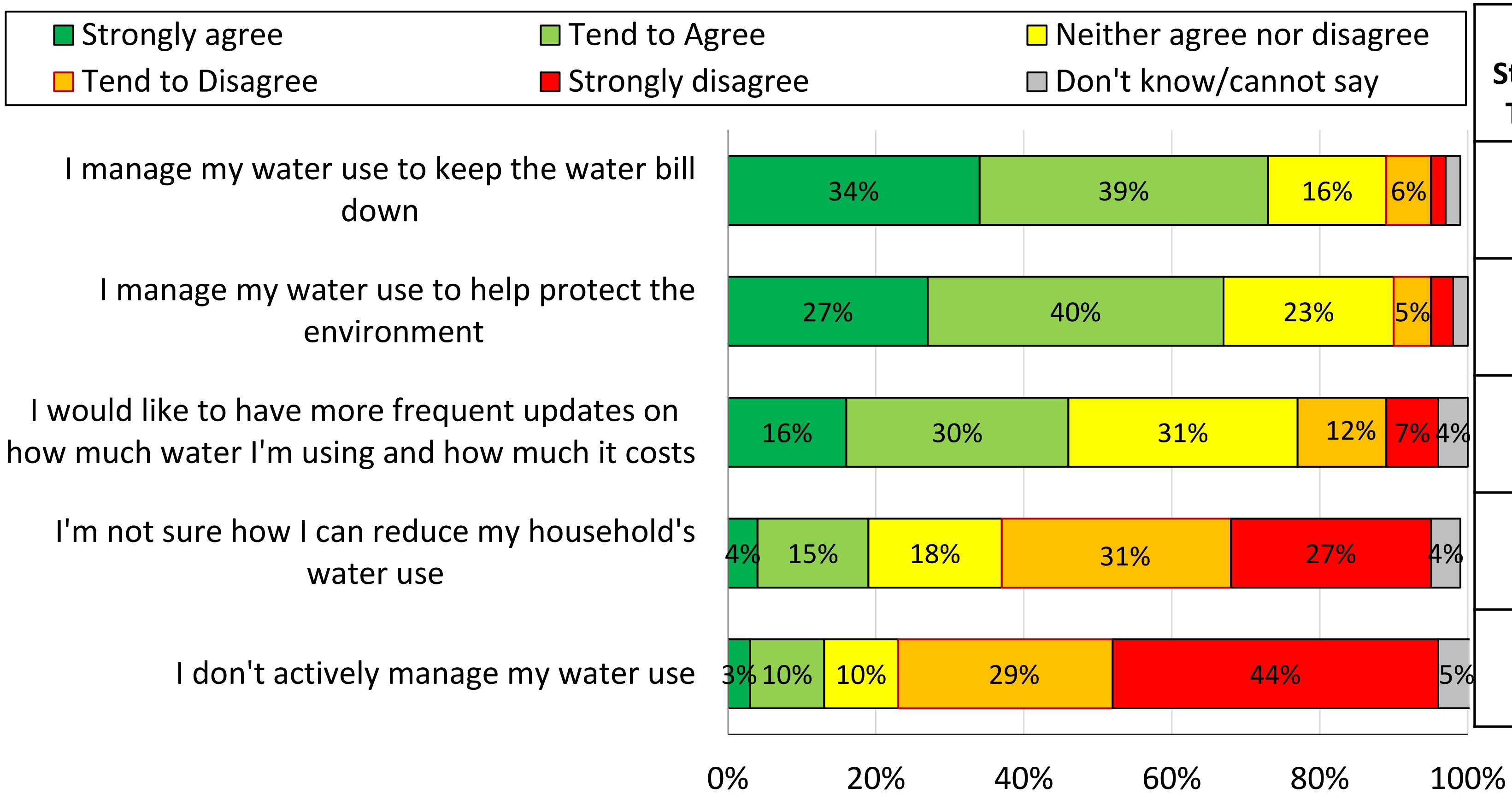
Question 1. Which of these words come to mind or when you hear the term "smart meter"?

In house monitor or display	44%
Helpful	34%
Bill management	30%
Unreliable	28%
Efficient	20%
Intrusive	17%
Accurate	16%
Smart app	15%
User friendly	15%
Lower bills	12%
Complicated	9%
Higher bills	8%
Trustworthy	7%
Innovative	7%
Reliable	6%
Don't know	5%

- The words chosen by the higher percentage of customers are *in house monitor or display* (44%), *helpful* (34%) and *bill management* (30%).
- This is closely followed by *unreliable* (28%).
- Those with a water meter were more likely to be positive with a higher proportion choosing accessible, helpful, efficient, lower-friendly, accurate and lower bills.
- Those over 55 were more likely to choose complicated and unreliable and less likely to choose efficient, accurate and innovative.

Base: 647, all respondents

Q2 Thinking about how you manage your water use, how much do you agree or disagree with the following statements?



% Strongly agree/ Tend to agree
73%
67%
46%
19%
13%

- It is clear that high proportions actively manage their water use, 73% *to keep their bills down*, 67% *to help protect the environment*.
- Only 13% agree that they *don't actively manage their water use*.
- 46% would *like more frequent updates on their water use*.

have your say...

Base: 647, all respondents

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Q2 Thinking about how you manage your water use, how much do you agree or disagree with the following statements?
Demographic differences

I manage my water bill to keep my costs down (73% agree strongly /tend to agree)

Most likely to agree:

- Those with a water meter (77% compared to 51% of those without)
- Those aged 55+ (74% compared to 66% of those aged 35- 54 and 54% of those aged 18 – 34*)
- Social grade DE (86% compared to 70% of C1C2s and 73% of ABs)

I would like to have more frequent updates on how much water I'm using and how much it costs (46% agree strongly /tend to agree)

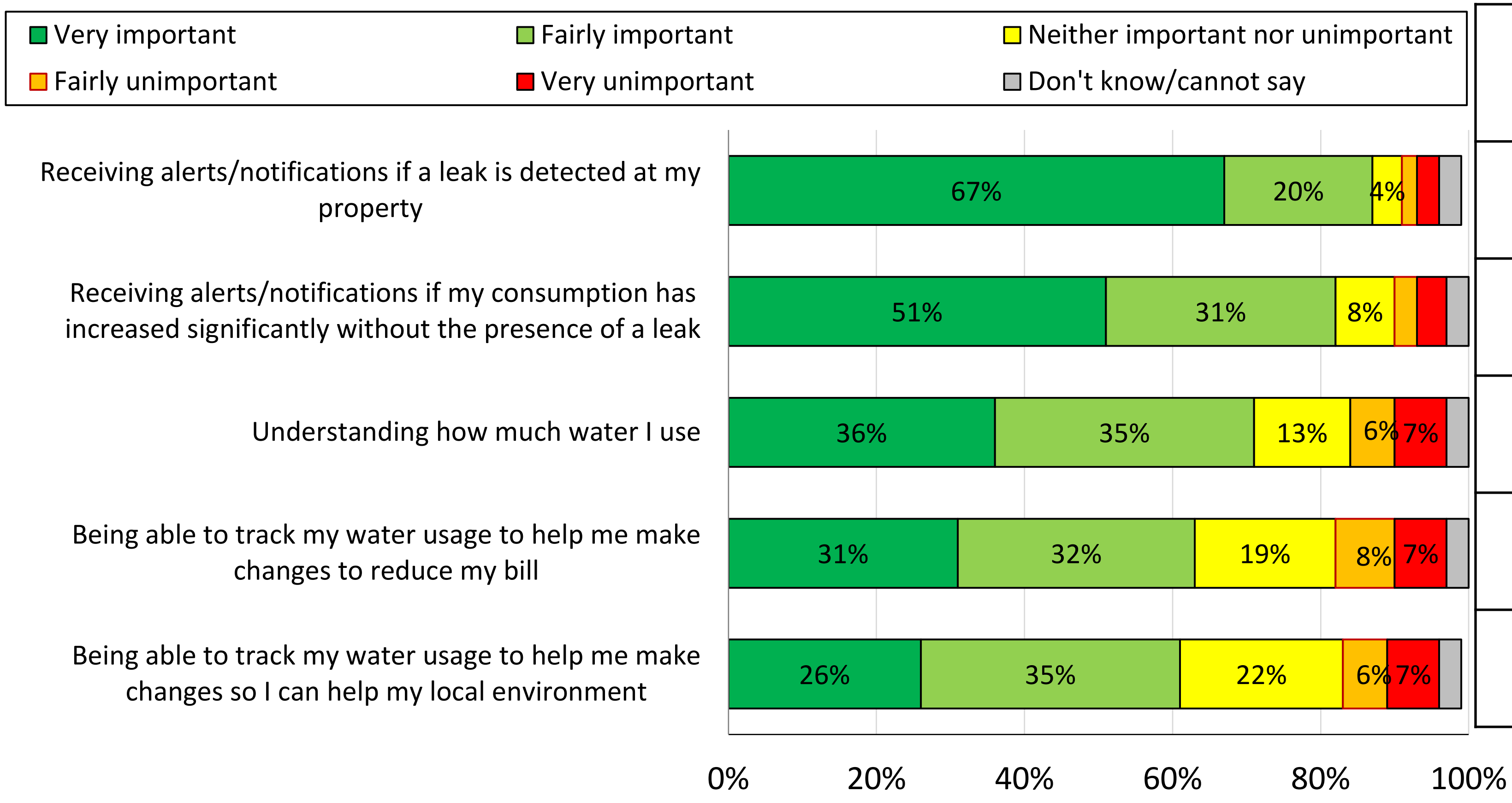
Most likely to agree:

- Those with a water meter (47% compared to 36% of those without)
- Those aged 18-34* (62% compared to 51% of those aged 35- 54 and 44% of those aged 55+)

- * Caution small base size

Base: 647, all respondents

Q3 How important to you are the following benefits for having a smart water meter?



% Very/Fairly Important
87%
82%
71%
63%
61%

- All of the benefits are considered to be important (very or fairly) by the majority of customers.
- The most important benefits are *receiving alters/notifications either for when a leak is detected* (87%) or when *consumption has increased significantly without a leak* (82%)
- 71% also feel it is important to be *able to understand how much water they are using*.

have your say...

Base: 647, all respondents

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Q3 How important to you are the following benefits for having a smart water meter?
Demographic Differences

Receiving alerts/notifications if a leak is detected in at my property (87% Very /fairly important)

Most likely to say important:

- Those with a water meter (89% compared to 77% of those without)

Receiving alerts/notifications if my consumption has increased significantly without the presence of a leak (82% Very /fairly important)

Most likely to say important:

- Those with a water meter (84% compared to 69% of those without)

Understand how much water I use (71% Very /fairly important)

Most likely to say important:

- Those with a water meter (74% compared to 56% of those without)

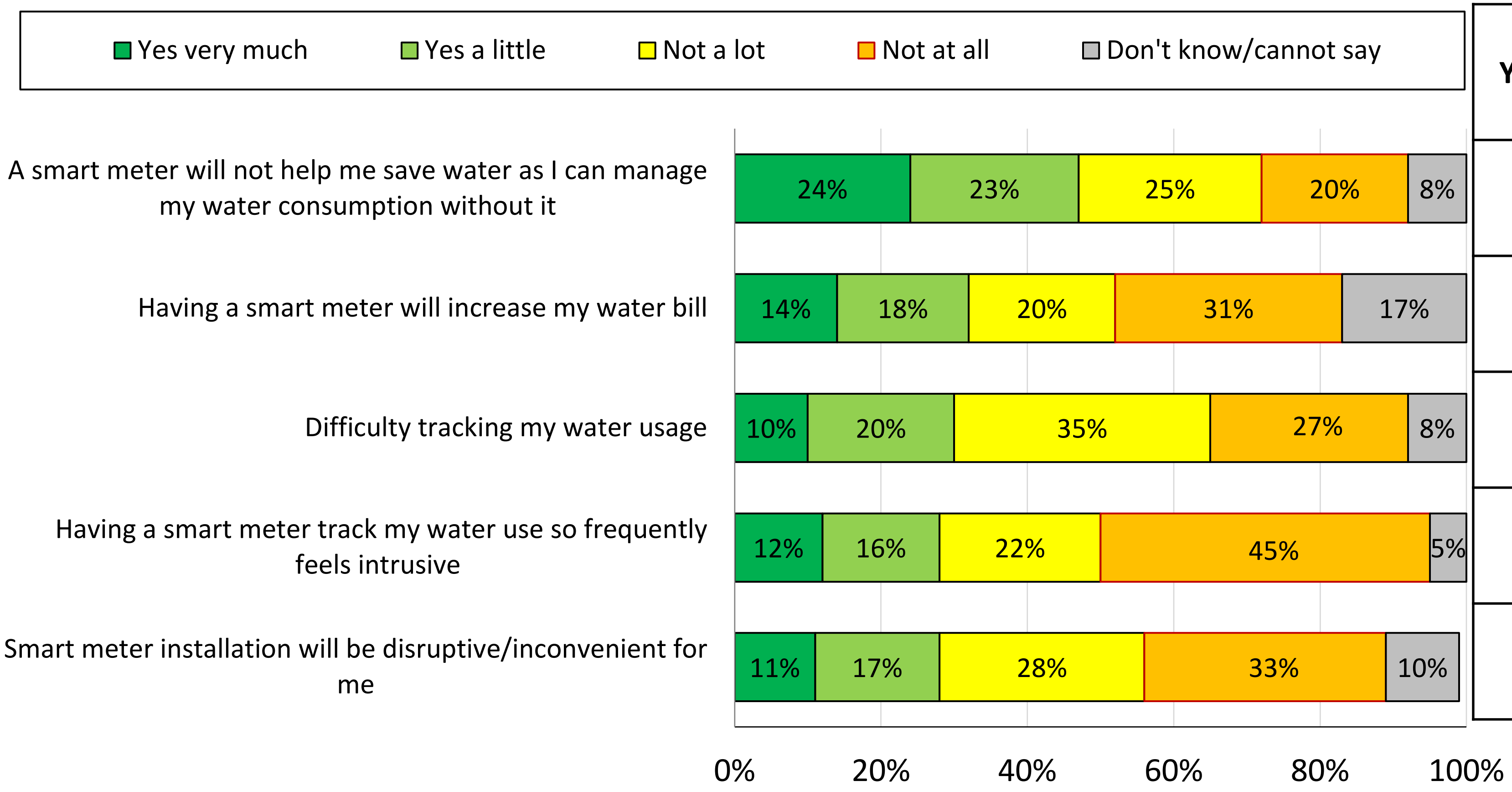
Being able to track my water usage to help me make changes to reduce my bill (63% very/fairly important)

Most likely to say important:

- Those with a water meter (66% compared to 48% of those without)

Base: 647, all respondents

Q4a Are you concerned about any of the following issues in relation to smart water meters?



% Yes very much / a little
47%
32%
30%
28%
28%

- Almost a half (47%) are concerned (a lot or a little) that having a smart meter *will not help them save water.*
- 32% are concerned that a smart meter *will increase their water bill*.
- Other concerns mentioned (spontaneously) are *reliability*, *accuracy*, *accessibility/location*, *cost increase to customers* and *intrusiveness.*

have your say...

Base: 647, all respondents

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Q4a Are you concerned about any of the following issues in relation to smart water meters?
Demographic Differences

Difficulty tracking my water usage (30% very / a little concerned)

Most likely to say concerned:

- Social grade DE* (37% compared to 32% of C1C2s and 28% of ABs)

Smart meter installation will be disruptive/inconvenient for me (29% very / a little concerned)

Most likely to say concerned:

- Those with a water meter (35% compared to 27% of those without)
- 35 – 54 year olds (34% compared to 28% of over 55s and 23% of 18-34s)
- Social grade DE* (37% compared to 29% of C1C2s and 28% of ABs)

Having a smart meter will increase my water bill (33% Very / a little concerned)

Most likely to say important:

- Those without a water meter (44% compared to 30% of those with a meter)

Having a smart meter track my water use so frequently feels intrusive (28% very / a little concerned)

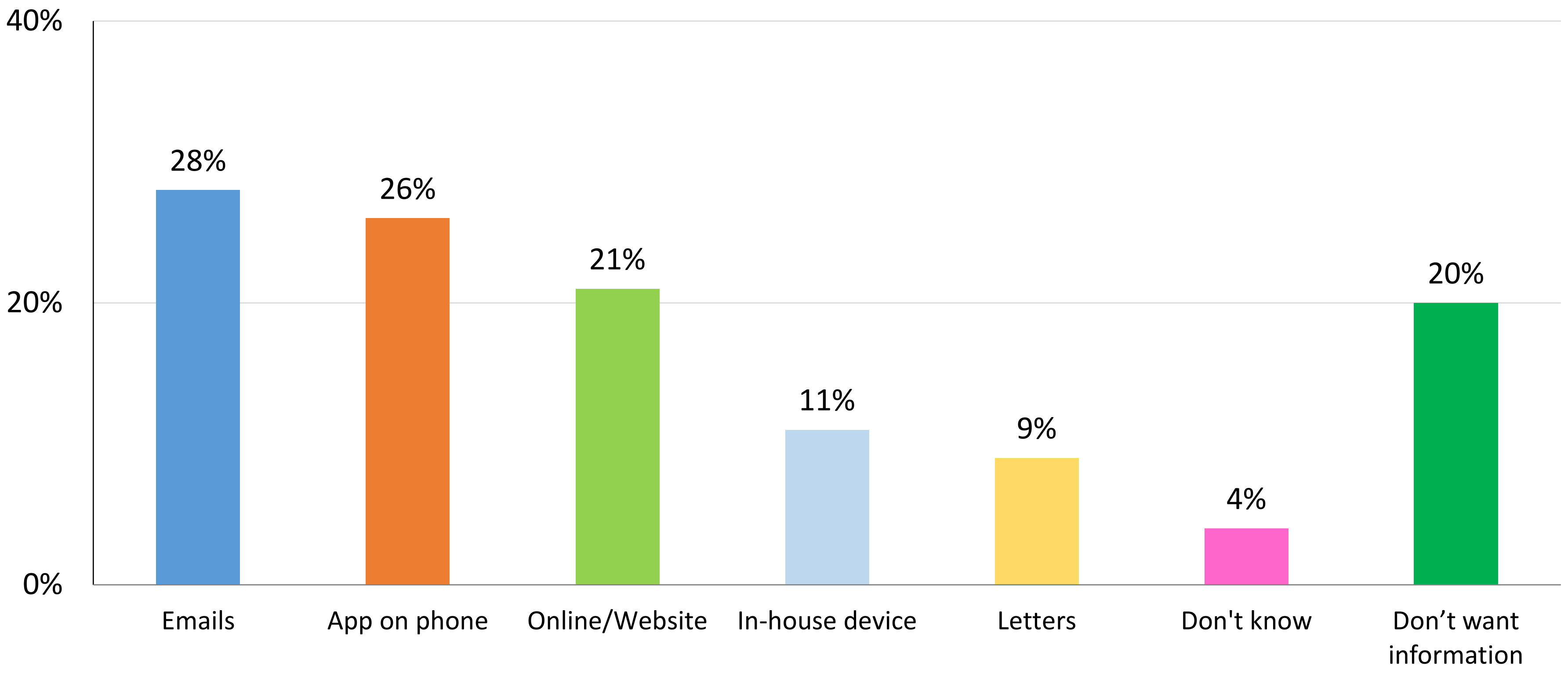
Most likely to say concerned:

- Those without a water meter (42% compared to 25% of those with a meter)
- Social grade DE* (39% compared to 28% of C1C2s and 28% of ABs)

* Caution small base size

Base: 647, all respondents

Q5 What is your preferred method for receiving information about your water use? % YES

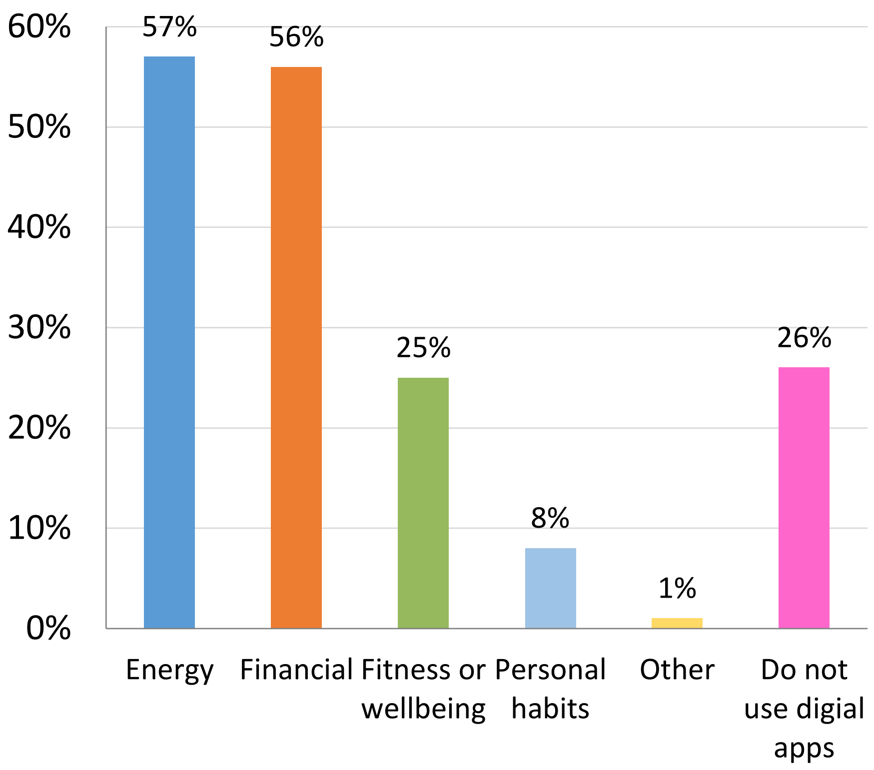


- *Emails* (28%) and *App on phone* (26%) are the most preferred methods for received information about water use.
- Those over 55 were most likely to prefer *emails* (29% compared to 20% of 35 – 54s and 15% of 18-34s) and less likely to prefer *Apps on their phone* (21% compared to 43% of 35-54s and 46% of 18-34s).

Base: 647, all respondents

DIGITAL PLATFORMS

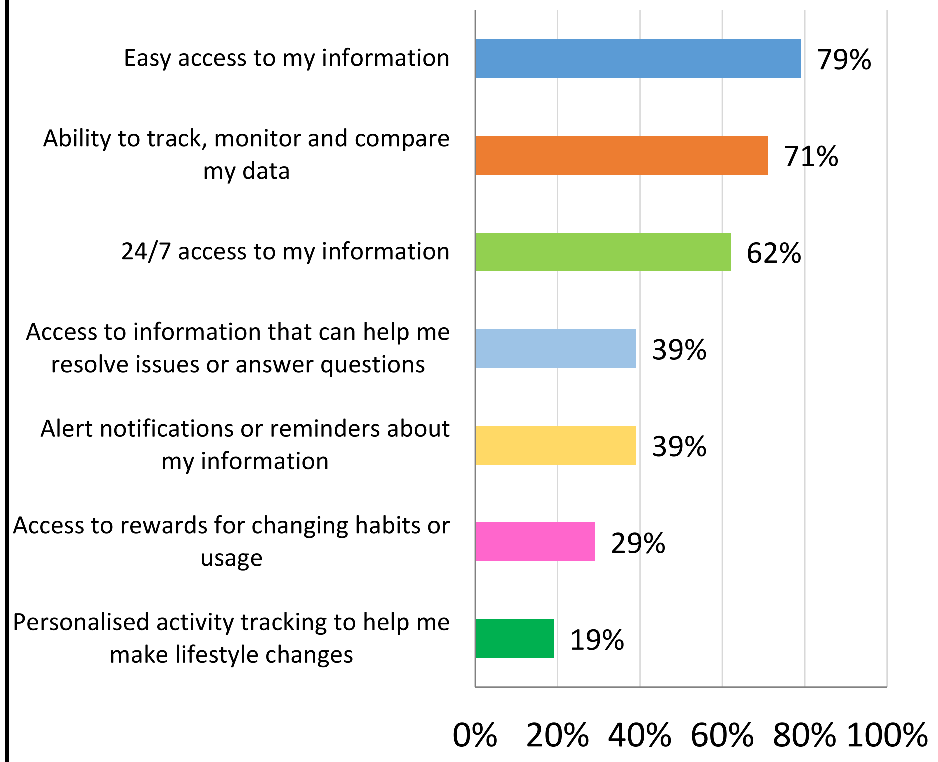
Q6a Do you currently use any digital platforms to monitor or track your utility usage or other lifestyle activities? % YES



- Almost three quarters use at least one digital platform (74%). Those aged 55+ were least likely use digital apps (30%)
- The most popular are *energy* (57%) and *financial* (56%)

Base: 647, all respondents

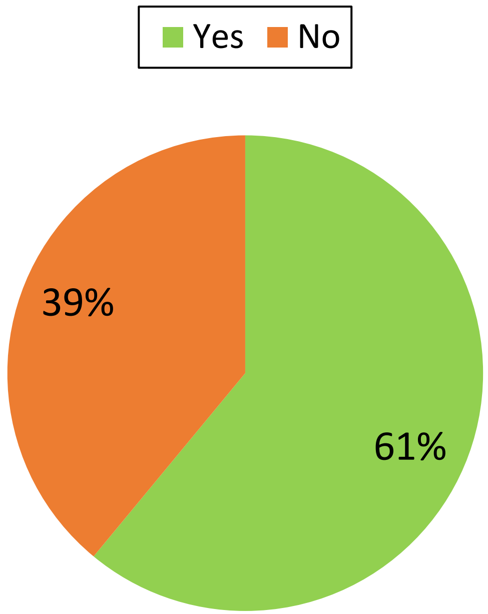
Q6b What features of these platforms do you like the most? % YES



- The most liked features are *easy access to information* (79%), *ability to rack, monitor and compare my data* (71%) and *24/7 access to my information* (62%).

Base: 476, those who use digital apps

Q7a Are you interested in having access to a digital platform?

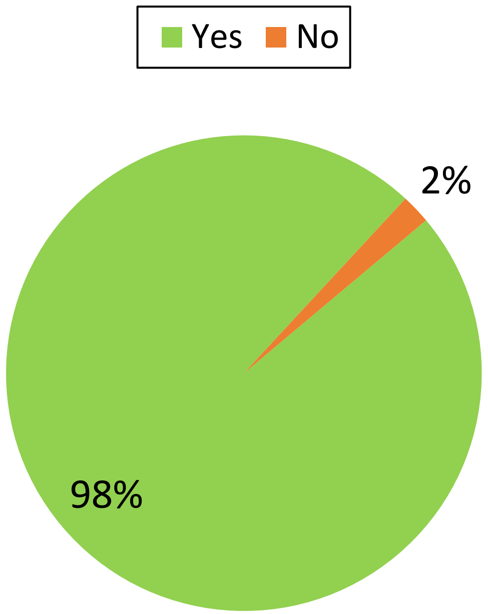


- 61% said that they are interested in having access to a digital platform
- 18-34s* are most interested in having access to a digital app (85% compared to 75% of 35-54s and 57% of 55+) as were ABs (65% compared to 59% of C1C2s and 47% of DEs) and those on a water meter (63% compared to 51% of those not on a meter)

*small base size

Base: 647, all respondents

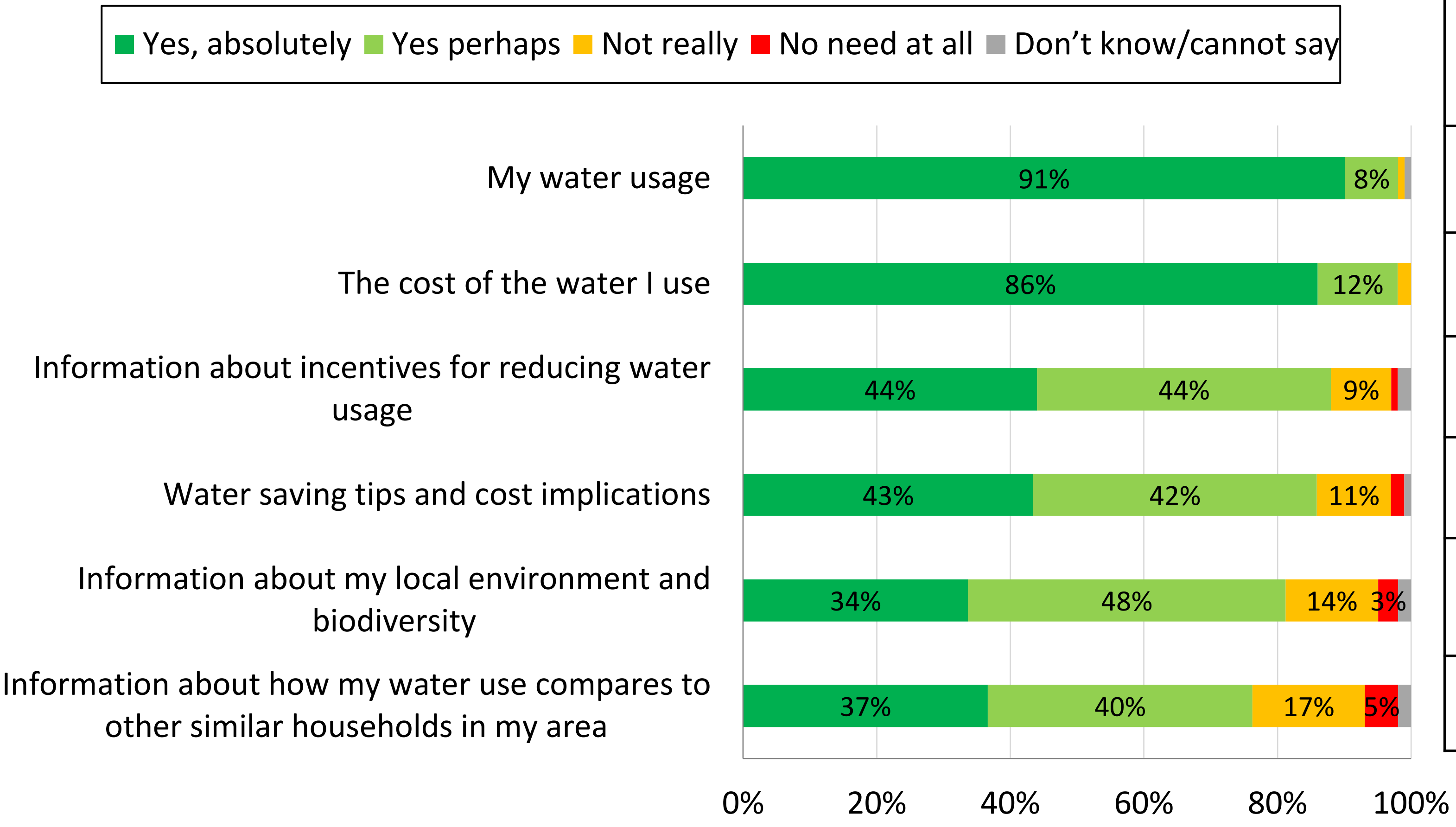
Q7b Would you be able to access a digital platform?



- Of those were interested, 98% said that they would be able to access a digital platform

Base: 394, those interested in a digital platform

Q7c If you had access to a digital platform, what information would you like see?

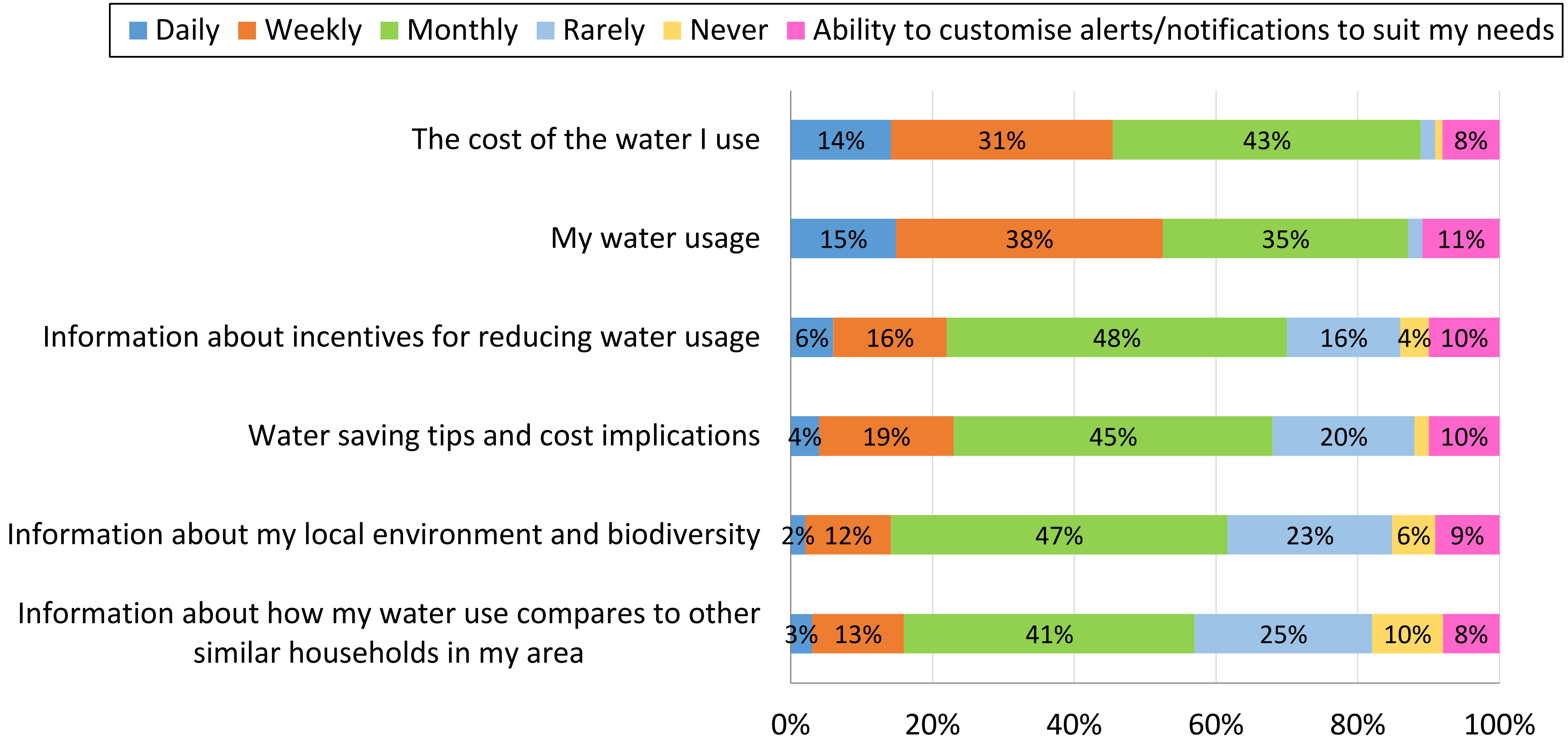


% Yes absolutely/ perhaps
99%
98%
88%
85%
82%
77%

- The information that customer would like to see the most is *my water use* (99% Yes absolutely / Yes perhaps), *the cost of the water I use* (98%) and *information about incentives for reducing water usage* (88%).

Base: 385, those who want and are able to access a digital platform respondents

Q7e If you had access to a digital platform, how often would you like to receive alerts/notifications about your water usage and other related information?



- The information that customer would like to see the most often (monthly or more frequently) is *the cost of the water I use* (88%) and *my water usage* (88%)
- Over a half are interested in all types of information offered at least monthly.

have your say...

Base: 385, those who want and are able to access a digital platform respondents

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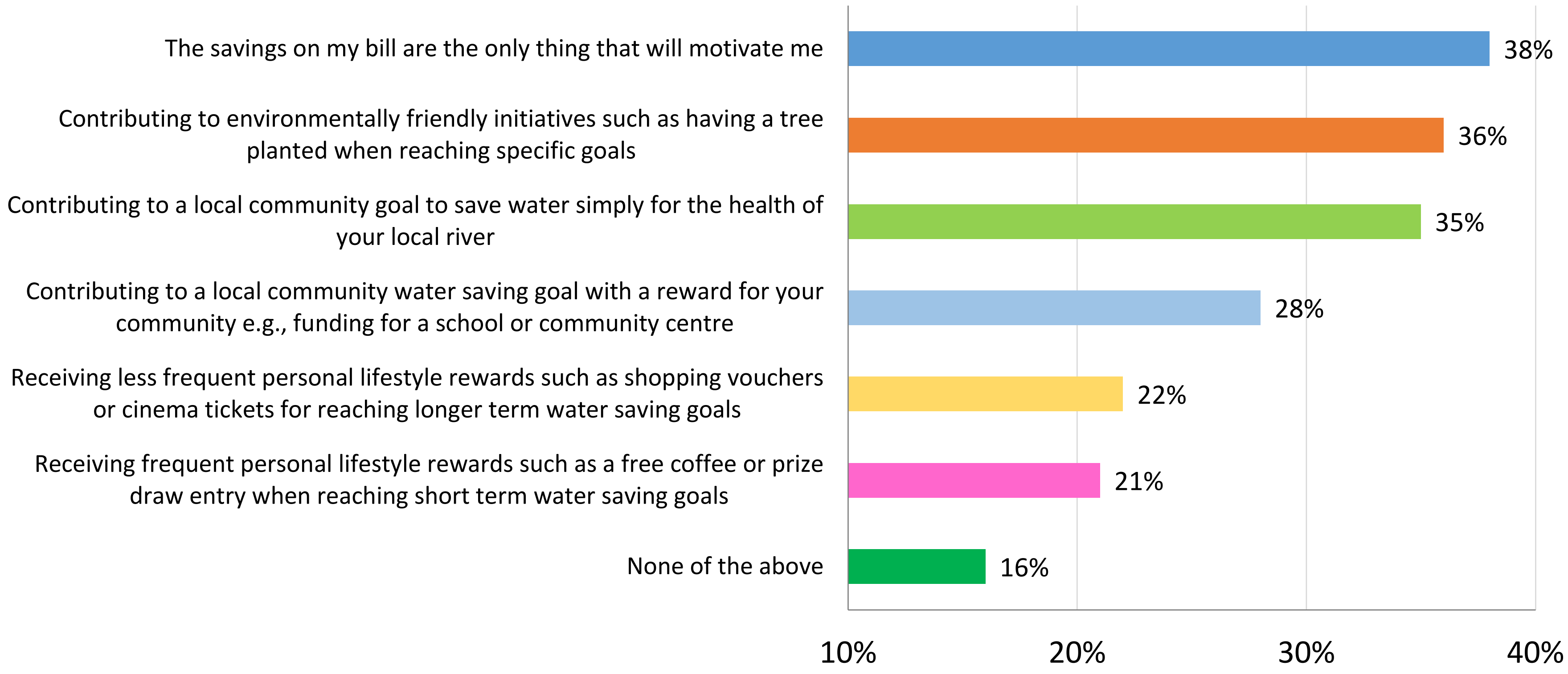
REDUCING WATER USAGE

Q8 Which of the following would motivate you to reduce the amount of water that you use? % YES



- 84% of customers said that they could be motivated to reduce the amount of water that they use by at least one of the suggestions listed.
- The most likely to motivate customers are *contributing to environmentally friendly initiatives such as having a tree planted when reaching specific goals* (36%) and *contributing to a local community goal to save water simply for the health of your local river* (35%).
- 38% agree with *the savings on my bill are the only thing that will motivate me.*

Base: 647, all respondents

Q8 Which of the following would motivate you to reduce the amount of water that you use?
Demographic Differences

The savings on my bill are the only thing that will motivate me (38% Yes)

Most likely to say Yes:

- Those with a meter (39% compared to 16% of those without)

Contributing to environmentally friendly initiatives such as having a tree planted when reaching specific goals (36% Yes)

Most likely to say Yes:

- Those with a meter (38% compared to 17% of those without)

Contributing to a local community goal to save water simply for the health of your local river (35% Yes)

Most likely to say Yes:

- Those with a meter (35% compared to 20% of those without)

Contributing to a local community water saving goal with a reward for your community e.g., funding for a school or community centre (28% Yes)

Most likely to say Yes:

- Those with a meter (28% compared to 18% of those without)
- Those under 55 (18-34* (46%) and 35-54 (37%) compared to 26% of over 55s)

* Caution small base size

Q8 Which of the following would motivate you to reduce the amount of water that you use?
Demographic Differences (Cont.)

Receiving frequent personal lifestyle rewards such as a free coffee or prize draw entry when reaching short term water saving goals (21% Yes)

Most likely to say Yes:

- Those with a meter (21% compared to 12% of those without)
- Those under 55 (18-34* (69%) and 35-54 (42%) compared to 16% of over 55s)

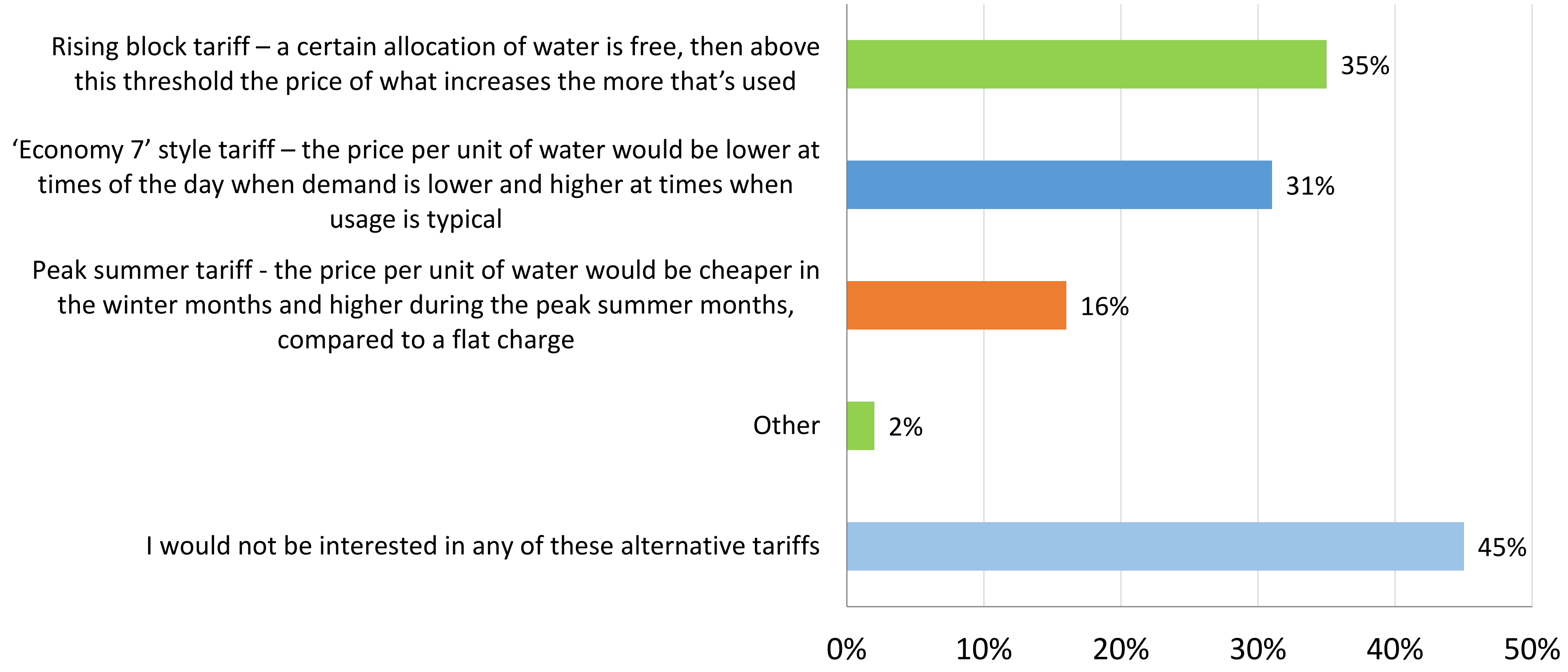
Receiving less frequent personal lifestyle rewards such as shopping vouchers or cinema tickets for reaching longer term water saving goals (22% Yes)

Most likely to say Yes:

- Those with a meter (21% compared to 15% of those without)
- Those under 55 (18-34* (54%) and 35-54 (37%) compared to 18% of over 55s)

* Caution small base size

Q9 How interested would you be in opting your household into one of the following alternative tariffs? % YES



- 45% of customers are not interested in any of the alternative tariffs offered.
- The most popular tariff is the *rising block tariff* (35%), followed by the *Economy 7 style tariff* (31%).

Q8 Which of the following would motivate you to reduce the amount of water that you use?
Demographic Differences

<u>Rising block tariff – a certain allocation of water is free, then above this threshold the price of what increases the more that's used (35% Yes)</u>

Most likely to say Yes:

- Those with a meter (36% compared to 17% of those without)
- Those aged 35-54 (45% compared to 38% of 18-34s and 33% of over 55s)

<u>Peak summer tariff - the price per unit of water would be cheaper in the winter months and higher during the peak summer months, compared to a flat charge (16% Yes)</u>

Most likely to say Yes:

- Those with a meter (17% compared to 5% of those without)

<u>'Economy 7' style tariff – the price per unit of water would be lower at times of the day when demand is lower and higher at times when usage is typical (31% Yes)</u>

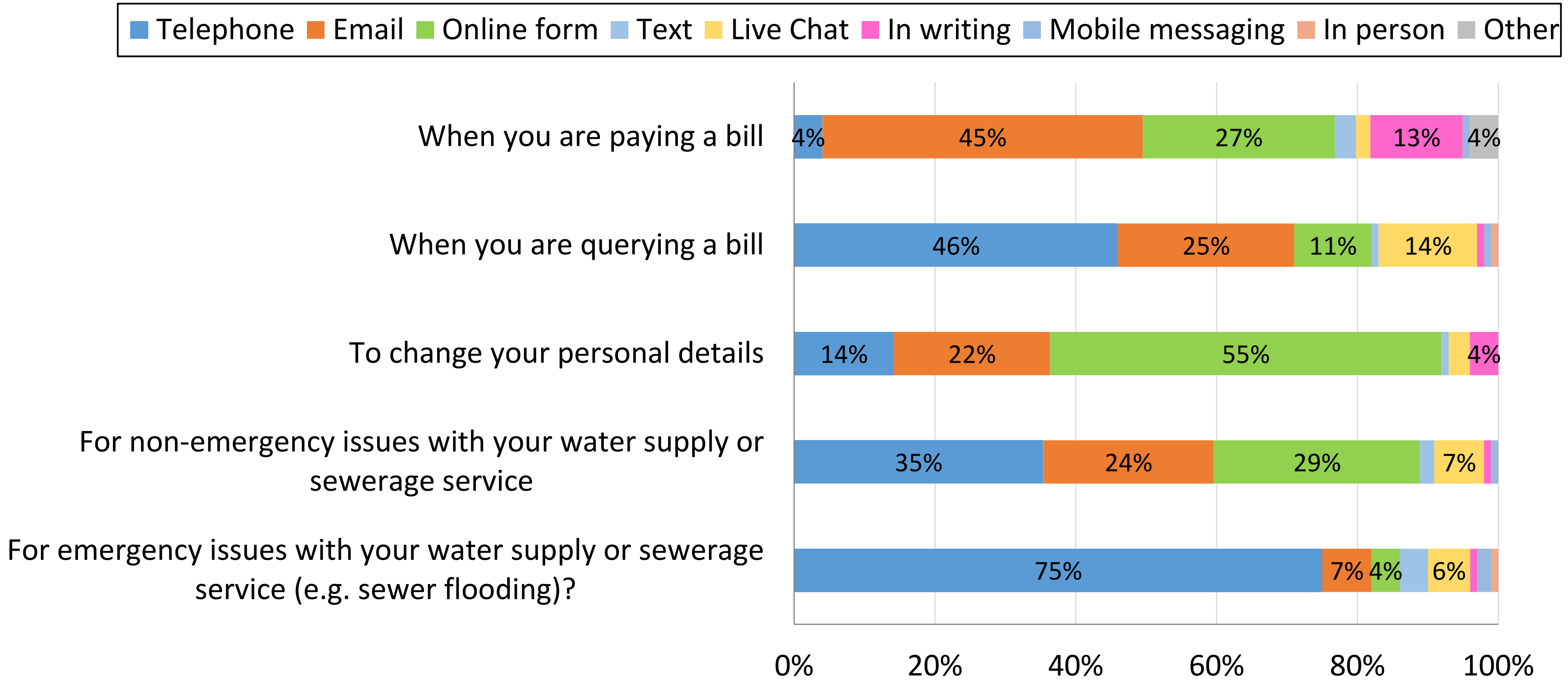
Most likely to say Yes:

- Those with a meter (30% compared to 19% of those without)

* Caution small base size

PREFERRED CONTACT METHODS

Q10a What is your preferred method of contact in each of the following scenarios?



- Customers' preferred method of contact varies by what the query is.
- For more emergency / more urgent queries telephone is the preferred method e.g. *emergency issues with your water supply or sewerage service* (75%), *querying a bill* (46%) and to a lesser extent*, non-emergency issues with your water supply or sewerage service* (35%).
- For less urgent queries, email or an online form are the preferred contact methods e.g. *paying a bill* (45% email, 27% online form) and *changing personal details* (22% email, 55% online form).

have your say...

Base: 647, all respondents

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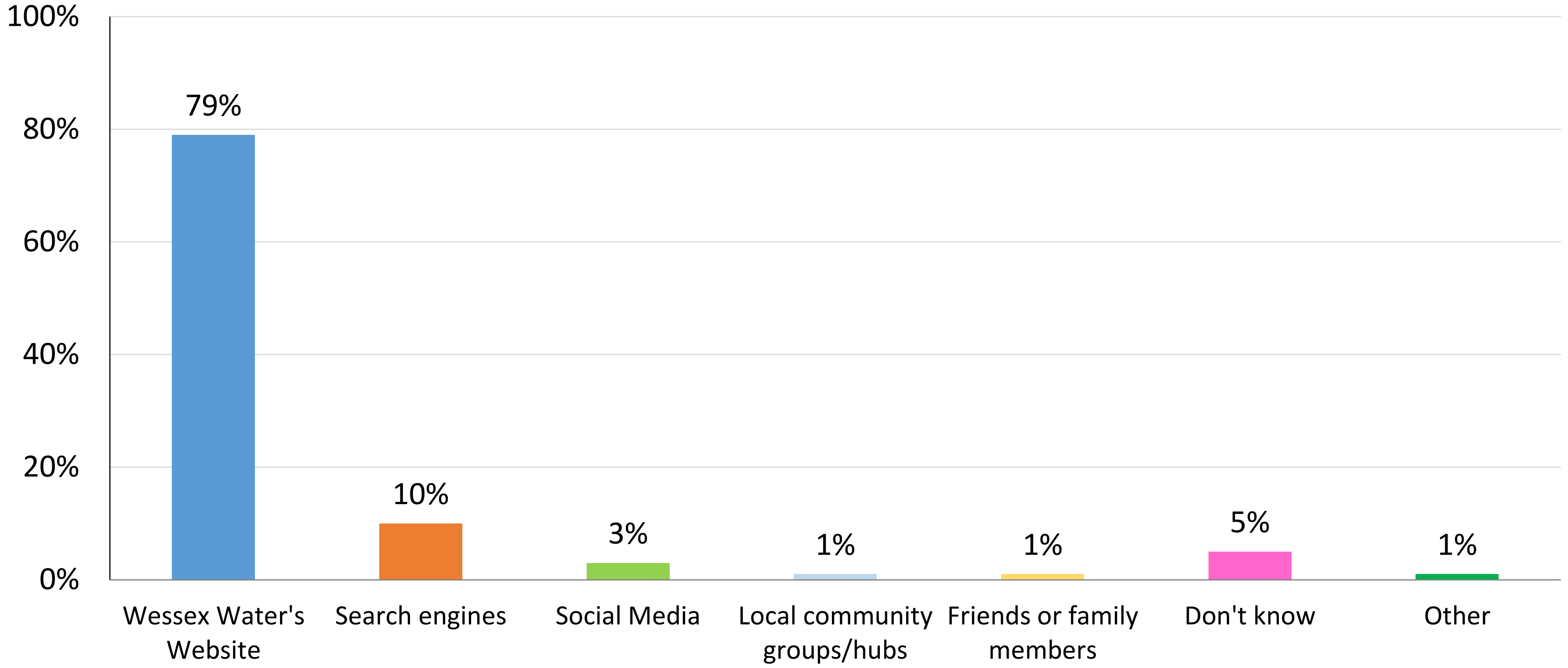
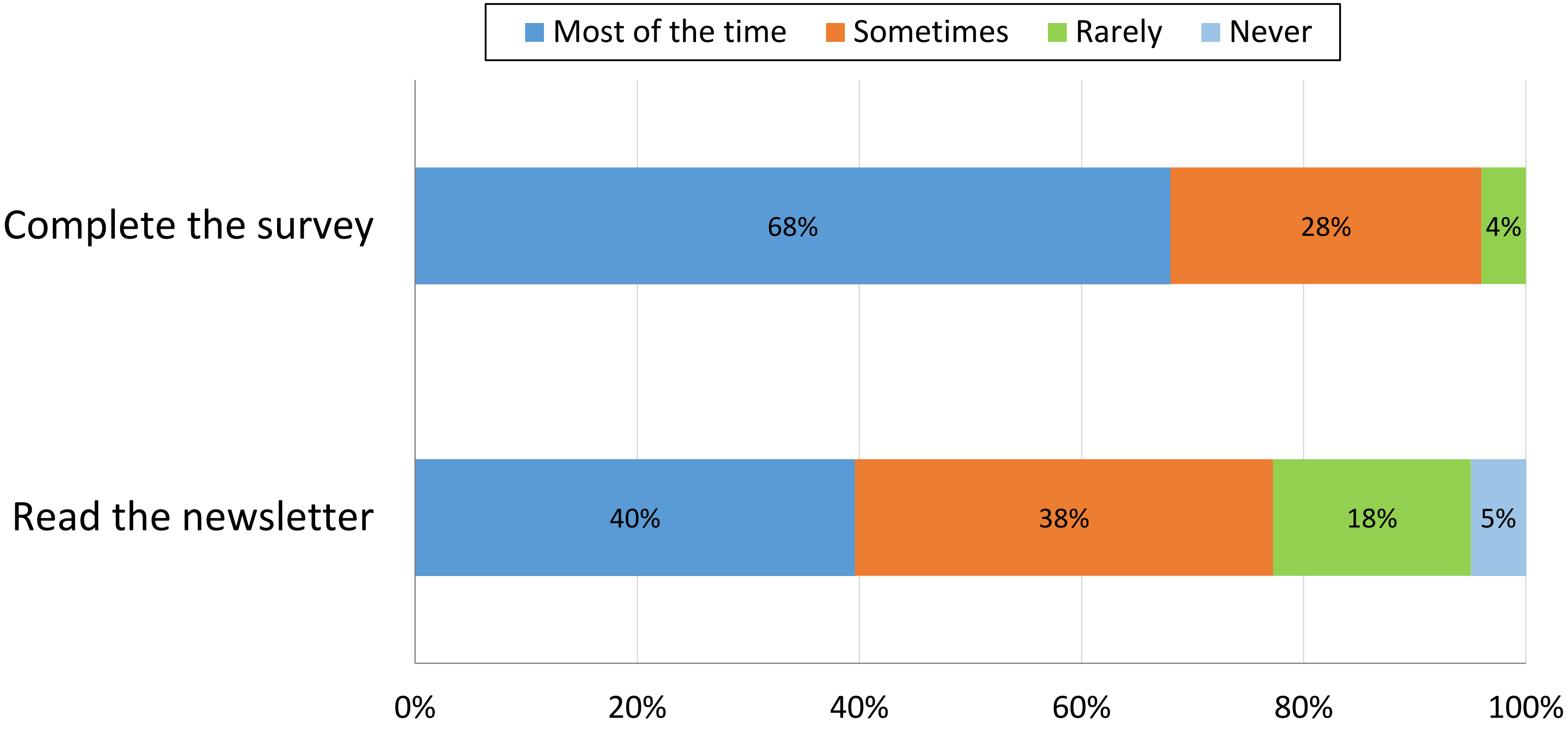
Q11 What source of information are you most likely to use if you wanted to find information about your water service? % YES



- The majority of people said that they would use *Wessex Water's website* if they wanted to find out information about water services (79%).

HAVE YOUR SAY

Q12a How often do you…..



- 68% said that they complete the panel surveys *most of the time*, and 28% said *sometimes*.
- However, when asked about the newsletter, a lesser proportion said that they read it *most of the time* (40%) and 28% *sometimes*. 23% *rarely* or *never* read the newsletter.

have your say…

Base: 647, all respondents

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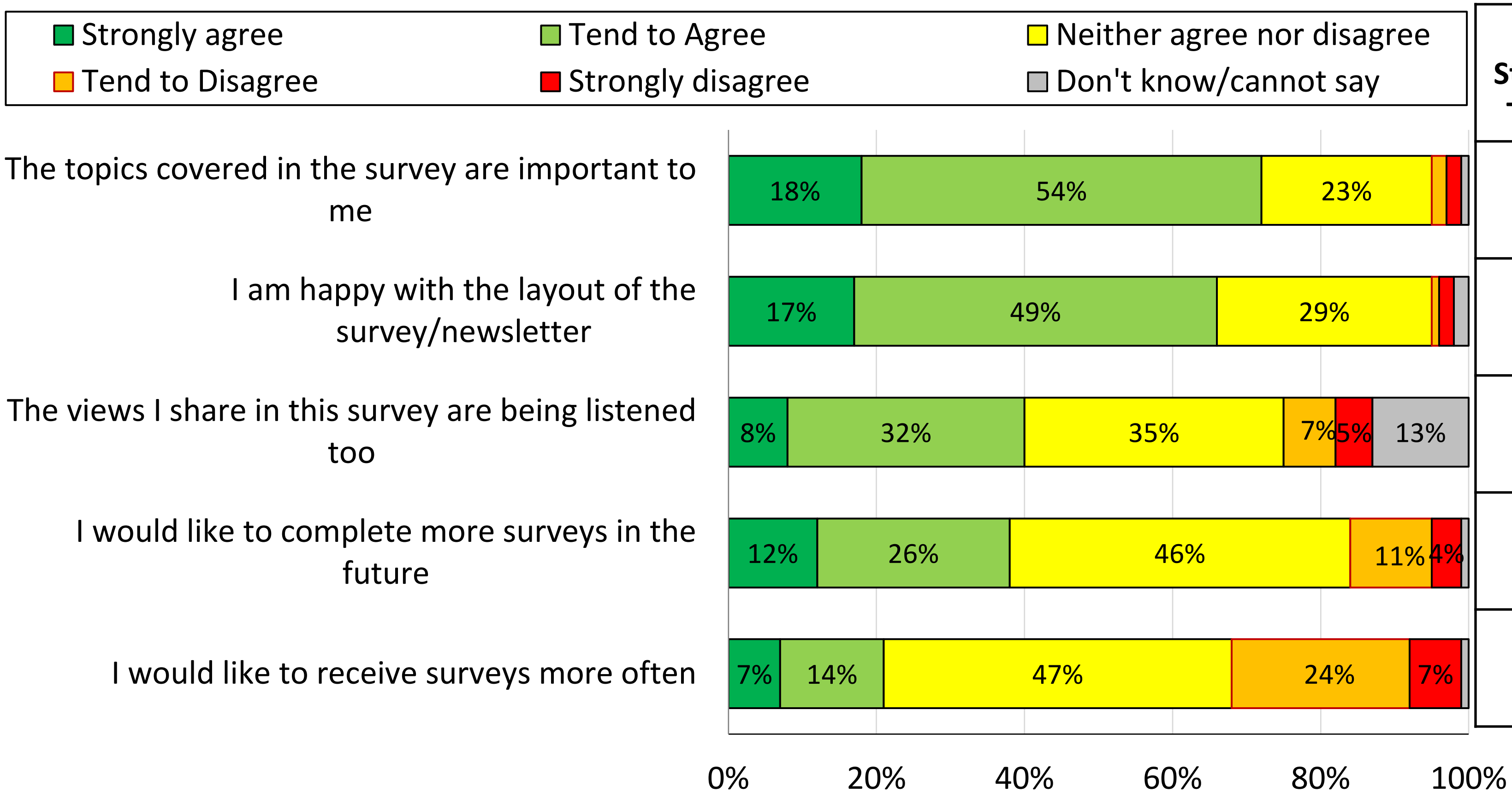
Q13 How much do you agree or disagree with the following statements….



% Strongly agree/ Tend to agree
72%
66%
40%
38%
21%

- 72% agree (either strongly or tend to) that *the topics covered in the survey are important to me*, however, just 40% agree that *the views that they share are being listened to.*
- Three quarters (66%) are *happy with the layout of the survey/newsletter,* however, there is no great demand to *receive surveys more often* (21% agree) or *to complete more surveys in the future* (38%).

have your say…

Base: 647, all respondents

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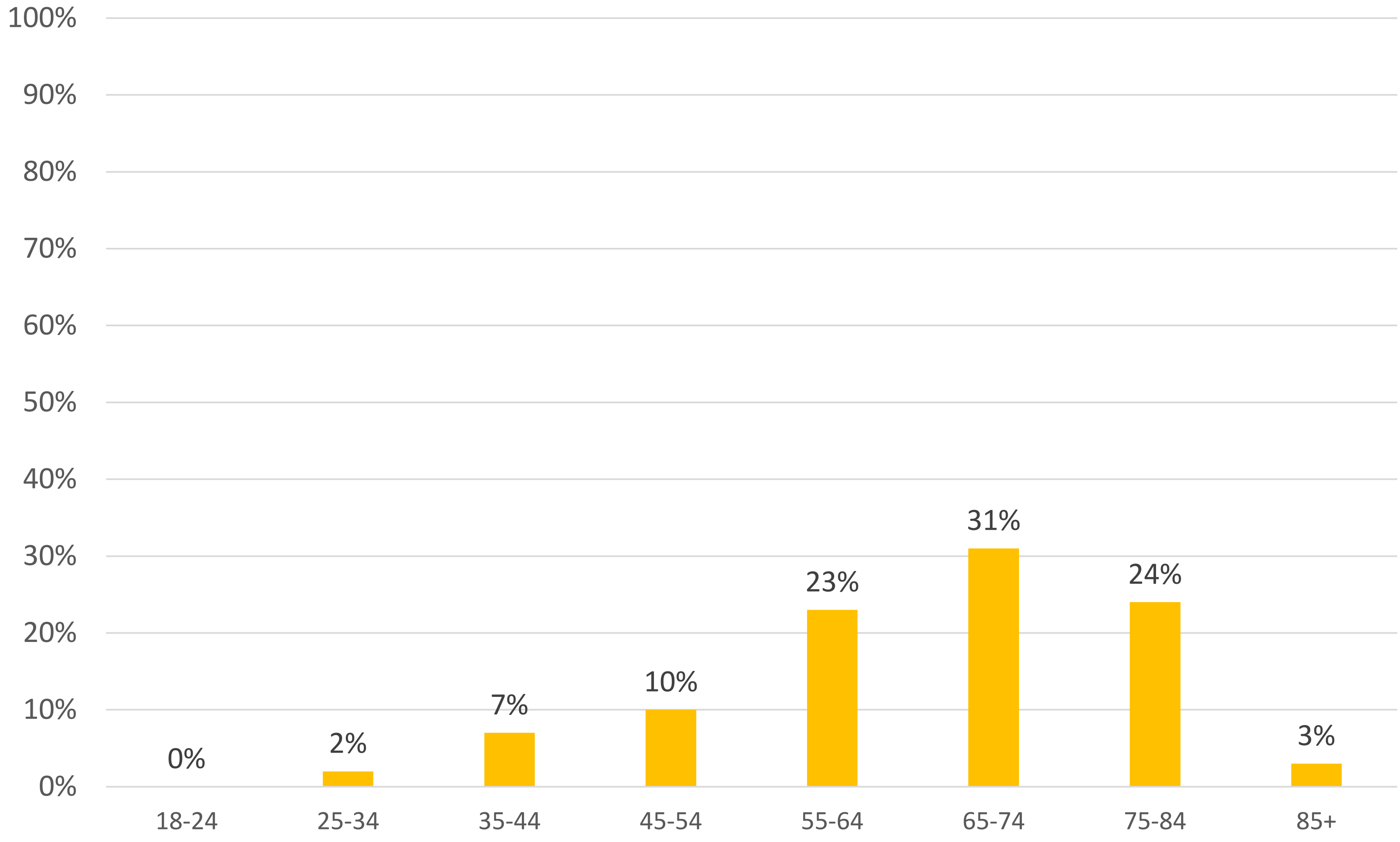
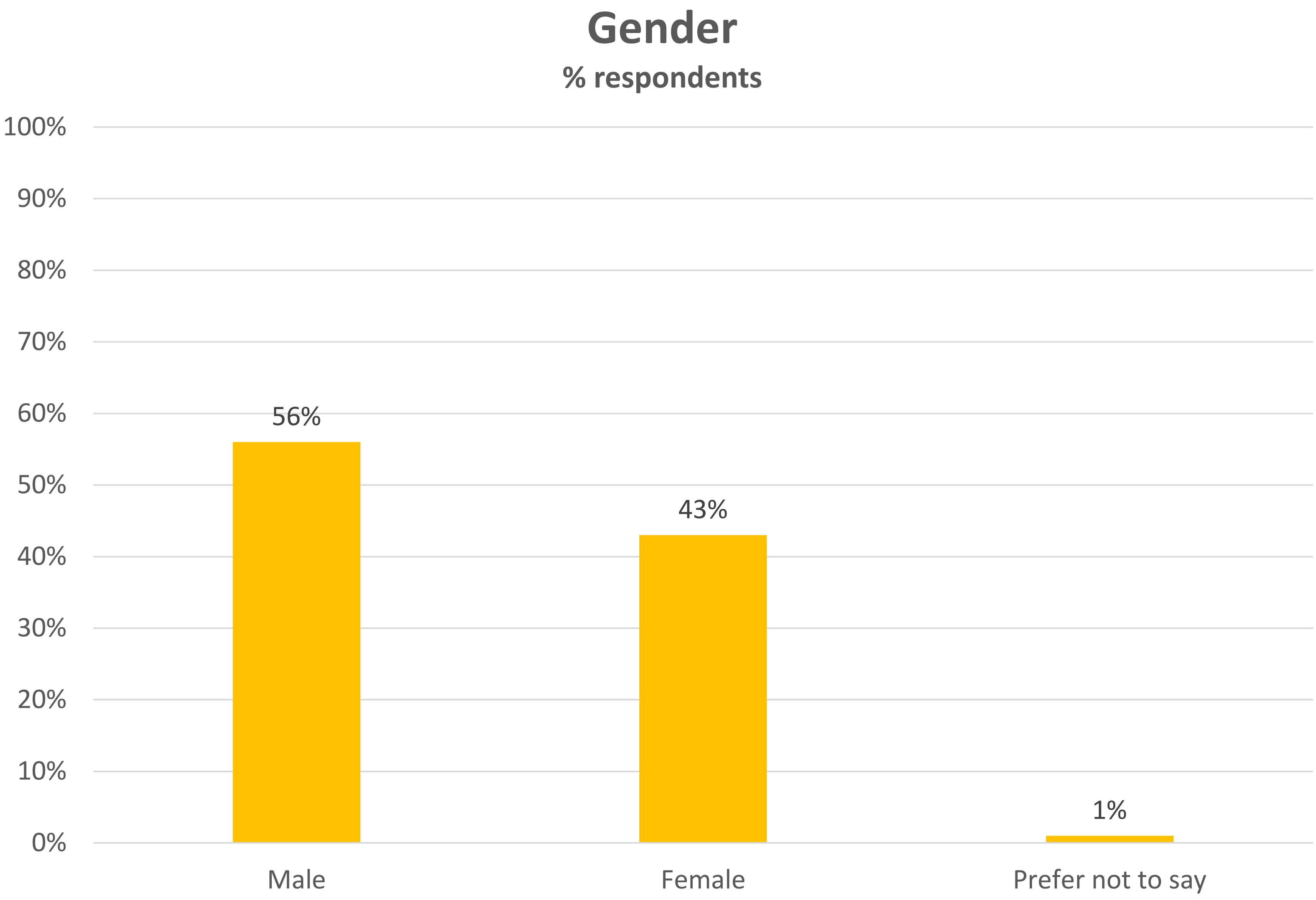
PROFILE

Age

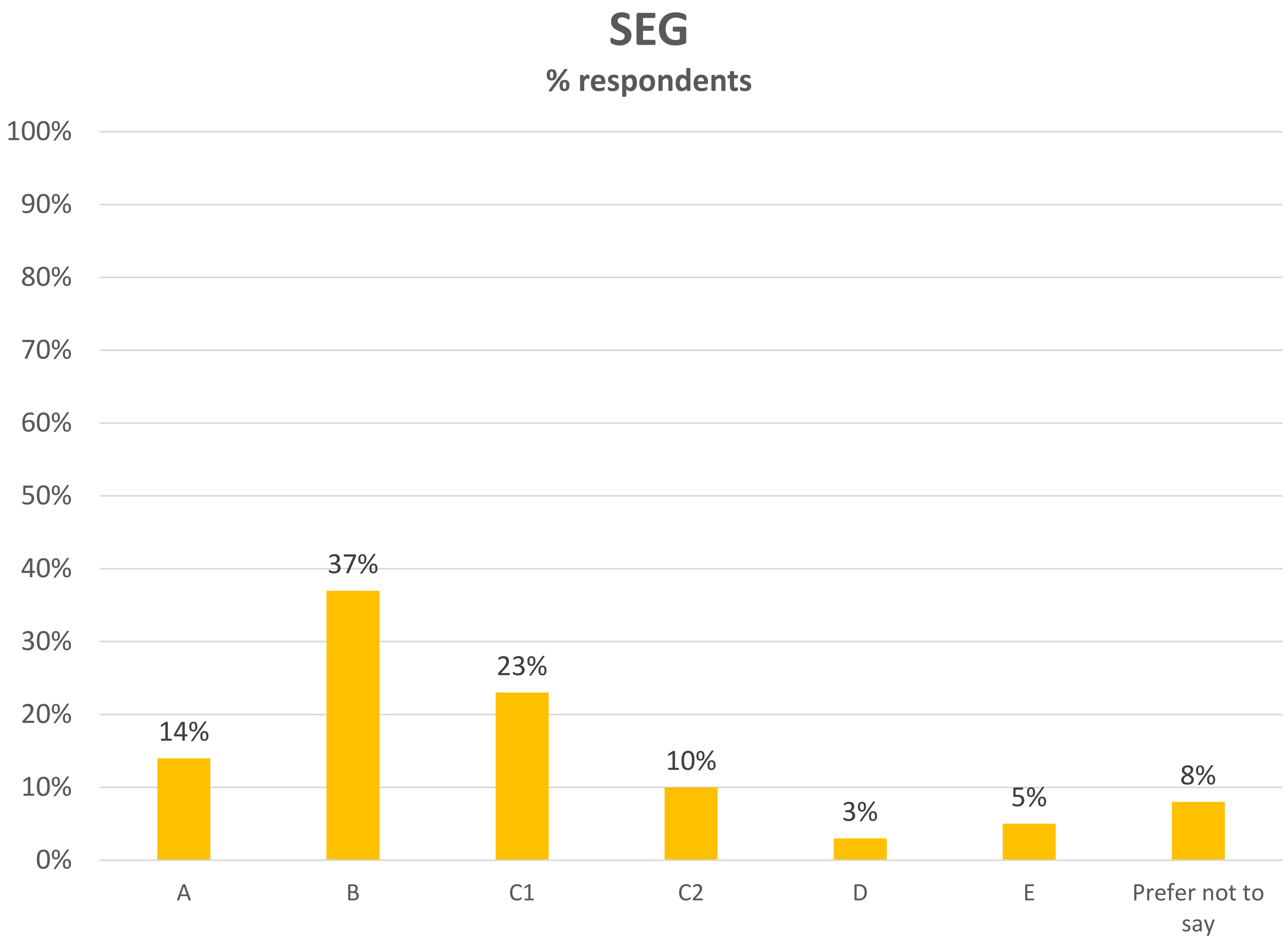
% respondents



Base: 647, all respondents



Base: 647, all respondents



Base: 647, all respondents

Summary of findings

Smart Meters

- The words chosen by the highest percentage of customers when they hear the term 'smart meter' are *in house monitor or display* (44%), *helpful* (34%) and *bill management* (30%). This is closely followed by *unreliable* (28%).
- Customer were asked to what extent they agree with a series of statements in relating to how they manage their water consumption:
  - *I manage my water use to keep the water bill down* (73% agree strongly/tend to agree)
  - *I manage my water use to help protect the environment* (67%)
  - *I would like to have more frequent updates on how much water I'm using and how much it costs* (46%)
  - *I am not sure how I can reduce my households water use* (19%)
  - *I don't actively manage my water use* (13%)
- Customer were then prompted with a list of benefits of smart meters and asked how important they thought each one was :
  - *Receiving alters/notifications for when a leak is detected* (87% very or fairly important)
  - *Receiving alerts/notifications if consumption has increased significantly without a leak* (82%)
  - *Understand how much water I use* (71%)
  - *Being able to track my water usage to help me make changes to reduce my bill* (63%)
  - *Being able to track my water usage to help me make changes so I can help my local environment* (61%)

Summary of findings

<u>Smart Meters (Cont.)</u>

- Customers were prompted with a list of possible concerns about having a smart meter and asked how concerned they are with each one:
  - *A smart meter will not help me save water as I can manage* my water consumption without it (47% concerned a lot or a little)
  - *Having a smart meter will increase my water bill* (32%)
  - *Difficulty tracking my water use* (30%)
  - *Smart meter installation will be disruptive/inconvenient for me* (28%)
  - *Having a smart meter track my water use so frequently feels intrusive* (28%)
- *Emails* (28%) and *App on phone* (26%) are the most preferred methods for received information about water use.

<u>Digital Platforms</u>

- Almost three quarters use at least one digital platform (74%). The most popular are *energy* (57%) and *financial* (56%).
- The most liked features of digital platforms are *easy access to information* (79%), *ability to rack, monitor and compare my data* (71%) and *24/7 access to my information* (62%).
- 61% said that they are interested in having access to a digital platform, of these 98% said that they would be able to access one.

Summary of findings

Digital Platforms (Cont.)

- The information that customer would like to see on a digital platform is:
  - *my water use* (99% Yes absolutely / Yes perhaps)
  - *the cost of the water I use* (98%)
  - *information about incentives for reducing water usage* (88%)
  - *Water saving tips and cost implications* (85%)
  - *Information about my local environment and biodiversity* (82%)
  - *Information about how my water use compared to other similar households in my area* (77%)
- The information that customer would like to see the most often (monthly or more frequently) is
  - *the cost of the water I use* (88% daily/weekly/monthly)
  - *my water use* (88%)
  - *information about incentives for reducing water usage* (70%)
  - *Water saving tips and cost implications* (68%)
  - *Information about my local environment and biodiversity* (61%)
  - *Information about how my water use compared to other similar households in my area* (57%)

Summary of findings

Reducing Water Use

- 84% of customers said that they could be motivated to reduce the amount of water that they use by at least one of the suggestions listed.
  - *savings on my bill are the only thing that will motivate me* (38%)
  - *contributing to environmentally friendly initiatives such as having a tree planted when reaching specific goals* (36%)
  - *contributing to a local community goal to save water simply for the health of your local river* (35%).
  - receiving less frequent personal lifestyle rewards such as shopping vouchers or cinema tickets for reaching longer term water saving goals (22%)
  - *receiving frequent personal lifestyle rewards such as a free coffee or prize draw entry when reaching short term water saving goals (21%)*
- 45% of customers are not interested in any of the alternative tariffs that were offered. The most popular tariff is the *rising block tariff* (35%), followed by the *Economy 7 style tariff* (31%).

Summary of findings

<u>Preferred Contact Methods</u>

- Customers' preferred method of contact varies by what the query is.
  - Telephone is the preferred method for *emergency issues with your water supply or sewerage service* (75%), *querying a bill* (46%) and *non-emergency issues with your water supply or sewerage service* (35%).
  - Email or an online form are the preferred contact methods for *paying a bill* (45% email, 27% online form) and *changing personal details* (22% email, 55% online form).
- The majority of people said that they would use *Wessex Water's website* if they wanted to find out information about water services (79%).

<u>Have Your Say</u>

- 68% said that they complete the panel surveys *most of the time*, and 28% said *sometimes*.
- 40% said that they read the newsletter *most of the time* and 28% *sometimes*. 23% *rarely* or *never* read the newsletter.
- Customer were asked to what extent they agree or disagree with the following in relation to the panel:
  - *the topics covered in the survey are important to me (*72% agree strongly or tend to agree)
  - *the views that they share are being listened to* (40%)
  - *I am happy with the layout of the survey/newsletter(66%)*
  - *I would like to complete more surveys in the future* (38%)
  - I would like to rece*ive surveys more often* (21%)