WaterTalk:

Smart Metering Customer Research

UNITED UTILITIES
DISCUSSION GUIDE – FUTURE BILL PAYERS
V5

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Energising Insight

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Background & Research Objectives

With a growing population and the uncertainty of climate change, water increasingly becomes a precious resource that must be protected at all costs to ensure a sustainable supply for the future. Alongside a number of supply and demand related interventions, the installation of water meters is an important part of the fight to conserve water, and United Utilities currently expects meter penetration to be 52% for homes and businesses in the North West by the end of AMP7 (2025)..

In order to meet the business's demand reduction targets across the AMP8 period, United Utilities has proposed an ambitious rollout of smart water meters for both domestic and non-domestic properties, comprising of:

1. Delivery of 500k new domestic smart meters
2. Replacement of 250k end of life domestic meters with smart
3. Replacement of 200k end of life non-domestic meters with smart

This is expected to bring meter penetration to 70% at the end of AMP8.

United Utilities wishes to conduct a 'foundational' piece of research to set the baseline for developing the customer facing smart metering strategy, to aid with proposition development and communication.

The business objectives are as follows:

- Understand awareness of the benefits of Smart Meters and the support for their roll out.
- Understand any resistance as a result of transitioning to smart meters.
- Explore propositions to encourage positive attitude towards the rollout of smart meters with domestic and non-domestic customers.
- Harness these insights to inform United Utilities on how best to clarify the proposition in future comms messaging to maximise the likelihood of successfully meeting the AMP8 objectives of increasing Smart Meter penetration from 52% to 70%.

The research will cover the following broad objectives:

- Explore smart meter proposition with domestic and non-domestic customers
- Understand levels of awareness of the benefits of smart meters and willingness to install, bill through the meter, and interact with data from the meter
- Understand barriers to smart meter installation, billing & data interaction
- Explore propositions to encourage smart meter installation, billing & data interaction Consider the 'smart' name and whether another name may be more suitable
- Deliver ideas/territories/collateral to develop as messaging to encourage meter/'digital' meter uptake

Project Timings

- Recruitment: 6th– 13th June 2022
- Materials development with United Utilities assistance: 24-30 June 2022
- Platform setup: 1-4 July 2022
- Fieldwork: 5-8 July 2022
- Interim Analysis and reporting: 11th – 18th July 2022
- Report submitted to United Utilities: 18th July 2022
- Debrief: 22 July 2022

5X FUTURE BILL PAYERS

- 18-24yrs
- All non-bill payers
- Mix of living situations:
    o Living with parents
    o Rented

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- o Student accommodation
- Mix of metered /unmetered if known

Discussion Flow

DISCUSSION GUIDE	
TASK DETAILS	**TEXT**
Day 1 – launches 5th July	
Title: Welcome! **Day(s):** 0 **Allocation:** N/A **Task type:** Welcome screen as they login	Hi everyone and welcome to your new community! Over the next 4 days, we'll be looking to get your views on water meters. Each day, we'll post some activities for you to respond to. These should take no longer than 30 minutes per day to complete and you can do them at any time that is convenient for you. This community is designed to be very informal, but we do want you to think about the answers you give. There are no right or wrong answers; we simply appreciate your honesty. Don't forget – as long as you respond to all the activities each day, you'll receive a £40 Voucher Express voucher as a thank you for your time. If you are new here, click the 'Get started' button, then enter the email address we used to invite you. Next, you will be asked to complete a few profile questions, along with your password. **NOTE**: the second time you log in, enter your email address and your password. You might want to bookmark this page for future use.
Title: Welcome! **Day(s):** 0 **Allocation:** All **Task type:** Welcome activity	Hi everyone and welcome to your new community! Over the next 4 days, we'll be looking to get your views on water meters. Each day, we'll post some activities for you to respond to. These should take no longer than 30 minutes per day to complete and you can do them at any time that is convenient for you. This community is designed to be very informal, but we do want you to think about the answers you give. There are no right or wrong answers; we simply appreciate your honesty. Don't forget – as long as you respond to all the activities each day, you'll receive a £40 Voucher Express voucher as a thank you for your time.
Title: Welcome to my world **Day** 1.1 **Allocation:** All **Task type:** Individual blog	To start off, we would like to get to know you a little better. Please introduce yourself - Where do you live? (It would also be great to know what type of building you live in and how old it is, if you know this!) - What do you do for work / leisure? - Who do you live with?

	• Who is responsible for the water bills in your household? **Moderator** – Welcome the respondents
Title: Your water usage **Day** 1.2 **Allocation:** All **Task type:** Individual blog	Great! Thank you for introducing yourself. Now we'd like to learn more about how you feel about your current water usage • How much water do you currently use? Which of your activities use the most amount of water? • What do you know about your household water bill? • To what extent do you think about the amount of water you use on a daily basis? o Has this changed at all in recent months with rises in prices? Why / why not? **Moderator:** Probe on how important the issue of water wastage is to them How is the cost of living crisis impacting their view on their use of water? Are they doing / changing anything as a result? Listen for mentions of minimising water consumption, and probe
Title: Your water supply **Day** 1.3 **Allocation:** All **Task type:** Individual blog	And now we'd like to know a little about what you know about your water supply: • What do you know, if anything, about about how your water supply works? • How about leakage within the network / within your home? Do you have any experience of this? If so, tell us about it. • Do you have any concerns about your water supply or leakage when it comes to your home? **Moderator:** Probe on how important the issue of water wastage / leakage is to them Do they engage with this, or not interested? Why?
Title: Thoughts on water meters **Day** 1.4 **Allocation:** All **Task type:** Individual blog	Now let's think more specifically about water meters. A water meter is a device that measures how much water you use. It is similar to your gas or electricity meter. Your supplier uses readings from the meter to calculate how much to charge you for your water and sewerage services. If you have a meter, the amount you pay will depend on how much water you have used. If you do not have a meter, you are charged a fixed amount each year ('unmetered' charges). These charges usually relate to the rateable value of your property. • In your opinion, what do you think is the main purpose of a water meter, in a customer's home? • What do you see as the advantages and drawbacks of having a water meter? • Does the household you are currently living in have a water meter?

	• Based on what you know, how open would you be to getting a water meter in the future? Why? **Moderator:** Are customers aware of the sustainability benefits of water meters / using less water? Are they aware of impact on carbon footprint? Do they care? Are they aware of the direct impact of water wastage on energy bills? Are they aware that a meter can help detect leaks that they may have in their home? If open to getting a water meter in future – what are the main factors driving this decision? Listen for mentions of energy smart meters & probe – to what extent does this inform their perceptions of water meters? Listen for mentions of concern about prices (considering the cost of living crisis) – to what extent does that make them feel more / less favourable towards water meters? Listen for barriers such as already feeling in control of usage, less concerned about saving money, worried about potential water usage anxiety, privacy concerns Do people in smaller properties feel they have less to gain from having a smart meter?
Title: Challenges faced by United Utilities **Day** 1.5 **Allocation:** All **Task type:** Individual blog **Stimulus:** challenges relating to reducing leakage	Now, there are several challenges water companies such as United Utilities might face when it comes to water supply and leakage. Have a look at the image which highlights some of these challenges. <mark>CHALLENGES GRAPHIC</mark> • What are your initial impressions now that you have read this information? • Did anything shock / surprise you? If so, what & why? • To what extent have your opinions about water supply & demand changed now that you have read this information? How? • How important are the issues of rising water consumption / extreme weather events / water wastage & leakage to you? • How important is the issue of potentially being able to identify leaks you have at home (that you may not be able to see)? • Whose responsibility is it to address these challenges? (e.g. Customers? United Utilities? Both? Anyone else?) Why? • What do you think would be the best solution to tackle these challenges? Why? **Moderator** – Which of the challenges is the most surprising / shocking? Which of these challenges should be a priority for United Utilities to tackle? Assess if stimulus changes their perception of water supply & demand issues creates greater urgency to tackle this issue. Assess how important the issue of water wastage/leakage to them – should it be a priority for United Utilities to tackle? How should solutions to tackle water challenges be communicated?
Day 2 – launches 6th July	

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Title: Digital / Smart Tech **Day:** 2.1 **Allocation:** All **Task type:** Individual blog	Welcome to Day 2 of the community! Today we're going to think a little more about 'smart' or 'digital' technology. - First of all, without thinking about entertainment devices, what do you associate with 'smart' or 'digital' technology in the home? - Do you use any smart or digital equipment/devices/technology within your house? Tell us about this: - What does this help you with? - How do you feel about the use of data from these sources? - What does it enable? - Are their any drawbacks / do you have any concerns? **Moderator**: If struggling, prompt with ideas such as Amazon Alexa, smart watches / fitness tracking devices, any device that learns how you use it to make your life easier What about smart lights/ energy meters? Understand acceptance of companies analysing data in general – is this something they can generally be open to?
Title: Sharing your data with your water company **Day:** 2.2 **Allocation: All** **Task type:** Individual blog **Stimulus:** explaining digitally enabled smart meters	Great! Now we'd like to understand how this might apply to your interactions with your water company. In the future, United Utilities may be able to analyse your data from a water meter to provide water usage guidance for you and your home: - How would you feel about your water company analysing your water usage data to to provide provide water usage guidance for you and your home? Why? - What do you think would be the benefits & drawbacks of United Utilities providing you with this kind of information? - What kind of water usage information would be useful for you to know? - How would you like to receive / interact with this information? - How often would you like to receive this information? - To what extent do you think smart technology could be a viable solution to the problem of water wastage/ leakage? Why/ why not? **Moderator**: Would they be open to e.g. telling them they have a leak and/or if their use is high compared to others nearby? Or would they just want the raw data? Any concerns about data privacy / ability of United Utilities to establish usage patterns and tell whether the home is occupied or not? Probe on levels of detail, types of water usage information that they would find useful
Title: Openness to digital water meters **Day:** 2.3 **Allocation:** All **Task type:** Survey	SINGLE SELECT Overall, how likely do you think you would be to install a water meter that shows you your water usage, based on what you know so far? 1. Very likely 2. Quite likely 3. Neither likely nor unlikely 4. Quite unlikely

	5. Very unlikely OPEN Please explain your answer

Title: Digitally enabled meters
Day: 2.4
Allocation: All
Task type: Individual blog
Stimulus: explaining digitally enabled smart meters
	Now we'd like you to have a look at this image, which shows you more details about digitally enabled water meters compared to regular water meters. Thinking specifically about **digital water meters**:.
	<mark>DIGITAL METER FUNCTIONALITY GRAPHIC (INC DATA FREQUENCY EXPLANATION)</mark>
	• What are your initial impressions of this idea?
	• What do you think would be the key benefits to you and your household of having this kind of meter?
	• Do you have any concerns about this?
	• What do you think about the set up process? What would United Utilities have to do to make set-up as seamless as possible? What kinds of updates would you expect?
	• What do you think about the frequency of data readings? What are the pros and cons of this?
	    o How would you feel about readings being taken weekly or hourly? How about every 15 minutes? Why?
	    o Are there any benefits or concerns about these different frequencies of taking readings? Which would you prefer?
	• How frequently would want to receive updates about your water usage data? Regardless of how frequently the reading is taken, how often would you want to receive this data on your water usage?
	    o E.g. Weekly? Monthly? Annually? Why?
	• What do you think would be the ideal name (to replace 'digitally enabled meters') to encourage someone like you to be open to the idea of having one installed?
	• To what extent do you think smart technology is a viable solution to the problem of water wastage/ leakage?
	
	Moderator:
	Probe to ensure participants answer every question & address all aspects of the questions
	Are they more open to sharing data now they have more information?
	Are they more open to water meters now they have more information?
	What are the top benefits that they can see here?
	What would be the ideal frequency of receiving this information?
	How would people feel about data being logged every 15 minutes vs. every hour? What difference would that make? Benefits / concenrs?
	Any concerns about data privacy / ability of United Utilities to establish usage patterns and tell whether the home is occupied or not?
	Listen for conspiracy theories e.g. are smart meters safe? Are smart meters secure? Will smart meters impact my health? And probe to understand where they heard these messages

Title: Digitally enabled meters - continued **Day:** 2.5	SINGLE SELECT Overall, how likely do you think you would be to accept/install a **digitally enabled** water meter in the future for your home, based on what you have read about them so far?

Allocation: All **Task type:** Survey **Stimulus:** Digital meter functionality graphic	1. Very likely 2. Quite likely 3. Neither likely nor unlikely 4. Quite unlikely 5. Very unlikely OPEN Please explain your answer **Moderator:** Probe to understand how this might have changed since before reading this information Which pieces of information are most convincing? Which pieces of information about smart meters are still causing doubt / hesitation?
Title: Questions / concerns about digitally enabled meters **Day:** 2.6 **Allocation:** All **Task type:** Individual blog **Stimulus:** explaining digitally enabled smart meters	Great! This is the last question for today. Here we would like you to think about everything you have learned so far about digitally enabled water meters. Do you have any further questions or concerns that you would like answering at this point? • Please let us know anything that is on your mind. We will answer any questions you have throughout the day tomorrow **Moderator:** Answer any comments / questions participants have at this point
Day 3 – launches 8th July	
Title: Digitally enabled meters - features **Day: 3**.1 **Allocation:** All **Task type:** Survey **Stimulus:** Digital meter functionality graphic	Welcome back to Day 3 of the community! Yesterday, you saw some information about digitally enabled water meters and gave us your reactions. Let's think about this in a little more detail today. RANKING A digitally enabled water meter may include any of the following features and benefits. Please rank them in order of appeal: 1. Fair and accurate billing (all customers paying for what they use) 2. Help in finding leaks within the home to prevent additional cost and damage to property 3. Help in reducing water use which may also help to reduce your energy bill (much of the water that is wasted in a home is heated water) 4. Help in reducing water use which will reduce your carbon footprint through the reduced use of water and energy 5. Help in understanding your water usage so you can be more in control and more aware of how much you use OPEN Please explain why you ranked the options in the way you did **Moderator:**

	Note: these are all features / benefits of smart meters in general (digital or dumb) Understand what customers interpret each of these incentives / benefits to mean Any other benefits / incentives you would like to see, that might encourage you to install a digitally enabled water meter?
Title: Future Digital meter options **Day:** 3.2 **Allocation:** **Unmetered** **Task type:** Individual blog	In the future, digital water meters may include the following features / benefits, to encourage more responsible water consumption. Have a look at the following ideas, and then answer the questions below: 1. Incentivising customers by rewarding them for reducing their usage to a certain level 2. Smart tariffs (e.g. cheaper tariff offered at off peak hours to encourage water use when demand is low) For each of the ideas, please tell us: • What do you think about this idea? • How would it help you, if at all? Why? • How would you feel if this idea was in place? • To what extent would it help you use less water? • What are your concerns about this idea? Why? • How could this idea be improved to meet the needs of you and your household? **Moderator:** If smart tariffs are liked, understand whether customers would also be willing for the smart meter to provide more frequent / granular data to enable this? Which idea is most likely to encourage Unmetered: to what extent would this idea encourage you to install a digital meter in future? What would customers do if this idea was in place? Complain to water company? Are they neutral about it? Any other ideas they have to reduce water consumption?
Title: Meter locations **Day:** 3.3 **Allocation:** All **Task type:** Individual blog **Stimulus:** meter positioning graphic	There are a number of considerations that are important in terms of where a water meter can be positioned within the network, including within a customers' home. Please take a look at the following graphic which outlines these scenarios ==METER POSITIONING GRAPHIC== • Firstly, after reading this, do you care where the meter is installed? Please explain your rationale here. • If you were having a meter installed, where would you opt to have your meter and why? • Would your answer differ depending on the type of meter (digitally enabled vs. non-digitally enabled?) • If you were responsible for making decisions about where to locate meters for United Utilities, from a business perspective (considering the

	engineering challenges highlighted in the graphic above), what would you recommend that would have the greatest beneficial effect for all?
Title: Thoughts on digital meters now **Day: 3.4** **Allocation:** All **Task type:** Individual blog **Stimulus: all previous stimulus materials**	Now we'd like to recap on everything you have seen so far about digitally enabled water meters. United Utilities are planning to deliver 500k new digital water meters, and replace 250k old meters with digital meters in homes across the North West, in order to solve issues with water wastage & leakage. This will not be a universal / compulsory rollout, but will aim to increase the number of households with a water meter from 52% to 70%. • In your opinion, does the plan to roll out digital meters make sense? Why/ why not? • How effective do you think digital meters will be in the water supply & demand challenges outlined on Day 1? Why/ why not? • If you were asked to install a digital meter in your home as part of this rollout, how would you feel? • Now you have read all the information, how would you feel about sharing your water usage data with United Utilities as part of this rollout? **Moderator**: What can United Utilities do to mitigate concerns about water meters / data sharing??
Title: Would you adopt a digital meter **Day:3.5** **Allocation:** All **Task type:** Survey	SINGLE SELECT Overall, how likely do you think you would be to install a **digitally enabled** water meter as part of the United Utilities rollout, in the future for your home, based on everything you have read throughout the community? 1. Very likely 2. Quite likely 3. Neither likely nor unlikely 4. Quite unlikely 5. Very unlikely OPEN Please explain your answer
Title: Optimising the offer **Day: 3.6** **Allocation:** All **Task type:** Individual blog	Finally, let's assume United Utilities will decide to go ahead with rolling out digital meters across households in the region: • How should this be carried out? • Where should they be placed? • What should set-up be like? How should United Utilities communicate with you about this? • What should the meters be called? (E.g. 'Smart'? 'Digital'? Something else?) Why? • What further information would you need to know? • What kind of assurances would you want?

	• How should United Utilities communicate the rollout to customers who may be less keen or know less about them? **Moderator**: What are the hooks that might persuade people this is the right thing to do?