Objectives & Methodology

• The purpose of this research project was to ascertain the level of demand for advanced metering systems amongst consumers and to explore the opportunity amongst water utilities.

• This project consisted of two components:
  • N=751 online surveys amongst Australian residents, and
  • N=33 phone interviews amongst Water Utility Executives.

• The location breakdown for the consumer component is set out below:

<table>
<thead>
<tr>
<th>Region</th>
<th>Sample Size</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW / ACT</td>
<td>255</td>
<td>34%</td>
</tr>
<tr>
<td>VIC / TAS</td>
<td>210</td>
<td>28%</td>
</tr>
<tr>
<td>QLD / NT</td>
<td>120</td>
<td>16%</td>
</tr>
<tr>
<td>WA</td>
<td>83</td>
<td>11%</td>
</tr>
<tr>
<td>SA</td>
<td>83</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Total (n=751)</strong></td>
<td></td>
<td><strong>34 28 16 11 11</strong></td>
</tr>
</tbody>
</table>

• A list of the water utility companies interviewed is appended to this document.
Section A:

Water Utilities - Executives
Just under one third (30%) of water utility executives rated themselves as being outstanding (A) or very good (B) at providing their customers with detailed, timely information on their water consumption.

Almost all (94%) water utility executives claimed to be actively promoting water conservation, with education programmes in schools being the most common form of promotion (39%).

One third of all water utilities claimed to have invested in billing software that allows them to employ variable rate billing, and half of these utilities had implemented variable rate billing.

Over 8 out of 10 (82%) of water utilities agreed that ‘it is critical that water utilities adopt smart meter technologies’.

42% of all water utilities had performed a cost benefit analysis regarding the implementation of smart meter technologies. The top two results of the analysis were that; there ‘wouldn’t be enough benefit/too costly for small effect’ (36%), and that the ‘investment can’t be justified until there is a proven product’ (21%).

Over half of all water utility executives indicated that their organisation had assessed the opportunity for smart meter technology and a further 27% indicated their organisation had implemented a pilot smart meter program, with the primary motivation cited for doing so being to alleviate the pressure on a limited resource.
Summary of Key Findings - Executives

- Over half (52%) of all water utilities main concern with considering or implementing smart meter technologies were the capital costs associated with doing so.

- The most commonly cited benefits associated with smart meter technologies for water utilities were ‘suppling customers with the tools to monitor and reduce water usage’ (55%) and ‘providing more accurate water rates’ (48%).

- The top barriers mentioned by water utility executives to implementing smart meter technologies were that the technology is untried (30%), the lack of cost recovery or measurable ROI (27%) and a lack of customer interest (27%).

- Nearly half (45%) of all water utilities claimed to be using Automated Meter Reading (AMR), with 40% of these executives claiming that there are enough benefits associated with smart meter technologies to cause them to replace AMR within the next three years.
**Perceived Ability to Provide Water Consumption Information**

30% of Water Utilities perceive themselves as being outstanding/very good at providing customers with detailed, timely information on their water consumption.

**Q3.** Please grade your organisation’s current ability to provide customers with detailed, timely information on their water consumption. Please rate using letter grades, where A is “outstanding” and F is “failing.”

Base: Water Utilities (n=33)
### Challenges Facing the Water Utilities Industry

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Total (n=33)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of water / Water security</td>
<td>42%</td>
</tr>
<tr>
<td>Climate change</td>
<td>12%</td>
</tr>
<tr>
<td>Consumer education / Acceptance of change</td>
<td>12%</td>
</tr>
<tr>
<td>Metering / Getting satisfactory meters</td>
<td>12%</td>
</tr>
<tr>
<td>Population growth / Keeping pace with it</td>
<td>9%</td>
</tr>
<tr>
<td>Keeping customers informed / Communication</td>
<td>6%</td>
</tr>
<tr>
<td>Providing customers with the tools to manage their water better</td>
<td>6%</td>
</tr>
<tr>
<td>Pricing</td>
<td>6%</td>
</tr>
<tr>
<td>Conserving it / Conservation issues</td>
<td>6%</td>
</tr>
<tr>
<td>Demand management</td>
<td>6%</td>
</tr>
<tr>
<td>The water reform process / New standards</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q4. In your opinion, what do you think is the biggest challenge currently facing the water utilities industry?

“Lack of water / water security” emerged as the most commonly cited challenge currently being faced by the water utilities industry.
Water Conservation Promotion & Activities

94% of Water Utilities claimed to actively be promoting water conservation

<table>
<thead>
<tr>
<th>Utilities actively promoting water conservation (n=31)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education programmes in schools</td>
<td>39</td>
</tr>
<tr>
<td>A water wise program / Community programs</td>
<td>29</td>
</tr>
<tr>
<td>Advertising / Media campaigns</td>
<td>29</td>
</tr>
<tr>
<td>Restrictions</td>
<td>23</td>
</tr>
<tr>
<td>Information on our website</td>
<td>23</td>
</tr>
<tr>
<td>Working with industrial users / Councils to promote efficiency</td>
<td>23</td>
</tr>
<tr>
<td>Provide water tips / in local papers / brochures</td>
<td>23</td>
</tr>
<tr>
<td>Marketing / Promotion at community events</td>
<td>19</td>
</tr>
<tr>
<td>Rebates on installation of water efficient products</td>
<td>16</td>
</tr>
<tr>
<td>We have a whole department team dedicated to it</td>
<td>13</td>
</tr>
<tr>
<td>Provide water saving devices</td>
<td>10</td>
</tr>
<tr>
<td>Have a leak detection program</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>29</td>
</tr>
</tbody>
</table>

Q5. Does your utility actively promote water conservation?

Q6. What does your utility do to promote water conservation?
Q7. Has your utility invested in updated billing software that allows you to employ variable rate billing? I will read three options, and ask you to indicate which one of these statements best applies.

- Yes, we have invested in this software (33%)
- No, and we are not planning to invest in the next two years (43%)
- No, but we are planning to invest in the next two years (12%)
- Unsure (12%)

Base: Water Utilities (n=33)

Q8. Does your utility currently employ variable rate billing?

- Yes (55%)
- No (45%)

Base: All respondents who invested in Billing software (n=11)
Adoption of Smart Meter Technologies

82% of water utility executives agreed that "It is critical that water utilities adopt smart meter technologies"

Q9. How do you feel about the following statement: It is critical that water utilities adopt smart meter technologies. Do you:

- **Strongly agree** - 18
- **Agree** - 64
- **Disagree** - 15
- **Strongly disagree** - 3

Base: Water Utilities (n=33)
Performance & Results of a Cost-Benefit Analysis

Incidence of Performing a Cost-Benefit Analysis

Yes 42%
No 49%
Unsure 9%

Results of the Cost-Benefit Analysis

<table>
<thead>
<tr>
<th>Water Utilities that have Performed an Analysis (n=14)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not enough benefit/too costly for small effect</td>
<td>36</td>
</tr>
<tr>
<td>We can't justify investment until there is a proven product</td>
<td>21</td>
</tr>
<tr>
<td>Positive results/we’d be better off with it</td>
<td>14</td>
</tr>
<tr>
<td>We need to look at it in more detail</td>
<td>7</td>
</tr>
<tr>
<td>Not been implemented yet because of high associated costs</td>
<td>7</td>
</tr>
<tr>
<td>We are still at the implementation stage</td>
<td>7</td>
</tr>
<tr>
<td>Don't know</td>
<td>7</td>
</tr>
</tbody>
</table>

Q10. Has your utility performed a cost-benefit analysis regarding the implementation of smart meter technologies.

Q11. What were the results of your cost-benefit analysis?

Base: Water Utilities (n=33)
Steps Taken Toward Enabling Smart Meter Technology

Over half of all water utility executives indicated that their organisation had assessed the opportunity for smart meter technology and a further 27% indicated their organisation had implemented a pilot smart meter program.

Q12. We are interested in learning what steps your organisation has taken toward enabling smart meter technologies. I will read a list of implementation checkpoints and ask you to indicate the furthest step your organisation has taken towards smart metering.

Base: Water Utilities (n=33)
Water utility executives who have assessed the opportunity for smart meter technologies estimated that on average 20% of their customers would make use of consumption data generated by smart meter technologies.

Q13. In your opinion, what percentage of your customers would make use of consumption data generated by smart meter technologies? Can you provide an estimate from 0-100%, or advise if you are unsure.

Base: All respondents who has assessed the opportunity for smart meter technologies (n=18)
Interest & Participation in Smart Meter Program

The implementation of a pilot smart meter program amongst utilities interviewed was too small to base any firm findings on and as such the results below are reported as raw scores rather than percentages.

### Customer Interest in Smart Meter Program

<table>
<thead>
<tr>
<th>Interest Level</th>
<th>Water utilities that have implemented a pilot smart meter program (n=9)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interested</td>
<td>n = 2</td>
</tr>
<tr>
<td>Not very interested</td>
<td>n = 5</td>
</tr>
<tr>
<td>Unsure</td>
<td>n = 2</td>
</tr>
</tbody>
</table>

### Customers Currently Participating in Smart Meter Program

<table>
<thead>
<tr>
<th>Participation Level</th>
<th>Water utilities that have implemented a pilot smart meter program (n=9)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>n = 2</td>
</tr>
<tr>
<td>1%</td>
<td>n = 5</td>
</tr>
<tr>
<td>10%</td>
<td>n = 1</td>
</tr>
<tr>
<td>Unsure</td>
<td>n = 1</td>
</tr>
</tbody>
</table>

Q14. On average, how interested are customers in your organisation’s smart meter program?

Q15. What percentage of your customers currently participate in your smart meter program?

* Extremely small base – view results with caution
Primary Motivation for Considering or Implementing Smart Meter Technology

Just under a third of all water utilities who are considering or have implemented smart meter technology are doing so to alleviate the pressure on a limited resource.

- **Alleviating pressure on a limited resource**: 30%
- **Regulatory requirements**: 11%
- **Customer demand**: 11%
- **Competition**: 4%
- **Efficient billing methods**: 4%

Q16. What is your organisation’s primary motivation for considering or implementing smart meter technologies?

Base: All water utilities who are considering or implemented smart meter technology (n=27)
**Concerns with Smart Meter Technology**

*Over half* of all water utilities *main concern* with considering or implementing smart meter technologies were the *capital costs* involved with doing so.

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital costs</td>
<td>52%</td>
</tr>
<tr>
<td>Operating costs</td>
<td>39%</td>
</tr>
<tr>
<td>Reliability of the technologies</td>
<td>39%</td>
</tr>
<tr>
<td>Service quality</td>
<td>30%</td>
</tr>
<tr>
<td>Compatibility of this new technology with existing systems</td>
<td>30%</td>
</tr>
<tr>
<td>Incremental costs to customers</td>
<td>18%</td>
</tr>
<tr>
<td>Customer engagement/getting them interested</td>
<td>9%</td>
</tr>
<tr>
<td>Security</td>
<td>6%</td>
</tr>
<tr>
<td>Time required to implement</td>
<td>3%</td>
</tr>
<tr>
<td>My organisation does not have concerns</td>
<td>3%</td>
</tr>
<tr>
<td>Governance of use</td>
<td>3%</td>
</tr>
<tr>
<td>Unsure</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q17. What concerns does your utility have as you consider or implement smart meter technologies?

Base: Water utilities (n=33)
Customers Who Would Utilise Smart Meter Technologies if Available

Water utilities who are not currently considering a smart meter program estimated that **on average 13%** of their customers would **utilise smart meter technologies** if available.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Number (n)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>2</td>
</tr>
<tr>
<td>20%</td>
<td>3</td>
</tr>
<tr>
<td>Unsure</td>
<td>6</td>
</tr>
</tbody>
</table>

*Extremely small base – view results with caution*
**Most Significant Benefits Associated with Smart Meter Technology**

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplying customers with the tools to monitor and reduce water usage</td>
<td>55</td>
</tr>
<tr>
<td>Providing more accurate water rates</td>
<td>48</td>
</tr>
<tr>
<td>Enabling early leak detection</td>
<td>27</td>
</tr>
<tr>
<td>Offering even-flow payment programs</td>
<td>21</td>
</tr>
<tr>
<td>Curbing overall water demand</td>
<td>12</td>
</tr>
<tr>
<td>Enforcing water regulations</td>
<td>6</td>
</tr>
<tr>
<td>Improving ability to conduct preventative maintenance</td>
<td>6</td>
</tr>
<tr>
<td>Water efficiency</td>
<td>6</td>
</tr>
<tr>
<td>Efficiency of our infrastructure</td>
<td>3</td>
</tr>
<tr>
<td>Ability to read difficult to get to places</td>
<td>3</td>
</tr>
<tr>
<td>Cost benefit</td>
<td>3</td>
</tr>
<tr>
<td>Unsure</td>
<td>3</td>
</tr>
</tbody>
</table>

Q19. In your opinion, what are the top two most significant benefits associated with smart meter technologies for water utilities?
### Most Significant Roadblocks to Implementing Smart Meter Technology

<table>
<thead>
<tr>
<th>Roadblock</th>
<th>Total (n=33)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Untried technology</strong></td>
<td>30</td>
</tr>
<tr>
<td>Lack of cost recovery on full investment or measurable return on investment</td>
<td>27</td>
</tr>
<tr>
<td>Lack of customer interest</td>
<td>27</td>
</tr>
<tr>
<td>Ageing technology infrastructure</td>
<td>21</td>
</tr>
<tr>
<td>Up-front customer expenses required</td>
<td>18</td>
</tr>
<tr>
<td>Unclear customer benefits</td>
<td>12</td>
</tr>
<tr>
<td>Data retention and management complexity/cost</td>
<td>12</td>
</tr>
<tr>
<td>Lack of industry support</td>
<td>9</td>
</tr>
<tr>
<td>Up-front utility expenses required</td>
<td>9</td>
</tr>
<tr>
<td>Capital cost NFI</td>
<td>9</td>
</tr>
<tr>
<td>Uncertainty regarding the best format and frequency for presenting data internally and to customers</td>
<td>6</td>
</tr>
<tr>
<td>Additional costs for maintenance to the new system</td>
<td>3</td>
</tr>
<tr>
<td>The technology is more suited to densely populated areas than we have</td>
<td>3</td>
</tr>
<tr>
<td>Not universal, not been adopted around Australia yet</td>
<td>3</td>
</tr>
<tr>
<td>Unsure</td>
<td>3</td>
</tr>
</tbody>
</table>

Q20. In your opinion, what are the top two most significant major roadblocks to implementing smart meter technologies?
Usage of AMR Incidence and Future AMR Intentions

45% of Water Utilities claimed to be using Automated Meter Reading (AMR)

Replacement of AMR with Smart Meter

- Yes: 40%
- No: 60%

Plan to implement AMR

- Yes: 55%
- No: 33%
- Unsure: 12%

Base: Water Utilities who use AMR (n=15)

Q21. Does your utility currently use Automated Meter Reading (AMR)

Q22. If your current AMR was completely amortized, do you believe there are enough benefits associated with smart meter technologies to cause you to replace your AMR with smart meters within the next three years?

Base: Water Utilities who don’t use an AMR (n=18)

Q23. Does your organisation have plans to implement AMR
## Reasons for Choosing AMR over Smart Meter Technologies

Q24. Why do you believe your utility chose AMR over smart meter technologies?

Water utilities who were planning on implementing AMR (n=9)*

<table>
<thead>
<tr>
<th>Reason</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart meter technology is too immature</td>
<td>4</td>
</tr>
<tr>
<td>The incremental smart metering benefits are not sufficient to justify the additional cost</td>
<td>4</td>
</tr>
<tr>
<td>Smart meter technology is too expensive</td>
<td>3</td>
</tr>
<tr>
<td>We would use them both / depending on application</td>
<td>3</td>
</tr>
<tr>
<td>Smart meter technology was not available at the time of the initial installation, so my organisation chose AMR</td>
<td>1</td>
</tr>
<tr>
<td>We’re currently reviewing both</td>
<td>1</td>
</tr>
</tbody>
</table>

* Extremely small base – view results with caution
Section B:
Water Utilities - Consumers
Summary of Key Findings - Consumers

- 40% of Australian consumers rated their water supplier a ‘B’, with over one third (35%) rating their water supplier a ‘C’ on their ability to provide detailed, useful information on their water use.

- Most (92%) consumers were concerned with the need to conserve water in their community and 8 out of 10 consumers were concerned with water costs in their home.

- 91% of consumers have intentionally taken steps to lower water usage in their home, with conserving water (83%) and the reduction of the current water bill (64%) being the top reasons for doing so.

- On average, consumers were doing five things around the home to reduce water use, with turning off the sink while brushing teeth or washing hands (78%) and limiting the time in the shower (78%) being the top two activities being undertaken by respondents.

- 7 out of 10 consumers who had not intentionally taken steps to lower water usage felt that they were already keeping their water use as low as possible and as such didn’t feel the need to take any further steps to reduce water in the home.

- Over one third (36%) of all consumers were interested in receiving more information on their current water use, with email being the preferred method of delivery (54%) and monthly intervals being the preferred frequency of receipt (46%).
Summary of Key Findings - Consumers

• Just over two thirds of all consumers were willing and able to decrease their personal water use, with ‘utility incentive / rebate for reduced use’ (mean score of 7.9) claimed to have the most impact on respondents to reduce their excess water use.

• On average, consumers estimated that they could realistically reduce their current water use by 9%.

• 59% of all respondents expressed interest in a complimentary online tool allowing them to monitor their water use and access detailed consumption and cost data on demand. Amongst those interested ‘graphs comparing your home’s month to month use’ (79%) and ‘estimated savings for different water-reduction initiatives’ (72%) were cited as being the most helpful aspects of information to access through the online tool.

• Amongst the respondents willing/unsure about paying a fee to support up-front costs, over half (53%) were willing to spend up to $20 on a one-off fee to support access to an online water consumption tool.

• The main advantage of a complimentary online water consumption tool was so consumers could see where they could lower their water use and what is using the most water (22%), with the main disadvantage being the cost/price increase (12%).
Summary of Key Findings - Consumers

• Over two thirds of consumers claim to be willing and able to decrease their personal water use. ‘Utility incentives or rebates for reduced use’ were felt to have the greatest potential to impact on reducing excess water use.

• On average, consumers estimated that they could realistically reduce their current water use by 9%.

• Few rejected the notion of a complimentary online tool allowing them to monitor their water use and access consumption and cost data. Aspects considered most helpful were graphs comparing month to month usage (79%) and savings estimates for various water-reduction initiatives (72%).

• Amongst respondents willing or unsure about paying a fee to support up-front costs, over half (53%) were willing to spend up to $20 on a one-off fee for the online tool.

• The main advantage of an online water consumption tool was to observe where water use is greatest and where it can be lowered (22%). The main disadvantage is the cost/pricing increase (12%).
More than ¾ of respondents are personally responsible for water costs.

Q4. Who is responsible for the water costs of your home?

Base: All respondents (n=751)
Q5. Thinking about your water supplier. Please grade your supplier on their ability to provide detailed, useful information on your water use. Please rate using letter grades, where A is “outstanding” and F is “failing.”

Base: Respondents who are responsible for water costs (n=579)
Top Ways in Which Water Utility can Better Meet Customers Needs

1. Ensure water quality \ cleaner water - 7%
2. Reduce the cost \ provide discounts - 6%
3. Provide subsidies \ finance for water tanks \ pay them off on water bill - 5%
4. Provide better \ stronger \ consistent pressure \ flow - 5%
5. Offering water saving tips \ info on devices - 5%
6. Give me regular \ more frequent \ detailed reports on usage - 4%
7. Keeping up the maintenance of the pipes \ infrastructure \ attend to leaks - 4%
8. Supply \ offer discounts on water saving devices - 3%

Q6. Aside from reducing your water prices, how could your utility supplier better meet your water needs?
Base: All Respondents (n=751)
Most (92%) Consumers were concerned with the need to conserve water in their community.

Q7. How concerned are you with the need to conserve water in your community?

Base: All respondents (n=751)
Concerned with Water Costs in the Home

Over 8 out of 10 consumers were concerned with water costs in their home

Q8. How concerned are you with the water costs of your home?

Concerned

- Very concerned: 41%
- Somewhat concerned: 40%
- Not very concerned: 14%
- Not at all concerned: 4%

Base: All respondents (n=751)
Reasons for Intentionally Reducing Water Usage in the Home

91% of Consumers have intentionally taken steps to lower water usage in the home

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total (n=680) %</th>
</tr>
</thead>
<tbody>
<tr>
<td>To conserve water</td>
<td>83</td>
</tr>
<tr>
<td>To reduce the cost of my current water bill</td>
<td>64</td>
</tr>
<tr>
<td>To adhere to state or local mandates requiring water reduction</td>
<td>44</td>
</tr>
<tr>
<td>To reduce water pollution in nearby rivers and lakes</td>
<td>17</td>
</tr>
<tr>
<td>Good for the environment \ the right thing to do</td>
<td>1</td>
</tr>
<tr>
<td>Put in water tanks \ a bore</td>
<td>1</td>
</tr>
<tr>
<td>Installed water saving devices</td>
<td>1</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>1</td>
</tr>
</tbody>
</table>

Q9. In the past twelve months, have you intentionally taken steps to lower your home’s water use?

Q10. Why have you taken steps to lower your water use?

Q9. Base: All respondents (n=751)  Q10. Base: Respondents who have lowered water usage (n=680)
## Most Commonly Cited Steps Taken to Reduce Water Use

On average consumers were doing **five** things around the home to reduce water use.

<table>
<thead>
<tr>
<th>Action</th>
<th>Total (n=680)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turning off sink while brushing teeth or washing hands</td>
<td>78</td>
</tr>
<tr>
<td>Limiting time in shower</td>
<td>78</td>
</tr>
<tr>
<td>Washing car less frequently</td>
<td>74</td>
</tr>
<tr>
<td>Restricting landscape watering</td>
<td>73</td>
</tr>
<tr>
<td>Repairing leaky faucets or toilets</td>
<td>63</td>
</tr>
<tr>
<td>Installing low flow shower heads</td>
<td>62</td>
</tr>
<tr>
<td>Installing low flow toilets</td>
<td>47</td>
</tr>
<tr>
<td>Installed water tanks / another tank / a bore</td>
<td>6</td>
</tr>
<tr>
<td>Using grey water</td>
<td>5</td>
</tr>
<tr>
<td>Using front loader washing machine / more economical machine</td>
<td>2</td>
</tr>
</tbody>
</table>

Q11. What steps have you taken to lower your water use? Please select all that apply.

Base: Respondents who have lowered water usage (n=680)
### Reasons Cited for Not Taking Steps to Reduce Water Use

7 out of 10 consumers who had not intentionally taken steps to lower water usage felt that they were already keeping their water use as low as possible and as such didn’t feel the need to take any further steps to reduce water in the home.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total (n=71)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already keep use as low as possible</td>
<td>70</td>
</tr>
<tr>
<td>Do not see my personal water use as an issue</td>
<td>31</td>
</tr>
<tr>
<td>Not responsible for water costs</td>
<td>15</td>
</tr>
<tr>
<td>Because of the costs involved in installing new fixtures</td>
<td>15</td>
</tr>
<tr>
<td>Do not know what action(s) would effectively reduce water use</td>
<td>8</td>
</tr>
<tr>
<td>Do not have time to focus on water use</td>
<td>7</td>
</tr>
<tr>
<td>Not concerned with water conservation</td>
<td>4</td>
</tr>
<tr>
<td>Dam is full \ we have plenty of water</td>
<td>3</td>
</tr>
<tr>
<td>Do not understand how much water could be saved</td>
<td>3</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>1</td>
</tr>
</tbody>
</table>

Q12: Why not?  Please select all that apply

Base: Respondents who have not taken steps to lower water usage (n=71)
Over one third (36%) of consumers were interested in receiving more information on their current water use, with email being the preferred method of delivery.
Nearly half (46%) of all consumers would prefer to receive information on their water use monthly.
Willingness to Decrease Water Use & Influencing Factors for Doing so

67% of Consumers were willing and able to decrease their personal water use

**Most Impactful**
- Utility incentive/rebate for reduced use: 7.9
- State and/or Federal tax rebate for reduced use: 7.6
- Utility rebate program for use of smart water technologies like clocks, low flow shower heads etc: 7.5
- Detailed information on your water use: 7.1

**Least Impactful**
- Detailed information on the global effects of reducing water waste: 5.8
- Increased water cost: 6.9

Q16. Are you willing and able to decrease your personal water use?
Q17. Which of the following, if any, would have the most impact on you to reduce your excess water use?

Base: Q16. All respondents (n=751). Q17. Respondents who are willing to decrease water use (n=666)
Attainable Percentage Decrease in Water Usage

On average consumers thought they could realistically reduce their current water use by 9%.

Q18. By what percentage do you believe you could realistically decrease your current water use? If you are unable to decrease your current water use, please select 0%.

Base: Respondents who are willing to decrease water use (n=666)
Interest in Online Tool to Monitor Water Use & Access Detailed Information

Q19. If your water utility supplier offered a complimentary online tool, allowing you to monitor your water use and access detailed consumption and cost data on demand, would you access and review this information?

- Yes: 59%
- No: 8%
- My utility provider already offers this type of program: 2%
- Not applicable – I am not responsible for the water costs of my primary residence: 7%
- Unsure: 25%

Base: All respondents (n=751)
Helpful Information for Online Water Consumption Tool

Of the respondents interested in the online water consumption tool, 5% thought it would encourage them to take steps to lower their water use.

Q20. What of the following information would be helpful to access through the online water consumption tool?

Q21. Do you believe having access to this data would encourage you to take steps to lower your water use?

Base: Respondents interested in Online tool (n=627)
Amount Willing to Spend on One-Time Fee

Of the respondents willing/unsure about paying a fee to support up-front costs, over half (53%) were willing to spend **up to $20** on a one time fee **to support access to an online consumption tool**

- **$0-$10**: 24%
- **$11-$20**: 29%
- **$21-$30**: 11%
- **$31-$40**: 3%
- **$41-$50**: 10%
- **More than $50**: 5%
- **Unsure**: 18%

Q22. Would you be willing to pay a fee to support possible up-front costs associated with the ability to view online water consumption reports?

Q23. Consider your home’s water bill. If you could reduce your water use by 10%-20% with better information about your consumption, approximately how much would you be willing to spend on a one-time fee that would support access to an online water consumption tool and/or an in-home display device providing real-time data?

Base: Respondents who are willing to pay fee (n=175)
Q24. What do you think would be the advantages and disadvantages of your water utility supplier providing you with a complimentary online tool (allowing you to monitor your water use and access detailed consumption and cost data on demand)?

<table>
<thead>
<tr>
<th>ADVANTAGES</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>We could see where we could lower our water use \ what is using the most</td>
<td>22</td>
</tr>
<tr>
<td>It will show me how much water we use \ keep track</td>
<td>19</td>
</tr>
<tr>
<td>We could quickly \ pre-emptively reduce water consumption as required</td>
<td>10</td>
</tr>
<tr>
<td>It will probably help to reduce water usage \ save water</td>
<td>10</td>
</tr>
<tr>
<td>It gives more information to make choices \ more control</td>
<td>9</td>
</tr>
<tr>
<td>Make me more aware \ increase awareness of usage</td>
<td>8</td>
</tr>
<tr>
<td>It provides an incentive to use less \ you could set targets</td>
<td>7</td>
</tr>
<tr>
<td>Be able to see what the cost areas are \ what is costing the most</td>
<td>7</td>
</tr>
<tr>
<td>Money savings</td>
<td>6</td>
</tr>
<tr>
<td>It would help detect leaks</td>
<td>3</td>
</tr>
<tr>
<td>Easy to use \ understand</td>
<td>3</td>
</tr>
<tr>
<td>Interesting to compare usage with other people</td>
<td>2</td>
</tr>
<tr>
<td>It will be good for the environment \ ensure water supply for the future</td>
<td>2</td>
</tr>
<tr>
<td>Sounds good \ will give it a go</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
</tr>
<tr>
<td>None</td>
<td>4</td>
</tr>
<tr>
<td>Don't know</td>
<td>14</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>DISADVANTAGES</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost \ prices increases</td>
<td>12</td>
</tr>
<tr>
<td>Time taken to access</td>
<td>5</td>
</tr>
<tr>
<td>Ease of using website \ understanding data</td>
<td>4</td>
</tr>
<tr>
<td>I mightn’t like what I see \ no excuses</td>
<td>3</td>
</tr>
<tr>
<td>People may have a cant be bothered \ blasé attitude</td>
<td>3</td>
</tr>
<tr>
<td>Privacy \ other people can see how much water we use</td>
<td>2</td>
</tr>
<tr>
<td>All households do not own a computer</td>
<td>2</td>
</tr>
<tr>
<td>Feeling under pressure to reduce consumption</td>
<td>2</td>
</tr>
<tr>
<td>People may become paranoid \ obsessed</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
</tr>
<tr>
<td>Nothing</td>
<td>37</td>
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<tr>
<td>Don't know</td>
<td>28</td>
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Section C:
Appendix
# Water Utility Companies Interviewed

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
<td>SA Water Corporation</td>
<td>2</td>
</tr>
<tr>
<td>Power &amp; Water</td>
<td>2</td>
</tr>
<tr>
<td>Goulburn Valley Water</td>
<td>2</td>
</tr>
<tr>
<td>Barwon Water</td>
<td>2</td>
</tr>
<tr>
<td>Sydney Water</td>
<td>1</td>
</tr>
<tr>
<td>Lower Murray</td>
<td>1</td>
</tr>
<tr>
<td>Gold Coast Water</td>
<td>1</td>
</tr>
<tr>
<td>Gosford City Council</td>
<td>1</td>
</tr>
<tr>
<td>Hunter Water</td>
<td>1</td>
</tr>
<tr>
<td>South East Water</td>
<td>1</td>
</tr>
<tr>
<td>QLD Urban Utilities</td>
<td>1</td>
</tr>
<tr>
<td>Western Water</td>
<td>1</td>
</tr>
<tr>
<td>Ben Lomond Water</td>
<td>1</td>
</tr>
<tr>
<td>ActewAGL</td>
<td>1</td>
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<tr>
<td>Yarra Valley Water</td>
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<tr>
<td>Southern Water</td>
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<tr>
<td>State Water</td>
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<td>Water Corporation</td>
<td>1</td>
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<td>Townsville Water</td>
<td>1</td>
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<tr>
<td>Ipswich Water</td>
<td>1</td>
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<tr>
<td>Queanbeyan Council</td>
<td>1</td>
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<tr>
<td>Mid Coast Water</td>
<td>1</td>
</tr>
<tr>
<td>Riverina Water</td>
<td>1</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>1</td>
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<tr>
<td>Moreton Bay</td>
<td>1</td>
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<tr>
<td>Melbourne Water</td>
<td>1</td>
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<tr>
<td>Murray Irrigation</td>
<td>1</td>
</tr>
<tr>
<td>Cradle Mountain Water</td>
<td>1</td>
</tr>
<tr>
<td>Gladstone Area Water Board</td>
<td>1</td>
</tr>
</tbody>
</table>
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