Smart Metering

QUESTIONNAIRE (NON-HOUSEHOLDERS)
V4

VERVE
Energising Insight

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Sample Definition

Sample definition
• n=200 NHH customers (from external sample)

Scripting specifications			
Job code	6466	Smart Metering	
Market and Languages	UK		
Sample source	☐Panel ☐Client List ☒3rd Party ☐Open link	If 'Client List', specify pipe ins	
Stimulus path			
Scripting tools			
Member Sat Qs (delete as appropriate)	Yes		
Hard Quota table:			

Project timings:

Element	Who	Timings
Draft questionnaires shared	Verve	Monday 12th September
Questionnaires signed off	UU	Friday 30th September
Scripting and testing	Verve	Monday 3rd to Friday 7th October
Fieldwork	Verve	Monday 10th to Monday 17th October
Draft report to UU	Verve	Monday 31st October
Debrief	UU / Verve	TBC

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Intro:

Many thanks for taking part in our survey.

Please click on the 'NEXT' button below to get started.

Section A: Screening and profiling

ASK ALL. SINGLE CODE. SCREENOUT IF CODE 4 NOT SELECTED
S1a. Where is your business based? *If your business operates in a number of areas, please answer where you typically work.* **Please select from the list below…**

1. South East
2. South West
3. West Midlands
4. North West
5. North East
6. Yorkshire and Humber
7. East Midlands
8. East England
9. Scotland
10. Northern Ireland
11. Wales
12. London
13. Don't know

SCREENOUT TEXT: Thanks for your interest in this survey, however you don't quite fit the criteria we're looking for today.

ASK ALL. MULTI CODE
S1b. Which part(s) of the North West is your business based in? *Please select all that apply.*

1. Cumbria
2. Cheshire
3. Greater Manchester
4. Lancashire
5. Merseyside

ASK ALL. SINGLE CODE
S2. Which of the below best describes the sector in which your business operates?

1. Agriculture, Forestry or Fishing
2. Automotive (e.g. trade or repair of motor vehicles or similar)
3. Business or Financial Services (including accountancy, advertising/marketing, administrative, computer services, communications / information / PR, consulting, legal, recruitment/employment, technology or similar)
4. Construction, Architecture or Engineering
5. Entertainment, Media or Sport
6. Healthcare, Medical or Pharmaceuticals
7. Hospitality (including accommodation, food / beverage services, travel and tourism or similar)
8. Manufacturing
9. Energy, Utilities or Mining

10. Personal or Household Services (including care services, carpentry, cosmetic, cleaning/laundry, electrician, fashion, hairdressers/barbers, plumbing or similar)
11. Property or Real Estate Services
12. Public or Community Services (including social services, education, membership organisations or similar)
13. Retail Trade (including businesses/shops selling goods/services to consumers such as clothing, electricals, groceries or similar etc.)
14. Transportation, Distribution or Postal Services
15. Wholesale Trade (including businesses/shops selling goods/services in bulk to retailers and other businesses such as clothing, electricals, groceries or similar etc.)
16. Other, please specify

ASK ALL. SINGLE CODE

S3. Which of the following best describes your role?
1. Owner / Founder / Chief Executive Officer / Managing Director (or similar equivalent)
2. Other high ranking executive (C-Suite) / Trustee Level (e.g. Chief Operating Officer, Chief Technology Officer, Chief Information Officer or similar equivalent)
3. Senior Management (e.g. Senior Manager, Director, Head of Department or similar equivalent)
4. Mid-level management (e.g. Manager, Supervisor, Team Lead, Deputies, Co-ordinator or similar equivalent)
5. Individual Contributor/Employee
6. Other (please specify)

ASK ALL. SINGLE CODE

S4. How many sites (e.g office, shop/store, warehouse, restaurant, café, pub or similar premises) does your business operate from in the North West?

1. 0 – I operate completely from home **SCREENOUT**
2. 1 site only
3. 2 sites
4. 3 sites
5. 4 sites
6. 5 sites
7. More than 5 sites

ASK ALL. SINGLE CODE

S5. Which of the following best describes your level of responsibility for managing the supply or use of water and wastewater services at your business' property?

1. Solely responsible / the main person responsible
2. Partially responsible / one of several people responsible
3. Bill payer / administrator of the account
4. I am not responsible at all **SCREENOUT**

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ASK ALL. SINGLE CODE

S6. How many people in total (including you) work within your business? *Please provide an answer thinking of the total number across sites in the North West only.*

1. 1 – just myself
2. 2 – 5
3. 6 – 9
4. 10 – 14
5. 15 – 19
6. 20 – 29
7. 30 – 39
8. 40 – 49
9. 50 – 99
10. 100 – 249
11. 250+

ASK ALL. SINGLE CODE

S7. If you know it, which company currently supplies meter reading, billing and account management services for the water provided to your business?

1. ADSM
2. Business Stream
3. Cambrian
4. Castle Water
5. Clear Business Water
6. ConservAqua
7. Everflow Water
8. First Business Water
9. Olympos Water
10. Self Supply
11. SES Business Water
12. Smarta Water
13. Source for Business
14. The Water Retail Company
15. United Utilities
16. Veolia
17. Water 2 Business
18. WaterPlus
19. Waterscan
20. Wave
21. Yu Water
22. Other (Please specify)
23. Not sure / can't say

ASK ALL. SINGLE CODE

S8. Do you know how your business' water meter is read?

1. Readings are taken by looking at the actual meter itself
2. Readings are taken with a data reading device via a radio signal
3. Readings are sent automatically to our supplier without anyone needing to visit our premises
4. We have a data logger device that is connected to our meter
5. Don't know

ASK ALL. MUTLI CODE. RANDOMISE
S9. Which, if any, of the following smart technology products do you have in your business?
By 'smart' we mean electronic devices that can connect to the internet, a local network or an app using wired or wireless technology.

Please select all that apply.

1. Smart thermostat
2. Smart lighting
3. Smart fridge
4. Smart oven
5. Smart speakers
6. Smart security system (e.g. security cameras)
7. Smart TV
8. Smart energy meter
9. Other (please specify). **HOLD**
10. None of the above. **HOLD. EXCLUSIVE**

Section B: Water usage in the business

SHOW TEXT

INTRO_1. Over the next few questions, we'd like to understand a little more about water consumption in your business.

ASK ALL. MULTICODE. RANDOMISE

Q1. Which of the following options apply to you, in relation to the supply of water to your organisation? Water is vital for…

1. …The manufacturing process which is essential to the running of your organisation (e.g. to power machinery, agricultural production etc.)
2. …The supply of services your organisation provides (e.g. cleaning services etc.)
3. …An ingredient or part of the product or service your organisation provides (e.g. food or drink, chemical, cosmetics manufacturer etc.)
4. …Normal domestic use for your organisation's customers and employees (e.g. customer toilets, supply of drinking water)
5. None of the above **HOLD. EXCLUSIVE**

ASK ALL. MULTI CODE. RANDOMISE

Q2. Which of these, if any, has your business had direct experience of? *Please select all that apply.*

1. An unplanned interruption to your water supply at your premises
2. Water leak(s) inside your premises
3. Water leak(s) outside your premises
4. An issue with the pressure, taste, smell or appearance of water at your premises
5. Problems with the stop tap, water meter and/or outside pipes at your premises
6. Flood water inside or outside of your premises as a result of blocked or overflowing sewers
7. Getting water supply pipes to your premises replaced
8. Getting a new connection to the mains clean water or mains sewer system to your premises or property being developed by your business
9. None of these. **HOLD. EXCLUSIVE**

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Q3. You said your business has experienced water leak(s) previously – how was the leak detected? *Please select all that apply.*

1. Our water bill was higher than expected
2. The central heating system lost pressure
3. There was a drop in water pressure
4. There were damp or discoloured patches on walls, ceilings or floors
5. There were mould or mildew patches on walls, ceilings or floors
6. There was a consistent dank smell somewhere in your property
7. The pipework was making unusual noises
8. Other (please specify) **HOLD**

Q4. What environmental and sustainability goals does your business have, if any?

1. Zero waste to landfill
2. Waste reduction / minimisation
3. Reuse and recycle
4. Pollution prevention
5. Net zero
6. Using renewable energy
7. Reducing water usage
8. Choosing sustainable transport options
9. Other (please specify) **HOLD**

Q5. What sort of things has your business been doing / introduced to reduce water usage?

1. Installed low-flow taps
2. Installed water efficient toilets
3. Installed a water butt (medium or small capacity)
4. Installed a rainwater harvesting tank (domestic use)
5. Checked for a leaky loo
6. Checked for dripping taps
7. Engaged with employees to help them be more water efficient
8. Had a water meter installed to monitor usage
9. Set water usage targets
10. Switched from automatic flushing urinals
11. Replaced appliances for more water efficient versions
12. Other (please specify) **HOLD**

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ASK ALL. GRID. SINGLE CODE PER ROW. RANDOMISE ROWS
Q6. Thinking about water consumption at your business, how strongly do you agree or disagree with the following statements?

ROWS

1. It's not worth our business doing things to save water if others don't do the same
2. Our business actively tries to save as much water as possible
3. There's plenty of water available, we don't need to make the effort to reduce our usage
4. We've got more important things to think about than saving water
5. I try to get my friends and family to save more water
6. All businesses share responsibility for saving water
7. Using less water is good for the environment
8. We pay for water, so we are entitled to use as much as we want
9. We struggle to find ways to reduce our water consumption
10. We are not able to reduce our water consumption, despite having tried in the past
11. There isn't much we can do to save water, it's needed for our everyday business

COLUMNS

1. Strongly agree
2. Slightly agree
3. Neither agree nor disagree
4. Slightly disagree
5. Strongly disagree

Section C: Introduction to Smart Water Meters

SHOW TO ALL
INTRO_2. Now we'd like you to have a look at this image, which shows you details about smart water meters compared to regular water meters.

Traditional water meter

- Meter readings are obtained visually i.e. someone looks at the meter and writes down the reading
- This can either be done by yourselves or by your retailer
- This data can be used to make sure that the amount you are paying is in line with the amount of water you are using

Smart water meter

- Smart water meters can send a read via a fixed communication network, much like your mobile phone
- Data can be read more frequently, e.g. every hour or even every 15 minutes
- This data can be used for bills
- It can also be used to;
  - Detect potential leaks in your property and depending on the location of the meter i.e. outside it can pick up leaks on your supply pipe, feeding your property
  - See how many litres of water you are using a day
  - Help us understand our network and identify where there may be potential leaks

ASK ALL. SINGLE CODE

Q7. How likely are you to switch to a smart water meter in the future for your business? This meter would be free to install.

1. I would definitely switch
2. I would probably switch
3. I might consider switching
4. I would probably not switch
5. I would definaltely not switch

Q8A. Why would you [SHOW "switch" IF Q7=1,2, SHOW "not switch " IF Q7=4,5 "consider switching " IF Q7=3] to a smart water meter?

ASK ALL. MULTI CODE

Q10. Which of the following, if any, would you expect to be available to your business via a smart water meter?

1. Smart water meter quickly alerts you that you may have a leak (preventing additional cost and damage to property)
1. Where leakage is identified, United Utilities would alert you and recommend you contact a plumber
2. Data analytics of your water usage, e.g. helping you to control and reduce your water usage
3. Visualisations of your anonymised consumption data over time and/ or how you compare to other peers
4. Frequent business water checks – for a charge, an advisor will attend the premises to assess water usage and help identify leaks and opportunities for reducing water usage
5. Smart tariffs (e.g. cheaper tariff offered at off peak hours to encourage water use when demand is low)

ASK ALL. RANKING. RANDOMISE

Q11. Which of these would be the most appealing to your business?

Please rank them in order of appeal, with 1 being the most appealing.

1. Smart water meter alerts you that you may have a leak (preventing additional cost and damage to property)
2. Where leakage is identified, United Utilities would alert you and recommend you contact a plumber
3. Data analytics of your water usage, e.g. helping you to control and reduce your water usage
4. Visualisations of your anonymised consumption data over time and/ or how you compare to other peers
5. Frequent business water checks – for a charge, an advisor will attend the premises to assess water usage and help identify leaks and opportunities for reducing water usage
6. Smart tariffs (e.g. cheaper tariff offered at off peak hours to encourage water use when demand is low)

ASK ALL. SINGLE CODE

Q12. A smart water meter provides an increased frequency of reads on water consumption.

This data may help your business keep tabs of how much water you're using, but also helps identify how much water is actually reaching you. There may be water leaks in the network, and having a smart water meter will help United Utilities identify water wastage as a result of leakage.

Taking this into consideration, and thinking specifically about the level of detail related to your water use, how often would you be comfortable sharing your household's water consumption data with United Utilities?

1. Every 15 minutes
2. Every 30 minutes
3. Every hour
4. Every 2 – 3 hours
5. Every 4 to 5 hours
6. I would not want to share my water consumption data with United Utilities

ASK IF Q12 ≠ 10. MULTI CODE

Q13. Which of the following, if any, would you be interested in receiving from United Utilities?
Please select all that apply.

1. Tips on how to save water
2. Your businesses water consumption data via an interactive app or smart device
3. Anonymised comparative data to other business' water consumption
4. Rewards for reduced water use
5. Inform me of potential leaks affecting my business
6. Other (please specify). **HOLD**

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Section D: Rolling out smart water meters

United Utilities are planning to replace 200k end of life non-domestic meters with smart water meters in businesses across the North West Region.

This will help to solve issues with water wastage & leakage, and ultimately contribute positively to the environment.

This rollout will aim to increase businesses with smart water meters.

The installation of the smart water meter itself would be free, consistent with current Policy, with just a small amount added to all bills to fund the overall investment.

ASK ALL. SINGLE CODE

Q14. **To what extent do you support or oppose the idea of United Utilities rolling out smart meters in the North West Region?**

1. Strongly support
2. Slightly support
3. Neither support nor oppose
4. Slightly oppose
5. Strongly oppose

ASK IF OPPOSE ROLL-OUT (Q15=4.5), MULTI CODE

Q15. **Why do you oppose this initiative?**

1. I do not think it will make a difference to the environment
2. I do not want a smart water meter
3. I am not impacted by these matters
4. The implementation would be a hassle in my life
5. Water leakage is not my responsibility
6. Installing a meter will not change my water consumption
7. Other (Please specify). **HOLD**

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ASK IF SUPPORT ROLL-OUT (Q15=1,2), MULTI CODE

Q16. Why do you support this initiative?

1. It's the right thing to do
2. It will be better for the environment
3. It will help to reduce water wastage
4. It's important to think about future generations
5. Other (Please specify). **HOLD**

ASK ALL. MULTI CODE. RANDOMISE

Q17. Which of the following do you think are the most effective ways for United Utilities to communicate this initiative to customers?

1. Website and social media
2. Emails
3. Posters/leaflets in doctors' surgeries, dentists, and hospitals
4. Leafleting directly to homes
5. Face to face (e.g., stalls in shopping centres, door knocking)
6. Included within bill statements
7. Text message
8. Interactive app
9. Via the retailer
10. Other (please specify) **HOLD**

Closing text

That's all for today! Thank you so much for taking the time to complete this survey, we appreciate your feedback.