



The voice for water consumers
Llais defnyddwyr dŵr

Smart Thinking – Metering for Business Customers

Summary Report
March 2023



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Foreword



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In April 2022, MOSL - the market operator for the non-household water retail market in England – published an [independent report](#) by Artesia, commissioned by the Strategic Panel’s Metering Committee. The report focussed on the potential benefits that could be realised by retailers and wholesalers through the wide scale rollout and adoption of smart water meters for business customers.

Advanced Metering Infrastructure (AMI) meters – or ‘smart’ meters - enable two-way communication between businesses and water companies, automatically transmitting your usage data directly. This entails a whole range of potential benefits, from more accurate readings to simplified billing, as well as savings in both time and money. Thinking further ahead, we wanted to understand how these kinds of benefits could apply to business customers in England and Wales – and what, if any, additional benefits could be realised from having enhanced metering technology.

This research, carried out in association with MOSL and on behalf of the Strategic Panel’s Metering Committee, aimed to understand whether business customers themselves find these potential benefits appealing, and particularly if business customers who already have smart meters perceive the benefits.

Our findings were encouraging, in that there is a sense among businesses in general of the potential for greater financial and operational efficiencies through the use of a smart water meter. Moreover, among businesses that already have smart metering, a clear majority (91%) found that it provided useful information.

However, the research also made clear the very real extent to which smart water metering is an unfamiliar concept to many businesses. Understanding of AMI technology is poor, meaning certain benefits regarding time and cost savings, as well as greater energy efficiency, may be underappreciated or unknown to many.

If new smarter metering technologies are rolled out across the water system – something that 82% of businesses would support – then there needs to be an emphasis on properly communicating the potential benefits, whether financial, environmental or organisational, particularly to smaller businesses.

Dr Mike Keil
Director of Policy, Research and Campaigns



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Executive Summary

Executive summary (1 of 2)



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Overview

Smart water meters are understood to help reduce water usage and allow businesses to be more efficient

- Businesses are already aware of smart water meter benefits through awareness of growing popularity of other utility smart meters in domestic use (and business).
- There is strong support (82%) for a broader rollout of new water meter technologies, with businesses expecting smart water meters to become commonplace, with time and financial savings (for businesses and water companies) strongly outweighing any perceived drawbacks.

Most valued Benefits

The most compelling benefits of smart water meters are found to be increased financial control, savings and time efficiencies

- Most (91%) of those who claim to have a smart water meter find that it provides useful information.
- Greatest value is placed on benefits facilitating greater financial control, potential for cost-savings, and a reduction in time, thought and effort paid to managing their water billing.
- Environmental benefits are often not appreciated as reduced water wastage is more readily associated with cost saving rather than environment which is a more compelling benefit.

Executive summary (2 of 2)



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Monetary value

Businesses are accepting of installation fees, provided benefits are well-communicated

- The mean estimated monetary value of receiving data on water usage is £255.12 and it is higher for bigger businesses or those operating from multiple premises.
- Cost of installation is cause for consideration, although many businesses observed reduced water bills and strongly value increased bill accuracy and time-savings that outweigh their initial opposition to paying if reconciled as an *'investment for the future'*

Next steps

Businesses need educating on *how* smart water meters work and how easy installation is

- Businesses don't know how AMI meters differ from AMR and basic water meters, meaning some benefits regarding time savings may be underappreciated or unknown.
- Those who claim to have a smart water meter are more likely to agree that they have seen most of the benefits than those who claim not to have a smart water meter.
- There are few drawbacks associated with installing smart water meters, although reassuring businesses that installation will not significantly disrupt business operations would alleviate concerns.



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Background, objectives and methodology



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What are smart water meters?

This research focused on Advanced Metering Infrastructure (AMI) meters specifically, which communicate directly with the water company providing data on a regular basis without the need for manual readings. This ensures that any unusual activity in water usage is detected immediately.

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Background and Objectives



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This research was commissioned by CCW, in association with MOSL on the behalf of the Strategic Panel's Metering Committee, in order to explore business customers' views on whether the expected benefits of smart metering are being realised and enjoyed by businesses.

1

To assess to what extent businesses are aware of smart water meters

2

To explore which benefits they would find most appealing

3

To investigate to what extent they experience the benefits already

4

To assess how much, if anything, they would be willing to pay for the installation of smart metering and/or access to consumption data

Overview



Online survey of 524 business water decision makers who are non-sole traders with at least 1 operating business premise and a water meter in England and Wales



Quantitative fieldwork conducted 5th – 23rd January 2023



The full sample was unweighted.

Approach

CCW commissioned Yonder Consulting to undertake an online B2B survey in England and Wales.

Yonder own and manage a highly engaged online panel of 150,000 UK adults and this resource was used as the primary source of sample for the online survey.

Yonder conducted 507 online interviews with businesses with a water meter in England and Wales. 17 boost interviews were achieved by a number of retailers contacting their metered customers on our behalf. Sole employees were excluded as were those businesses without an operating business premises. Only those with sole or some responsibility for the water bills of their organisation were interviewed.

Sampling

A stratified sampling technique was employed using multiple demographic groupings to select respondents randomly from Yonder Consulting's online business panel. This approach helps to minimise selection bias and ensure certain segments of the population are not over- or under-represented.

There were no quotas set.

Overview



30-minute depth interviews with 15 respondents



Qualitative fieldwork conducted 6th – 17th February 2023

Approach

Yonder selected 15 respondents who had successfully completed the quantitative survey to participate in 30-minute depth interviews.

Interviews were conducted via Zoom and line of questioning was structured to gather further rationale behind quantitative insights measuring the appeal of various smart meter benefits.

Sampling

Our sample was screened qualitatively to ensure a mix of gender, ages, business sector and company size as well as ensuring all participants had responsibility in monitoring and paying their companies water bill.

We also confirmed participants had AMI smart meters installed on at least one of their business premises.

Screening ensure a mix of:

- Gender
- Business sector
- Water company
- Estimated annual water bill
- Company size
- Number of business premises

Limitations

Screening of the qualitative sample did not exclude organisations participating in trial period where installation of smart meters was part of a wider roll out. None of our **qualitative** sample paid directly for installation potentially lessening appreciation of associated drawbacks.

Scope and Limitations of this Report



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Scope

This report aims to establish attitudes and behaviours of the overall England and Wales business population and highlights results at an overall level as well as by the key sub-groups as outlined in the Table 1. It provides a robust sample to be able to analyse the data on this basis. Where the base size is too small, this has been flagged with an asterisk to treat the data as indicative only.

The statistical reliability of the data at 95% confidence level is outlined in Table 1

In addition to highlighting key sub-groups significantly different to the total, results are also charted for other sub-group categories of interest when data is significantly different to the total.

Statistical differences legend (at 95% confidence)

- + Statistically higher than all other categories within the subgroup
- Statistically lower than all other categories within the subgroup

| | Key sub groups | Sample Size | Margin of Error for response of 50% |
|-------------------------------------|----------------|-------------|-------------------------------------|
| | Total sample | 524 | +/- 4.3% |
| Claimed smart water meter ownership | Yes | 313 | +/- 5.5% |
| | No | 148 | +/- 8.0% |

Limitations

This research was completed online. In general, online respondents are more technically knowledgeable and are more likely to be early adopters of new technology products and services.

Online survey respondents are also incentivised to complete surveys. To counter this, rigorous quality control procedures were implemented to maximise the attention paid by respondents when participating in the survey and avoid 'happy clicking' or rushing through surveys to reach the reward at the end.

Additionally, we are reporting claimed smart water meter ownership and the claimed incidence rate is higher than the known levels of smart water meter ownership. This may indicate a lack of understanding surrounding smart water meters and presents an opportunity to better educate business customers.

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Respondent profile

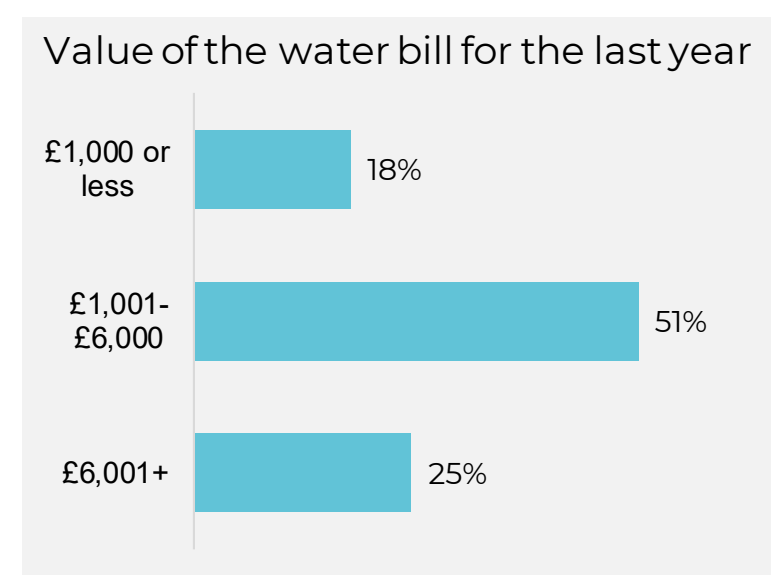
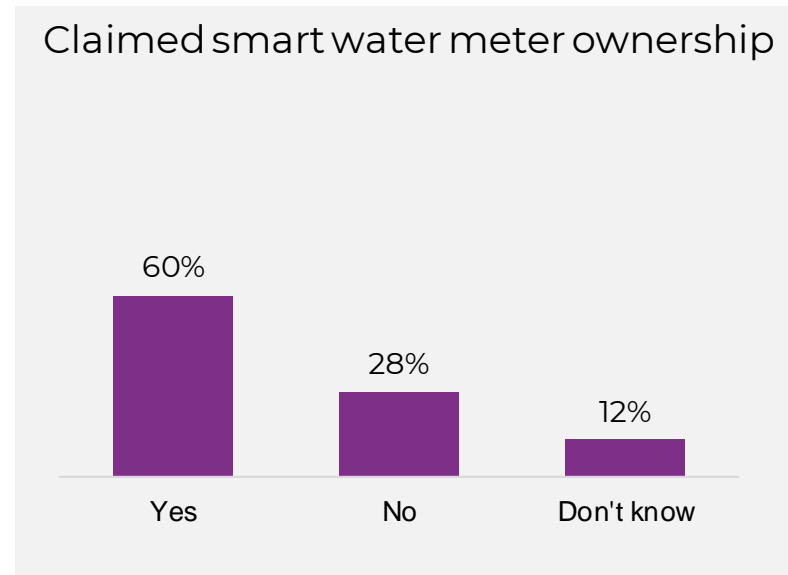
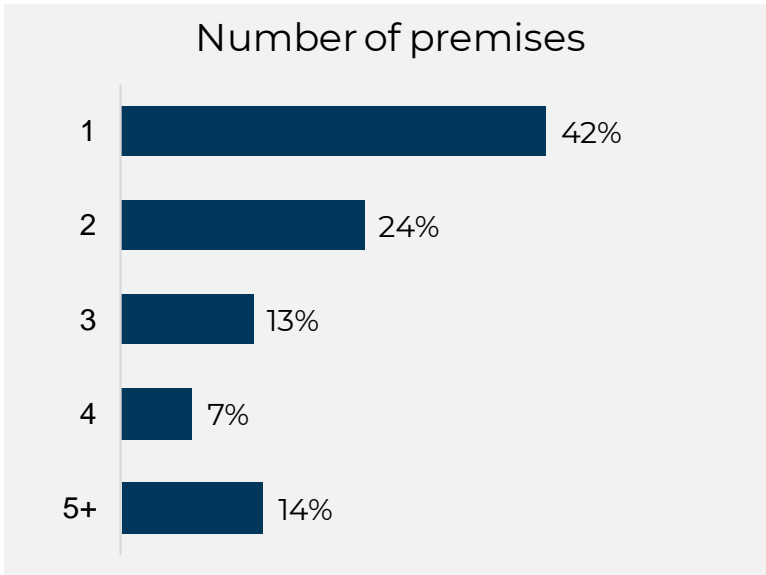
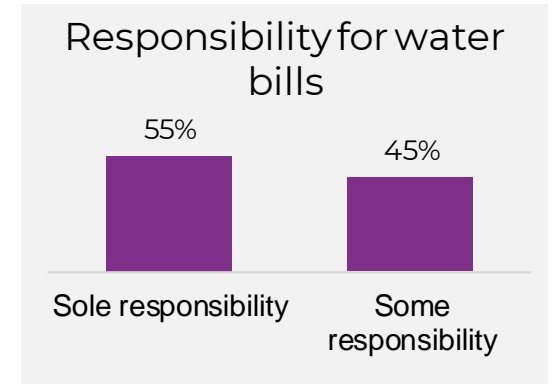
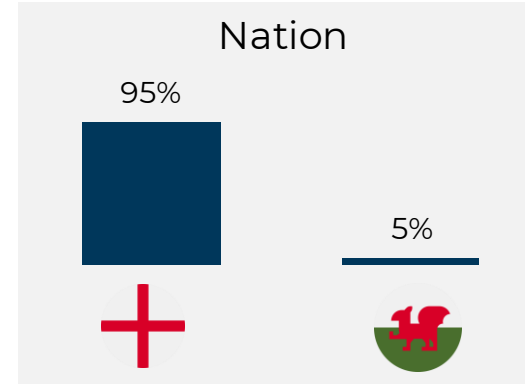
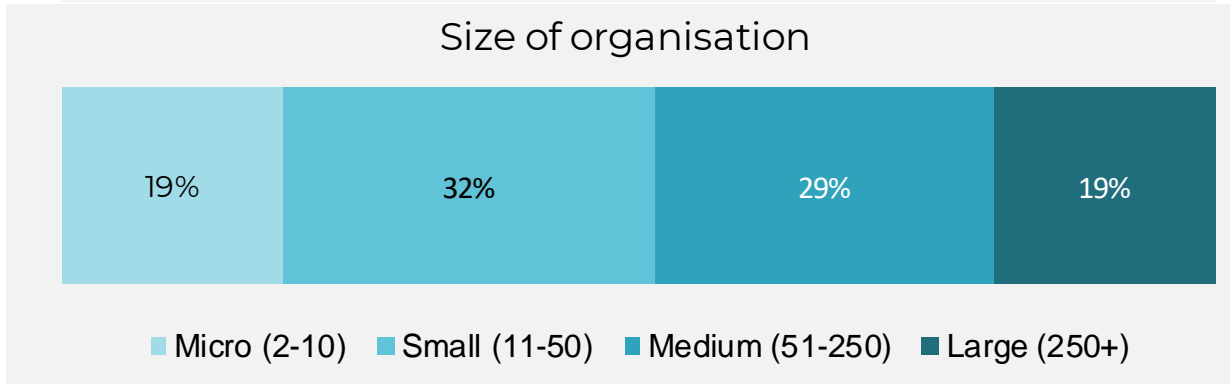


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Quantitative respondent profile



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Qualitative respondent profile



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Qualitative sample made up of **15** respondents, ensuring a mix of business types:

Size of organisation

- **3** Micro (2-10 employees) businesses
- **3** Small (11-50 employees) businesses
- **5** Medium (51-250 employees) businesses
- **4** Large (250+ employees) businesses

Responsibility for paying water bills

- **13** respondents with sole responsibility for water bills
- **2** respondents with some responsibility for water bills

Water-essential business

- **6** respondents from water-essential businesses
- **9** respondents from non-water-essential businesses

Value of the water bill for the last year

- **3** respondents with bills under £1,000
- **8** respondents with bills between £1,001 - £5,999
- **4** respondents with bills over £6,000

Number of business premises

- **5** respondents with sole business premises
- **10** respondents with multiple business premises

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Support of smart water meters



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Increased awareness of energy-saving initiatives is leading to greater receptiveness to smart water meters



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It is important to remember our qualitative sample **participated in a trial and did not pay for installation directly**, although most initiated conversations with their water company to install a smart water meter and claimed they would have paid to have them installed

Greater use domestically

Benefits experienced with gas and electric smart meters in domestic use are more apparent during cost-of-living crisis, and assumed to be relevant to smart water meters in business use.

Expected future policy change

Businesses expect they will need to comply with future policies to reduce their water use. Smart water meters will protect them against such changes and ensure they are compliant.

Colleague endorsement

Smart water meter benefits are communicated between businesses.

Aligning with environmental company strategy

Businesses are looking to improve their 'green credentials' to grow client base and promote sustainability profile.

“We talk to other businesses, other breweries like ours and they talked about how much easier it was having a smart meter. I Googled it and rang the water company to see if we could get one”

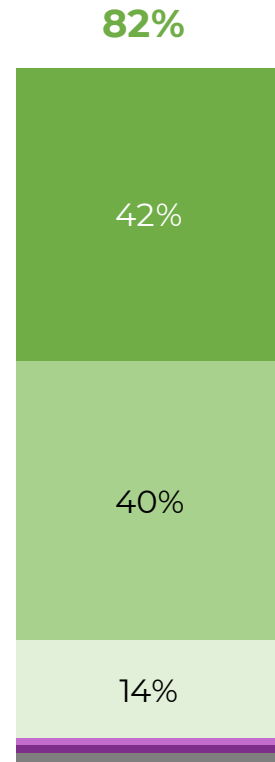
“It's part of our civic responsibility. We're all going to have to install at some point because its better for everyone. It puts you ahead of any government policy enforcing offices to meet energy efficiency and environmental requirements which are bound to come into effect”

In principle, around 4 in 5 businesses would be supportive of new water meter technologies being rolled out across the water system

Levels of support around the rollout of new technology across the water network

Net: Supportive

- Very supportive
- Somewhat supportive
- Neutral
- Not very supportive
- Not at all supportive
- Don't know



Net: Not supportive

Demographics who are more likely to be supportive



Those who claim to have a smart water meter than those who don't (**86%** to **74%**)



Those with higher water bills than those with lower (**86%** for £1,001-£6,000 and **85%** for £6,001+ to **71%** for £1,000 or less)



Those who belong to non-micro organisations (**69%** for Micro to **88%** for Small, **86%** for Medium, **82%** for Large)



Those who operate multiple premises than those with only 1 (**87%** to **76%**)

Labels under 4% are not shown

Q.14 Imagine there were new water meter technologies available. To what extent would your organisation support the idea of rolling out this new technology across the water system? Base: All respondents (524), Those who claim to have a smart meter (313), Those who claim not to have a smart meter (148), £1,000 or less (95*), £1,001-£6,000 (266), £6,001+ (131), Micro (102), Small (168), Medium (152), Large (102), 1 premise (221), Multiple premises (303) *Caution: low base size, only use as indicative



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Perceived benefits



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How we identified the most appealing benefits

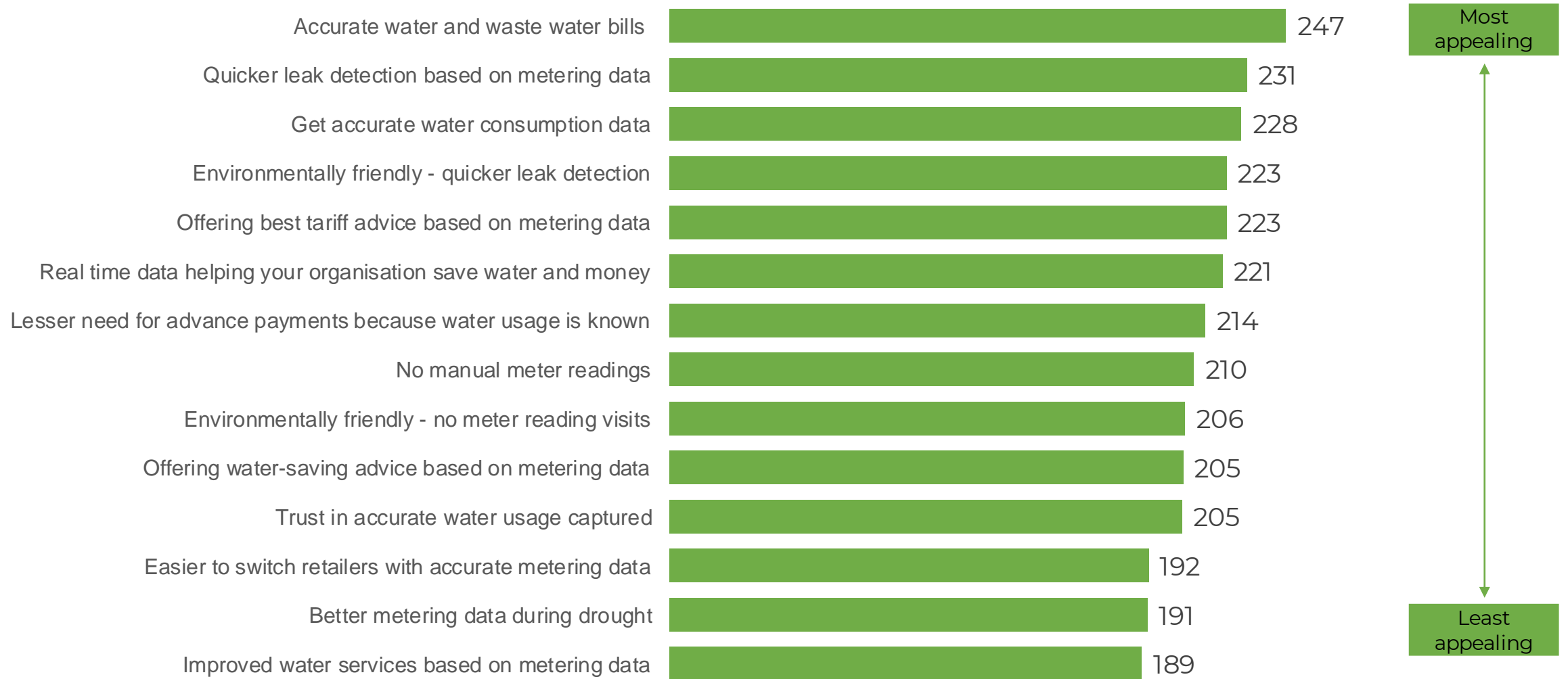
- A **MaxDiff (Maximum Difference Scaling)** was conducted to establish which benefits are most appealing to target businesses. The MaxDiff forced respondents to trade off all the benefits and creates a robust benefit ranking.
- Respondents traded off sets of three benefits at a time against one another to force a choice/preference. This was repeated over a series of survey screens.
- We used statistical analysis to derive the relative appeal of each benefit tested to provide a ranking from most to least appealing.
- Results were anchored to determine whether or not each message was considered appealing or not. Anything above the anchor point of 100 was an appealing message.
- Please note that for clarity, in this report we have shortened the wording of benefits. The full benefit wording is in the appendix.

The most appealing benefit of having a smart water meter is accurate billing



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Most and least appealing benefits of smart water meters (all scored above 100 so all appealing)



Benefit descriptions have been truncated for clarity, see Appendix for full descriptors 21
Q15-16. MaxDiff Base: All respondents (524)

The greatest appeal lies within the tangible benefits businesses can see



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Benefits identified in the quantitative stage aligned with the qualitative research. Benefits can be distinguished into two groups; The tangible '**essentials**' and the less-tangible '**nice to haves**'

Essentials

Primary benefits

Benefits considered most impactful to business that reflect more compelling reasons to install smart water meters



Increased accuracy of water bills



Quicker identification of leaks



Ease of automatic meter reading

Nice to have

Secondary benefits

Benefits likely not considered before installation reflecting less compelling reasons to install smart water meters **in isolation**



Environmental benefit



Peace of mind



Future proofing / planning

The benefits of bill accuracy



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Primary benefit

Financial forecasting and managing cash flow problems

Consistent and reliable billing of water use allows businesses to predict bills and plan budgets with greater certainty.

This allows smaller contingency budgets for water, that can be reallocated elsewhere (more valuable in smaller businesses with lesser disposable income)

Helpful in disputing bill discrepancies

Regular and accurate data around water usage reassures businesses they can dispute bill discrepancies quickly and with more success.

Businesses are aware of other businesses experiences dealing with lengthy disputes over bills and look to avoid this themselves.

“We’re a small business, and because we’d sometimes forget to take our meter reading, or send it late, we’d be given estimates. It created turbulence in our cash flow which is difficult to manage, but now we’ve been able to control that”

“We received an invoice some £70,000 over what we usually pay. With the smart meter, we were able to quickly investigate the cause of this. It transpired we had been paying for a nearby factories water, as well as our own”

Both water dependent and non-dependent businesses identified short and long-term practical benefits

Primary benefit

Short term

Incentivising workforce to use less water

Non-water essential businesses encourage employees to use less water and in some cases display water meter readings as an incentive to keep costs down.

Possibility of negotiating an improved tariff or switching provider

Awareness of this benefit was low but interest in pursuing this in the future high, although perceived cost-saving expected to be minimal.

Identifying inefficiencies in business machinery

Meters shows peaks in water use that helps identify faulty appliances or ways businesses is using water inefficiently (e.g. dishwashers running out of hours)

Long term

Quicker identification of leaks

Many businesses have previously experienced, or heard of instances where unreported leakages resulted in high water bills. Quicker detection of leaks is considered more of a cost-saving benefit vs. environmental.

Prolonging durability of infrastructure

Businesses can delay replacing old infrastructure (pipes, boilers etc. presenting significant cost) if leaks and malfunctions are quickly identified and repaired.

“
It's funny, you get obsessed with it. It makes you more aware you're paying for it and staff have definitely tried limiting water use where they can
”

“
Our bill's been reduced by 10%. That's a result of people being more aware of how much water they're using
”

“
We have old Victorian pipes supplying our water which need replacing, quicker detection of leaks means we can put off replacing them a little longer
”

“
“Our water usage wasn't reducing proportionally to the number of people in the office. The smart water meter identified water fountains running, coffee machines running cleaning cycles, dishwashers cleaning etc all when nobody was in the office. It's highlighted easy changes that will save us money, and lessen wastage”
”

Automatic water meter reading saves time and hassle and reaffirms trust of paying for what is actually used



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Primary benefit



Time-saving benefits

Businesses with larger premises value time saved travelling across multiple sites to take readings.



Eliminates access issues

Water companies physically reading meters requires constant access, and customer disturbance – a challenge to some businesses.



Reaffirms trust in water company

For those having experienced erroneous readings by water company or billing disputes, smart water meters reassure businesses they are paying for what they use.

“ We’re on a 5 acre estate, so it’s a lot of walking to get from one meter to the next ”

“ There were a couple instances where they’d [water company] got the reading wrong, so we just wanted to take control ”

“ It was just a hassle because for them to get to the meter we had to make sure the gates were left open, move all the trucks. So it just meant we didn’t have to do that every time they wanted to take a reading ”

Although environmental benefits are not top of mind, they are valuable to businesses looking to the future



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Secondary benefit

Awareness of smart water meters environmental benefits was low

Businesses where their brand promotes *environmental consciousness* are more likely to appreciate these benefits

Quicker identification and repair of leaks was associated as being a financial benefit rather than an environmental one

Recognised environmental benefits included:

Sense of civic responsibility

Businesses feel it is their responsibility to be environmentally responsible with their water usage, and smart water meters helps to fulfil this

Enviro-credentials can help boost client development

Public facing businesses with sustainability credentials may promote use of smart water meters to clients to position themselves as sustainable business to partner with.

Future-proofing against water-use policy change

Installing smart water meters protects businesses against future policy change regulating water consumption.



It aligns with how we want to present our company to customers, that we're building for the future, for a better tomorrow. Environmentalism is part of our offering to clients and smart meters are a part of that.



Automated meter reading provides greater peace of mind and becomes 'one less thing to think about'



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Secondary benefit



Reducing the thought process

Generally, businesses are happy to relinquish all responsibility to their smart water meter



Removes human error

Businesses recognise human error can occur in reading meters (both by employees and water companies), smart water meters reaffirms trust in accuracy of the reading



Provides regular, on time readings

Automatic readings ensure businesses avoid entering late readings resulting in meter estimates that fluctuate monthly bills



Easy access to usage data

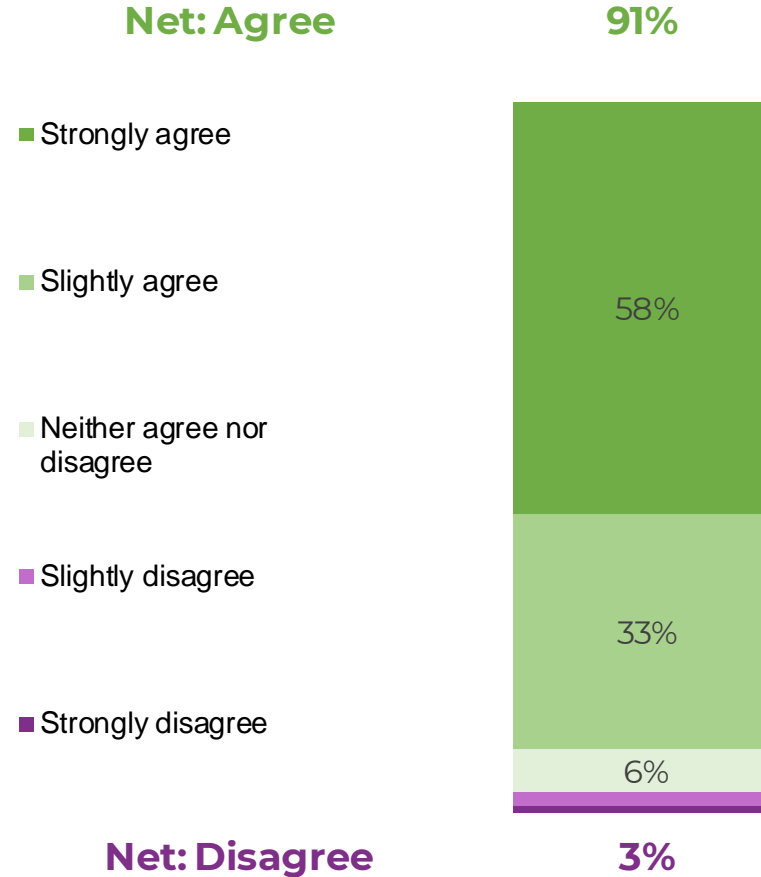
Quick and easy access to usage, bills, and prepayment balance helps reaffirm peace of mind

“
It just makes everything that little bit easier. We can choose to engage and look into our water usage at our own convenience. There's no lag time. It makes our life simpler.
”

“
I guess trust had gone a bit. It turned out the water company had read the meter wrong on a couple of occasions. Mistakes happen, but this just corrects that
”

9 in 10 of those who claim to have a smart water meter find that it provides useful information for their business

Claimed usefulness of smart water meter information



Labels under 4% are not shown

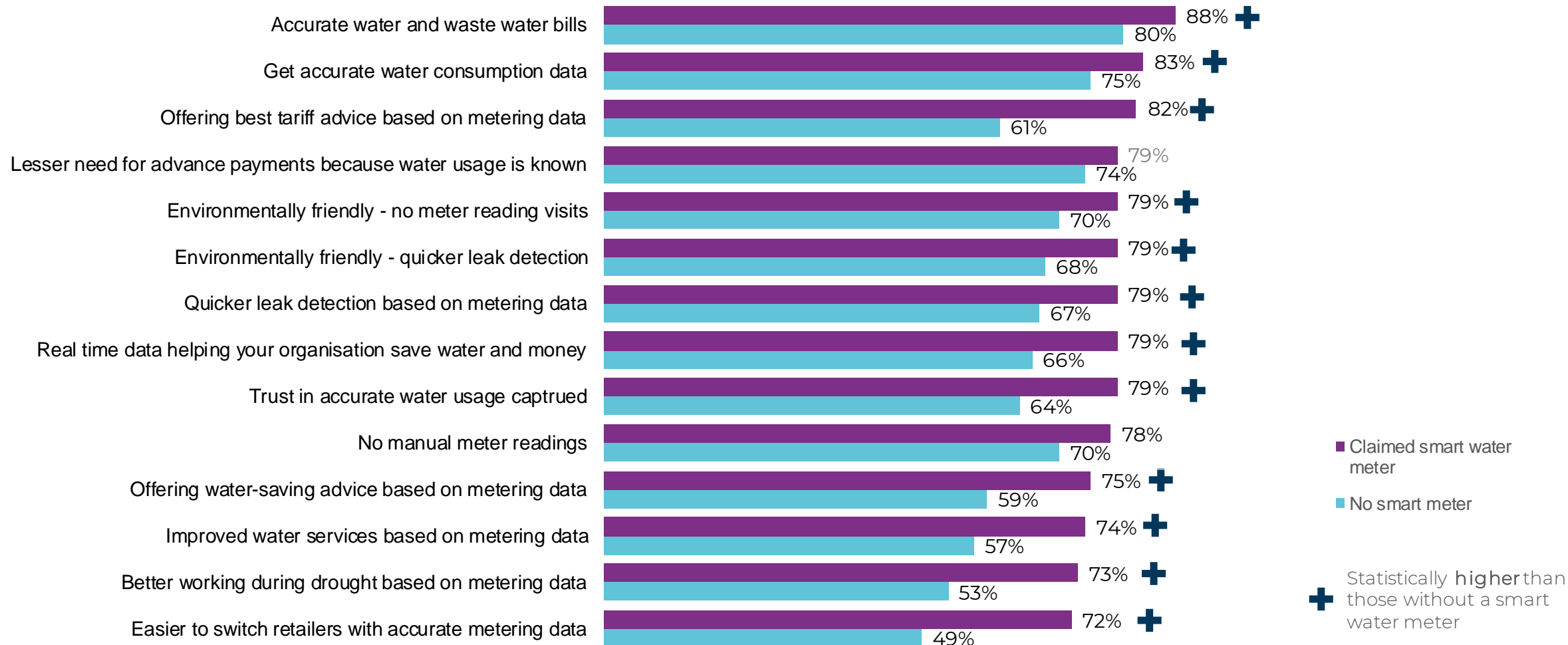
Q.10 To what extent do you agree or disagree with the following statement: My organisation's smart water meter provides useful information for the organisation? Base: All respondents who claim to have a smart water meter (313)

Those with a smart water meter are more likely to be experiencing most of these benefits



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Net: Agree for having seen benefits from having a water meter by claimed smart water meter ownership



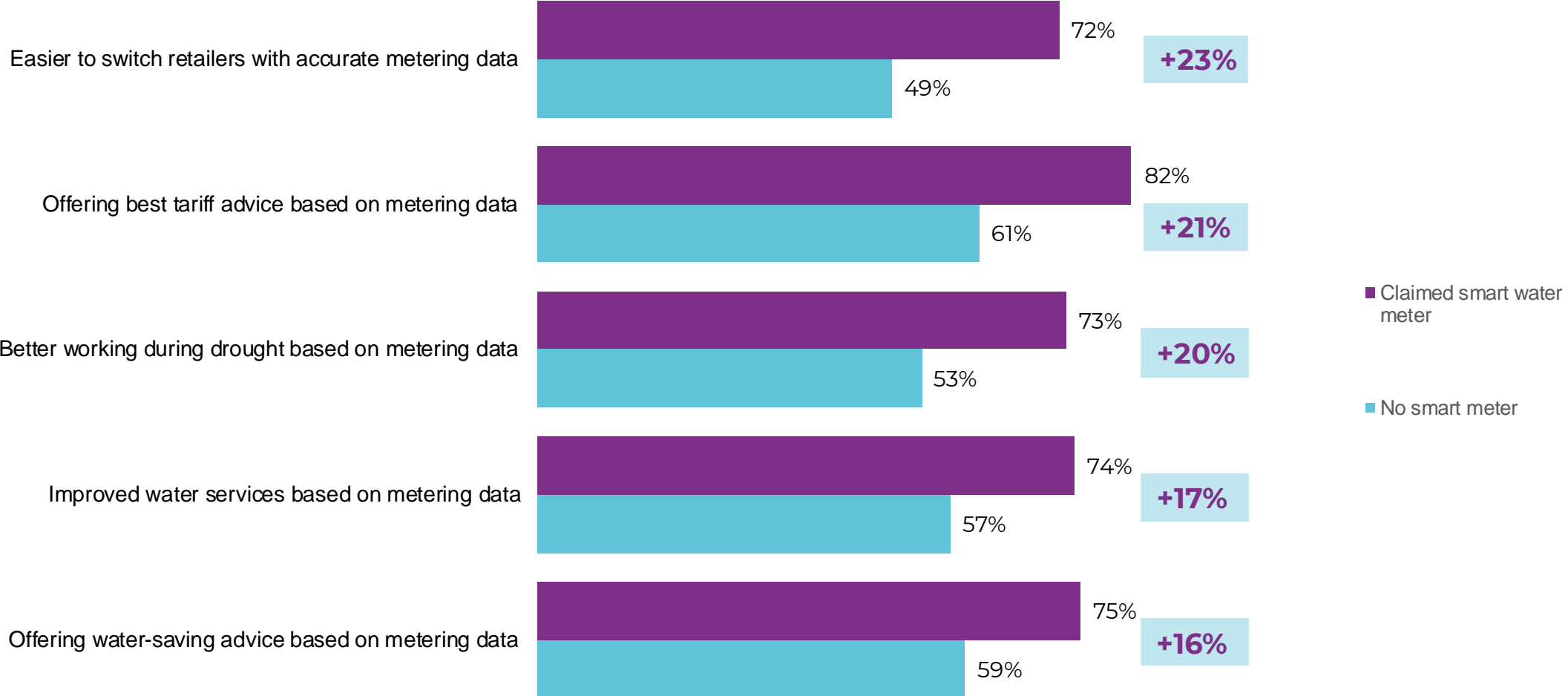
Benefit descriptions have been truncated for clarity, see Appendix for full descriptors
 Q.17 To what extent do you agree or disagree that you have seen these benefits from having a water meter? Base: All respondents who claim to have a smart water meter (313), All respondents who don't have a smart meter (148)

Those with a smart water meter are particularly more likely to see improved switching, tariff advice and functionality during drought, compared to those with non-smart meters



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Top 5 benefits more noticed by those with a smart water meter

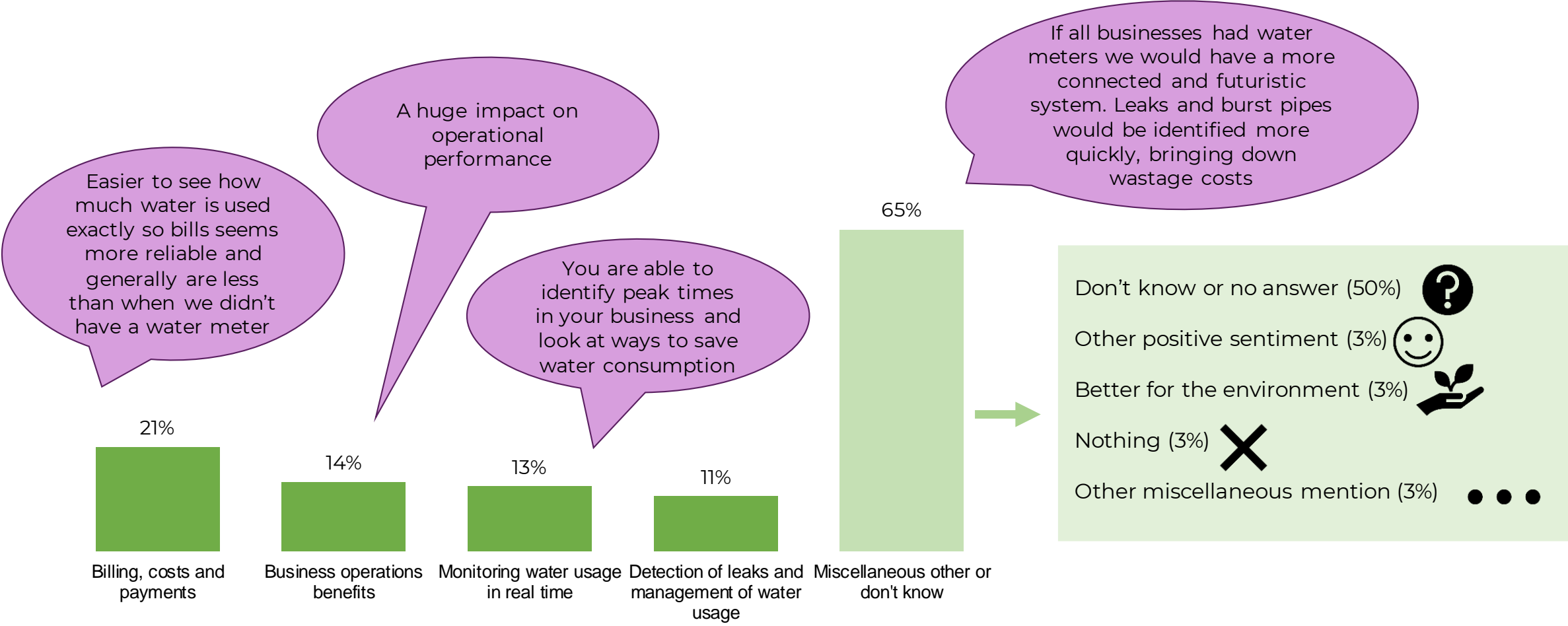


Majority don't know what other benefits would come with having a smart water meter, but a fifth cite benefits for billing, costs and payments



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Other potential benefits of a smart water meter, after seeing the MaxDiff



Easier to see how much water is used exactly so bills seems more reliable and generally are less than when we didn't have a water meter

A huge impact on operational performance

You are able to identify peak times in your business and look at ways to save water consumption

If all businesses had water meters we would have a more connected and futuristic system. Leaks and burst pipes would be identified more quickly, bringing down wastage costs



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Practicalities of smart water meter rollout



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Insight into drawbacks to installing smart water meters, including the initial installation cost

Whilst unlikely to deter installation, perceived drawbacks reflect potential areas to clarify in future

Downtime of operations during installation

Businesses expect that they will need to cease operations during installation. In reality the speed of installation was surprising

Data security

Question where water usage data is saved and how it could be used

Mobile data issues

Questions over whether smart water meters will function properly if business premises located in an area with poor signal

Inability to revert back

Businesses are cautious of being 'Guinea pigs' for new technology in case something goes wrong and it is not possible to revert back to a previous metering system

Installation costs are perceived as a worthwhile investment rather than a drawback

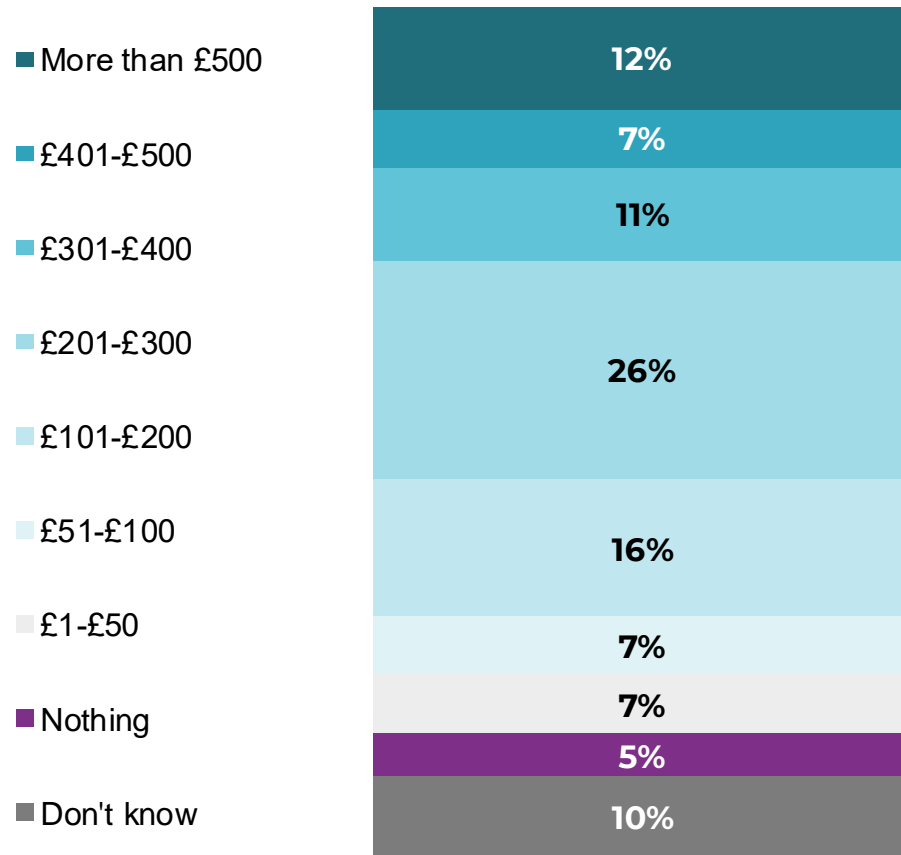

Our qualitative sample did not pay directly for installation of meter

- + Retrospective claims were made that they would have accepted paying for installation based on significant benefits to their organisation
- + Framing promotion of smart water meters around **investing now** to save in the future expected to counteract opposition to installation cost (provided businesses are educated on how smart water meters facilitate this)
- + Time-savings and 'peace of mind' alone are considered enough to pay for smart water meters (for larger businesses), although financial benefits are more widely accepted to warrant installation costs

"I'd rationalise the cost by thinking of it as an investment. We've seen a 10-15% reduction in our water bill. Multiply it over a few years and that's paid for the installation and is actually saving money"

Majority see at least some monetary value in receiving regular data on their water usage, with the size of the organisation and the number of premises affecting this significantly

Perceived monetary value of receiving data on water usage, with means per subgroup

The total mean monetary value estimate is **£255.12**

Large businesses* estimate the monetary value to be significantly higher at **£315.72**, likely reflecting the estimated bigger savings they could have on their annual water bill



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Key findings



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- There is support amongst business consumers for the rollout of smart water meters and the perceived benefits have genuine appeal.
- Those aware of smart water meters most readily associated it with financial and time-saving benefits, with environmental benefits being less top of mind.
- There are some concerns when it comes to the installation process as water-essential businesses are very sensitive to interruptions to their water supply and have limited understanding of what the installation process entails.

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Appendix



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The benefits tested



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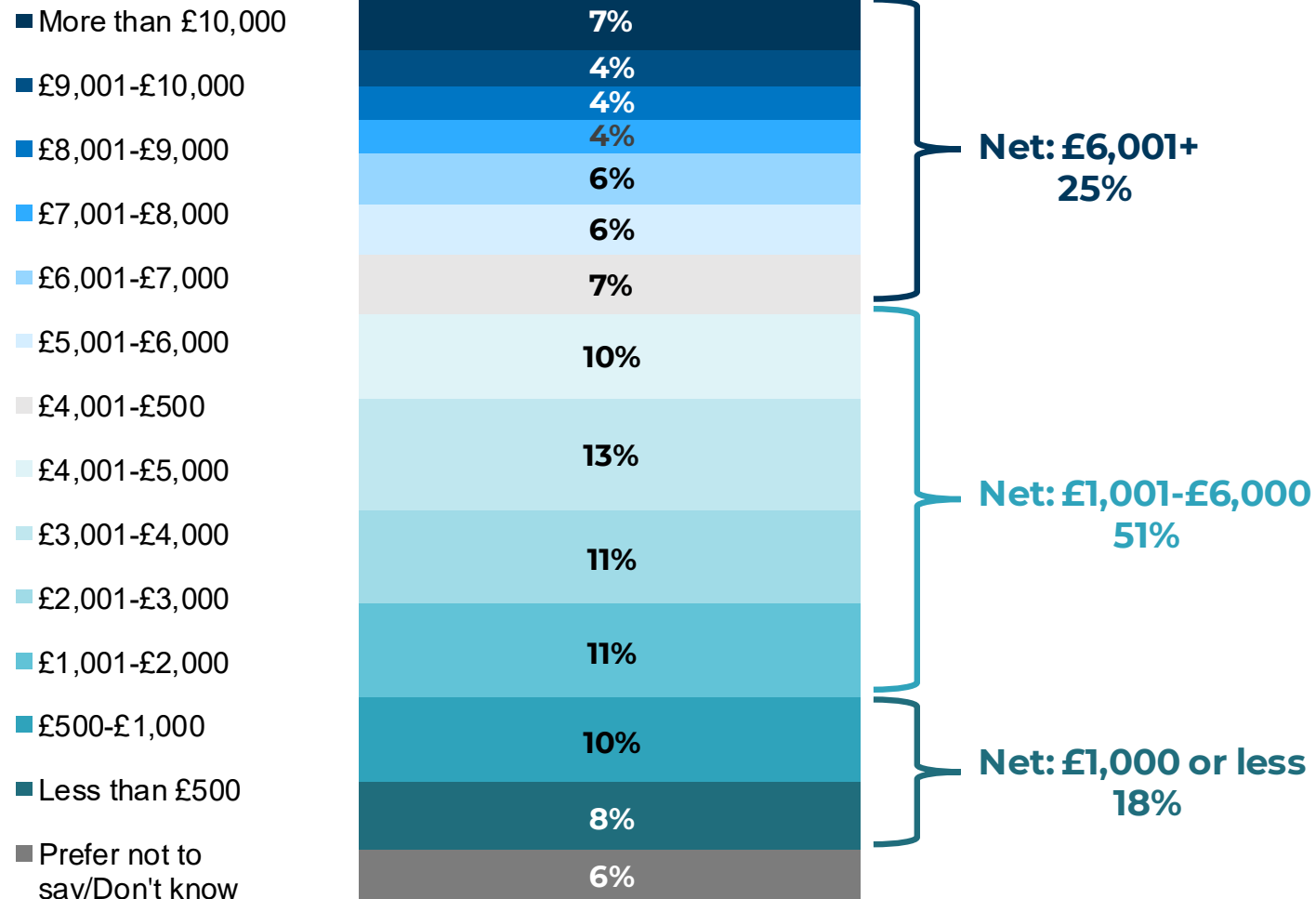
| Shown in the survey | Truncated for the report |
|--|---|
| Data on your organisation's water use in real time, so you can work out ways to save water and money. This result in both financial and environmental benefits | Real time data helping your organisation save water and money |
| Accurate water and waste water bills | - |
| Metering data can be used to offer advice on how your organisation can save water | Offering water-saving advice based on metering data |
| Metering data can be used to identify leaks at your organisation's premises to offer help more quickly and avoid a high/unexpected water bill | Quicker leak detection based on metering data |
| Metering data can be used to understand your organisation's water usage more accurately to offer advice on the best tariff | Offering best tariff advice based on metering data |
| Easier to switch retailer, as your organisation will have accurate, up-to-date water meter readings | Easier to switch retailers with accurate metering data |
| No need for anyone within your organisation to manually read the water meter, nor for meter reading visits by your water company | No manual meter readings |
| Get accurate water consumption data for your organisation | Get accurate water consumption data |
| Greater trust in your organisation's water company and retailer accurately capturing your water usage | Trust in accurate water usage captured |
| More environmentally friendly because your water meter can be read remotely | Environmentally friendly – no meter reading visits |
| More environmentally friendly because quicker leakage detection reduces the amount of water processing needed | Environmentally friendly – quicker leak detection |
| No need or reduced need for advance payments, because the water company has an accurate picture of your organisation's water usage | Lesser need for advance payments because water usage is known |
| Metering data will allow your organisation, the retailer and the water company to work better in times of drought | Better metering data during drought |
| Metering data could allow your retailer to offer other improved water services | Improved water services based on metering data |

Half of respondents paid between £1,001 and £6,000 for the last annual water bill



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Approximate water bill for the last 12 months

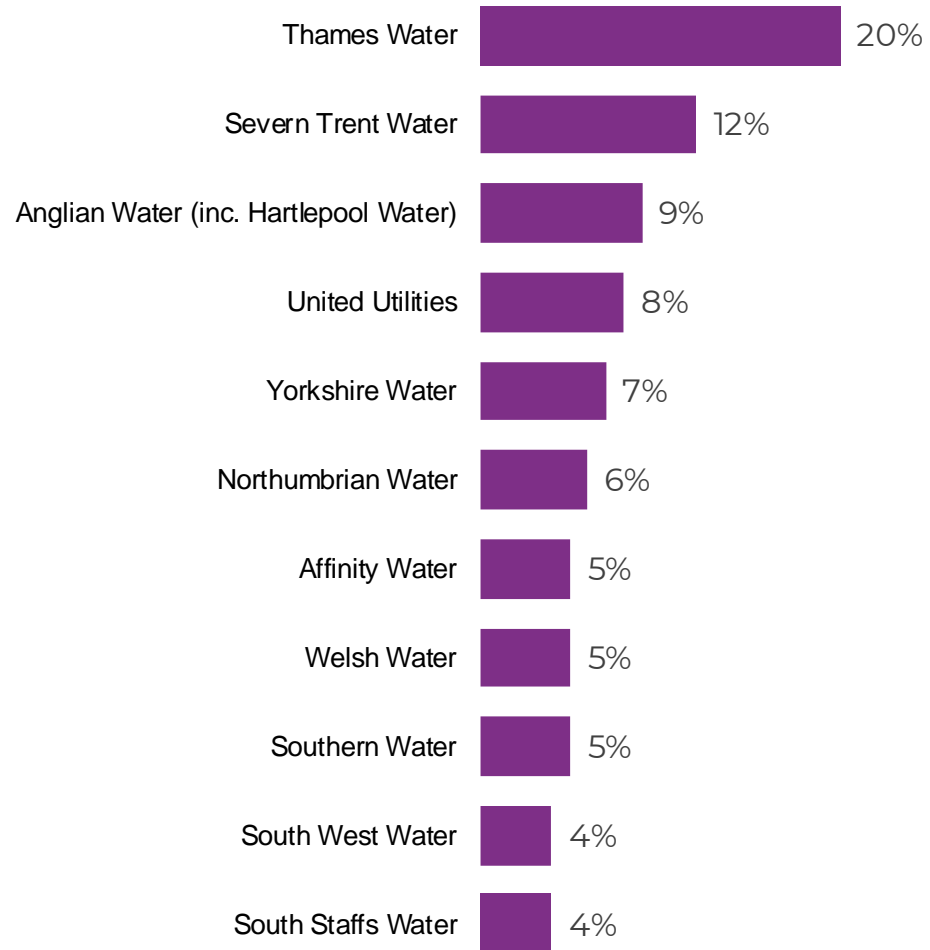


Q. 11 Please indicate the approximate amount your water bill was for the last 12 months 39

Base: All respondents (524)

A fifth of respondents surveyed use Thames Water for their businesses' water services

Which water company provides their businesses' water services



Results under 4% are not shown

Q12. Which water company provides your organisation's water services? 40

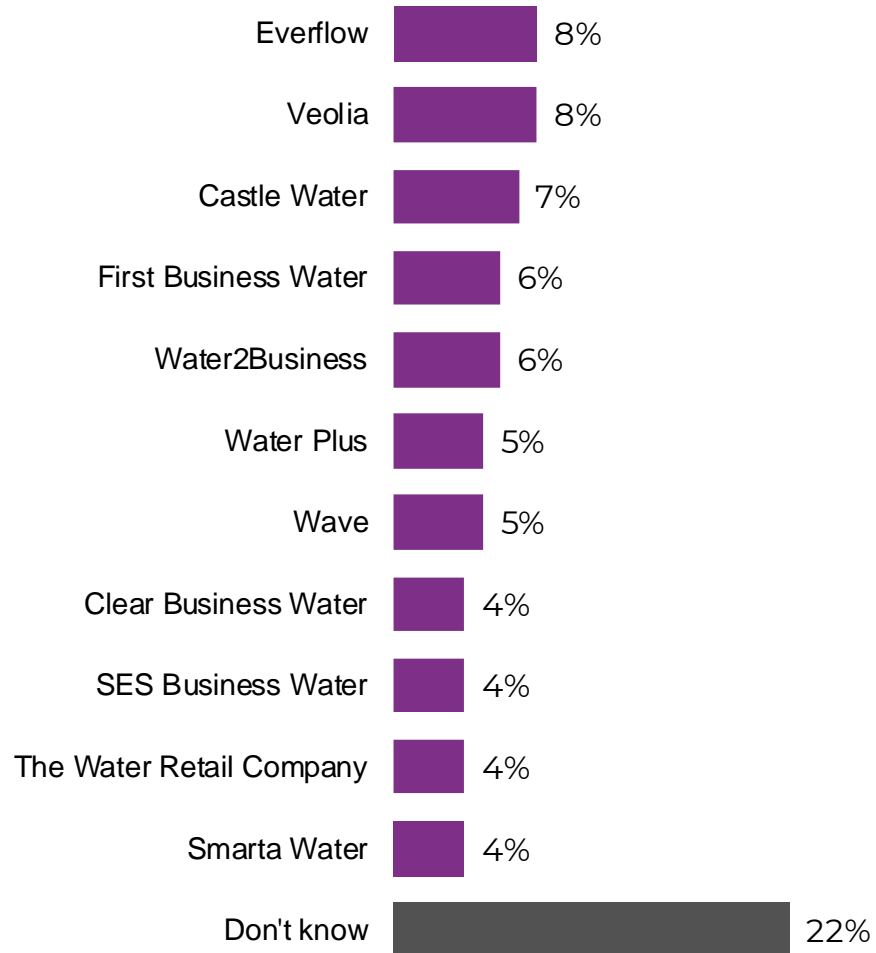
Base: All respondents (524)

There is a wide spread of water retailers among the sample



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Which water retailer services their business

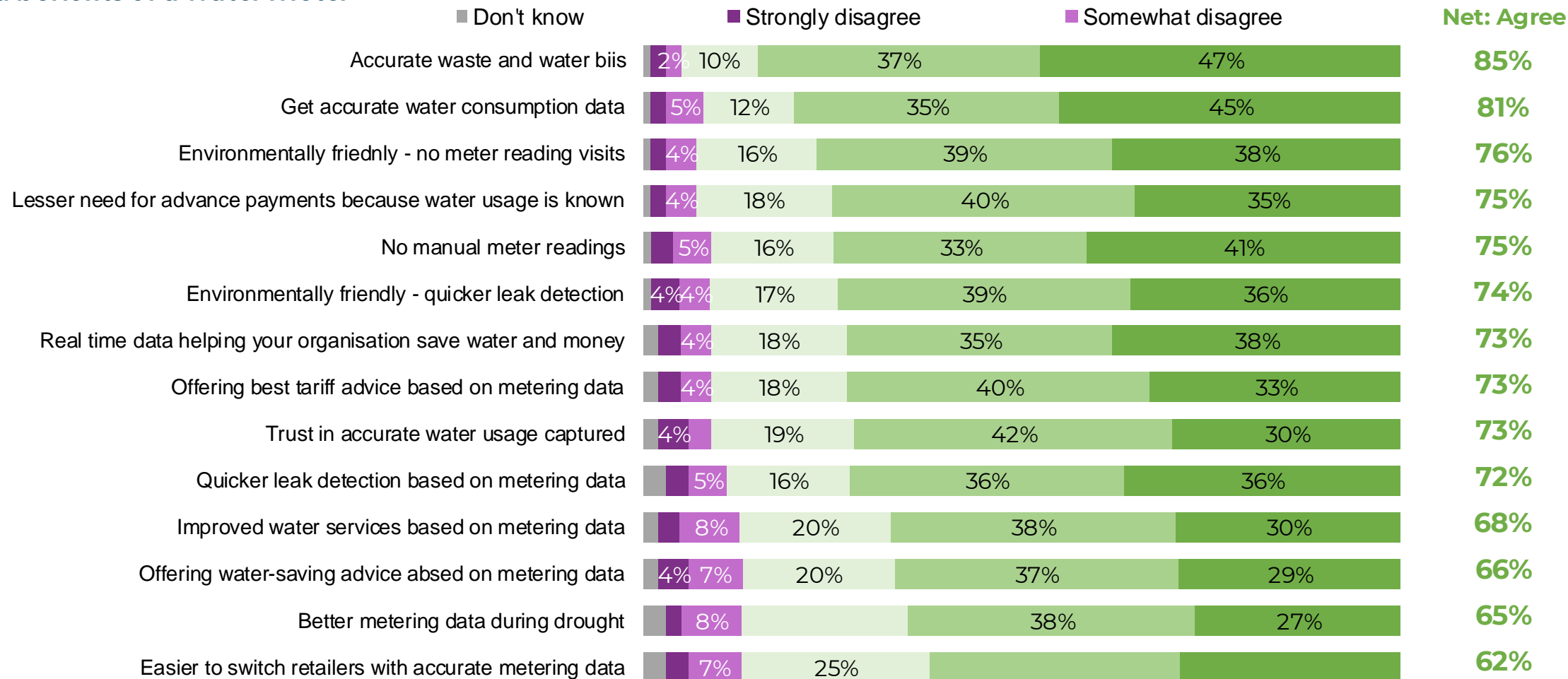


Most noticed benefit of having a water meter is to do with getting accurate bills and getting data in real time to save both water and money



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Perceived benefits of a water meter



Labels under 4% are not shown

Q.17 To what extent do you agree or disagree that you have seen these benefits from having a water meter?

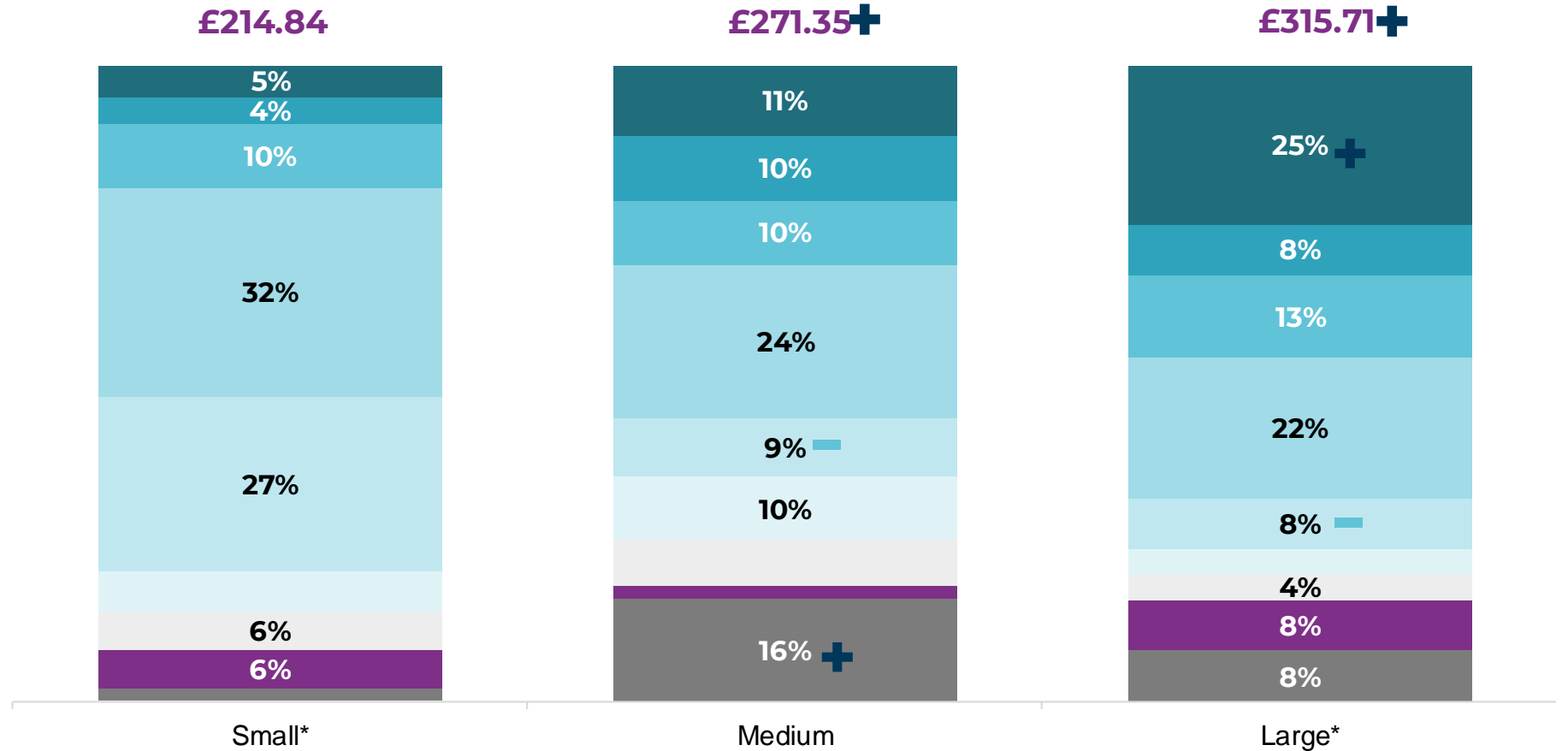
Base: All respondents (524)

Bigger organisations are more likely to place a bigger monetary value on receiving data on their water usage

Perceived monetary value of receiving data on water usage by company size

Mean value

- More than £500
- £401-£500
- £301-£400
- £201-£300
- £101-£200
- £51-£100
- £1-£50
- Nothing
- Don't know



— Statistically lower than those from small companies + Statistically higher than those from small companies



A large, stylized, light blue 'CCW' logo is positioned in the background, spanning across the right side of the image. It is rendered in a thick, rounded, cursive font with a slight 3D effect.

ccw

The voice for water consumers
Llais defnyddwyr dŵr

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