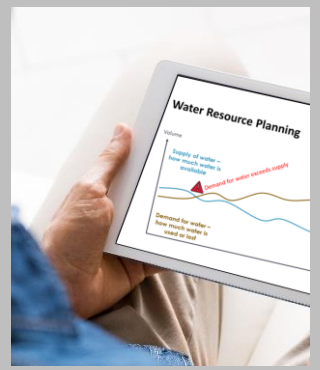
E073

Essex & Suffolk Water
Water Resources Management Plan Survey report
July 2022

METHODOLOGY

Online survey



- Online survey with current bill payers
- Panel survey with future customers and non-household customers

Face-to-face survey

- Face-to-face survey to reach audiences who are digitally disengaged or people who haven't been sufficiently engaged through the online survey

SAMPLE SIZE

	Sample size	Target
Household	1095	1000
Non-Household (business customers)	102	100
Future customers (aged 18-24 who are not currently responsible for paying the water bill)	117	100
Overall	1314	1200

SAMPLE SIZE

	Sample size	Target
Essex customers	907	N/A
Suffolk customers	407	N/A

	Sample size	Target
Customers in vulnerable circumstances* (customers who are on the Priority Services Register or eligible for it, who struggle to pay the bills, who are unemployed with state benefits only)	271	250

*Customers in vulnerable circumstances and Essex/Suffolk customers are included within the total of household respondents

NOTES ON ANALYSIS

- Across the report you will see a change of colour and arrows next to percentages on charts. This has been automatically applied by our survey software at the 95% significant level. If you see this, this means there is a 95% certainty that the software has determined there is a difference.

- The significance means that there is a difference between the population of that subgroup and the overall population. For example, a red arrow signifies this percentage is significantly smaller than the overall percentage. The blue arrow signifies that this percentage is significantly higher than the overall percentage.

- Whether or not an option is statistically significant depends on the sample that chooses that answer option and how big the difference is in percentage points.

- You will also come across an overall weighting category. This has been used for both of our MaxDiff questions as AB social grade was overrepresented in our survey so the results have been rebalanced by applying weighting. This ensures the influence of AB social grade in the sample is reduced and the influence of social grades that were underrepresented is increased.

- The weighting coefficients we used for the weighting are:
  - AB – 0.45
  - C1 –2.21
  - C2 –1.67
  - DE – 1.01

- For example, this means that the influence of AB social grade respondents in the sample was multiplied by a factor of 0.45 and the influence of C1 social grade respondents was multiplied by a factor of 2.21, to make the data representative of the population proportions.

Key Insights

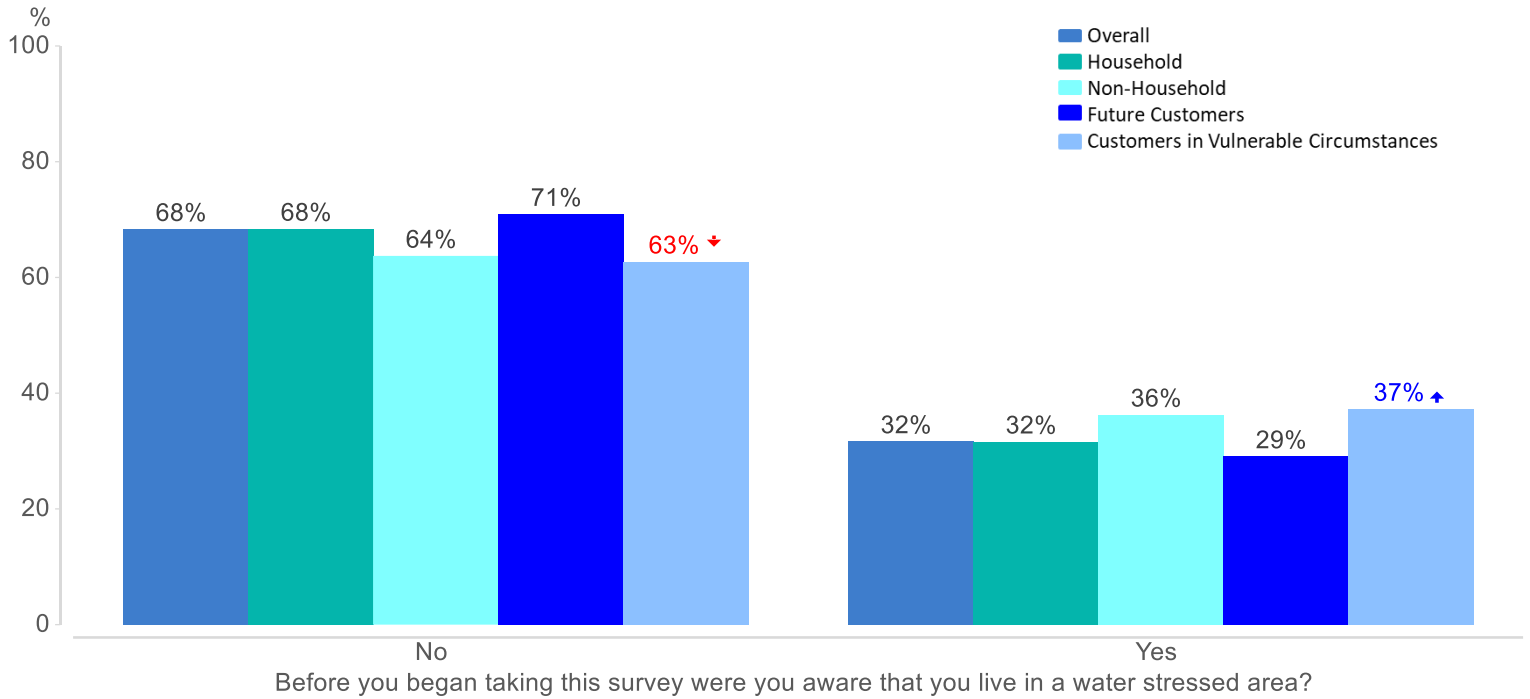
KEY INSIGHTS

- Many options were supported in the general question but they need to be seen in context compared against each other to see clearer preferences emerge
- Company-side side leak reduction, winter storage reservoirs and pipelines had high support at all stages
- Solutions such as water saving devices/behaviours and customer-side leak reduction had strong support in isolation but in context moved down the priority list
- On the other hand, aquifer storage & recharge had lower levels of definite support but achieved a good MaxDiff score when compared to other solutions
- Some solutions such as nitrate removal, desalination plants and abstraction are least supported

Survey results

Awareness

Awareness:



total sample size = 1314; 95% confidence level

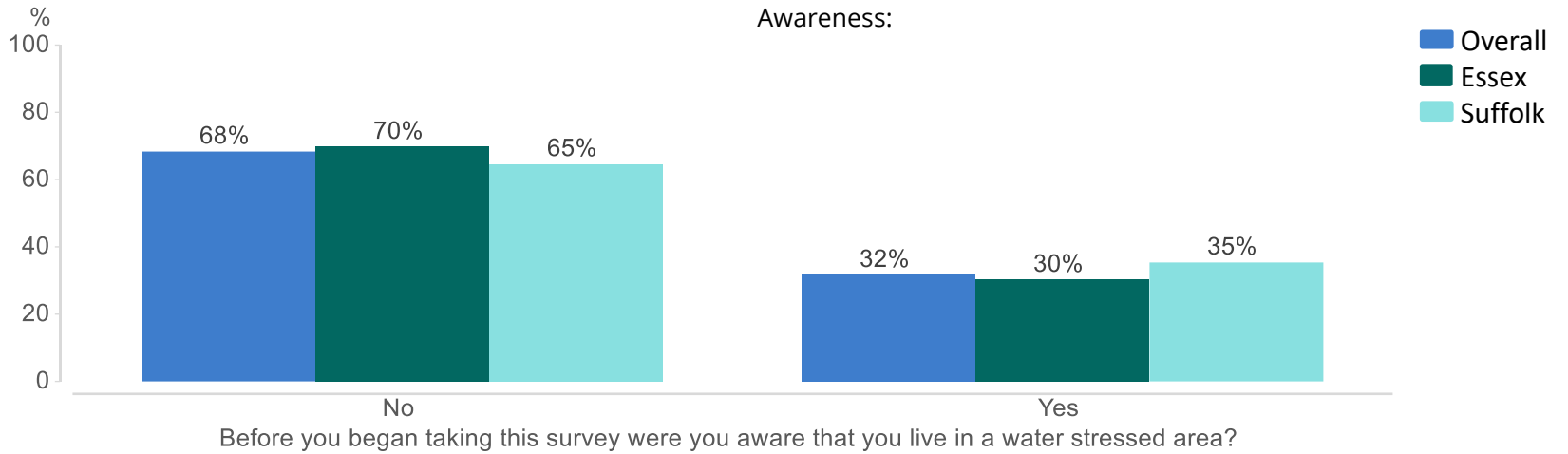
The majority of the sample overall are not aware that Essex and Suffolk are water stressed areas. This confirms what we found in the focus groups, where only a small proportion knew about this and where respondents only associated drought with developing countries. Finding out about this made people realise water is a finite resource and made it more real, spurring them on to act now and to be more mindful.

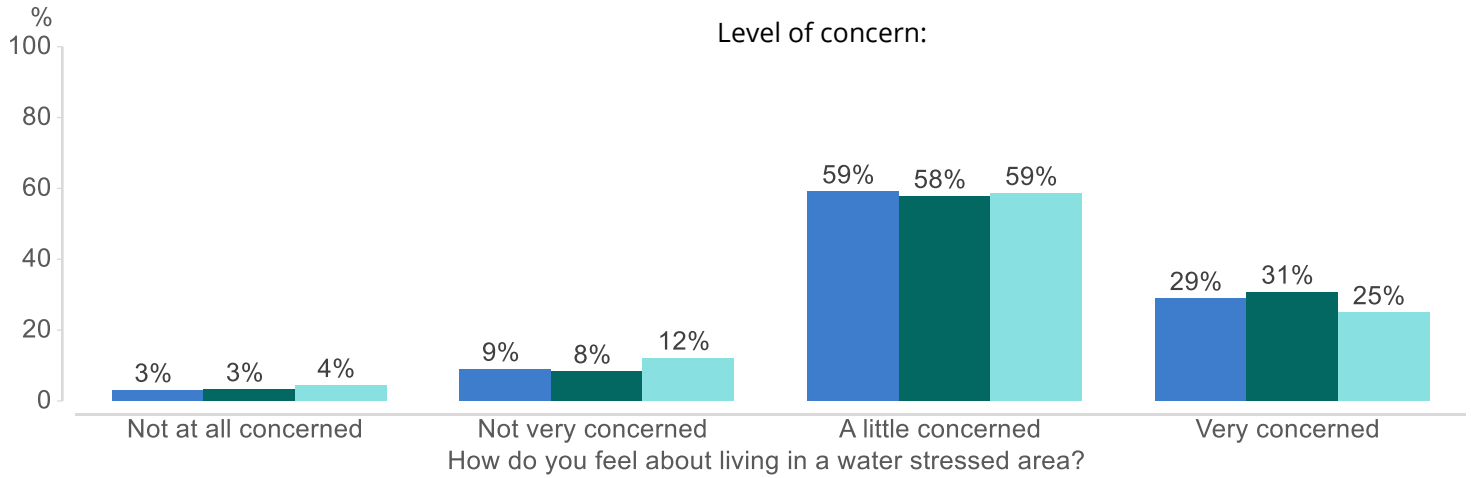
Customers in vulnerable circumstances and Non-Household customers have the highest awareness.

However just below 65% of them are not aware.

WATER STRESSED AREA

Awareness and level of concern by region





total sample size = 1314; 95% confidence level

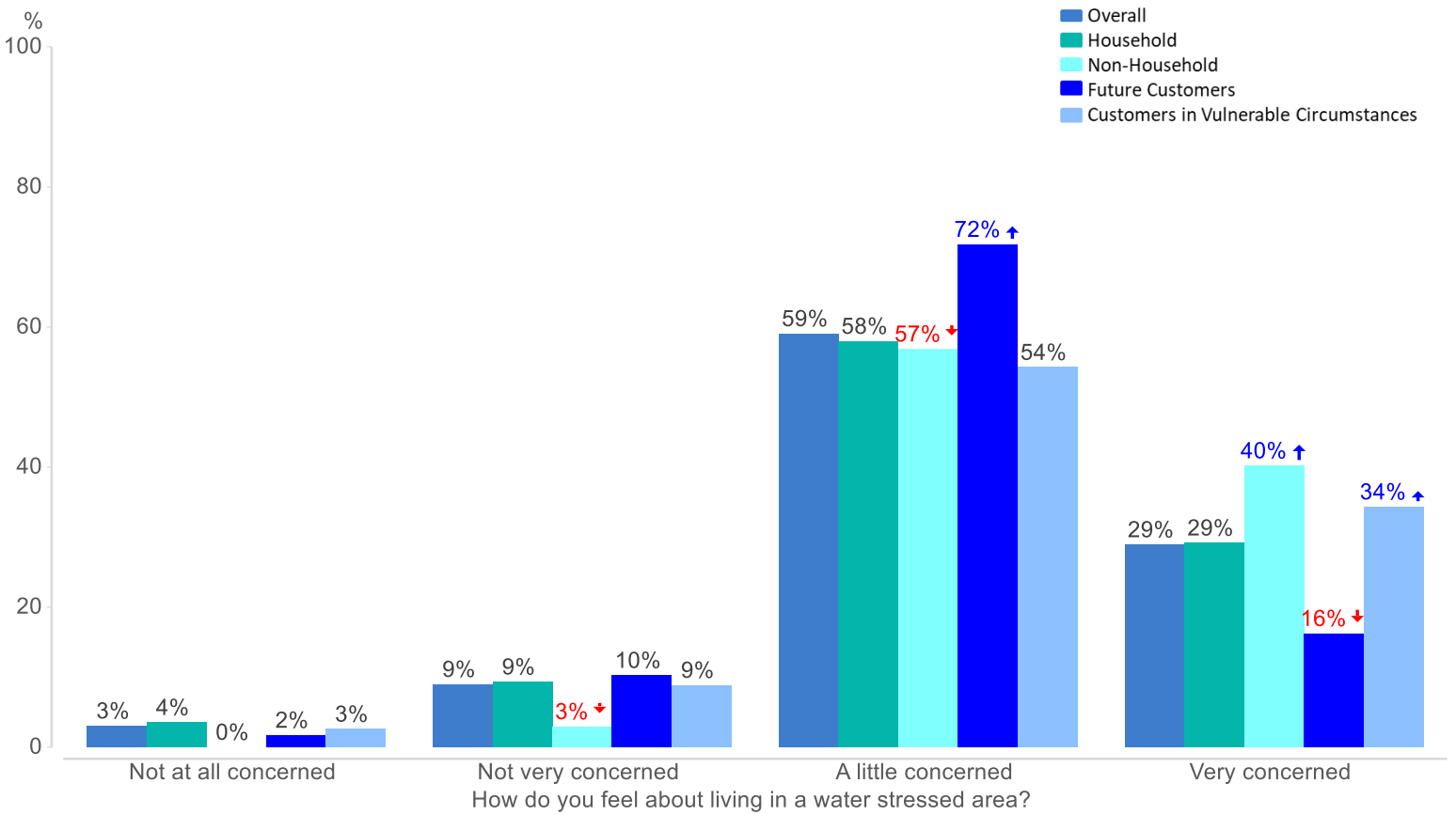
Suffolk respondents are slightly more likely than those in Essex to be aware of living in a water stressed area.

However, the proportion of those who are very concerned in Suffolk is slightly lower compared to the overall and Essex sample.

WATER STRESSED AREA

Level of concern

Level of concern:



total sample size = 1314; 95% confidence level

Learning of the water stressed areas does cause concern with 29% overall being very concerned and 59% a little concerned. When the topic was introduced in the focus groups concerns were also raised.

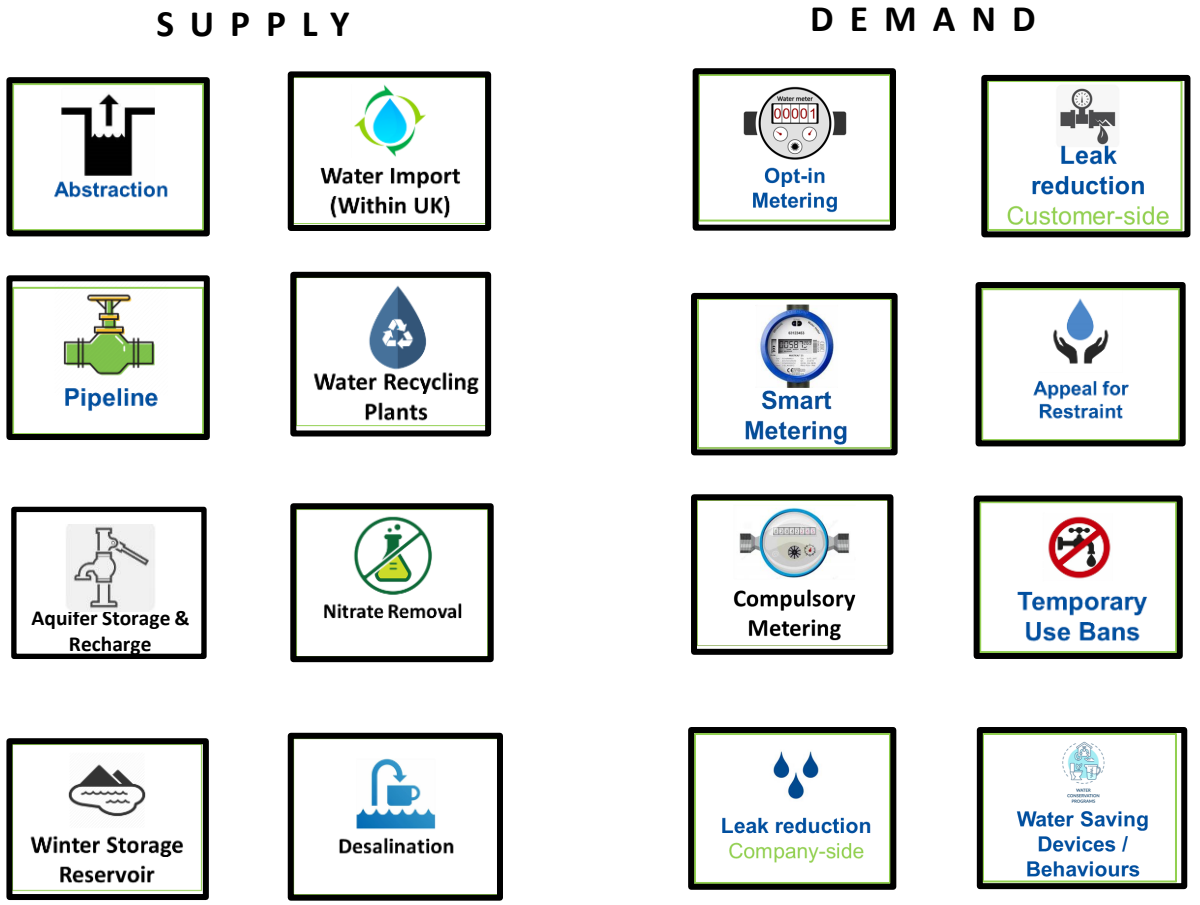
Non-Household customers have the strongest concerns (with 40% being very concerned) and are also the most concerned compared to the overall figure.

72% of future customers are a little concerned about this. The Anglian Water 2021 WRMP survey has shown that this young demographic are risk takers and typically downplay concerns compared to other subgroups.

Supply & Demand

SUPPLY SIDE OPTIONS

Stimulus shown



Respondents were shown a video illustrating a number of possible solutions aimed at increasing water available for supply or reducing demand from customers.

They were first asked whether they supported each of those measures in a general question on a five-point scale.

Then they were shown the same solutions again in a MaxDiff question format, where respondents have to make a choice and therefore delivers a clearer picture of the top priorities for customers compared to a standard question. MaxDiff was used in the analysis section as it gives us a share of preference for which solution they prefer the most or the least.

SUPPLY SIDE OPTIONS

Stimulus shown

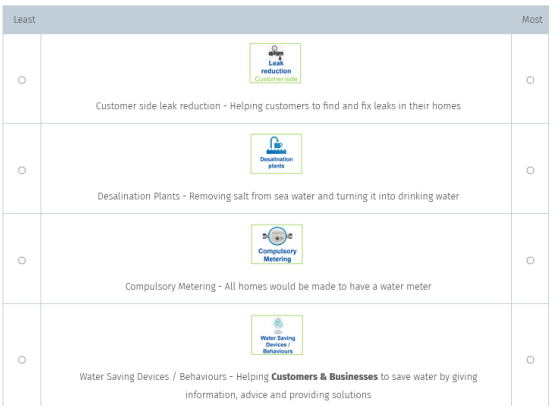
SUPPORT QUESTION

* 14. Please select your level of support for each of these options:

	Definitely would support	Possibly would support	Undecided	Probably would not support	Definitely would not support
Compulsory Metering 	○	○	○	○	○
Opt-in Metering 	○	○	○	○	○

MAXDIFF QUESTION

We would like you to select which options you would like your water company, **Essex & Suffolk Water**, to implement, and what they should focus on to ensure there is enough water for everyone.
For each of the questions below, **please choose your most and least preferred option:**
(Please note this question is repeated a few times with different combinations of options)



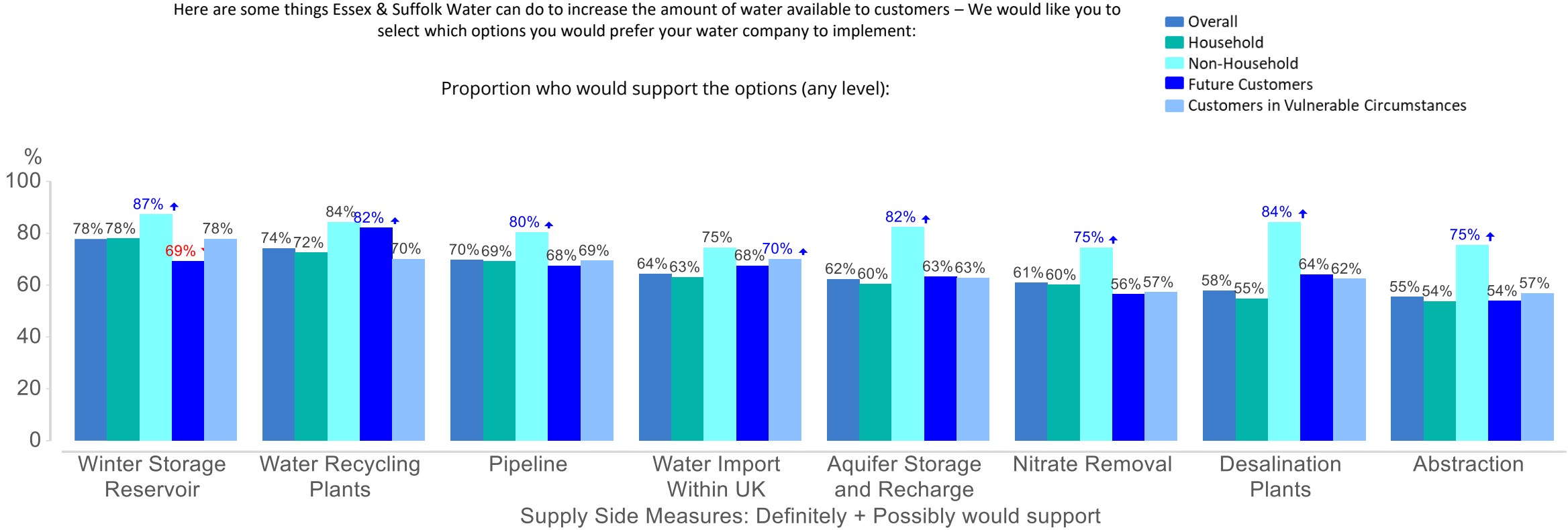
The screenshots above show the two question types as they were displayed to respondents – the MaxDiff question was repeated a total of 14 times with different combinations of options.

SUPPLY SIDE OPTIONS

Level of support

Here are some things Essex & Suffolk Water can do to increase the amount of water available to customers – We would like you to select which options you would prefer your water company to implement:

Proportion who would support the options (any level):



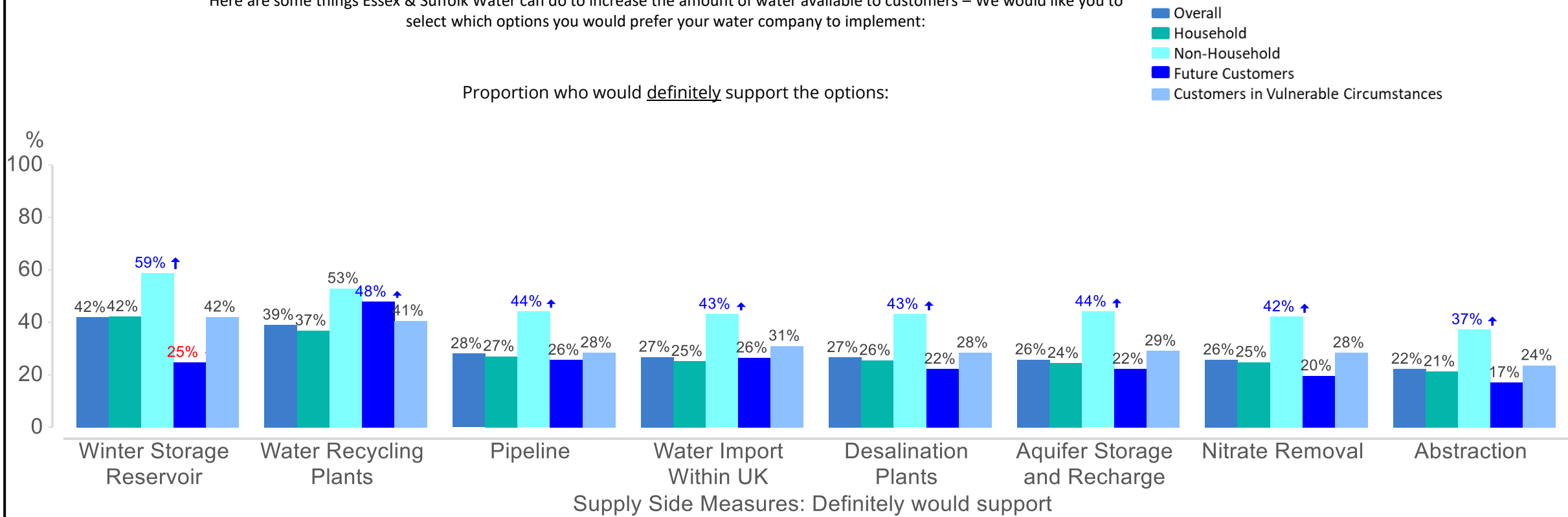
total sample size = 1314; 95% confidence level

SUPPLY SIDE OPTIONS

Level of support

Here are some things Essex & Suffolk Water can do to increase the amount of water available to customers – We would like you to select which options you would prefer your water company to implement:

Proportion who would definitely support the options:



total sample size = 1314; 95% confidence level

SUPPLY SIDE OPTIONS

Level of support

Note: respondents were given five options to choose from; Definitely would support, Possibly would support, Undecided, Probably would not support and Definitely would not support. The chart on page 15 shows a combination of Definitely & Possibly would support. The one on page 16 only shows Definitely would support.

Over 50% overall support all supply side solutions with winter storage reservoirs, water recycling plants, pipeline and water import the most supported. In the focus groups winter storage reservoirs were chosen because of their minimal impact on the environment and their long-term benefit to the community, which outweigh the social costs incurred in the short term.

Water recycling plants appealed to focus group respondents thanks to the 'recycling' element and the high amount of water generated.

Pipelines were seen as cost effective and with a short timescale.

Water import was seen as a way to share resources which could use river systems to transport water in between areas.

Abstraction receives the lowest level of support with 55%. In the focus groups only a few people supported this solution because of environmental concerns.

Non-Household customers are more supportive towards all supply side solutions – this may be because a higher proportion of them (40%, shown on page 10) are very concerned about water stress.

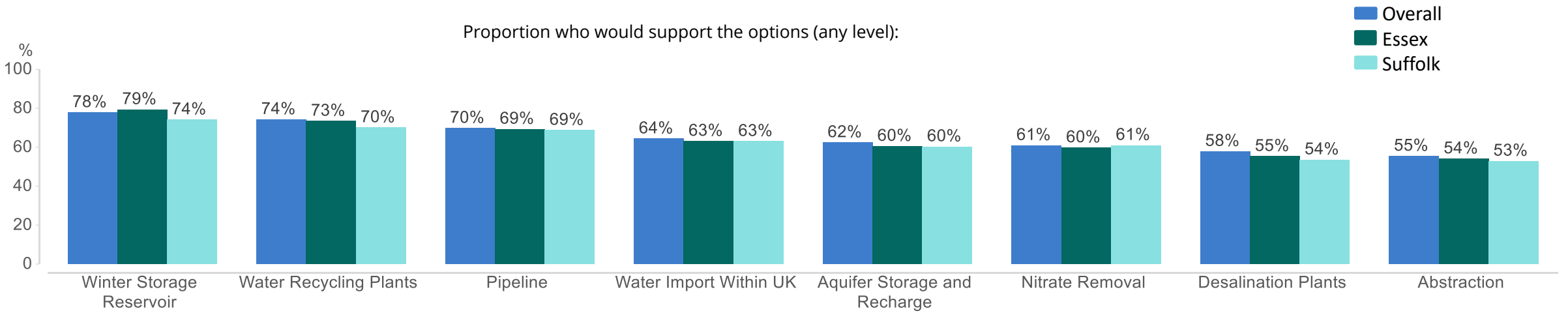
Future customers are more inclined to support water recycling plants (48% definitely support).

Information on which options should be chosen for investment can be found on the combined analysis from slide 42

SUPPLY SIDE OPTIONS

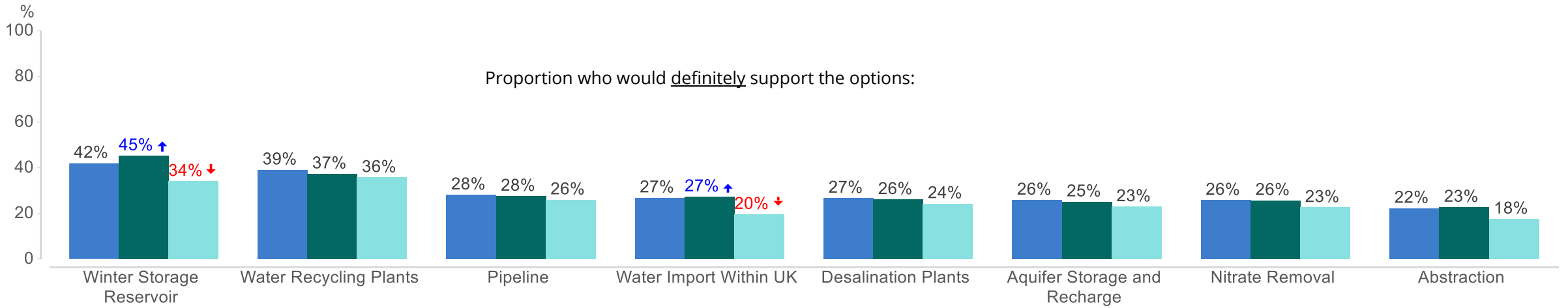
Supply side solutions by region

Proportion who would support the options (any level):



Supply Side Measures: Definitely + Possibly would support

Proportion who would <u>definitely</u> support the options:



Supply Side Measures: Definitely would support

total sample size = 1314; 95% confidence level

Supply side solutions by region

The two regions match the overall pattern when it comes to support levels, with very minor differences.

However, when it comes to definite support, respondents in Suffolk are significantly less likely to support winter storage reservoirs and water import within the UK compared to those in Essex.

SUPPLY SIDE OPTIONS

Why people support supply side solutions

Environmental Impact

- In line with the focus groups, most respondents supported supply side solutions that did not put a strain on the environment, are sustainable and were low cost for consumers.

> "I think even though some solutions are expensive (e.g. water storage reservoir) in the longer term they are safer for the environment which is the most important factor for me. I don't want to disrupt natural wildlife or marine life or have any toxic waste being produced and having an effect on farmland/marine life."

- Most respondents accept that water is a precious commodity and as such needs to be protected. However, they want it done in an environmentally and ecologically friendly way. This is why they supported options that gave additional benefits, such as reducing waste.

> "Reservoir is my preference because of the environmental and ecological benefits that this type of water storage facility can offer. I believe that we have to accept that water is a precious commodity and we must all be prepared to pay a little more for it"

Environmental Impact – Wildlife

- Impact on wildlife from some solutions have created a real concern for respondents, echoed both in the survey and the focus groups. Those that impact wildlife by extracting water or can poison aquatic life were less supported than others.

> "Do not agree with taking huge amounts of water from our rivers. Regarding desalination, could there not be another option to get rid of the brine other than discharging back into the sea thus harming wildlife? I would support this option if an alternative could be found for the brine."

- The impact of brine and reducing water supplies for aquatic life were expressed with the highest concerns by a majority of respondents. Customers stated they would support abstraction and desalination more if it can be done in a more sustainable and environmentally friendly way.

> "I would like to have a system that is not causing any major harm to the environment or sea life. also choosing the one that will reduce the chance of any human errors, resulting in unwanted chemicals/waste in the water, that will also cause harm."

Why people support supply side solutions

Future Water Supply

- Another factor respondents felt strongly about is protecting the future supply of water. Respondents supported options that produced a high level of water and reduced wastage. This can help explain why Water Recycling Plants and Winter Storage Reservoirs received a higher proportion of definitely would support.

> "The solution is likely to be a range of options but some solutions are more sustainable. I don't like short term schemes that just kick the can down the road and prefer long term solutions. Reservoirs have a range of benefits."

- Respondents voiced their opinions on sustainability and provision of water for the future, not just for the present.

> "We need to think about the future (5-10 years) not just the present"

> "I think the water recycling plants would be a sustainable way of re-using water which would mean less wastage"

SUPPLY SIDE OPTIONS

Why people support supply side solutions

Cost of Bills

- Some of the negative impacts respondents expressed was their concerns in cost of bills rising. Respondents are more against those solutions that they know will result in a high increase in bills and generate a low amount of water.

> "There are people with limited incomes who might struggle to pay extra on what is already an expensive resource. I'd support things like desalination only if the downsides could be mitigated and I am conscious of the fact that all your solutions rely very much on current technology. That, however, is an ever-changing scene and it is possible that certain processes might well become cleaner and more efficient in the future."

- Some respondents are also torn about providing water for the future and rising prices. Some customers would prefer a range of low and high cost options to ensure their water bill does not rise catastrophically.

> "Definitely cost is a worry but also the amount of water generated because there is a very real risk of being without water for everyone with climate change. It should be a mix of a low cost available now solution and a more expensive but with high amount of water for long term for example abstraction & desalination"

Relying on Rainfall

- Respondents are also concerned about those solutions that rely on rainfall to replenish stocks. Due to climate change and the threat of drought customers have high concerns in regards to this.

> "The sea is predictable and can be relied on to provide water. Rainfall is not reliable in the UK and that will only increase with global warming."

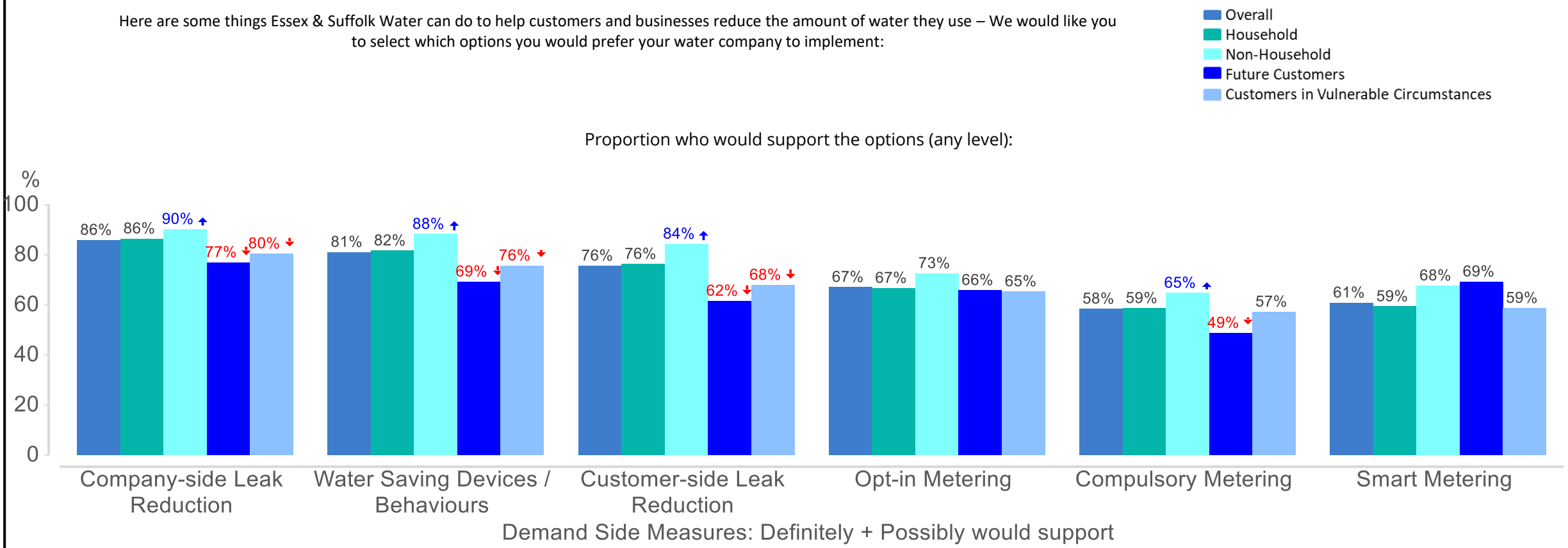
- Respondents want a mix of solutions, they do not feel one solution can ensure the future protection of Essex and Suffolk's water supply. This was a consideration also in the groups, where respondents suggested solutions that could be used in combination with each other to achieve the desired amount of water.

> "We can't rely on rainfall, so building a reservoir seems pointless. We should not tamper with groundwater (aquifer; abstraction etc). We should try and minimise greenhouse gases. We should remove nitrates; recycle more; move water resources around within the UK and beyond, and consider desalination as a weak possibility, although if it were wind or solar powered I'd be a little more in favour of it."

DEMAND SIDE OPTIONS

Level of support

Here are some things Essex & Suffolk Water can do to help customers and businesses reduce the amount of water they use – We would like you to select which options you would prefer your water company to implement:



total sample size = 1314; 95% confidence level

DEMAND SIDE OPTIONS

Level of support

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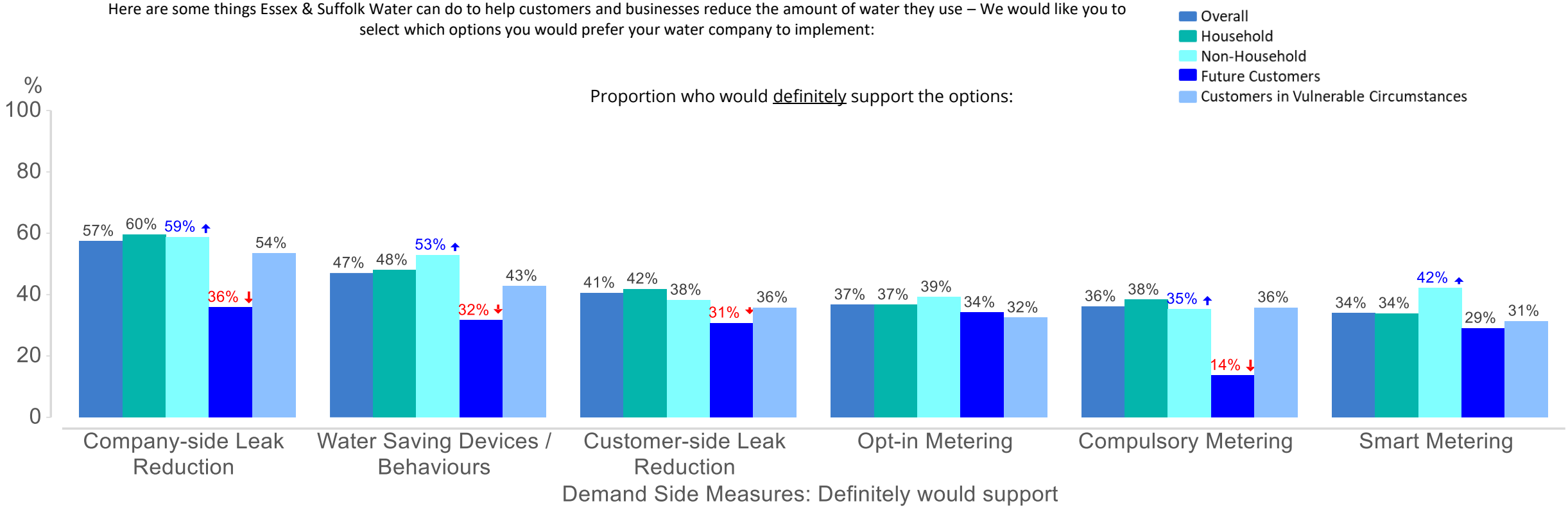


total sample size = 1314; 95% confidence level

DEMAND SIDE OPTIONS

Level of support

Just as a note respondents were given five options to choose from; Definitely would support, Possibly would support, Undecided, Probably would not support and Definitely would not support. The chart on page 23 shows a combination of Definitely & Possibly would support. The one on page 24 only shows Definitely would support.

Company-side leak reduction and Water saving devices/behaviour are the top supported options. In the focus groups these two options were also generally supported with some minor caveats.

For future customers smart metering is also on a par with water saving devices at 69%.

Customer-side leak reduction and Opt-in metering also have general support from over two thirds of the sample and over a third definitely support these options. In the focus groups the former was liked until it became clear that customers had to pay for this. Opt-in metering was liked because of its flexibility but focus group respondents felt it was not strong enough to change people's habits (a sentiment echoed by the open ended responses to the survey).

Non-Household customers have higher support levels on supply and demand side reflecting their higher levels of concerns about future water supply.

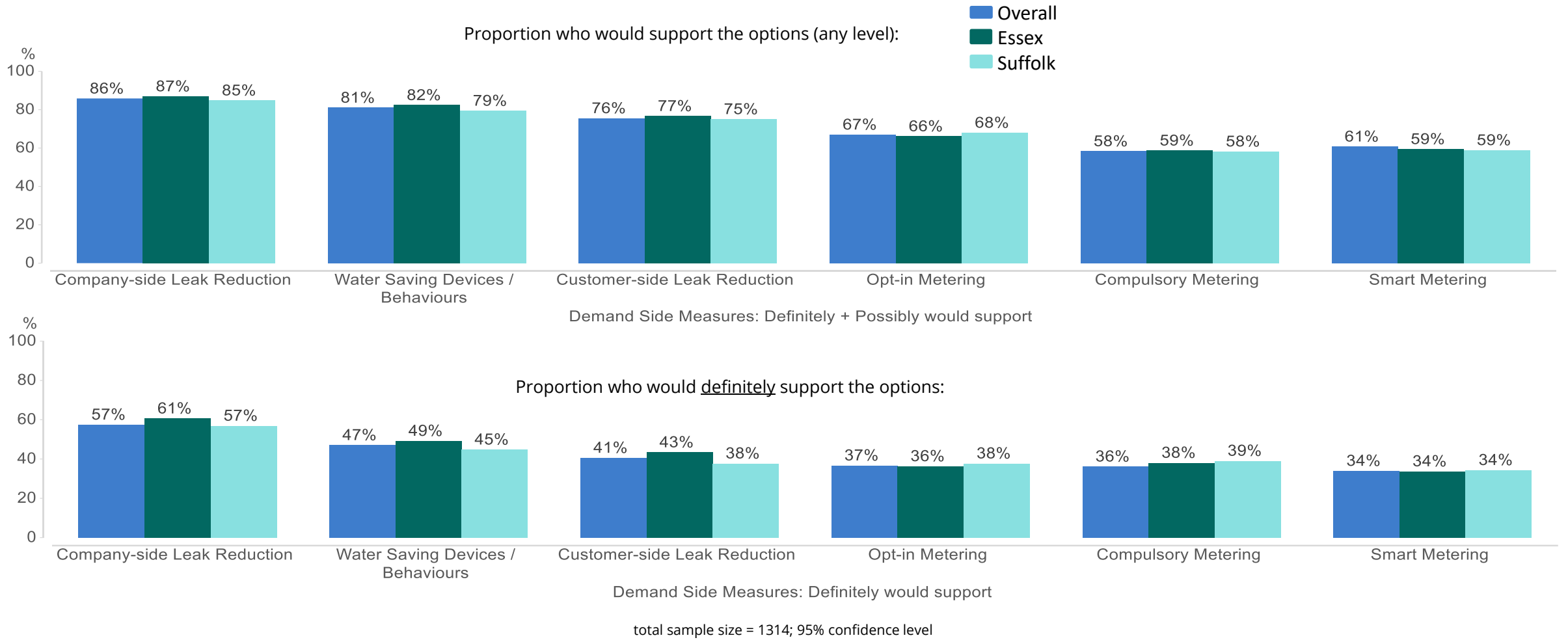
Future customers support levels of supply and demand side show similar score levels – it is the overall Household score that is higher for demand side options - this goes back to supporting options that cost less, as shown in the focus groups, and making the most of what we have.

Future customers show lower support for compulsory metering, with only 14% definitely supporting it. Compulsory metering was also divisive in the focus groups as it's too dependent on individual circumstances and respondents expressed empathy and concern towards those who have larger families and are on a low income - and would therefore end up paying more if this solution was implemented.

Information on which options should be chosen for investment can be found on the combined analysis from slide 42

DEMAND SIDE OPTIONS

Demand side solutions by region



total sample size = 1314; 95% confidence level

When looking at the support for demand side options by region there are no major differences between Essex & Suffolk, with Essex respondents only slightly more likely to support both types of leak reduction and water saving devices/behaviours compared to those in Suffolk.

Why people support demand side solutions

Company-Side Leak Reduction

- This was the most supported option by the respondents. However, the comments made by customers suggest they are not too happy with how the solution has been thought out.
- A few respondents are glad to see that Essex & Suffolk water are trying to support home owners.

> "Without support, home owners could be totally unaware of underground leaks and wastage."

- However, most comments were in regards to how leaks go easily undetected and are not fixed quick enough by their supplier. This was also clear from the groups.

> "Your record for leak reduction in our area is poor and must be addressed."
> "I think that when leaks are spotted, on the company side, they need to be tackled quicker and more efficiently."

- Respondents also voiced their opinions on having to pay for leaks outside of their homes. Focus group respondents also thought they shouldn't have to pay for this.

> "I think it's preposterous that you expect customers to pay for leaks when it's the water companies that have under-invested in fixing them. It's a saving you are responsible for, not the customer."
> "The company should be doing all it can to reduce supply side leakages. This should not be a cost increase for the customer."

Customer-Side Leak Reduction

- Similar to company-side leak reduction, this was one of the top supported solutions. However, again, customers are not too happy with how the solution has been thought out.
- Respondents appreciate the idea of using this solution alongside metering to help detect possible leaks within their households.

> "Monitor leakage in homes can reduce water wastage."

- However, in line with what expressed in the focus groups, homeowners feel they need more support from Essex & Suffolk water if they can fully support this solution. This is due to the possible cost implications arising from detecting leaks and then fixing them. Some people may not be able to afford this.

> "Most customers won't be in a position to pay to have the path dug up on their own property to find a leak."

Why people support demand side solutions

Water Saving Devices / Behaviours

- Water saving devices also had significant support amongst respondents. They feel this can be a positive solutions as it will help save money and reduce their environmental impact.

> "Smart devices smart money saving."
> "Devices to reduce water use are a good idea."

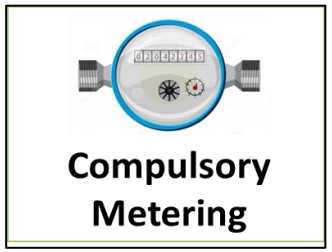
- However, some mention that you could introduce other water saving devices such as water butts which could help save even more water. Other customers also suggest education and retrofitting new builds with devices could be another step towards saving more water. Focus group respondents also highlighted how education is key.

> "As far as I can tell you haven't included customer water savers like water butt for the home garden and other ideas that I have for rainwater fallen on customers homes."
> "Water saving devices need to be installed in all new build homes - there's 100s of them going up already. Education via advertising campaigns and metering must be compulsory for people to pay for what they use."

- Some respondents are also sceptical how effective these devices can be. Other customers also mentioned having a lack of trust and feel they are pointless.

> "I'm not sure how well encouraging water saving devices would work, would it really be cost effective?"
> "Water saving devices are generally rubbish, you end up running taps twice as long or flushing twice, etc.. to get the job done."

Compulsory Metering



- Compulsory metering had a very mixed response from respondents, both in the survey and in the groups. Even though it was one of the least supported solutions, customers saw that it has its positives and its negatives.

- Respondents felt if every household had a meter then behaviours and attitudes to water would change. Wastage would be reduced due to people 'paying for what they use'.

> "Water should be compulsorily metered to make people more aware of usage and the more you use the greater the cost."

- However, some felt that there would be a lack of support for this option. Respondents across the survey and the focus groups voiced their concerns for large families, people with disabilities and customers in vulnerable circumstances. Metering may result in an increase in their bills and thus forcing them to conserve more water than the[illegible]

> "As someone with a disability that uses a high level of water for cleaning I would not be able to have a meter."
> "Bills have already increased making it near impossible to save anything. If you were to put in compulsory meters my bill would increase."

DEMAND SIDE OPTIONS

Why people support demand side solutions

Opt-in Metering

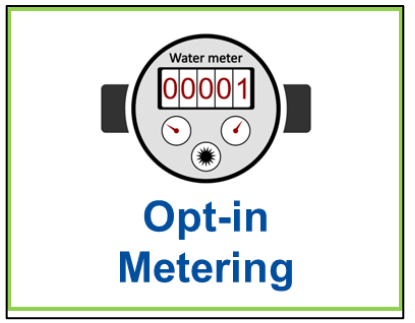
- Opt-in metering was the most supported metering option amongst respondents.

- Respondents preferred this metering option as it gave them more flexibility. Customers feel they are more in control if this solution comes in to place.

> "Campaigns and opt in meters allow people to feel they are in control and not being dictated too."
> "Opt-in metering is most effective and more likely to succeed as it will be better received by consumers. Every leak is one too many."
> "Would support opt in metering due to the option to withdraw if circumstances change."

- However, some respondents voiced that this solution will not result in a high water saving. This is because those who use more water than others will not opt-in.

> "Metering water drives the other behaviours. I find it difficult to believe that opt in metering has much of a reduction. If you use a lot (or think you do, or do not care) you wouldn't opt in. You only opt-in if you think you use less water."



Smart Metering

- Like all the other metering options smart metering elicited a mix of opinions.
- Respondents liked the idea that smart metering can help spot any possible leaks in their property - a much better addition compared with normal meters.

> "If smart metering could alert if a customer has a leak by an increase in usage or continuous usage and not be extended in surveillance to monitor other things then it is an option."

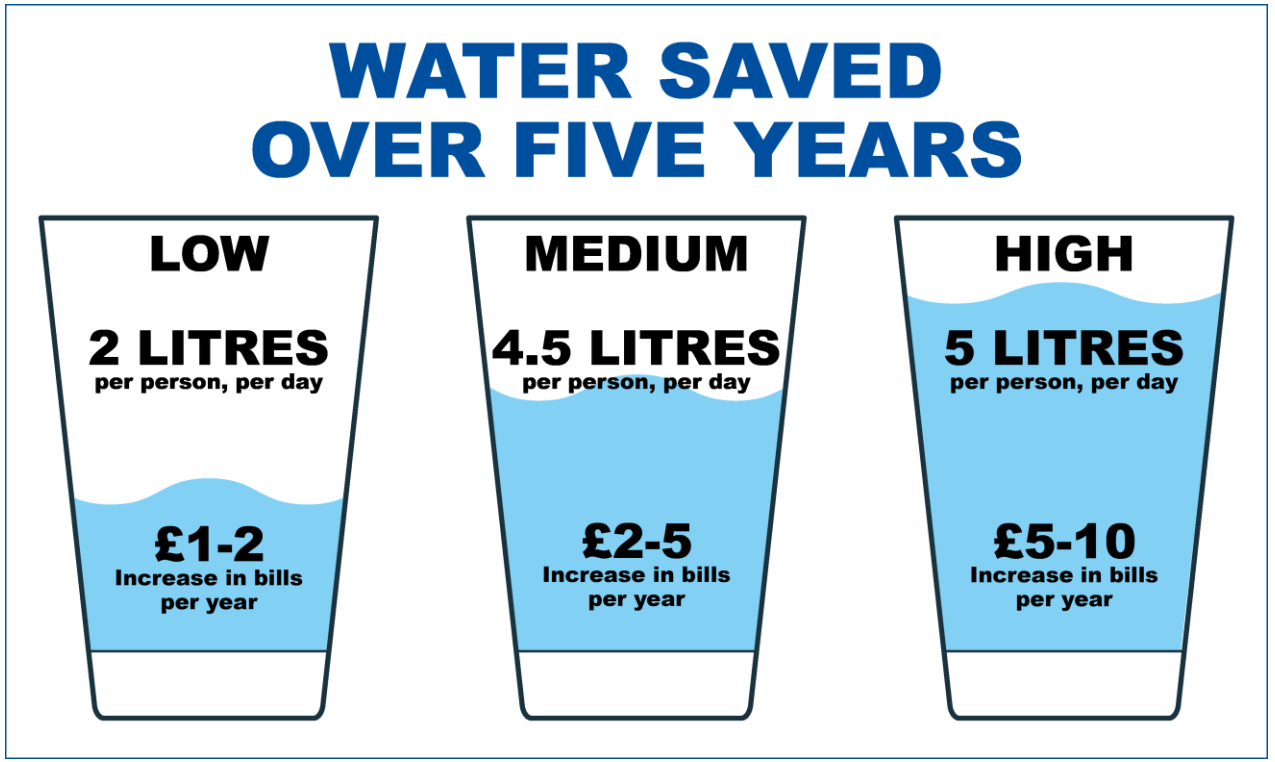
- However, a few respondents felt that smart metering would not help curb attitudes or behaviours to water usage.

> "Smart metering is a waste of time (based on my experience of smart electricity metering) as it has no impact on my behaviour."

- Other respondents also feel smart meters are invasive and unreliable. Some customers believe they can be prone to error and cause a big increase in bills.
- Lack of trust in the technology was also a concern mentioned by focus group respondents.

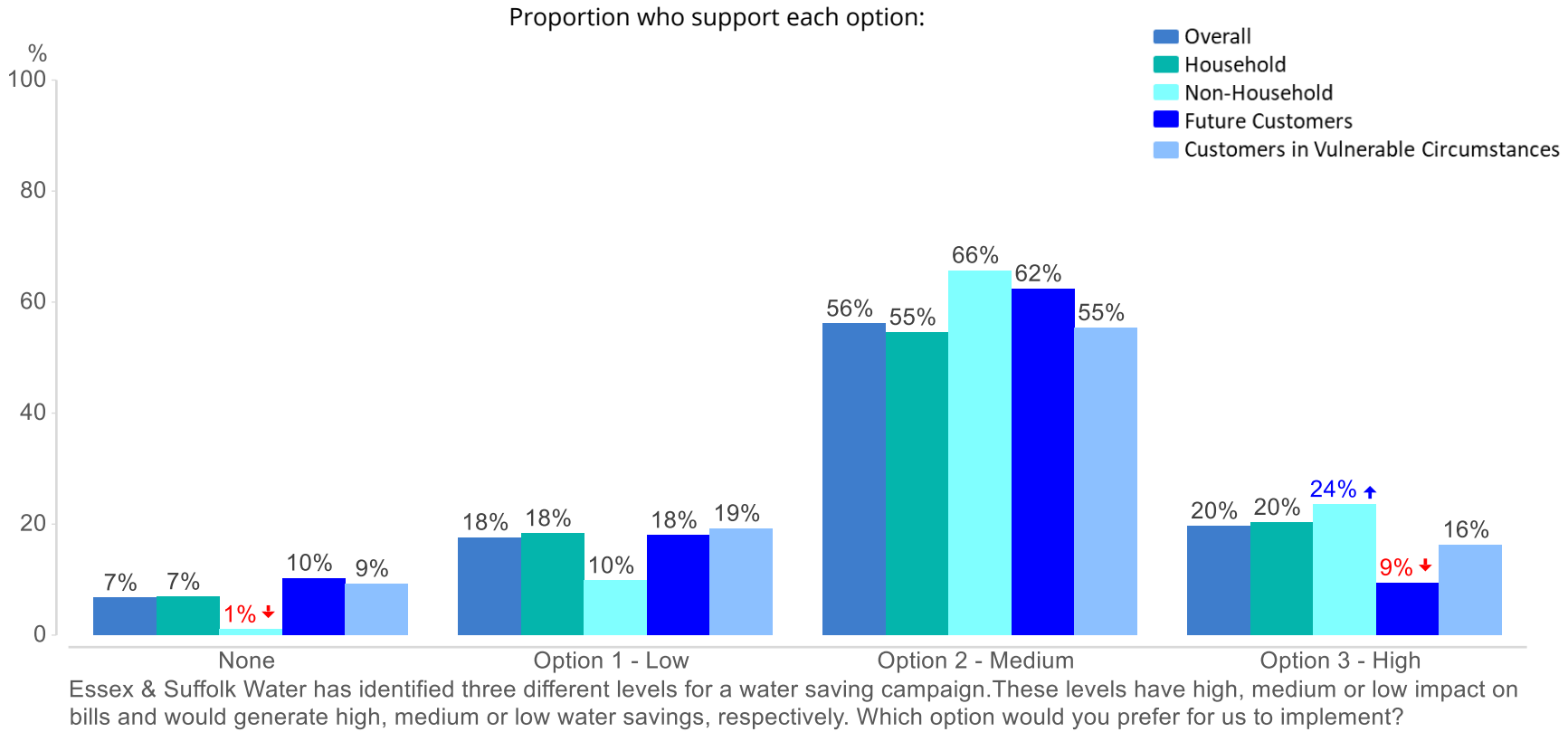
> "Smart meter technology is not long term reliable. Too open to errors."
> "Not really in favour of smart metering as it puts somebody out of a job and smart meters go wrong and are invasive."

Options



Respondents were shown an image with three different options in terms of level of water saved.

Options



total sample size = 1314;
95% confidence level

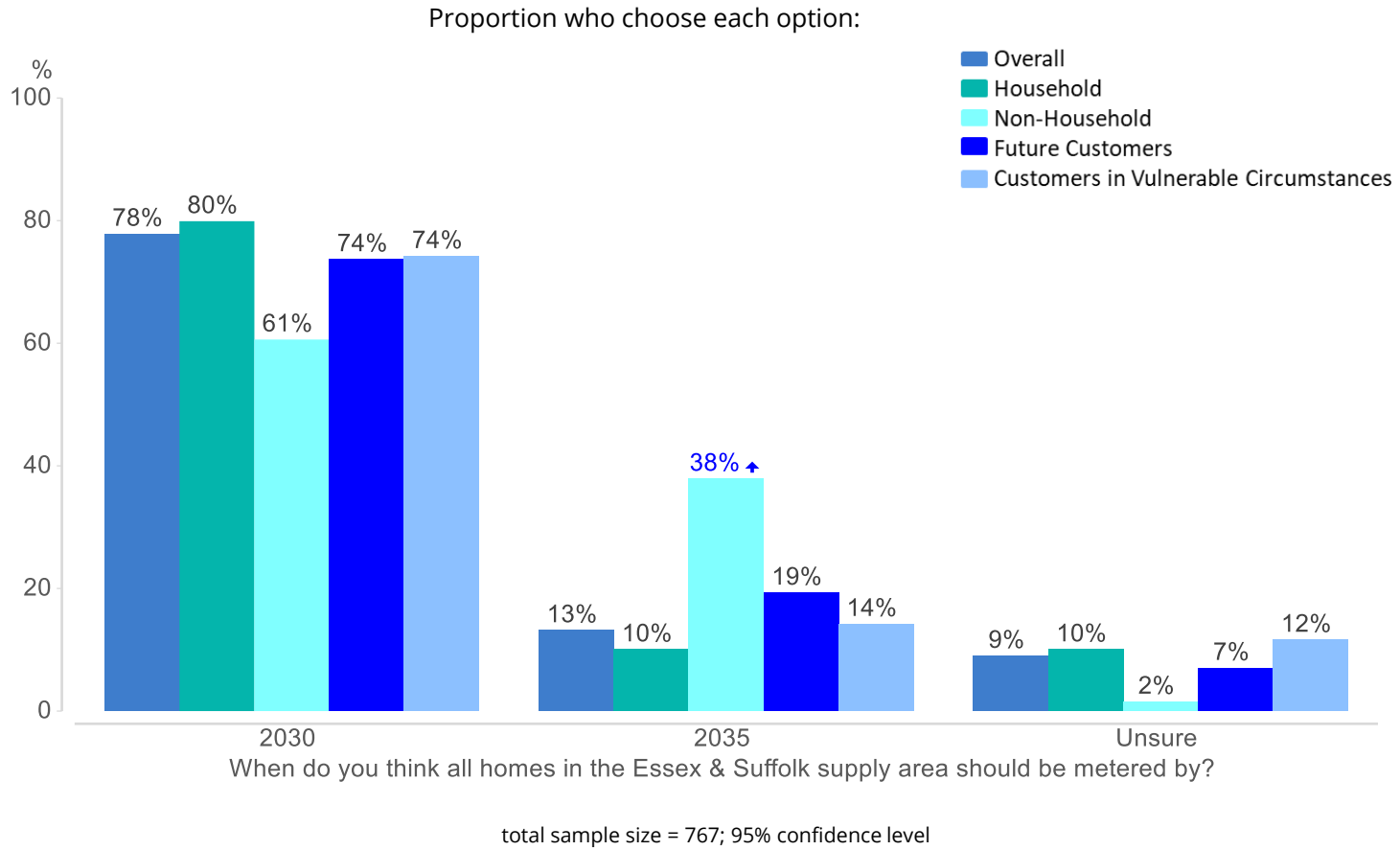
Option 2 – (Medium water saved) of a water saving campaign is favoured by the majority (56%) of the sample. This is in line with the focus groups where half of respondents chose the medium option.

Non-Household customers are slightly more in favour of option 3 but the majority support option 2.

Future customers are less inclined to support option 3.

COMPULSORY METERING

Timeline



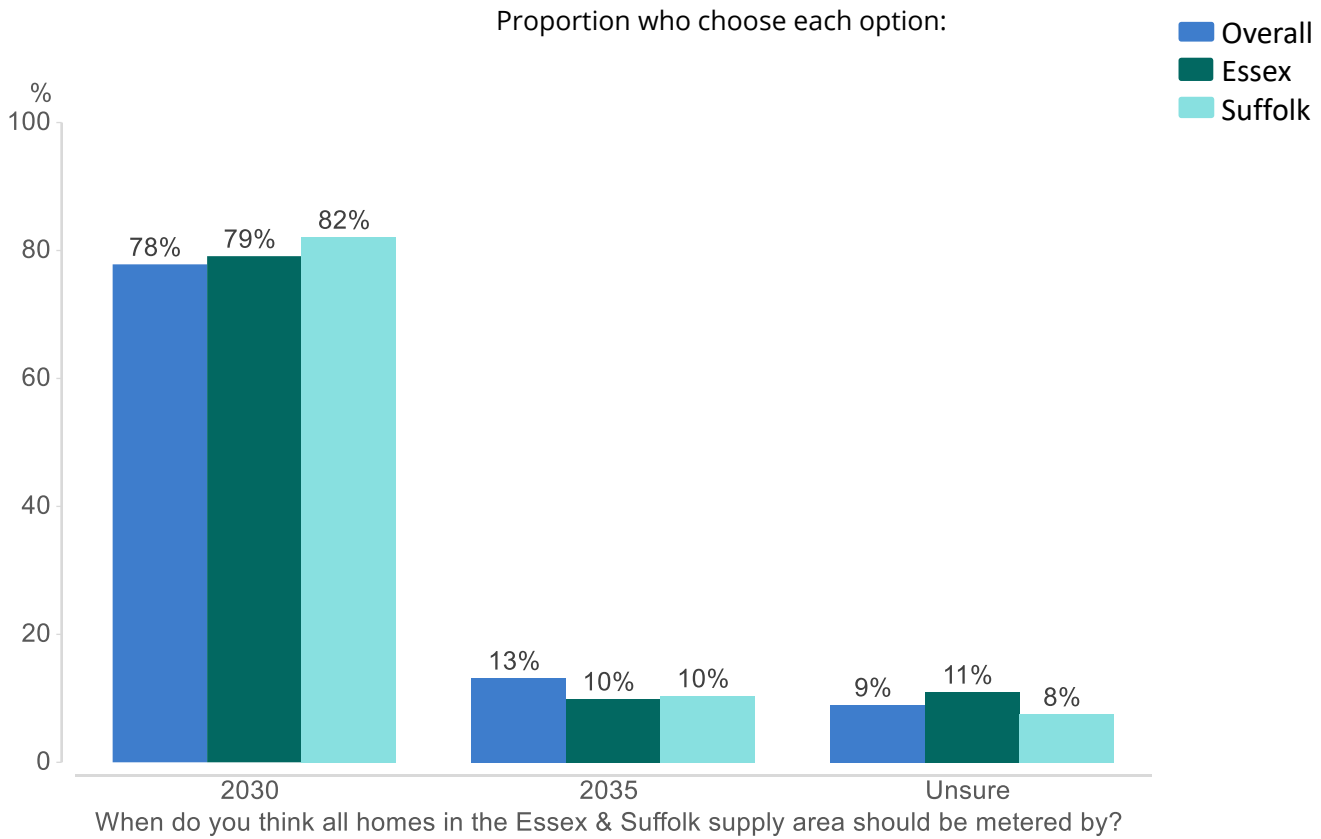
total sample size = 767; 95% confidence level

58% of the overall sample support compulsory metering (page 14) and the majority of these respondents would like to see this implemented by 2030 (78%).

65% of Non-Household customers support compulsory metering and even though the majority of them prefer 2030 implementation, 38% among them would favour 2035.

COMPULSORY METERING

Timeline by region



Respectively 59% and 58% support compulsory metering in Essex and Suffolk, on a par with the overall sample.

82% of Suffolk respondents would like to see this happen by 2030.

MaxDiff

MaxDiff questioning helps overcome issues normally associated with other types of questions.

In particular, compared to rating questions:

- it makes it less likely that respondents will agree with everything
- it forces respondents to prioritise their answers
- it doesn't use scales, which can be problematic as some people tend to use only certain parts of the scales

Compared to ranking questions:

- it allows us to test a large number of items without increasing cognitive load for the respondent
- it allows for ties between different items. This reflects real life scenarios where choices have to be weighed up on pros and cons
- It gives an idea of what distance there is between different items

SUPPLY & DEMAND

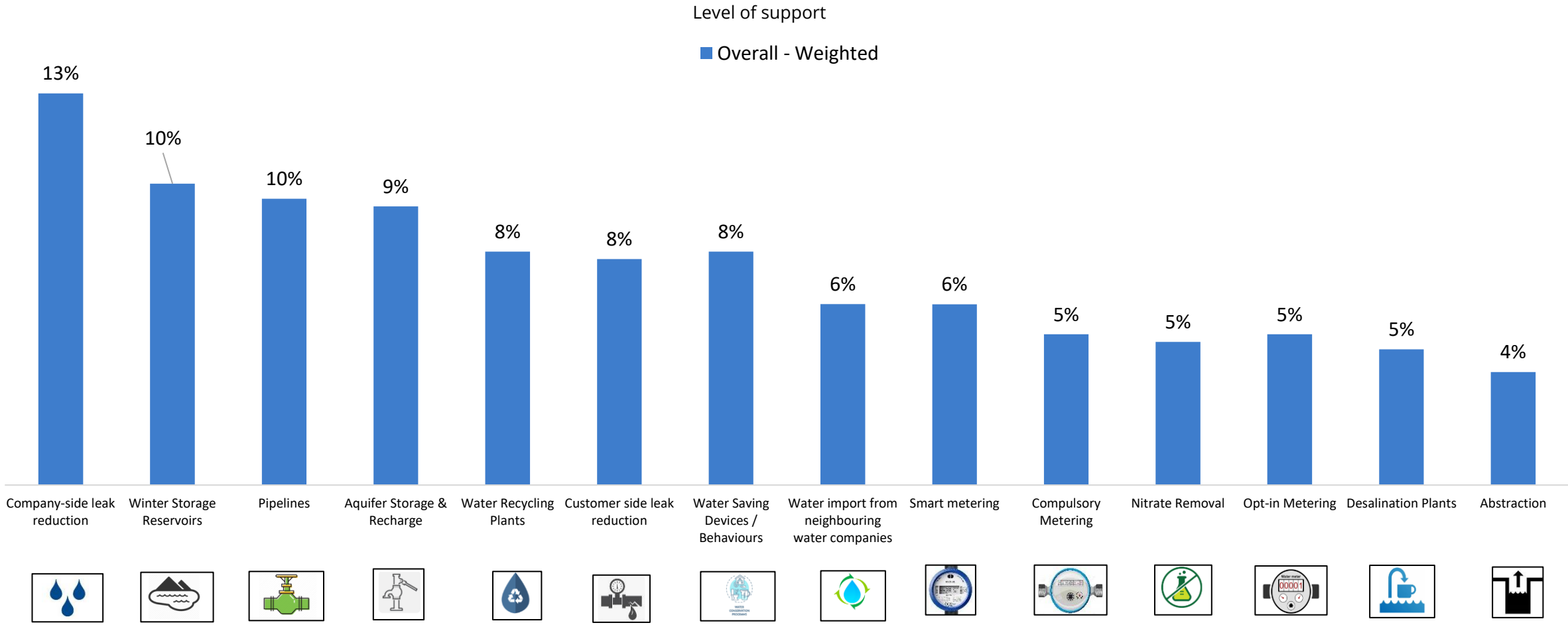
MaxDiff

Respondents were shown a set of supply & demand side options and were asked to choose the option they preferred the most and the one they preferred the least. The question was repeated a total of 14 times with different options being shown each time.

This method allows us to establish priorities for respondents and shows the share of preference amongst customers for each solution.

SUPPLY & DEMAND

MaxDiff scores



We would like you to select which options you would like your water company, **Essex & Suffolk Water**, to implement, and what they should focus on to ensure there is enough water for everyone. For each of the questions below, **please choose your most and least preferred option:**

(Please note this question is repeated 14 times with different combinations of options)

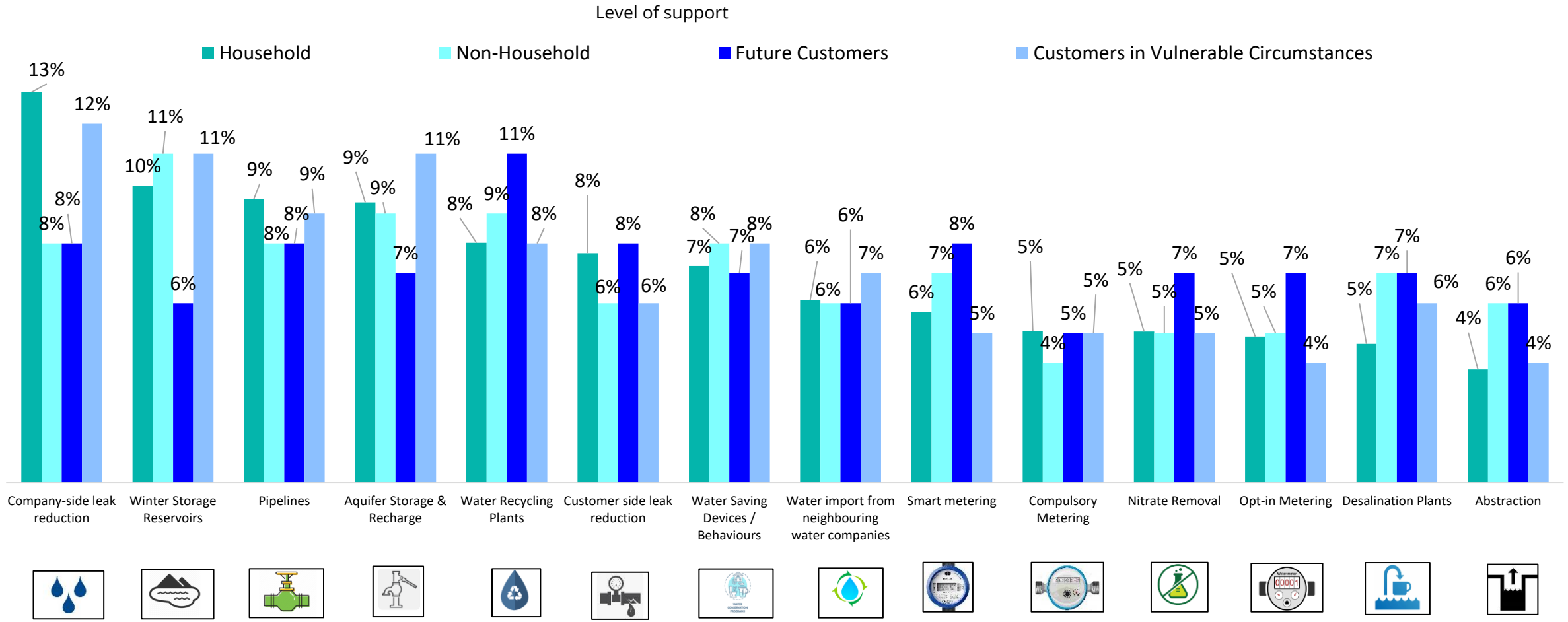
total sample size = 1314; 95% confidence level

MaxDiff scores

- Scores of the MaxDiff are shares of preference – these are the percentages of times one solution is preferred over others by the respondents
- As in this question we had 14 solutions over a total of 14 repetitions, if all solutions were selected equally we would see a 7% share of preference for each
- In this question the top solution (company-side leak reduction) had a preference score of 13% - which is nearly twice as high as its expected score if all things were equal, thus showing a strong respondent preference for this solution

SUPPLY & DEMAND

MaxDiff scores by subgroup



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(Please note this question is repeated 14 times with different combinations of options)

total sample size = 1314; 95% confidence level

MaxDiff scores

Company-side leak reduction receives the highest support overall – this reflects the view expressed in the focus groups where respondents were in favour but also highlighted that this should already be happening and they would expect the amount of water saved to be higher.

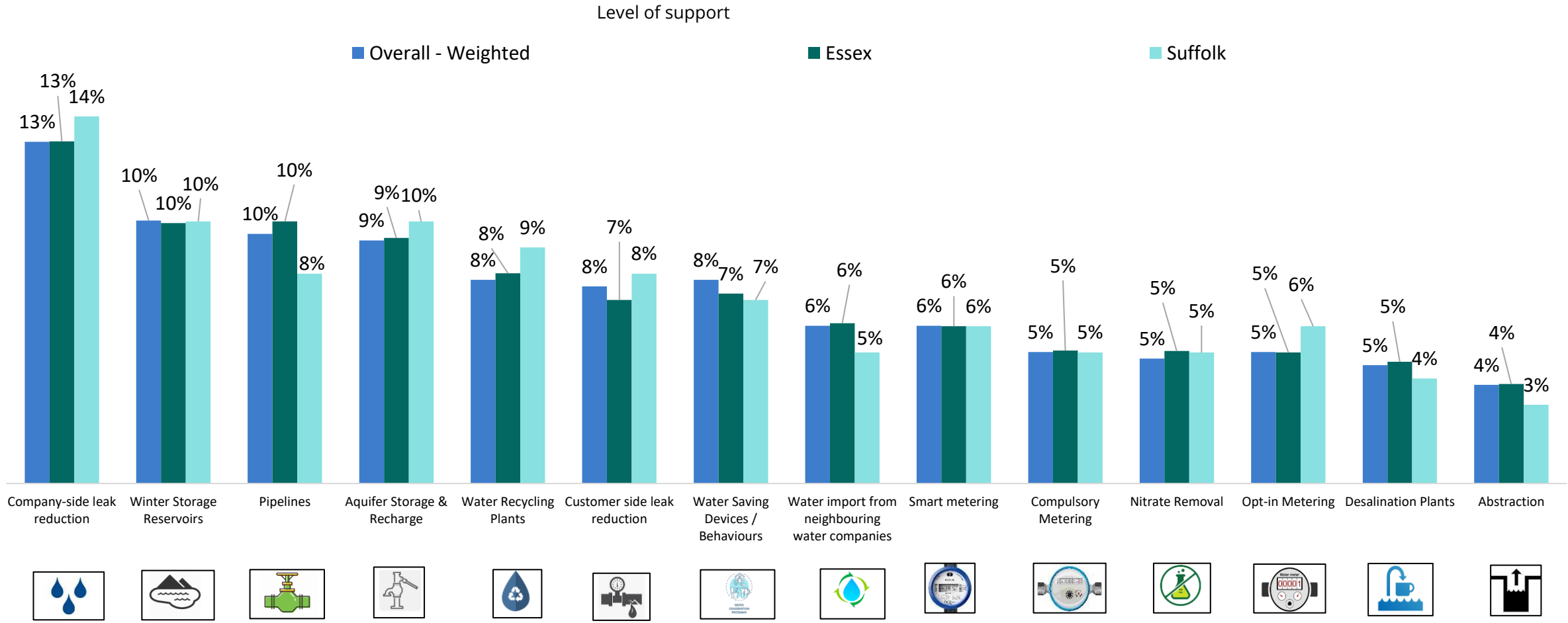
It's followed by winter storage reservoirs, which had an even split in the focus group: though it has some social costs and a long timeline it can bring long-term benefits to the area.

Among future customers water recycling plants is the most supported option. They also show more support for smart metering and opt-in metering than other groups. This younger audience may respond better to the use of words such as 'recycling' and 'smart'.

Abstraction is the solution with the lowest support – focus groups highlighted its potential environmental impact.

SUPPLY & DEMAND

MaxDiff scores by region



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(Please note this question is repeated 14 times with different combinations of options)

total sample size = 1314; 95% confidence level

MaxDiff scores by region

- The top solution across both regions is still company-side leak reduction (13%) followed by winter storage reservoirs (10%)
- Pipeline comes third for Essex respondents on their priority list but Suffolk respondents choose aquifer storage & recharge and water recycling plants ahead of it

Overall Analysis of Investment Options

Overall analysis

- General support takes into account how many people support a solution. MaxDiff takes into account how many people support the solution and whether they prefer it to other solutions. For example a customer may generally support winter storage reservoirs and leak reduction company side. However, when asked to choose between the two would prefer the leak reduction customer side. MaxDiff takes this into account.

- Scores of the MaxDiff are shares of preference (i.e. the percentage of times one solution is preferred over others by the respondents) and therefore the best factors to use for any modelling that may be completed as they take into account customer preferences (priorities).

Overall analysis

- Key for colours used on the next slide:

MaxDiff score:	General support ('definitely support'):	Focus group outcome:
Over 10%	Over 40%	Supported by the majority
Between 5 and 10%	Between 30 and 40%	Split opinions
Under 5%	Under 30%	Supported only by a minority or less

The colours have been applied **by column**. For example:

- if a solution was supported by the majority of respondents in the focus groups it was marked in green under the column 'Focus group outcome' in the table above
- If it achieved a 'definitely support' score of over 40% it was marked in green under the column 'General support'
- If it achieved a MaxDiff preference score of over 10% it was marked in green under the column 'MaxDiff score'

Overall analysis

	MaxDiff score:	General support ('definitely support'):	Focus group outcome:
Company -side leak reduction	13%	57%	Generally supported but should be happening already and water saved is only low
Winter storage reservoirs	10%	42%	Even split – social costs and timeline are not ideal but could bring long term benefits
Pipeline	10%	28%	Overall liked but mostly as a back up or short term solution
Aquifer storage & recharge	9%	26%	Generally supported by the majority but should be a back-up solution
Water recycling plants	8%	39%	Timeline too long and would need another solution to be implemented to fill the gap
Customer -side leak reduction	8%	41%	Majority would not support as unclear benefits and would not pay for this
Water saving devices/ behaviours	8%	47%	Generally supported by the majority but some think it's too expensive

SUPPLY & DEMAND

Overall analysis

	MaxDiff score:	General support ('definitely support'):	Focus group outcome:
Water import	6%	27%	Generally supported by majority but may not be long term as dependent on cost and surplus water
Smart metering	6%	34%	Divided support – can help people change habits but not all trust the technology
Compulsory metering	5%	36%	Half would be in favour but depends on individual circumstances
Nitrate removal	5%	26%	Only supported by minority due to high environmental impact
Opt-in metering	5%	37%	Having the option is liked but is not strong enough to change people's habits
Desalination plants	5%	27%	Low support despite high volume of water generated – might change with alternative to brine discharge
Abstraction	4%	22%	Only a solution for small proportion due to environmental concerns

Recommendations

- There are three investment options **preferred** overall:
- **Company-side leak reduction** was supported at all stages of the research. The focus groups underlined how it does not affect wildlife and helps reduce wastage, making the network more efficient
- **Winter storage reservoirs** also had overall support from survey respondents. The focus groups highlighted its short-term social costs but also its positive track record and benefits for the wider community
- **Pipelines** received a lower level of 'definite' support in the survey possibly due to concerns about it being a short term solution that depends on water available elsewhere (which could run out), which was also mentioned in the focus groups. Focus group respondents also saw it as a cost effective solution with a short timescale for delivery. When assessed compared to other options in the MaxDiff it's preferable to other solutions. As mentioned in the groups it should go hand in hand with consumer education to change people's habits and therefore fix the problem long term

Recommendations

- Out of the **middling solutions**, the ones that received the best support are:
- **Water saving devices/behaviours**: this solution achieved high general support but moves into the middle section on MaxDiff. Even though generally supported in the focus groups as it delivers instantly more water resource, there were concerns about resistance from the general public to a change in habit and the idea that customers shouldn't be paying for this to be implemented.
- **Customer-side leak reduction**: strongly supported in isolation, once seen in context it moved to the middle section on MaxDiff. From the focus groups we know being able to find undetected leaks is appealing but respondents struggle to see the benefits, especially if they have to pay for the repairs, which raise concerns about affordability. Clear benefits would need to be communicated as well as affordability ensured.

Recommendations

- **Aquifer storage & recharge**: this achieves a good MaxDiff score but had lower ‘definitely support’ proportion. This means in the context of other solutions it is preferred but here are some concerns. The focus groups highlighted this as a backup solution (not a standalone option) as it relies on natural resources we already have. Costs and environmental impact, especially for a relatively low amount of water generated, would have to be carefully assessed for this solution.
- **Water recycling plant**: this achieves middling scores for both general support and MaxDiff and was seen as only a back up solution in the focus groups due to the long time scale. Other solutions would need to be used to increase supply in the meantime.

Recommendations

- **Metering** solutions receive medium standalone support but are found in the lower half of the MaxDiff preference table. Metering splits opinions among customers and may put pressure on larger families. Focus group respondents also debated whether it would actually encourage people to use less water.

Solutions that have low customer support throughout are:

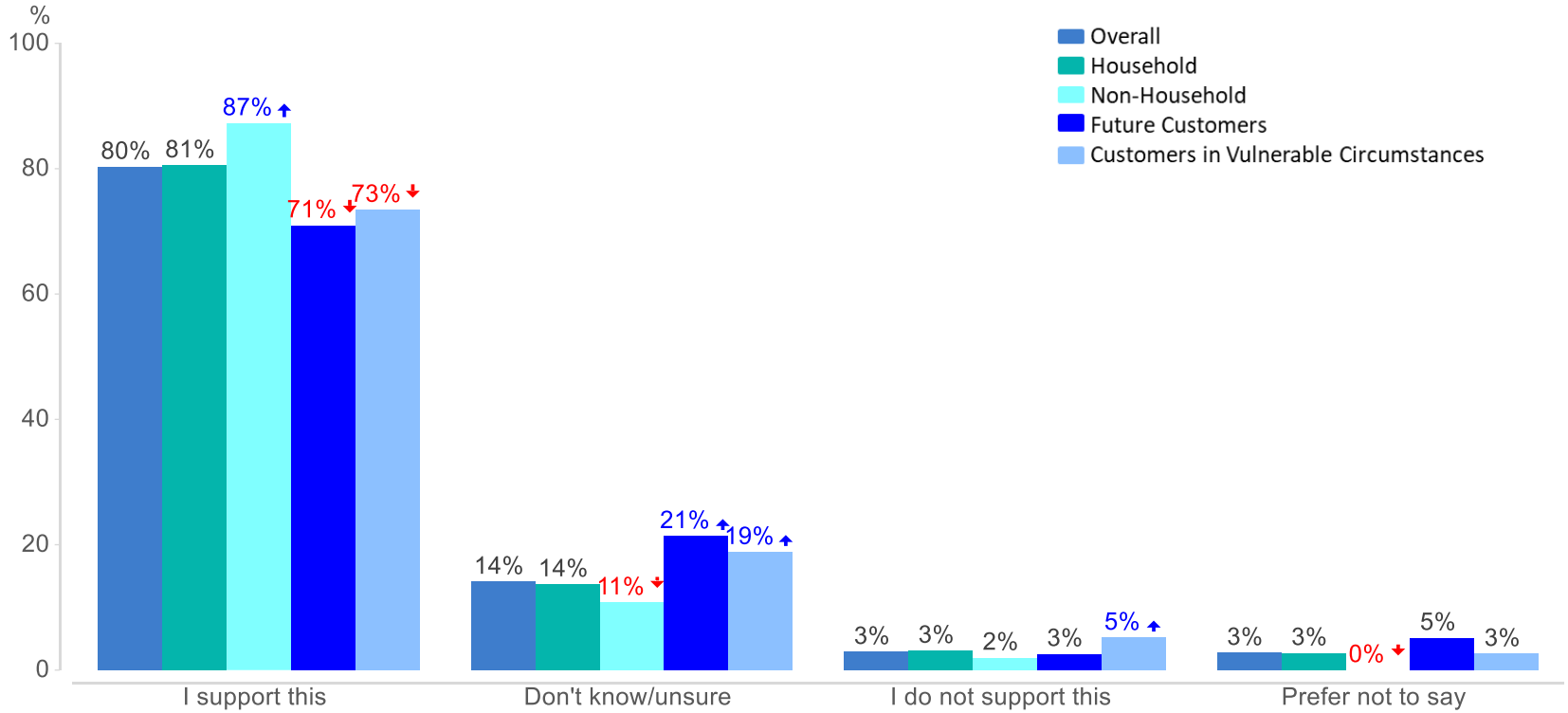
- **Nitrate removal**: this solution was difficult to understand for respondents, even though we explained this concept in the survey following comments in the focus groups. The main concern around this solution is around the chemicals used in the process which make it risky and potentially damaging
- **Desalination plants**: focus group respondents were put off by the brine discharge and its potential harmful impact, as well as its high costs, even though this solution generates a high amount of water
- **Abstraction**: it received the lowest support because it has high environmental costs and is not sustainable in the long run

Environmental Ambition

ENVIRONMENTAL AMBITION

Level of support

Proportion who choose each option:



Essex & Suffolk Water makes careful decisions to make sure there is enough water for everyone's needs and at the same time the environment does not get harmed. The water we use at the moment comes from rivers, lakes and springs but in 2035 - 2050 we might need to take less water from those sources to protect them from the effects of climate change. We are unsure how much less water we should take. Between 2025 and 2027 we could look into how much water is needed in the environment in the long term. This way we could plan to protect or improve the environment from the future effects of climate change. How do you feel about this?

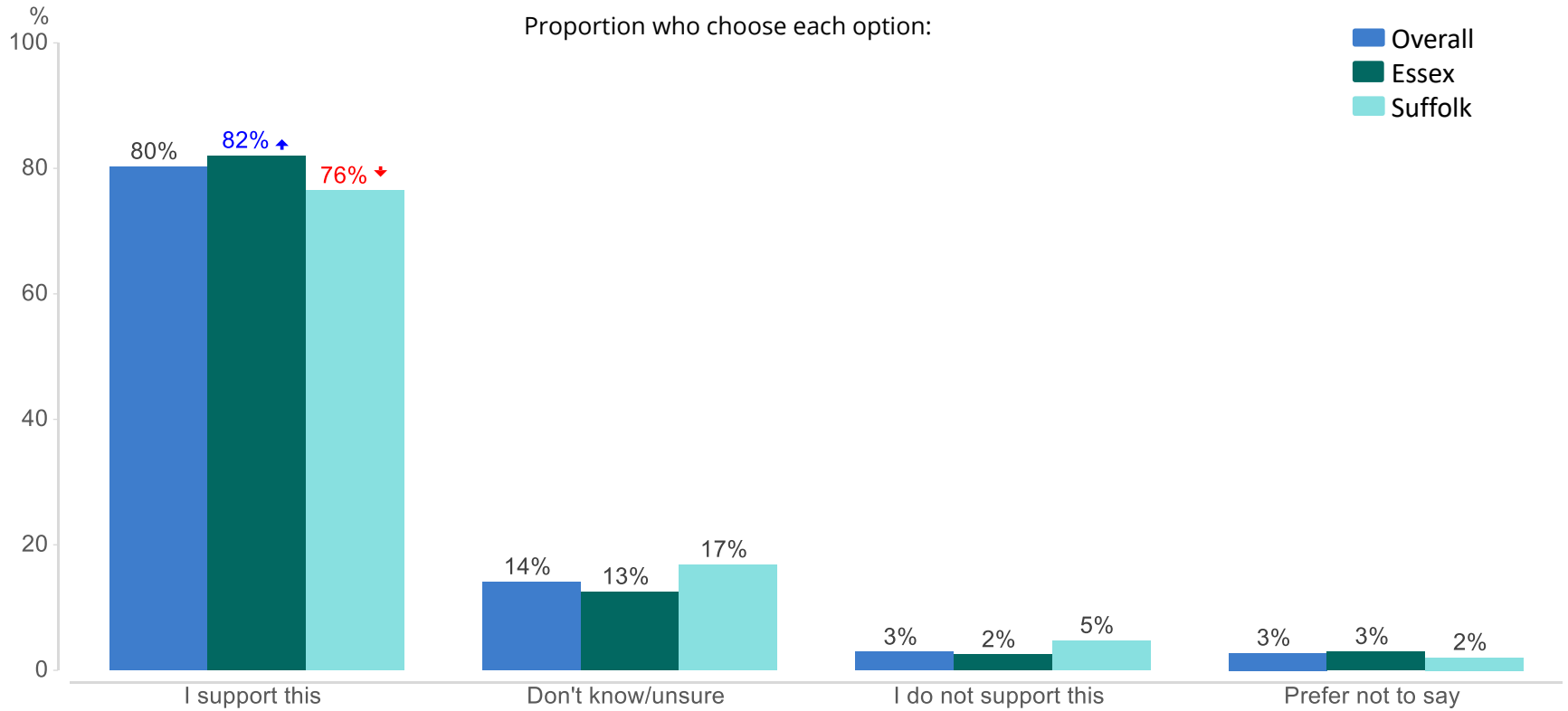
total sample size = 1314; 95% confidence level

Respondents overall are strongly supportive of the environmental ambition with Non-Household customers supporting it the most (87%).

Future customers are slightly less supportive but the majority (71%) are still in favour compared to overall, with 21% of them unsure.

ENVIRONMENTAL AMBITION

Level of support by region



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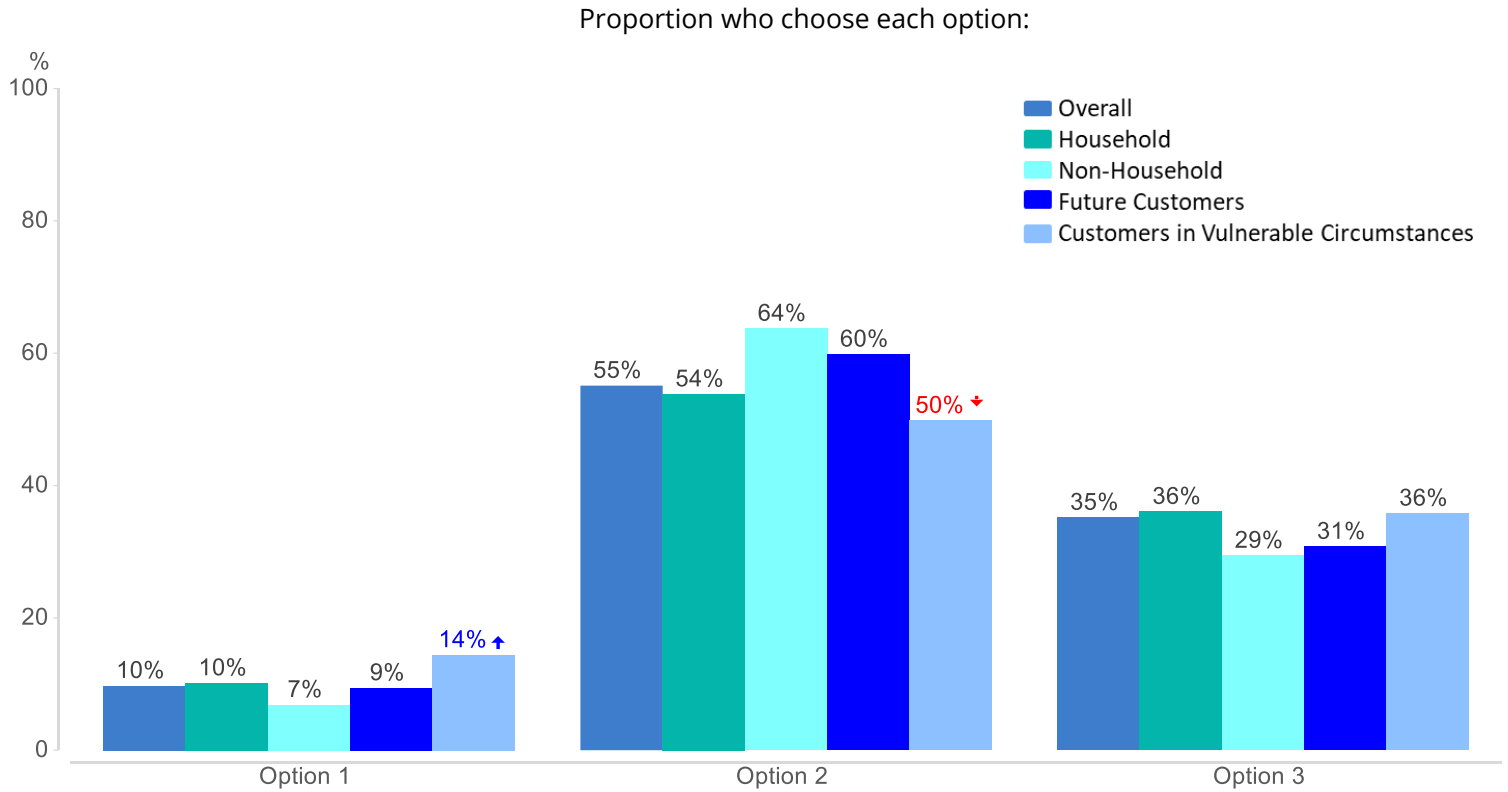
total sample size = 1314; 95% confidence level

76% of Suffolk respondents support the water company's future environmental efforts whereas this proportion is higher among Essex respondents (82%).

Options



There are three options we can take to protect rivers, lakes and springs from the effects of climate change: Option 1: Continue to take the same amount of water from the environment, leaving it in a poorer state than it was before we took water from it. This option requires the lowest level of investment. Option 2: Reduce the amount of water we take from the environment, bringing it back to the same state it in was before we took water from it. This option requires some investment. Option 3: Further reduce the amount of water we take from the environment, making it better than it was before we took water from it. This option requires the most investment. Please select the option you think we should take:

total sample size = 1314; 95% confidence level

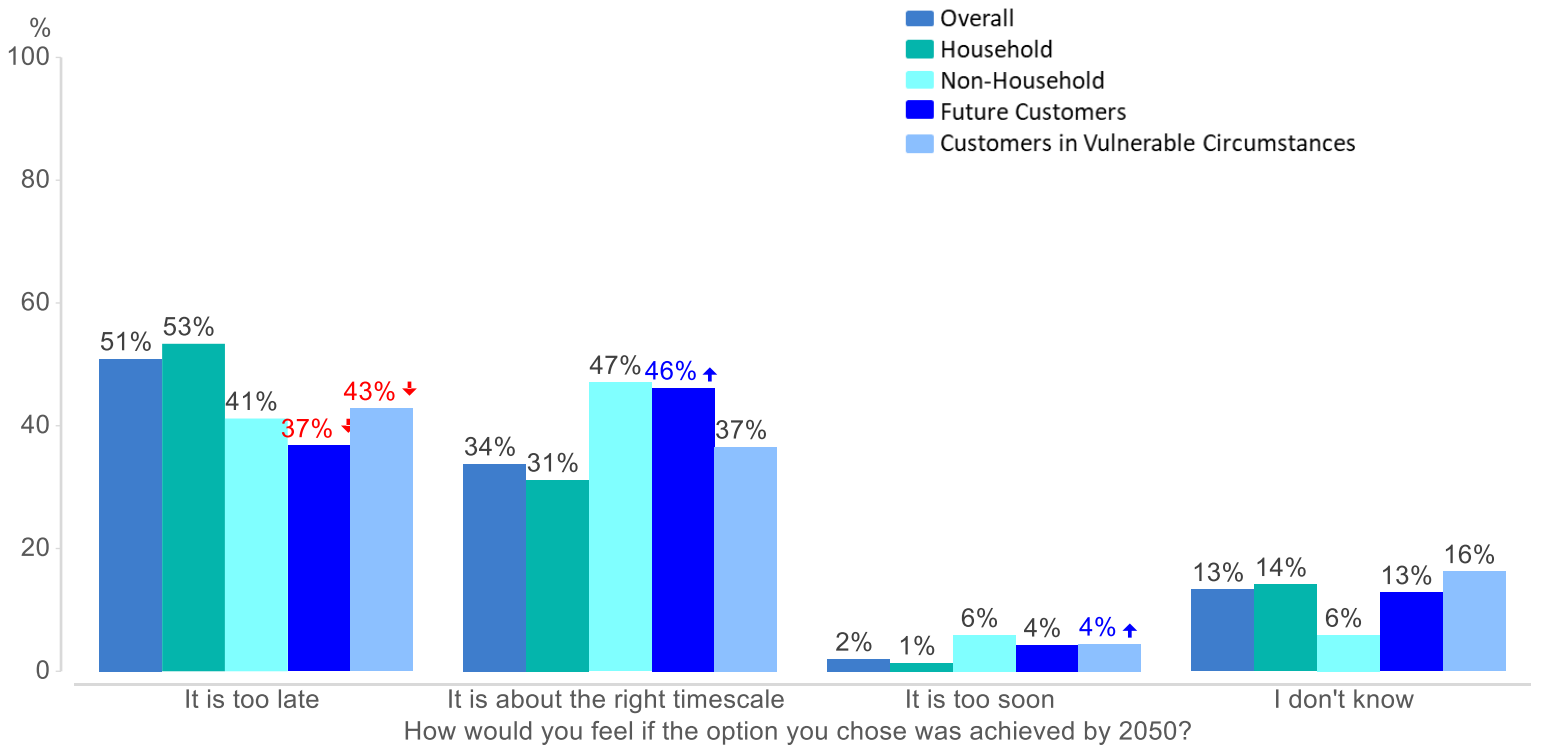
55% of overall customers would like to see option 2 (reducing the amount of water taken from the environment) being implemented. This was the option with the highest level of support across all segments.

Non-Household customers support this option most strongly (64%).

Customers in vulnerable circumstances prefer option 2 the most in line with the whole sample; however these customers are inclined to support option 1 more than other subgroups – likely due to the lowest level of investment required for this option.

2050 Target

Proportion who choose each option:

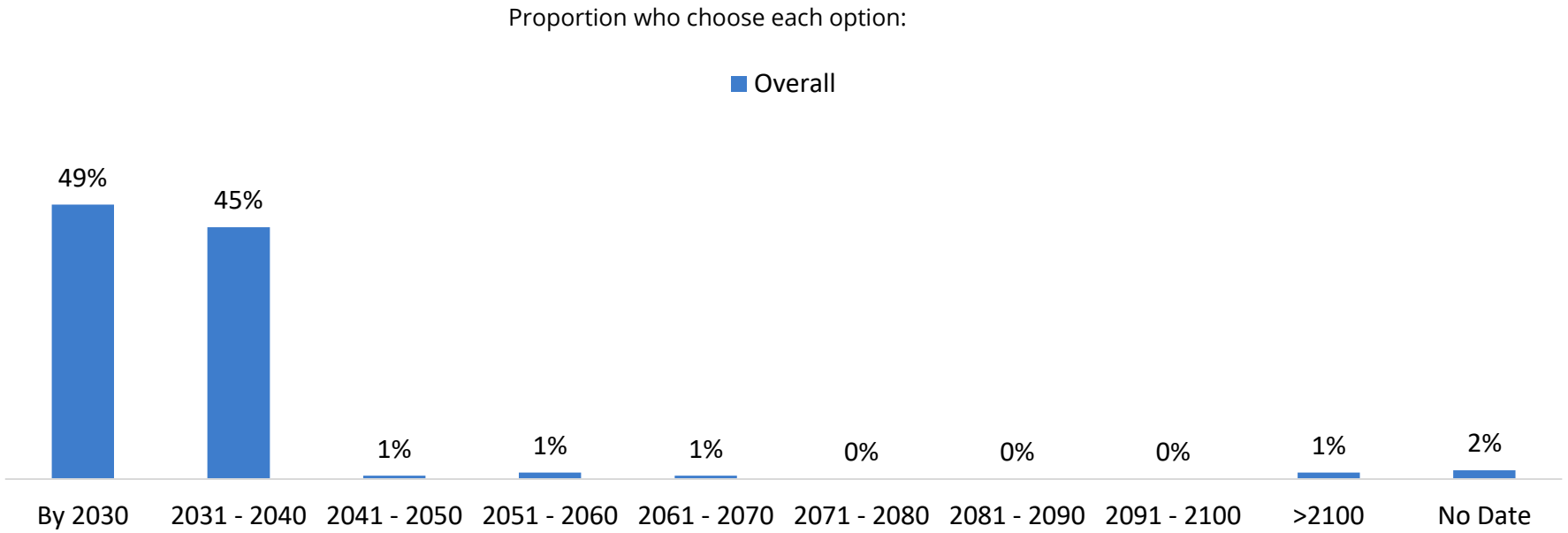


total sample size = 1314; 95% confidence level

51% of the overall sample feel that achieving the target by 2050 is too late.

Non-Household and future customers are more split, with slightly more thinking this is about the right timescale compared to the other segments.

Environmental Target - Year



By which year would you like this environmental target to be achieved? Please enter the year.

Those who said 2050 was either too soon or too late, Sample = 695

This chart is based on those who said the environmental target to be achieved by 2050 is either too soon or too late.

Most respondents who thought 2050 too soon or too late want this goal to either be achieved in this decade (49%) or the next (45%).

Out of the respondents who answered this question, 4% said it was too soon and 96% said it was too late.

Drought

DROUGHT MEASURES

Plan for the future

Respondents were asked the following question:

In times of drought we may need to put some restrictions on how much water customers use to make sure we have enough water if dry weather turns into an extreme drought. Without these restrictions we would need to increase the water supply.

There are three levels of actions we could take when it comes to drought:

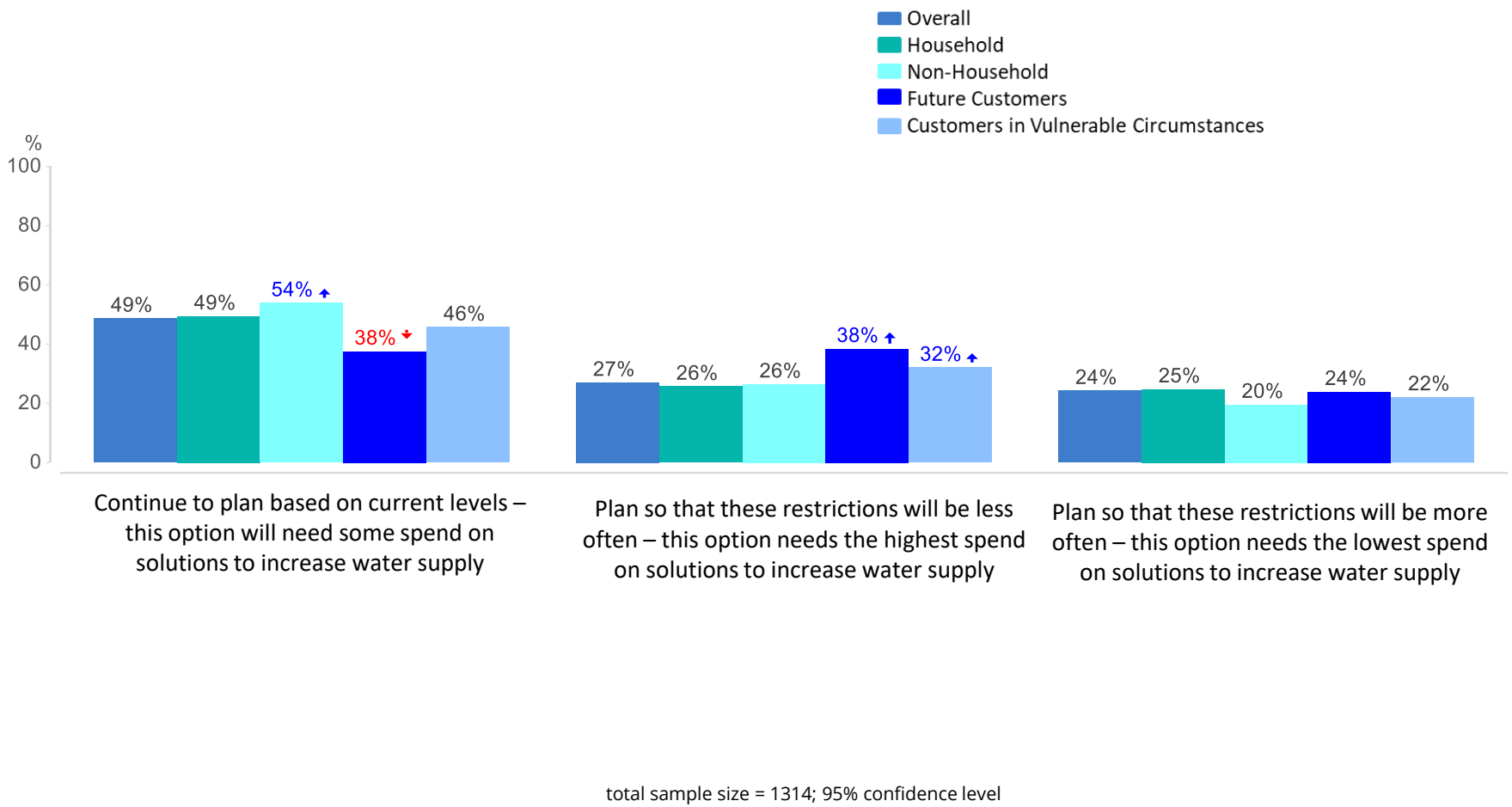
- **Level 1**: we would use all of our communication channels (for example social media and press releases) to ask our customers to use water wisely. This happens once in 10 years on average.
- **Level 2**: if a drought happens we might restrict water use for some time (for example restrict the use of hosepipes to water gardens). This happens once every 20 years on average.
- **Level 3**: if there is a severe drought we may need to put wider restrictions on non-essential water use (for example, watering outdoor plants on business properties). This happens once every 50 years on average.

Even though the action for level 1 happens on average once in 10 years this does not mean that this action will be needed this regularly. For example, a 1 in 10 year drought might happen 3 times in 10 years and then not again for another 20 years.

What do you think we should do in the future?

Plan for the future

Proportion who choose each option:



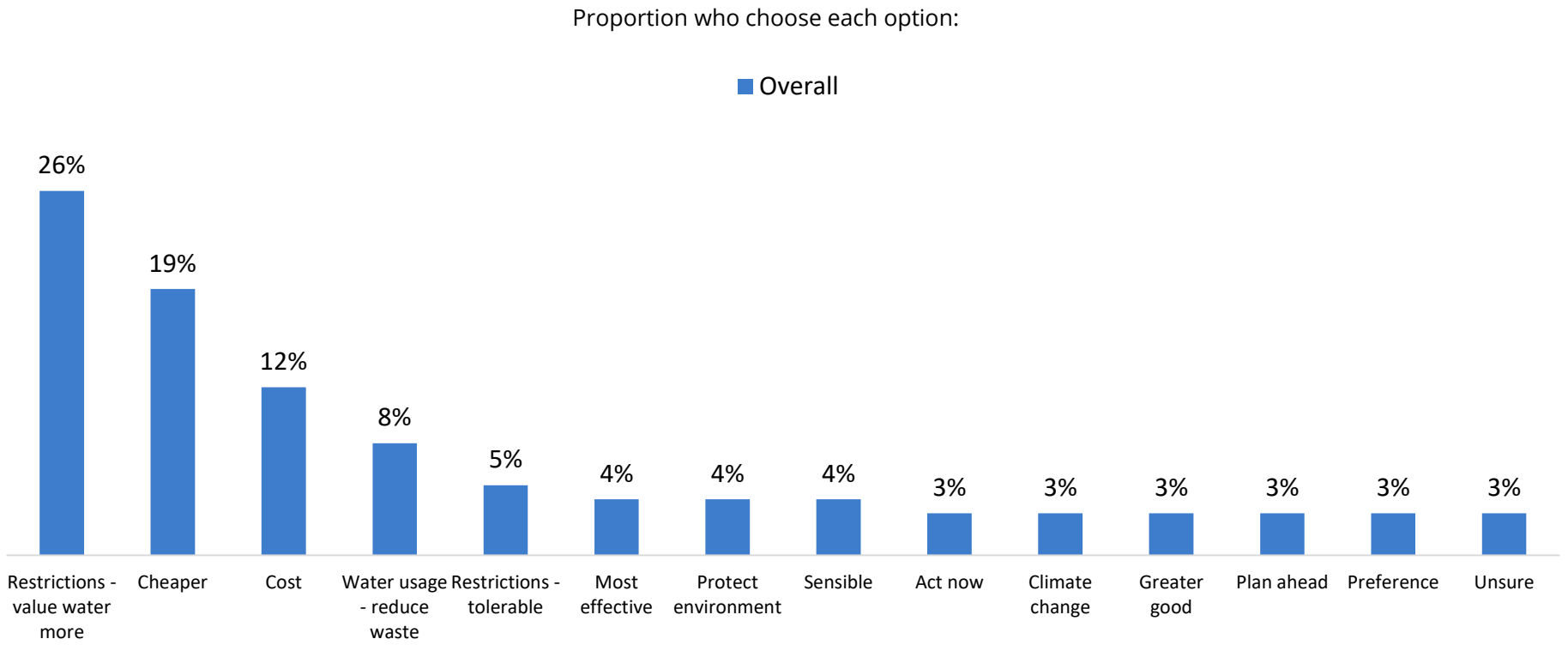
total sample size = 1314; 95% confidence level

49% of the overall sample would like to continue planning based on the current likelihood of restriction levels.

This is the most supported option for most segments; however future customers show equal support for option 2 – planning so that restrictions will happen less often (38%).

In the focus groups the use of temporary restrictions was seen as common sense and something that would be accepted but it might be hard to police the bans and people might not follow the rules.

Open Ended



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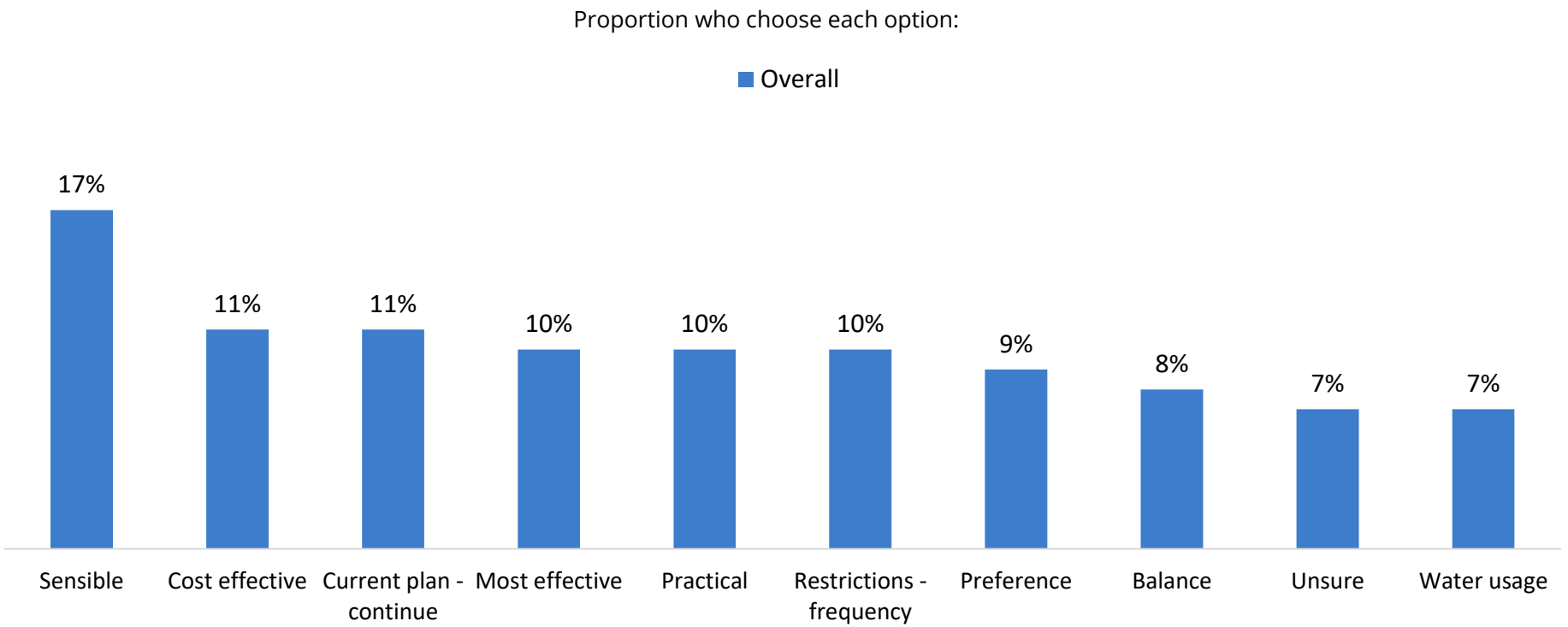
Those who said: Plan so that these restrictions will be more often - this option needs the lowest spend on solutions to increase water supply, Sample = 247

This chart is based on those who prefer to plan so that these restrictions will be more often - this option needs the lowest spend on solutions to increase water supply.

26% of respondents feel that if Essex & Suffolk Water opt for this plan it will make people value water more and use it more sparingly. This sentiment was also expressed in the focus groups when respondents were made aware of the risk of drought in the region.

19% of respondents are concerned about rising bills so have opted for this option due to it being the cheapest. Cost was also a consideration in the groups, with some objecting to costs involved in campaigning for a more responsible usage.

Open Ended



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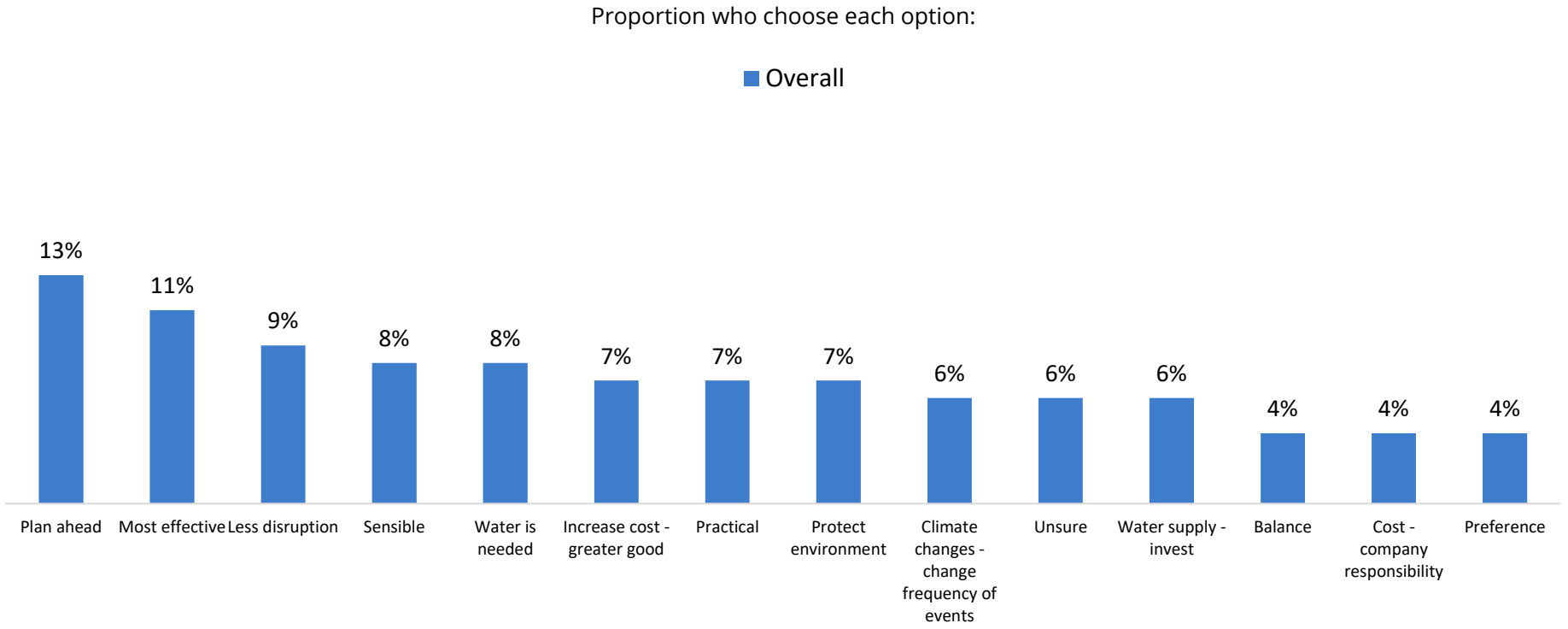
Those who said: Continue to plan based on current levels - this option needs some spend on solutions to increase water supply , Sample = 490

This chart is based on those who prefer to continue to plan based on current levels - this option needs some spend on solutions to increase water supply.

17% of respondents feel that if Essex & Suffolk water opt for this plan it would be the most sensible option.

11% of respondents feel that it is the most cost effective plan and it is the current plan so they want to see it continue.

Open Ended



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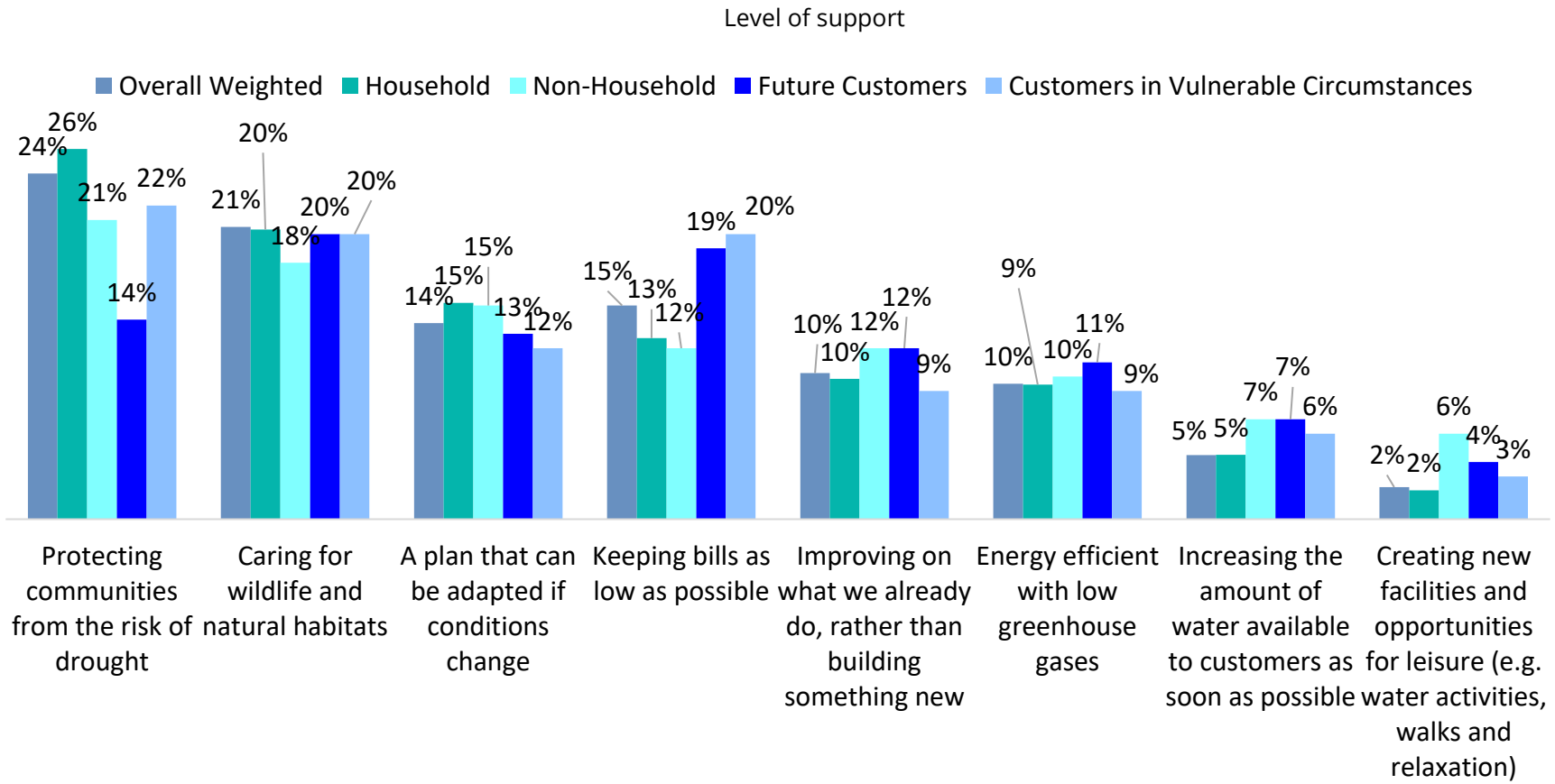
Those who said: Plan so that these restrictions will be less often - this option needs the highest spend on solutions to increase water supply , Sample = 257;

This chart is based on those who prefer to plan so that these restrictions will be less often - this option needs the highest spend on solutions to increase water supply.

13% of respondents feel that if Essex & Suffolk water opted for this plan it would help them plan ahead for the worst case scenario.

11% of respondents feel that this option would be most effective.

Water Resources Management Plan



All of the options you've looked at have their own pros and cons.

We'd like to know what are the most and least important factors to you when deciding whether or not you support an option.
Out of the following, **please tell us what you think is the most important and the least important to you:** (Please note this question is repeated a few times with different combinations of options)

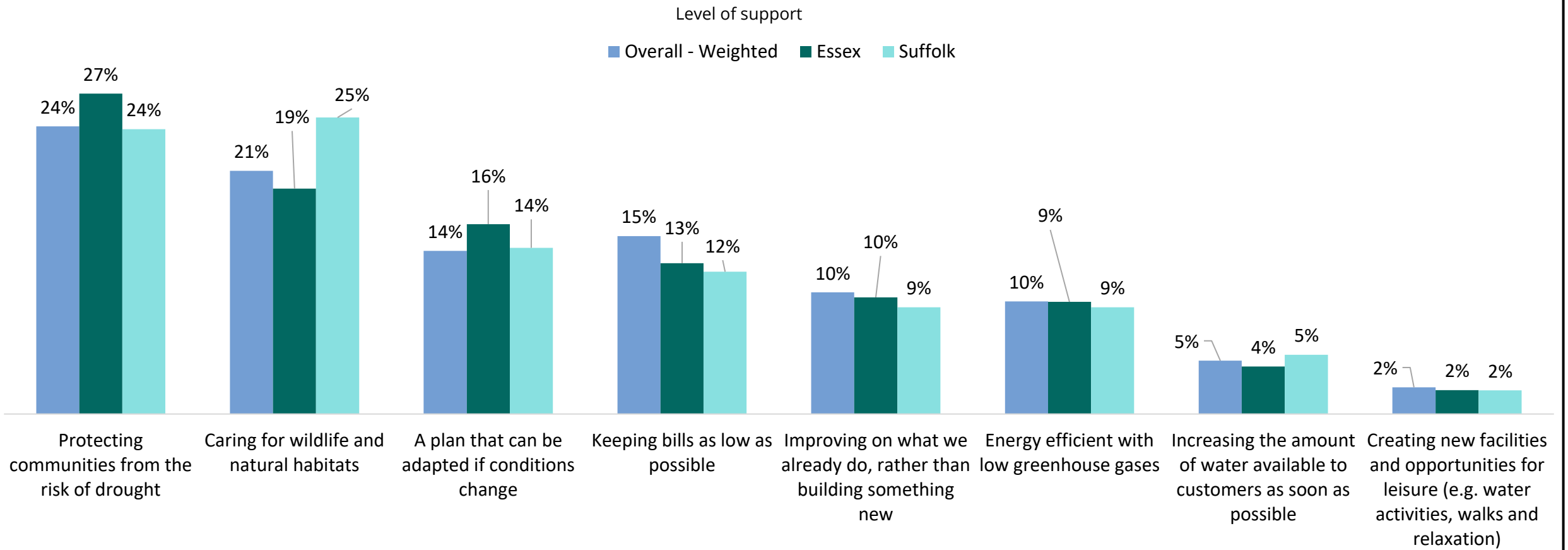
total sample size = 1314; 95% confidence level

Protecting communities from drought has the highest support, followed by caring for wildlife and natural habitats and an adaptable plan. In the focus groups drought resilience was also respondents' main concern. In the groups the importance of supporting wildlife and natural habitats was middling whereas in the survey it has jumped to second place in the list of priorities.

Keeping bills low is preferred by customers in vulnerable circumstances and future customers.

BEST VALUE PLANNING

Water Resources Management Plan by region



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Out of the following, **please tell us what you think is the most important and the least important to you:** (Please note this question is repeated a few times with different combinations of options)

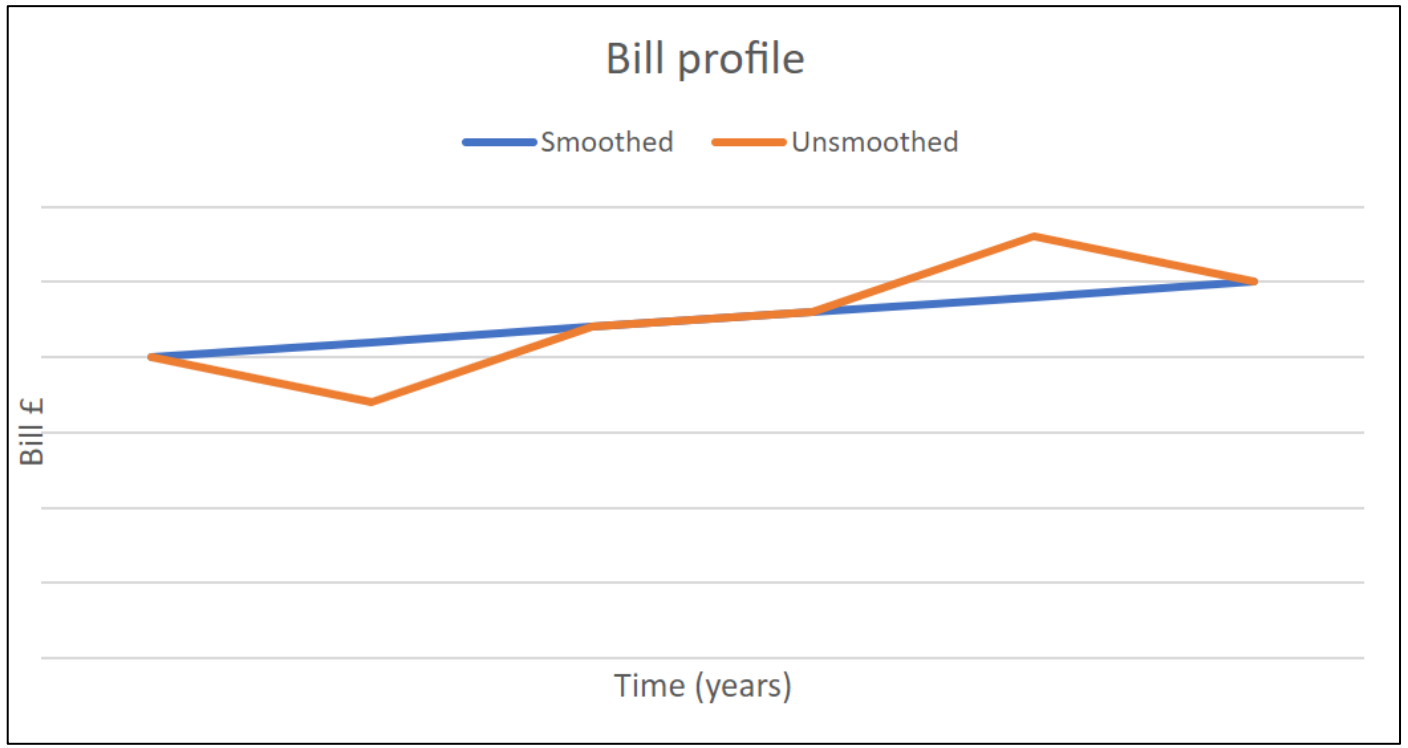
total sample size = 1314; 95% confidence level

Water Resources Management Plan by region

- Protecting communities from drought is the top priority for Essex respondents (27%)
- Among Suffolk respondents slightly more prioritise wildlife and natural habitats (25%)
- Keeping bills as low as possible and an adaptable plan are slightly less important for Suffolk respondents compared to Essex customers

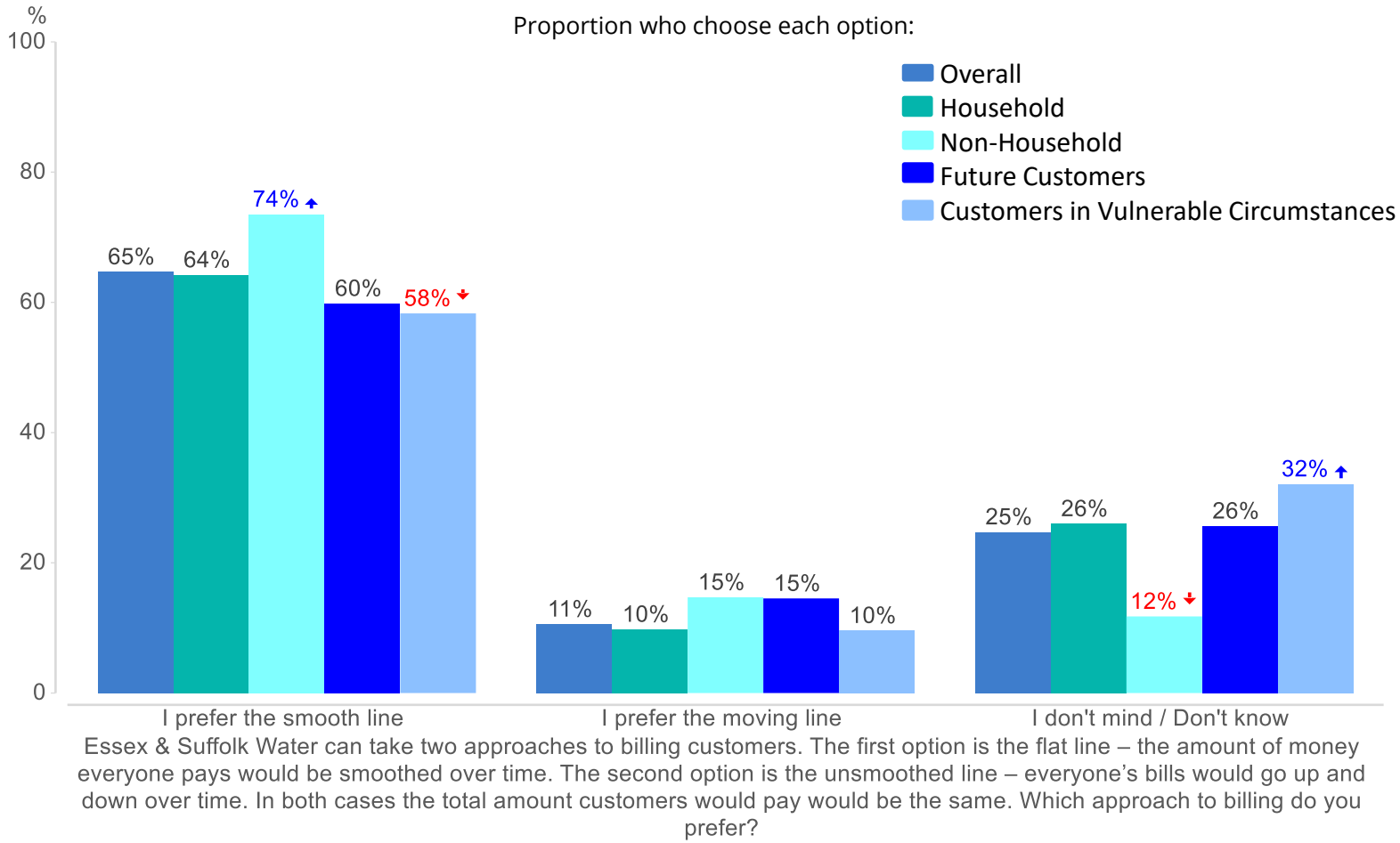
Bill Profile

Bill Profile



Respondents were shown the image to the left, featuring two different bill structures Essex & Suffolk Water could choose from, and were asked to indicate which one they preferred and why.

Preferred bill structure

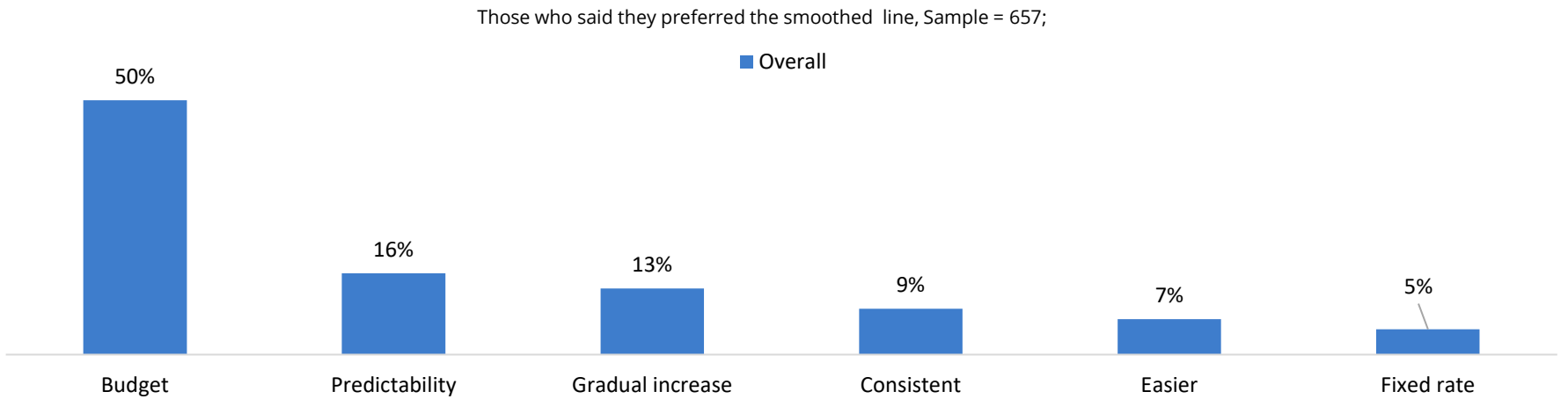


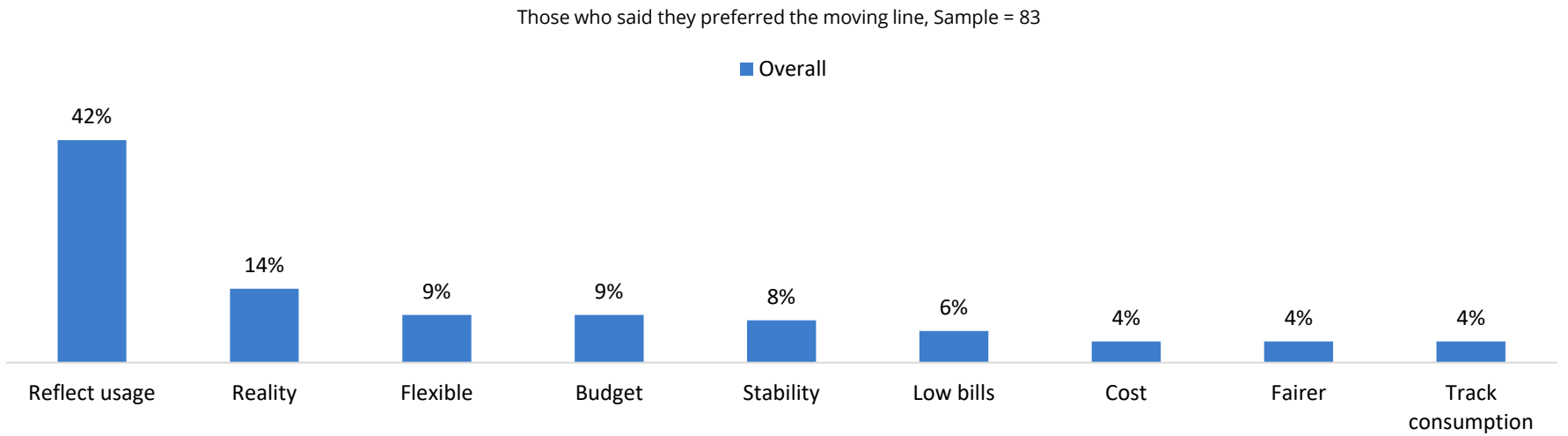
total sample size = 1314; 95% confidence level

Smoothed bill profiles are the most popular across all segments. This is in line with the focus groups, where respondents overwhelmingly picked this option as it helps customers plan their expenditure rather than being landed with an unexpected increase. This is particularly important now during the current cost of living crisis.

This option is especially popular amongst non-households (74%).

Open Ended





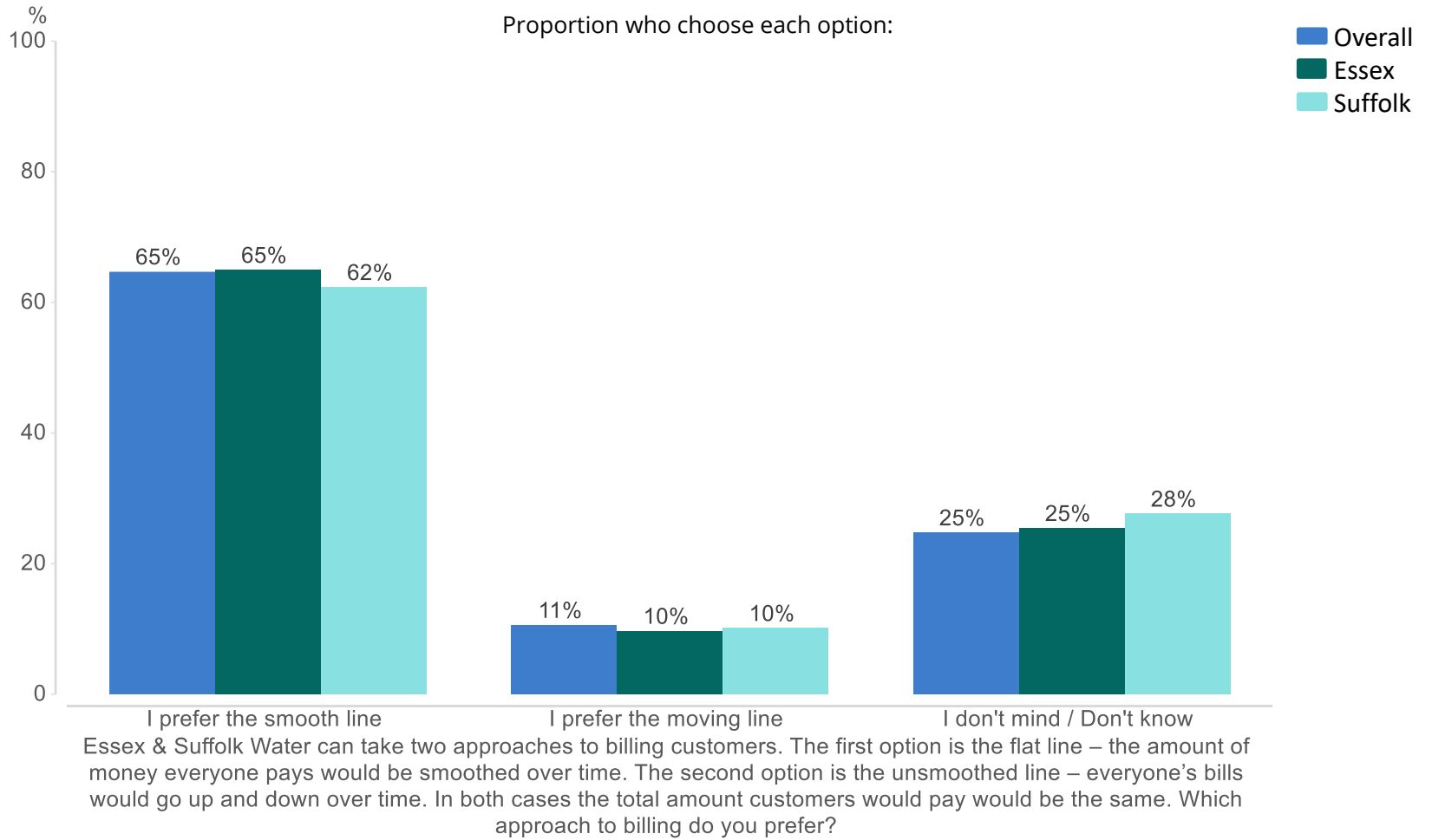
Essex & Suffolk Water can take two approaches to billing customers. The first option is the flat line – the amount of money everyone pays would be smoothed over time. The second option is the unsmoothed line – everyone's bills would go up and down over time. In both cases the total amount customers would pay would be the same. Which approach to billing do you prefer?

These charts are based on reasons behind choice for either a moving or smooth line.

50% of responses in support of the smoothed line like that it enables them to budget. 16% also stated it gives them more predictability.

Among those who preferred the moving line 42% believed this would be linked to their water usage.

Preferred bill structure by region



There are no major differences across regions as a smooth line is still the top rated option.

Slightly more in Suffolk say they don't mind which option they are offered compared to Essex.

Conclusions and recommendations

CONCLUSIONS & RECOMMENDATIONS

Three investment options were **preferred** overall:

- **Company-side leak reduction** was supported at all stages of the research so it should be implemented as a first solution. It has low impact on wildlife and helps reduce wastage, making the network more efficient
- **Winter storage reservoirs** also had overall support from survey respondents. It has short-term social costs but also a positive track record and benefits the wider community
- **Pipelines** received a lower level of 'definite' support in the survey possibly due to concerns about it being a short term solution that depends on water available elsewhere, when but assessed compared to other options in the MaxDiff it was preferred to other solutions. This should go hand in hand with consumer education to change people's habits and fix the problem long term

CONCLUSIONS & RECOMMENDATIONS

Some **middling solutions** also emerged. The ones that received the best support are:

- **Water saving devices/behaviours**: this solution achieved high general support but moves into the middle section on MaxDiff. It delivers instantly more water resource, but there could be resistance from the general public to a change in habit and people feel we shouldn't be paying for this to be implemented.
- **Customer-side leak reduction**: strongly supported in isolation, once seen in context it moved to the middle section on MaxDiff. Finding undetected leaks is appealing but respondents raise concerns about affordability. Clear benefits would need to be communicated as well as affordability ensured.
- **Aquifer storage & recharge**: this achieves a good MaxDiff score but had lower levels of definite support. This is a backup solution as it relies on existing natural resources. Costs and environmental impact would have to be carefully assessed for this solution.
- **Water recycling plant**: this achieves middling scores for both general support and MaxDiff and was seen as only a back up solution. Other solutions would need to be used to increase supply in the meantime.

CONCLUSIONS & RECOMMENDATIONS

- **Metering** solutions receive medium standalone support but are in the lower half of the MaxDiff preference table. Metering splits opinions among customers and may put pressure on larger families.
- Solutions with low appeal throughout are:
- **Nitrate removal**: this solution was difficult to understand for respondents and the main concern regards the chemicals used in the process
- **Desalination plants**: there are concerns around brine discharge and its potential harmful impact, alongside its high costs
- **Abstraction**: it received the lowest support because it has high environmental costs and is not sustainable in the long run

CONCLUSIONS & RECOMMENDATIONS

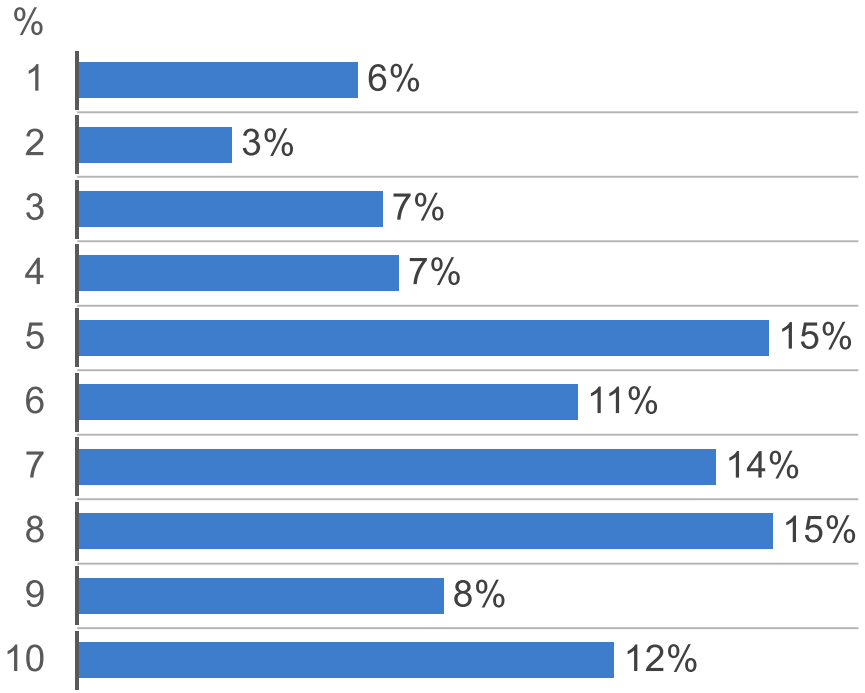
- Awareness that the Essex & Suffolk Water supply area is water stressed is low but it is cause for **concern** for over half overall
- Respondents are strongly supportive of the environmental ambition, and particularly of option 2 (i.e. **reducing the amount of water taken** from the environment, bringing it back to the same state it was in before)
- With regards to best value planning, **protecting communities from the risk of drought** is a priority for respondents, followed by caring for wildlife and natural habitats
- In terms of drought measures, respondents' preference is to **continue to plan based on the current levels** of action – respondents see this as a sensible strategy and focus groups also showed that restrictions are seen as common sense (though possibly hard to enforce)
- A **smoothed** bill structure is by far the best option for respondents overall, as it enables respondents to budget and plan their expenditure – this was also the preferred option in the focus groups

Survey Scores

SURVEY SATISFACTION

Scores

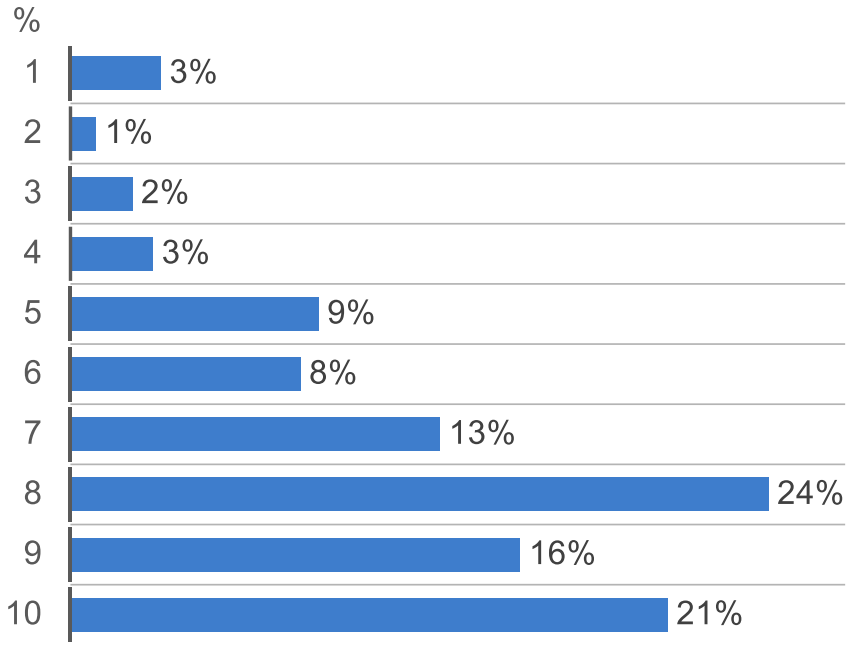
How enjoyable did you find the survey?



Average Score - Enjoyable

6.2

How easy or difficult was it to understand the information you were provided during this survey?



Average Score – Ease of understanding

7.5

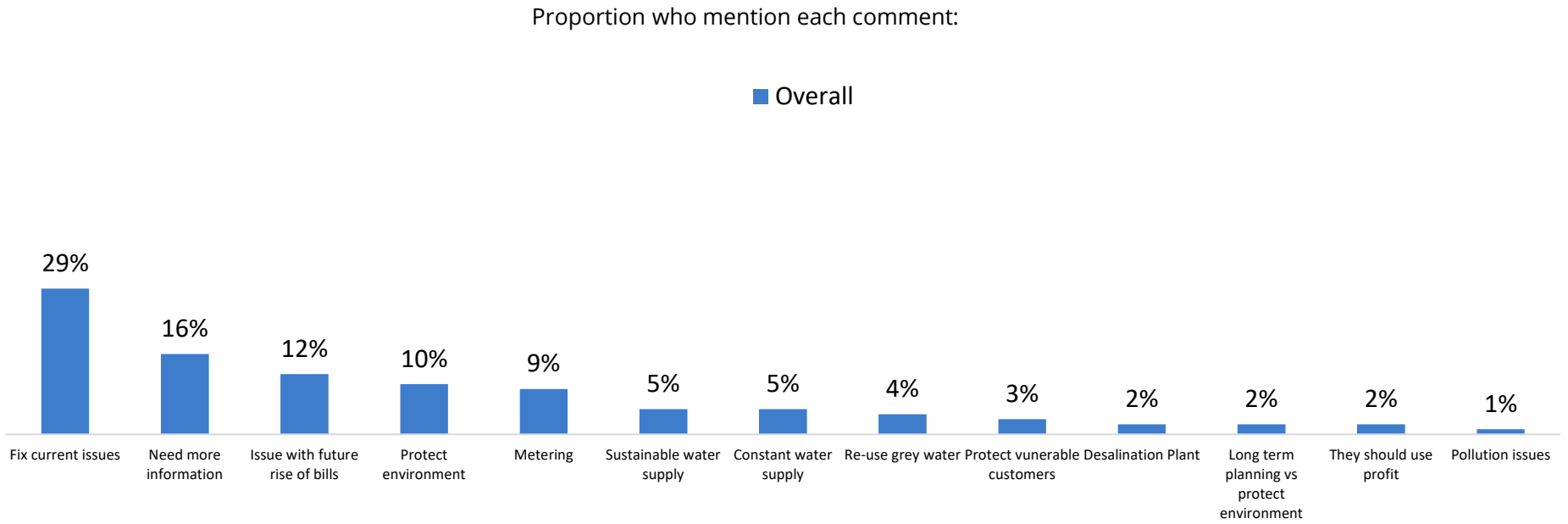
74% overall found the survey easy to understand with a score of 7+ out of 10, which indicates that the concepts were explained in a way that respondents found user-friendly.

However, only 49% found the survey enjoyable with the same score.

Some customers contacted us to report technical difficulties. Due to the length of the questionnaire the survey experienced drop outs and the overall completion rate was 30%.

FINAL COMMENTS

Open Ended – Comments on survey topics



Do you have any other comments or suggestions about the topics in this survey? Comments about survey topics

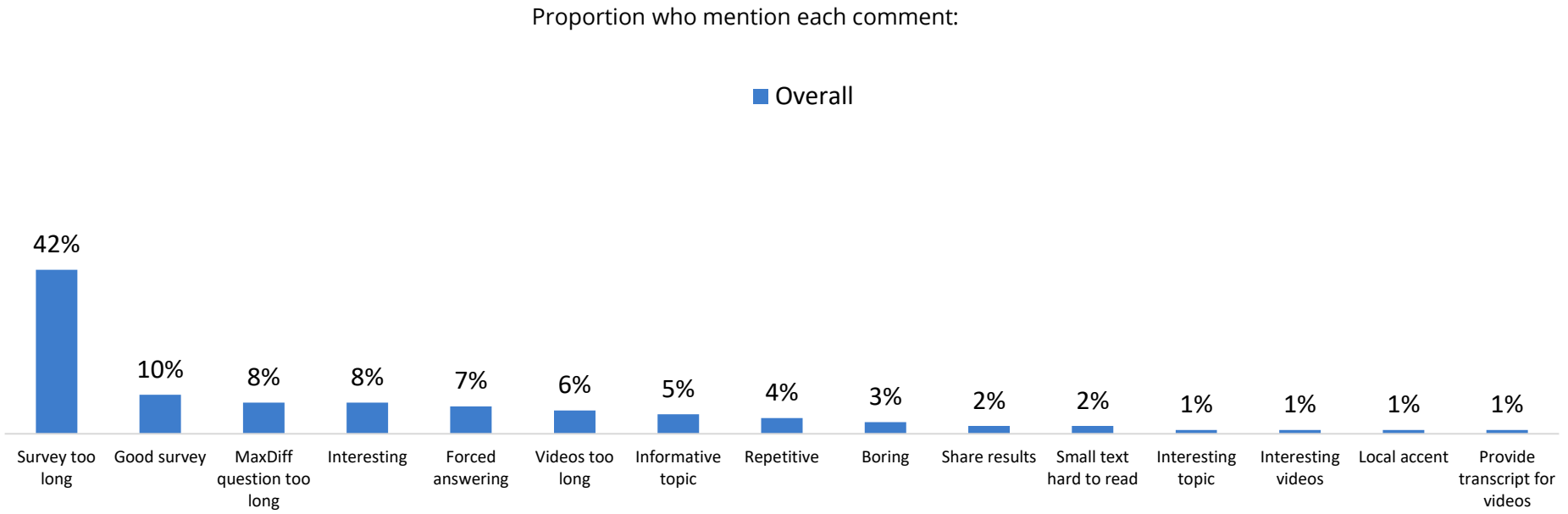
Top topics mentioned when removing No Comment, Sample = 200

This chart is based on any additional comments left at the end of the survey relating to topics mentioned in the questionnaire, **excluding people who had no comment**.

29% of those who left a comment mentioned a need to fix current issues in the network.

FINAL COMMENTS

Open Ended – Comments about survey



Do you have any other comments or suggestions about the topics in this survey? Comments about survey

Top topics mentioned when removing No Comment, Sample = 129

This chart is based on any additional comments left at the end of the survey relating to the survey itself, **excluding people who had no comment**.

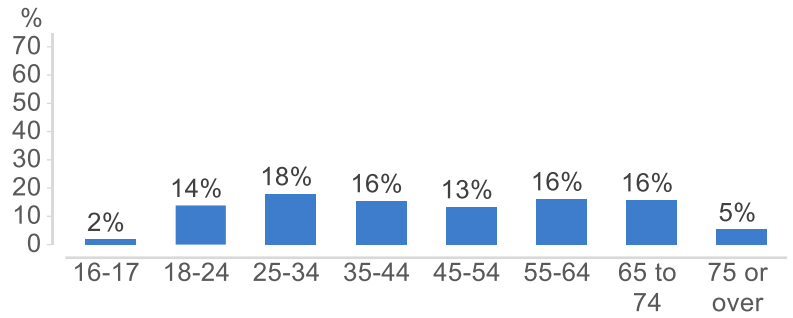
42% of those who left a comment found the survey too long.

10% liked the survey and 8% found it interesting, though another 8% also found the MaxDiff question too long.

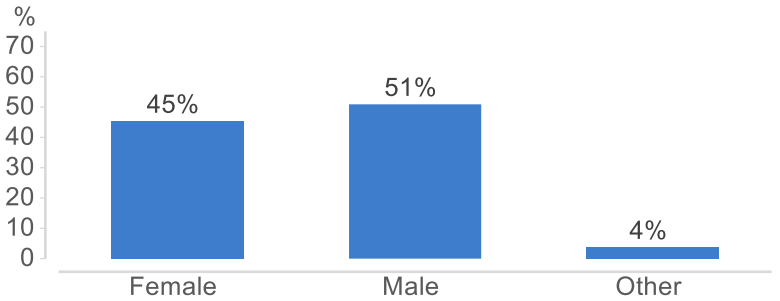
Sample Profile

Sociodemographics

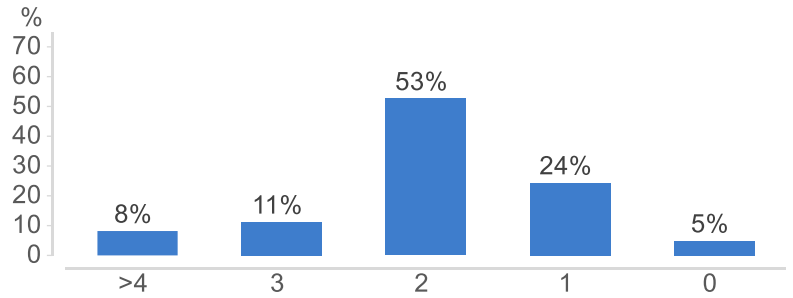
Which of the following age groups do you fit into?



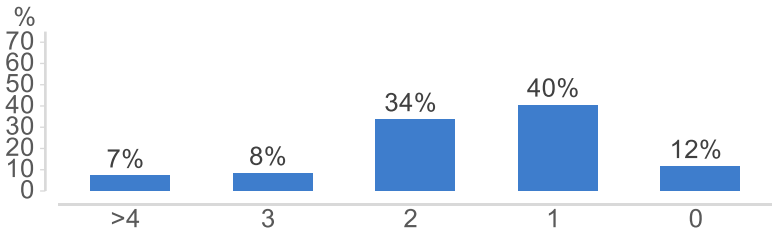
What is your gender?



How many Adults live in your household?



How many Children aged 18 and under live in your household?

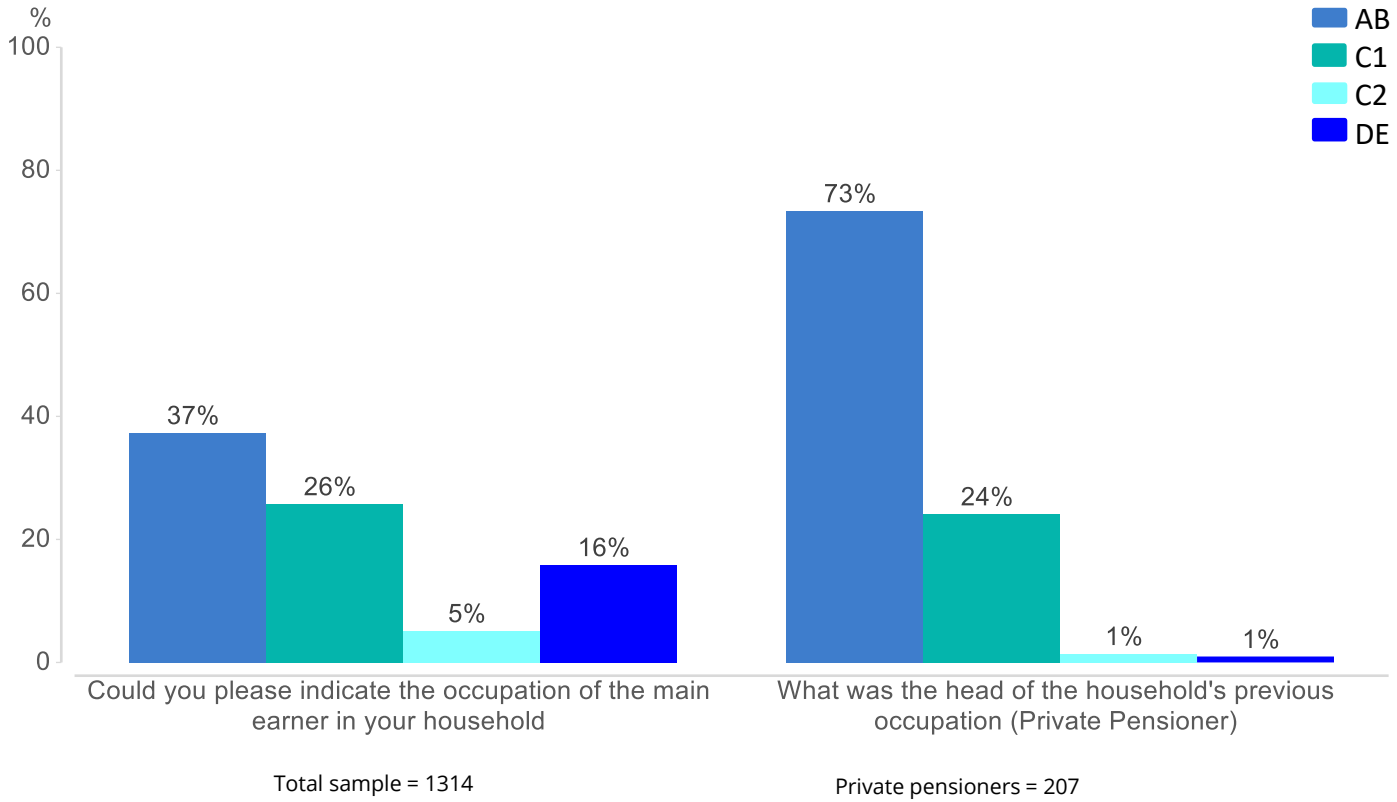


total sample size = 1314; 95% confidence level

SAMPLE PROFILE

Social grade

Current and previous occupation of the head of the household



- AB= Higher and intermediate managerial, administrative and professional
- C1=Supervisory, clerical and junior managerial, administrative and professional; students living away from home
- C2=Skilled manual workers
- DE=Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

Social grade

Respondents were asked about their current occupation.

Only those who fell into the ‘Private Pensioner’ category were asked about their previous occupation. Responses given to the two questions were then codified into the 4 socioeconomic groups featured on the chart on page 81.

8% of respondents overall fell into the state pensioner category.

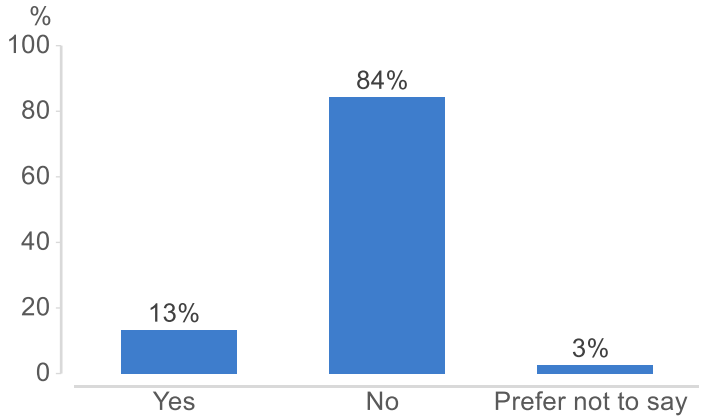
Our sample shows that more respondents fell into AB social grades compared to the customer base (where AB are 22%).

Conversely, the survey sample has fewer respondents from social grades C2 and DE. Both these social grades amount to 23% in the customer base but their proportion was lower in the sample.

As a result, data for the MaxDiff question has been weighted to rebalance the proportions of socioeconomic groups in the sample, to reduce any influence having an overrepresentation of AB and an underrepresentation of C2DE might have had on responses.

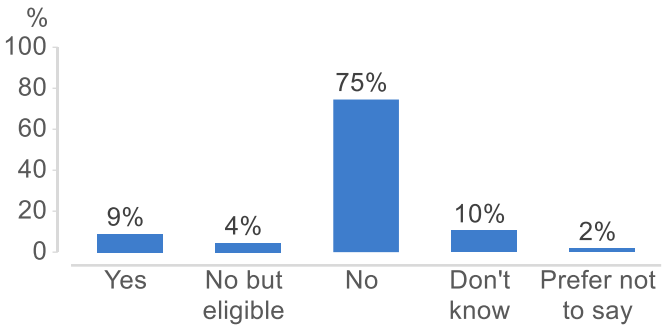
Priority Services Register

Is English your second language?



sample size = 1314

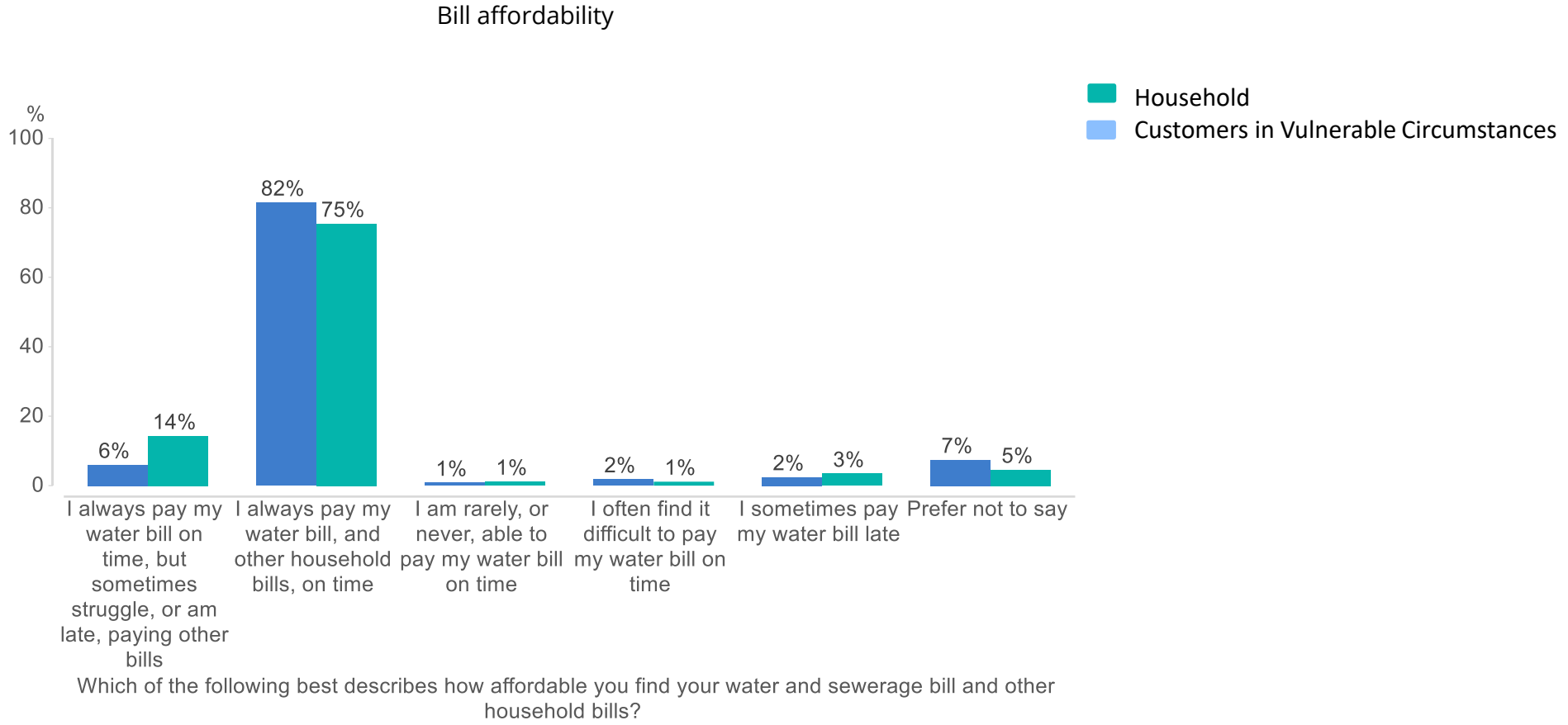
Is anyone in your household registered on the Priority Services Register?



sample size = 1314

The proportion of those who speak English as their second language is slightly higher than the UK population and the percentage of those who are on the PSR is broadly in line with the UK average.

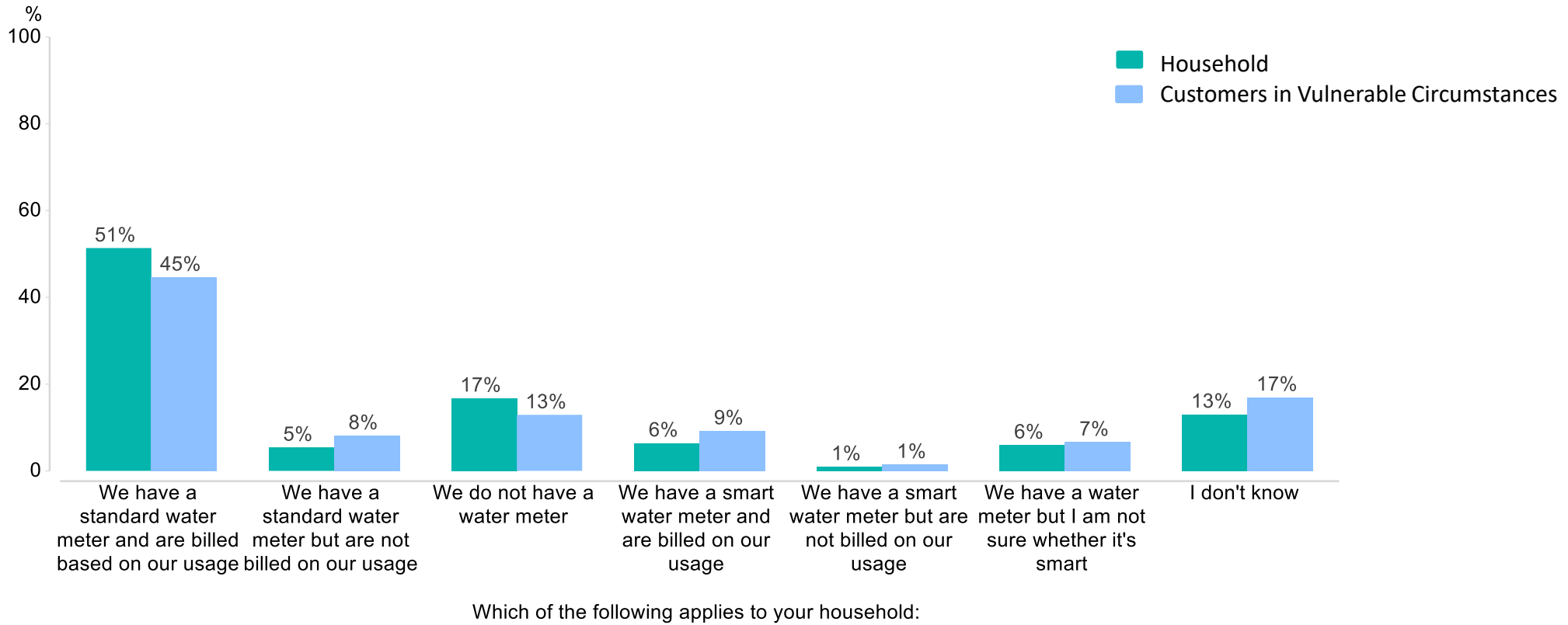
Bill Affordability



Household = 1095, Customers in vulnerable circumstances = 271; 95% confidence level

Meter status

Which of the following applies to your household?

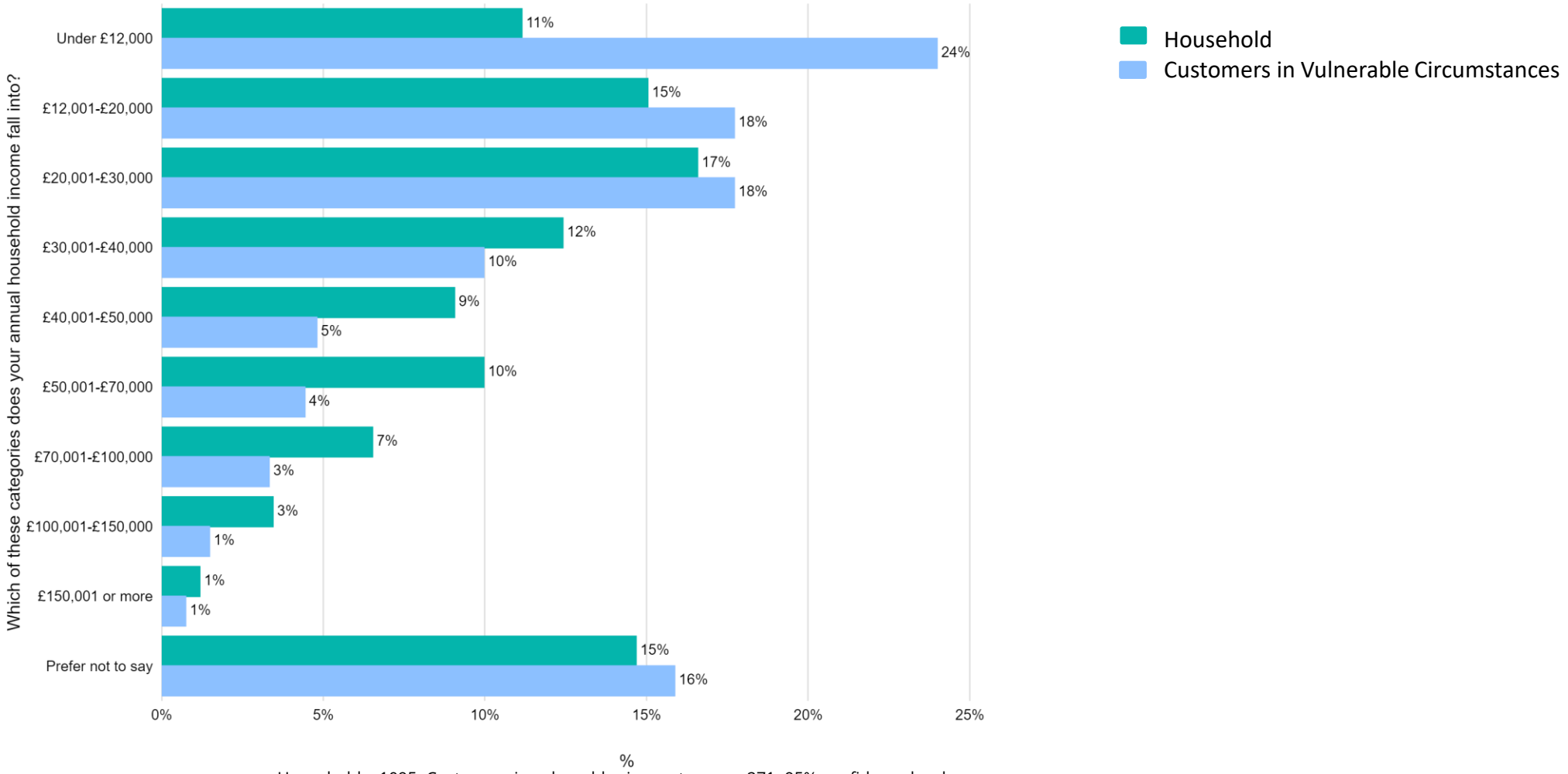


Which of the following applies to your household:

Household = 1095, Customers in vulnerable circumstances = 271; 95% confidence level

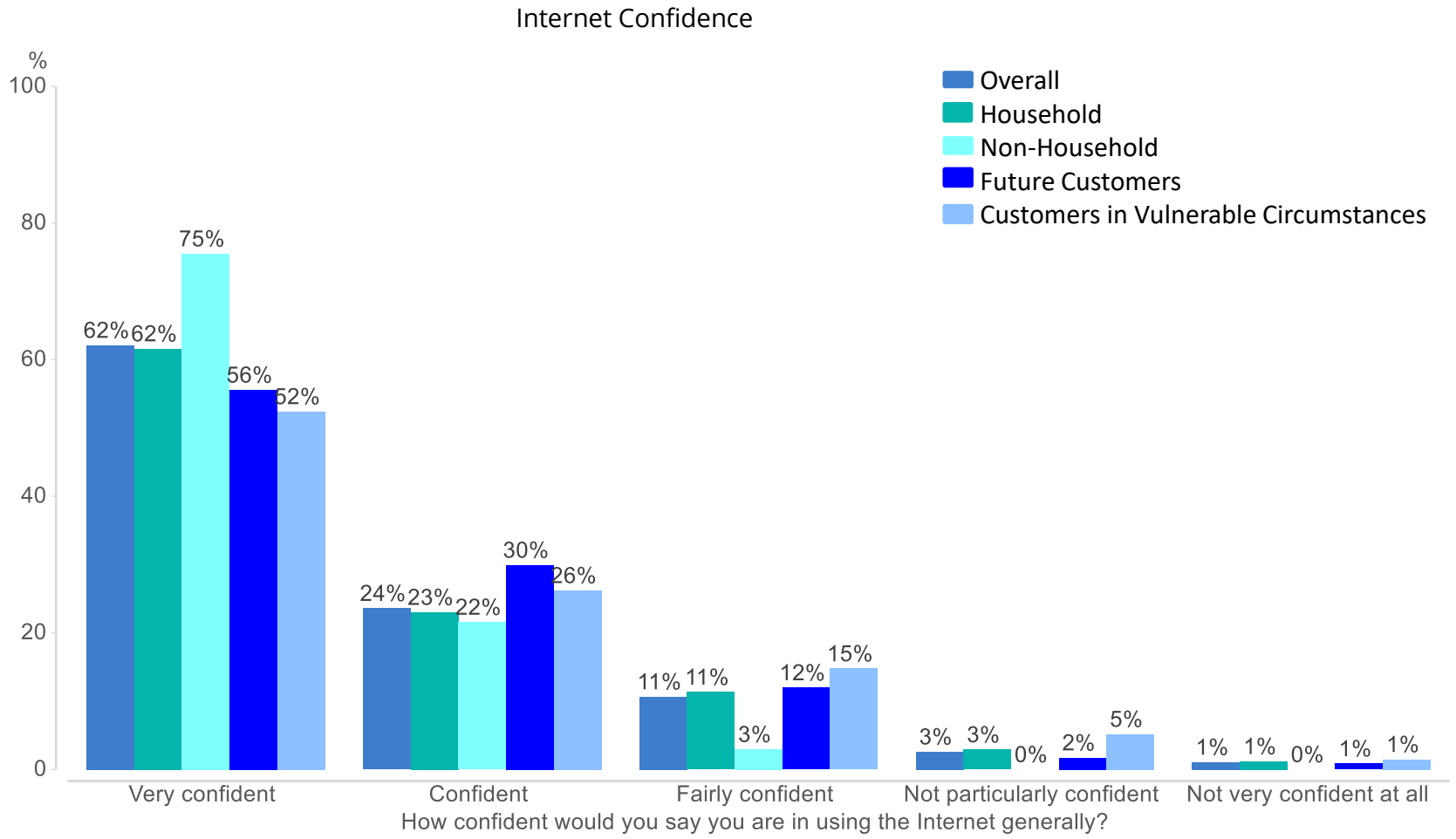
Income

Household income



Household = 1095, Customers in vulnerable circumstances = 271; 95% confidence level

Internet Confidence



92% of people in the UK are regular Internet users.

Especially since the pandemic customers over 55 have increased their technical capabilities.