

# Promoting water efficiency among Non-Household customers

## Understanding how wholesalers can motivate usage reduction

12<sup>th</sup> August 2022



Research indicates potential market for propositions however water companies will need to be proactive

- 1 Cost control is more acute than ever for NHH – so potentially more receptive to cost saving messages**
  - Continuing challenges of pandemic with a hardening economic picture is front and centre for NHH
- 2 Complacency about water saving prevalent in all but largest users**
  - Any initiatives will need to overcome barriers to water use reduction: it is seen as a marginal cost vs. other utilities
  - Plenty of evidence of water efficiency measures in place: this box perceived to have been ticked already
  - Low engagement with environmental/water scarcity drivers due to lack of knowledge (or sense of urgency)
- 3 However, focused discussions and exposure to propositions suggests NHH are open to nudges/new ideas**
  - NHH looking for cost efficiencies: accurate billing first and foremost – but incentives and audits interest
  - Opportunity to leverage link with energy usage
  - NB: Observe disconnect between Retailer standpoint (research stages 1 & 2): NHH more receptive than Retailers suggest
- 4 Propositions receive mixed response: short and long term approach is required**
  - In today's climate, NHH engage with propositions that require minimal effort for maximum cost benefit: the onus is on the water companies to be proactive with attractive incentives on offer. Short term gains will require considerable investment from water companies
  - Future strategies should focus on communicating/educating re. wider need to tackle water security. The lower cost propositions require NHH to engage with the existential need to use less water (which they do not currently see).
- 5 Next steps: what does WRE want to take forward?**
  - Targeted (short term) propositions developed further and tested with relevant (higher user) NHH sample
  - Longer term plans require 'hearts and minds' offensive in which to promote (lower cost) propositions





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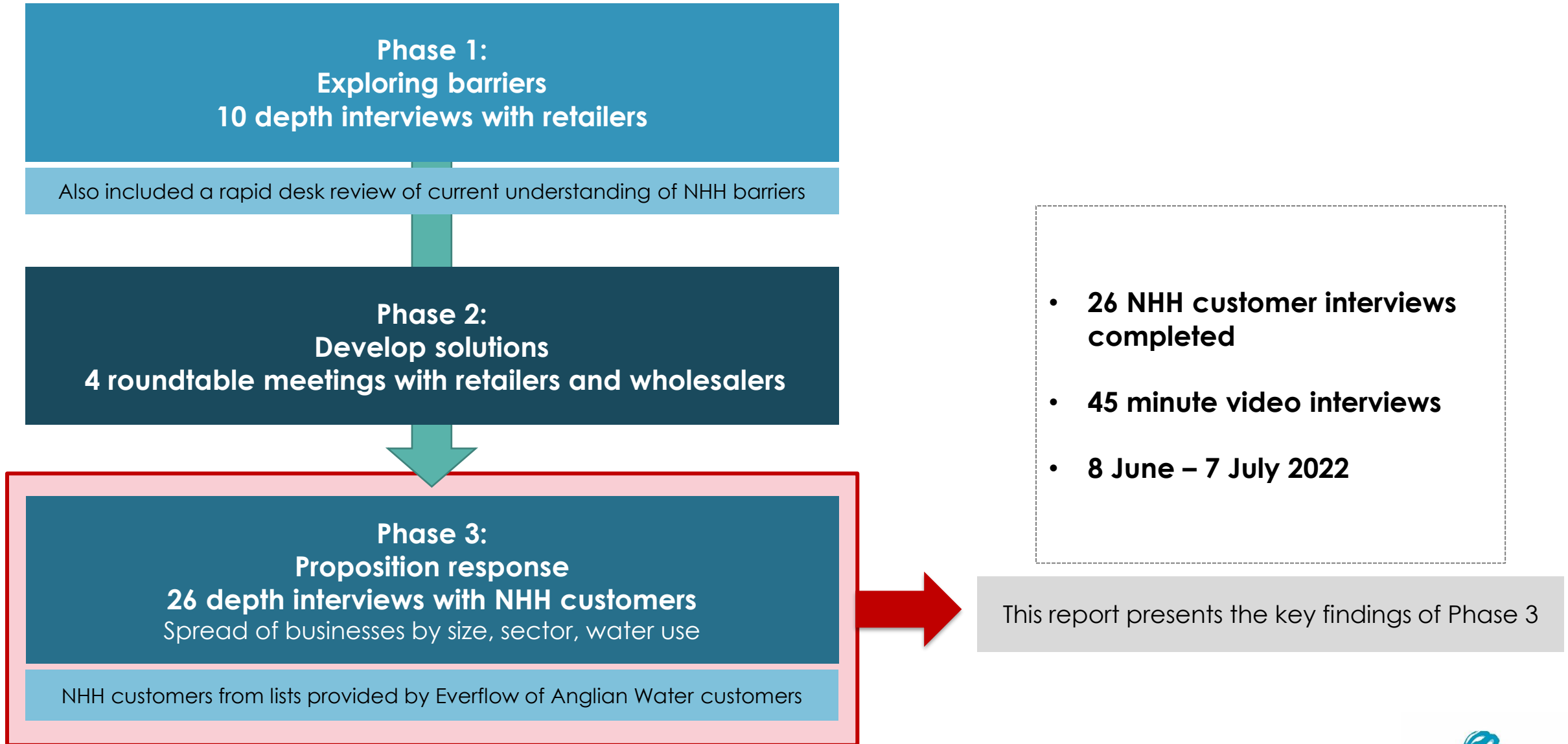
05

**Strategic implications**



A photograph of a laboratory laundry room. The room features rows of white front-loading washing machines with teal-colored upper cabinets. The machines are arranged in a long line, and the teal overlay is semi-transparent, allowing the background image to be visible. The text "Sample & methodology" is written in white on the teal overlay. The room is brightly lit by overhead fluorescent lights, and the floor is a light-colored tile. In the background, more washing machines and a glass partition are visible.

# Sample & methodology



WRE members sought to collaborate with retailers when reaching out to their NHH customers

## Phase 3 Objectives

### Current role of water efficiency

How, if at all, have businesses adopted water efficiency?

### Barriers to water efficiency

What is, and could be, preventing adoption of water efficiency?

### WRE proposition response

How do business feel about WRE's water efficiency propositions?

## Recruitment & fieldwork

June						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

July						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Businesses were recruited from lists provided by WRE retailers, which involved several stages to obtain permission:

- WRE requested retailer cooperation
- BM provided WRE with template invitation email to pass on to retailers so they could send out to large pool of NHH customers, with GDPR processes outlined
- One retailer (Everflow) agreed to share customer names with Anglian (& Blue Marble) for the research
- Blue Marble invited businesses from the Everflow list (via email and telephone) to take part. A range of business sectors and sizes was recruited from the list provided (see next slide for details)

Blue Marble and WRE considered the potential weakness of including only Anglian customers. On balance it was concluded that the type of businesses represented are relevant across the WRE group and will provide a valuable view at this stage.

The WRE members concluded that other industries or sectors that are more prevalent in specific regions but lacking in this sample (e.g. technology and tertiary education in the Cambridgeshire region) may be included in the next iterative phase of this project using a different recruitment approach to achieve a more representative sample.

- The sample provided comprised **c.350 contacts** in total
- The recruitment process involved contacting the entire list with up to **3 follow up contacts**
- With 26 full interviews, the strike rate for this project was **1/13.5**

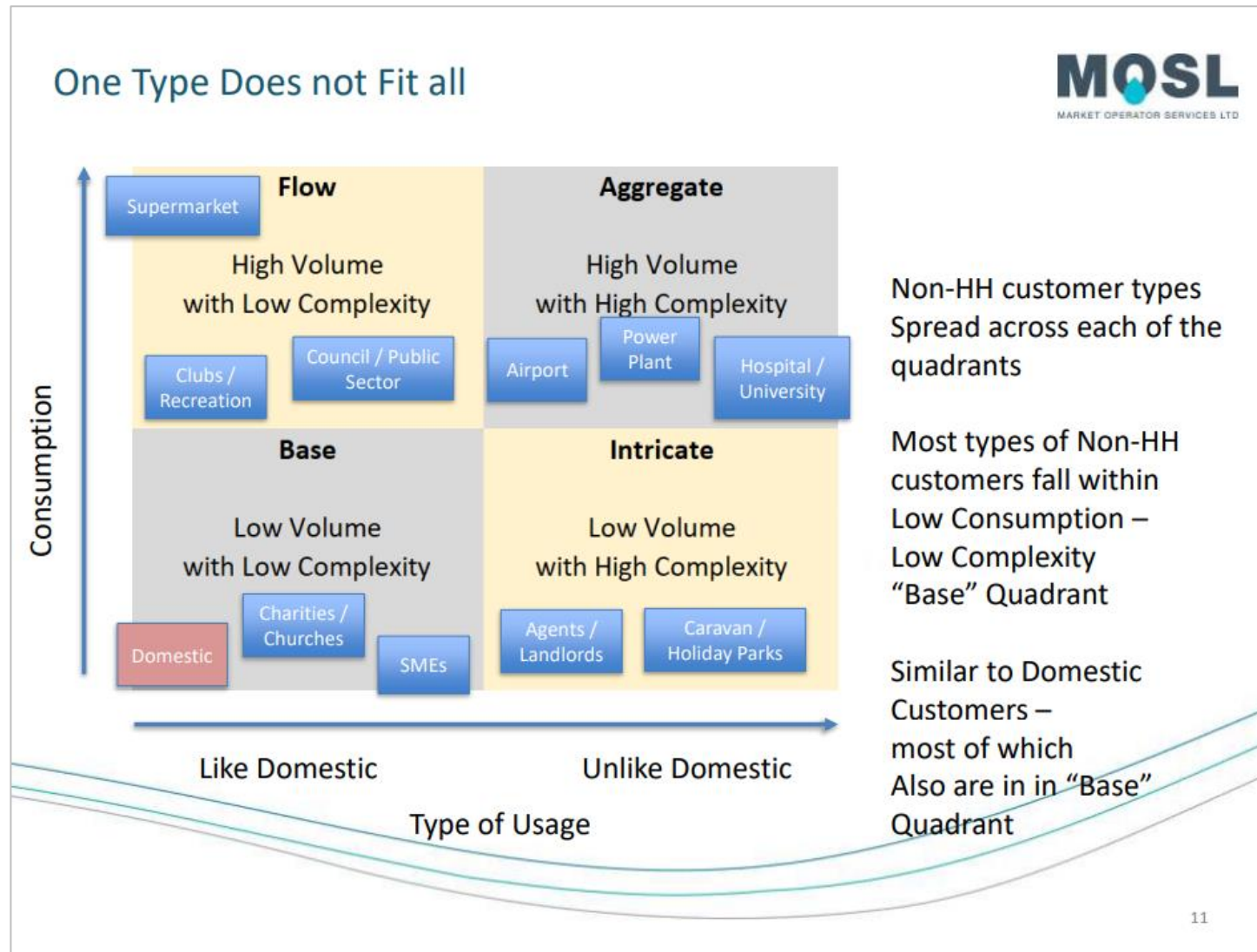
Business sector	
Leisure / hospitality	6
Agriculture	7
Food and beverage	3
Education	3
Healthcare	3
Retail	2
Manufacturing	1
Construction	1

Water volume	
100-1000 l/d	7
1000-3500 l/d	12
3500-13700 l/d	6
Over 13700 l/d	1

Business size (by employees)	
Small-medium (1-49)	20
Medium-large (50-249)	6
Large (250+)	-

**This sample is not representative of all businesses in the region and this should be born in mind when reading the report. Instead it reflects a broad cross section and provides indicative data on how businesses respond to the proposition ideas.**

We applied the MOSL and RWG segmentation on consumption and usage to the NHH sample



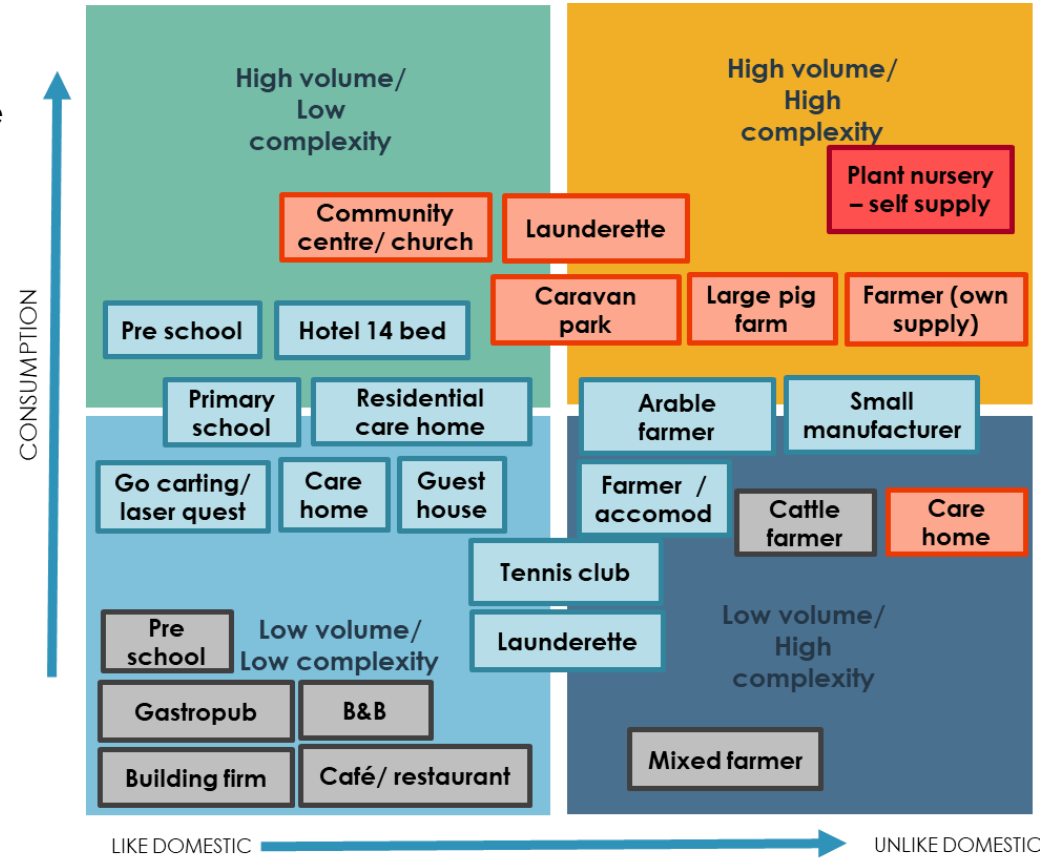


# All MOSL segments represented (although no very large users in this sample)

Smaller NHH dominate the sample, which reflects the NHH population and the lists provided, but means the sample of higher volume users is small

- Low complexity but high volume:**
- Domestic use on a larger scale
  - Water use critical for customer use

- Domestic-like water needs:**
- Very small organisations
  - Kitchens, toilets and some bathroom facilities - mainly for customer use; watering gardens and washing machines



**Blend of high volume and complexity:**

- Water used in processes at higher volumes
- Agriculture with high usage and complex needs e.g. arable and livestock mix
- Caravan park with individual water meters for each site

**High complexity but low volume:**

- Water use critical in e.g. manufacturing processes - as well as being used for staff toilets / domestic use
- Agricultural uses e.g. drinking water for animals, essential cleaning of machinery
- Example (care home) required to have water lab tested



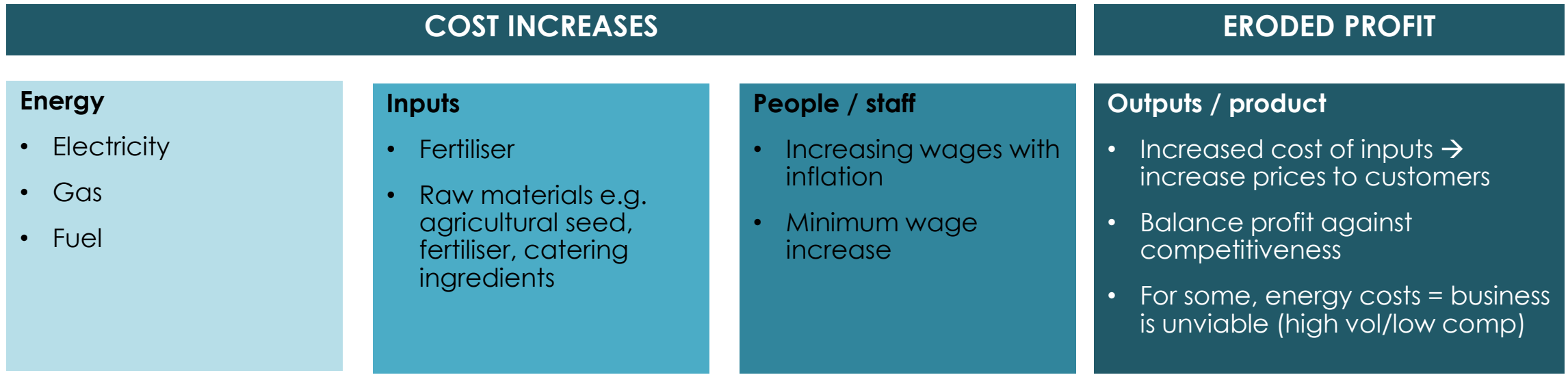
# NHH business context



# Increasing prices, particularly of energy are key concerns for all businesses

The increasing cost of energy is the main concern for businesses rather than water; they are trying to work out how much of the increases they can pass on to customers and still remain competitive.

## The main challenges experienced...



Consequently, many businesses have already (often reluctantly) increased their prices to customers



"Prices are **all over the place**, both for sales and outputs"  
(High volume / high complexity)

"It's very **fashionable to save more resources** as people are more willing to act - it's a lot more real now"  
(Low volume / low complexity)

"Energy costs going up by 100% and gas going up by 200%... a wash that costs £5 would cost £15, **nobody is going to pay that!**"  
(High volume / low complexity)

"I **feel awful** (increasing our prices) with all of the other increases households are experiencing."  
(High volume / low complexity)



# NHH mostly satisfied with water supplier and retailer

Many customers are content with the service they are receiving. Key touchpoints are metering and billing (NB no respondents indicated they had a smart meter)



Customers want **accurate bills**, no surprises, and to be billed for actual usage (not estimations of future usage)

**Seasonal businesses** find est. bills particularly difficult

**Leakage costs:** after leaks they want the water retailer to share how much water leaked – and preferably share the cost impact immediately

**Metering:** they want easy access to usage data (currently providing meter readings difficult, esp. if the meter is below ground)

**Communications:** they want clear, polite, professional communications (not 'threatening' comms once bill is due)

Clear opportunity for **Smart meters** to make life easier and improve access to water usage data, enabling customers to be billed only for what they use and to encourage them to engage in water usage

Almost everyone in this sample is **aware of the market structure** and that customers deal with retailers rather than the water companies directly – not surprising as:

- All the companies had actively chosen Everflow
- Customers were pre-warned about the research topic



# Water efficiency perspectives

# Current water saving strategies employed across the segments

The approaches adopted reflect the business scale and water use; smaller simpler businesses adopt simple, low investment approaches while high volume / high complexity are able to invest in more complex water saving measures

CONSUMPTION

## High volume / low complexity

- Reduce flow rates in showers
- Water efficient washing machines

This group can't imagine how to reduce their water usage further. Have already looked into / tried to reduce usage. Open to ideas to save money.

*"Would have thought most businesses would want to reduce usage because of the cost."*

## High volume / high complexity

- Store / capture rainwater
- Recycle drainage water
- Low flow toilets

High water users likely to be in water efficient mindset (cost control). Even so, they are open to hearing new ideas on water efficiency.

*"If they can show us some feasible ways to do it [save water] I'm quite happy to see what we can do."*

## Low volume / low complexity

- Water efficient press taps, automatic switch off
- Since having leaking toilets, check toilets frequently for leaks
- Bricks or hippos in the toilet cistern
- Stop pre-rinsing items before dishwashing

Businesses in this sector not actively looking to reduce water usage. Need a return on any investment. Energy is a bigger cost and concern.

*"Toilets are relatively new, low flow; I mean we could put a brick in the cistern I suppose."*

## Low volume / high complexity

- Collect via water butts for gardens/grounds
- Farm buildings – use concrete or plastic rather than timber previously, uses less water to wash
- Pressure washer to clean rather than hose
- Monitor water use for leaks

Businesses with complex needs do not feel they are using water needlessly; do not see how could use less.

*"Hard to see how we can reduce as our biggest usage is drinking water for pigs."*

LIKE DOMESTIC

UNLIKE DOMESTIC



BLUE MARBLE

## Awareness of future water supply problems...



About half interviewed claim to be aware of short or long-term demand problems for water – but not to the level of detail shown.

Prompted information supplied by moderator:

'The 4 Water companies operating in the east of England are developing a plan for increasing water supplies – investing in new ways to source water (e.g. underground aquifers, rivers, reservoirs). However, many of these options won't be operational for many years. In the meantime, the population is still expanding, there is increased demand expected from commercial sectors, energy and agriculture. On top of this, rainfall levels across an already relatively dry region are forecast to reduce even further due to climate change. Plus, from 2025 the Environment Agency is restricting the amount of water companies can take out of rivers and underground aquifers etc. to protect water environments.'

**LOW PRIORITY**

- **Water supply issues do not surprise**
- **Most claim they are open to reducing water use**
- **But there is no sense of urgency to tackle the problem**
  - Perceive they've already done what they can and that their business processes are already optimised
  - Can't envisage how they could reduce their water use further
  - Energy reduction is top-of-mind to save money, more than saving water



"Water is in short supply generally in the East of England."  
(Low volume / low complexity)

"We must have a hundred taps around the nursery in different places and it's easy just to see one dripping and think that it's not much water but actually if you've got several that are doing it all the time it does add up over a year... **it's nice to have a bit of external push sometimes.**"  
(High volume / high complexity)

**The market is open to reducing water use but the main barrier is complacency  
NHH need clear demonstration of how they can save more → opportunity for water companies & retailers**



# During Covid many businesses had to stop trading or adapt

New activities often meant companies used less water than in their usual operations, despite the need for additional Covid washing precautions

## All eventualities found in this sample...



### Temporary closure:

- Disrupted supply chains impacting production
- Reduced demand for services
- Unable to continue working as usual



### Diversified:

- Unable to operate as usual so offered different services during Covid e.g.:
  - Provided support worker accommodation
  - Takeaways instead of eat-in:
  - Became a vaccination & blood donation centre rather than cafe



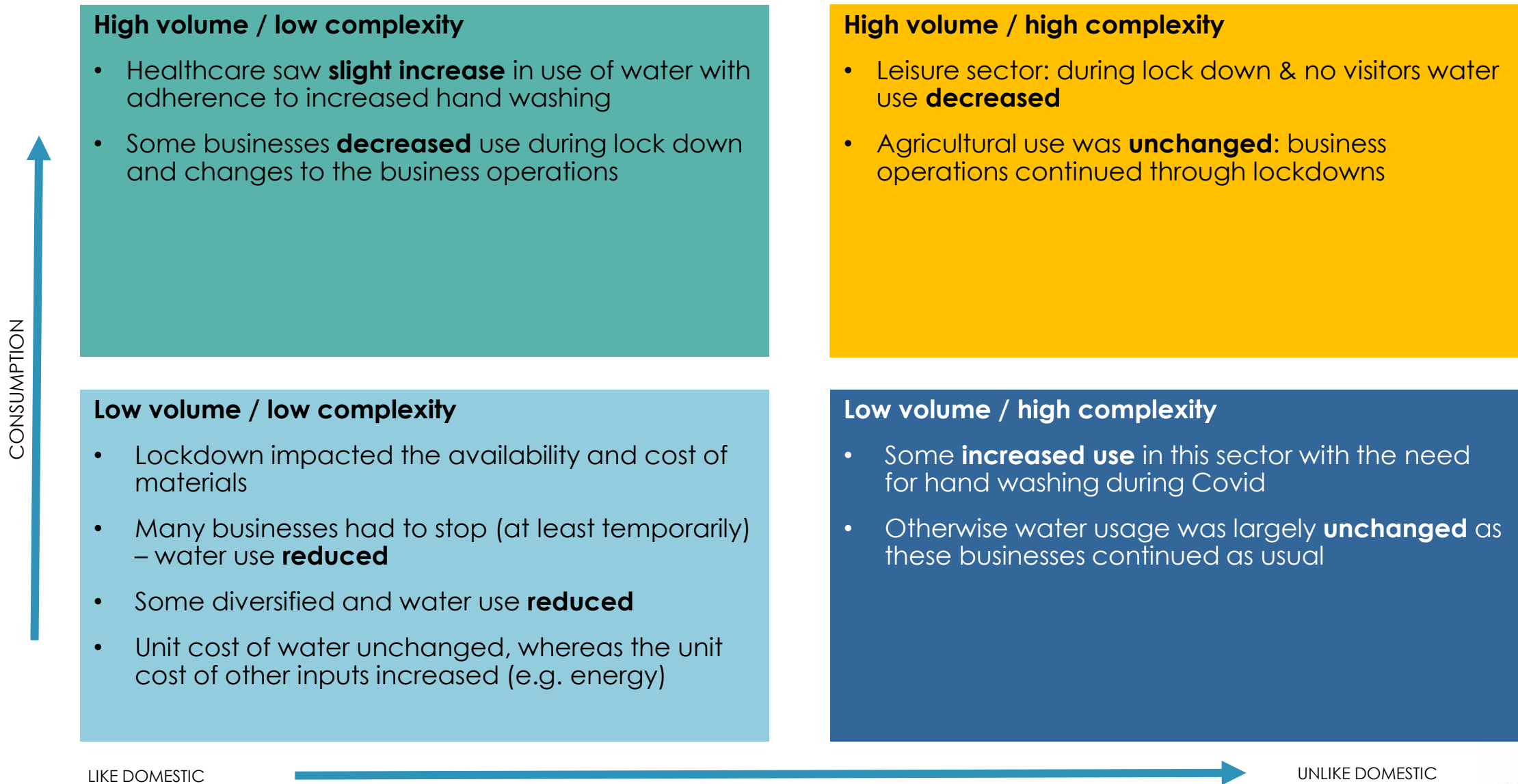
### Business as usual:

- Business continued during Covid
- More handwashing (but perceive the cost of water minimal)
- Of more impact has been increase in costs e.g. energy bills, minimum wage increases

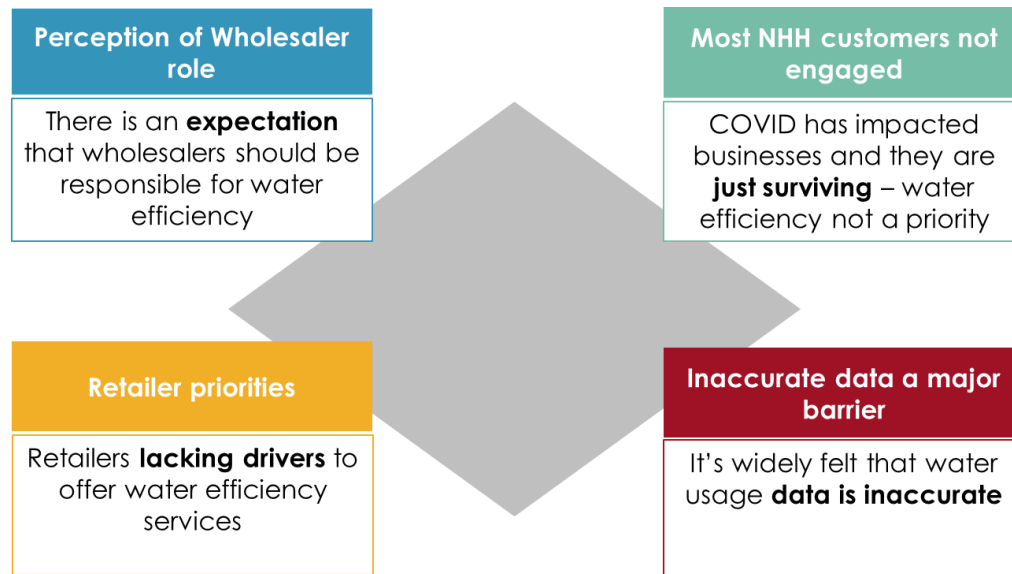




The greatest impact was in the low volume/low complexity sector where businesses may have closed or changed to cope during Covid



Retailers saw many challenges and obstacles for water efficiency...



## Retailers presented a strong case why NHH not engaged

- Post COVID survival – water efficiency not a priority
- Only really relevant to large users
- Lack of water efficiency options available – wholesalers targeting personal households
- No financial motive for NHH; and water efficiency measurement is expensive, e.g. water loggers (ROI not possible in short term) and inaccessible without smart meters










## While these barriers are now evidenced among NHH customers, there appears to be more engagement than Retailers suspect

- Many are already implementing some water efficiency measures
- New information about water scarcity as part of the research process led most to want to hear more about water efficiency



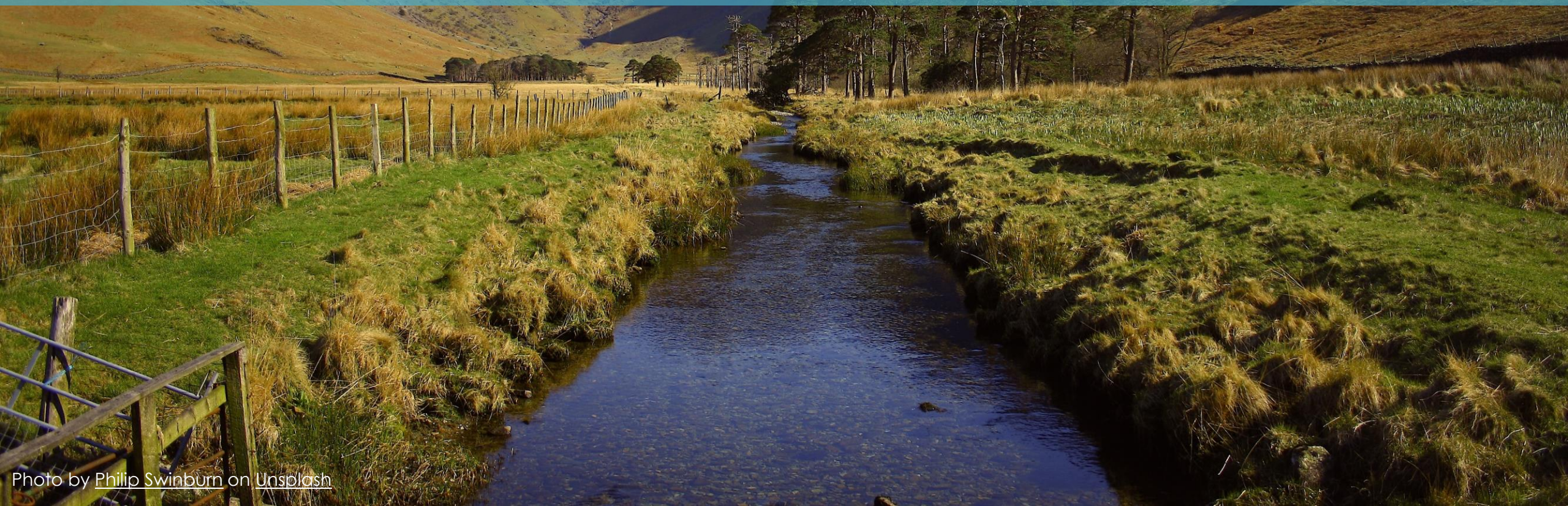
# Summary of NHH barriers to water saving

Based on the rapid desk review, retailer perspectives (phase 1 & 2) and the NHH interviews (phase 3)

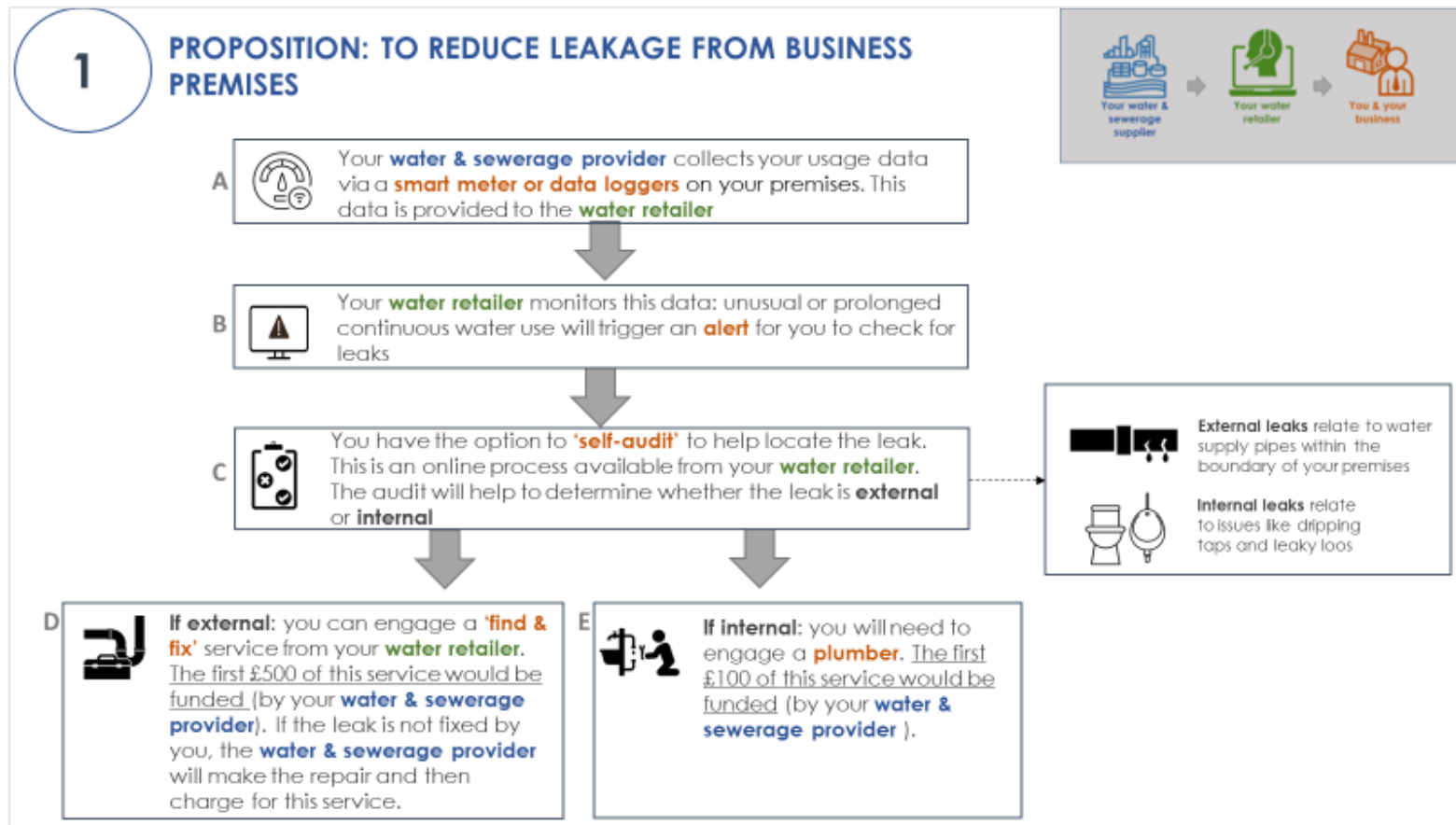
COM		Barrier	✓ ✗
Capability barrier (skills/knowledge)		Lack of accessible & accurate <b>consumption data</b>	
		No sense of <b>how</b> to be (more) water efficient	
Opportunity barrier (time or money)		No sense of <b>when</b> to be (more) water efficient	
		No/inadequate <b>cost benefit</b> to save water	
Motivation barrier (why want to do it)		Lack of <b>awareness of water scarcity</b> context / need	
		Water restrictions/bans not seen as a <b>business threat</b>	
		<b>Deferred responsibility:</b> looking to the industry and government to promote/implement water efficiency	
		Lack of <b>incentives to save</b> (or disincentives not to)	
		Limited <b>consequences</b> if NHH do nothing (e.g. customers not demanding this)	

We use this checklist in the analysis of the propositions

# Response to propositions



## Proposition 1: to reduce leakage from business premises



“

*"That's a **great idea** - it just makes sense. If every business did that then you would be **cutting down on the actual leaks.**"*  
(Low volume / low complexity)

*"We do struggle with some electric meters because they **can't get a firm coverage**; a water meter **might not work.**"*  
(High volume / high complexity)

”



## Proposition 1: to reduce leakage from business premises

**Response to overall idea:** specifically for those who had experienced leaks in the past, this proposition feels valuable; it can help identify and help fix leaks more quickly which in turn saves money and potential damage



### Hooks and highlights

- ✓ Leaks are something businesses worry about – this **offers a solution** to help detect and fix leaks faster
- ✓ Idea of **high usage alert feels innovative** and would encourage customers to check for leaks when they normally wouldn't
- ✓ Helping to identify **invisible leaks** in particular, appeals
- ✓ Financial support is an added bonus
  - ✓ £100 feels adequate for a plumber callout fee
  - ✓ £500 OK for smaller businesses, but larger businesses conscious that a big leak repair could be a lot of (very expensive) work
- ✓ The smart meter concept also captures attention; customers like the idea of **more accurate billing** and not having to read a meter



### Concerns and questions

- ? Those in **newer buildings or smaller premises** were less convinced that this service would be relevant for them (less likely to experience leaks)
- ? Self-audits a nice idea, but need to find time for it; some scepticism it'll be done effectively
- ? Questions around how funding will work in practice
- ? Some concerned about **feasibility of smart meters** in their location e.g. rural farmers
- ? Customers **with large properties and land** unsure about where 'external' responsibility lies within their property boundary

### Improvements

- Ensure it's clear where the customer is responsible for leaks
- Provide case studies or cost examples to help contextualise the financial support against the cost of leak repairs
- Outline clear guidelines for support eligibility and how funding will work










### Target audience:

- Businesses of all sizes
- Businesses across all sectors
- Businesses ranging from low to high water usage



**Proposition 1:** to reduce leakage from business premises

## Is the proposition overcoming barriers?

CAPABILITY		Lack of data	✓	Relies on smart meters and loggers
		How to use less?	✓	Enables leaks to be managed
OPPORTUNITY		When to use less?	✓	Whenever a leak alert occurs
		No cost benefit	✓	Prompt alert minimises cost of leak
MOTIVATION		Water scarcity - unaware	✗	
		Bans not a threat	✗	
		Defer responsibility	✓	Providers proactive, NHH reactive
		No incentives to use less	✓	Financial help
		No consequence (doing nothing)	✗	

This proposition relies on wholesalers and retailers proactively delivering leak alerts.

NHH customers are largely driven by cost; there is limited need to drive them to appreciate the wider water scarcity context

NHH customers aren't concerned about how wholesalers and retailers operate this scheme; but there is an expectation that they'd learn about it from their retailer



## Proposition 2: to enable businesses to reduce water



“

“We'd probably go for the **water company audit**. If they had enough detailed information, they're likely to **spot things that don't even occur to us**. A self audit on itself we might miss things unintentionally.”  
(High volume / high complexity)

”



**Proposition 2:** to enable businesses to reduce water

**Response to overall idea:** overall, customers would prefer an in-person audit by their water company, especially amongst larger companies - the self-audit tool does not have sufficient cut through as it stands.

## Hooks and highlights

- ✓ The water company audit provides a **fresh perspective** or new ideas for how to be water efficient
- ✓ **Clear guidance** on where improvements can be made within the business
- ✓ Idea of **installation** of water devices and free fixes appeals
- ✓ Potential to **save money** through water saving
- ✓ Incentives for larger investment has potential to motivate businesses to act
- ✓ Reporting outputs an added bonus
- Though appealing, some low volume/low complexity businesses felt they would benefit more from an **online audit** to save everyone time and money

## Concerns and questions

- ? The self-audit tool though a nice idea, feels generic and isn't a tailored approach - businesses recognize that they're **unlikely to put the time or effort** into completing it
- ? Some felt their **businesses were too complex** or seasonal and therefore wouldn't be able to describe their circumstances on an online form
- ? Some **smaller businesses** felt that they don't use enough water for this to be worth it (for them or the water company)
- ? Businesses with a **simple set up** don't see where they could be more efficient without significant changes e.g. a launderette

## Improvements

- Important to be clear whether an in-person assessment would come at a cost
- Offer or advertise specialist support and guidance for more complex or unique businesses
- Optimise self-audit tool to offer a hybrid and tailored approach – self-audit with support from online chat or video call










### Target audience:

- Low complexity/high volume
  - For High complexity the offer is too generic for their businesses
  - For Low volume the potential savings and/or benefits are not worth the effort
- Those whose business model is not unique or complex



**Proposition 2:** to enable businesses to reduce water

## Is the proposition overcoming barriers?

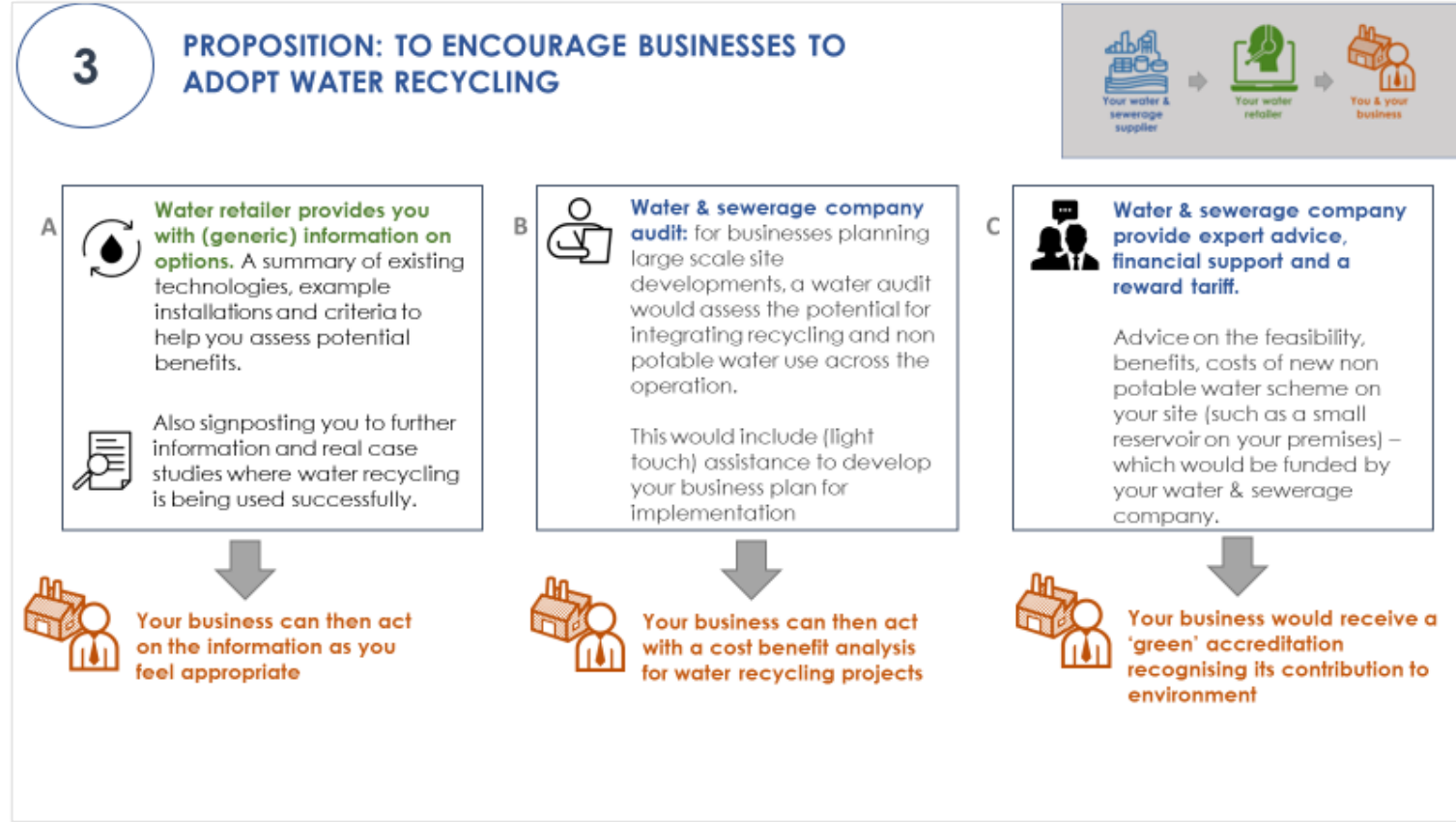
CAPABILITY		Lack of data	✓	Assessment of usage in audit + usage reports
		How to use less?	✓	Guidance given on how to act
OPPORTUNITY		When to use less?	✓	Guidance given on when to act
		No cost benefit	✓	Positioned as cost saving/lower bills
MOTIVATION		Water scarcity - unaware	✗	
		Bans not a threat	✗	
		Defer responsibility	✓	Providers offering support
		No incentives to use less	✓	Lower bills and incentives for higher investment
		No consequence (doing nothing)	✗	

This proposition relies on wholesaler and retailers proactively delivering audits.

However, the proposition doesn't specify what would trigger accessing an audit. NHH customers are driven by cost and savings on bills; awareness of water scarcity is not needed as a motivator

Wholesaler and retailer roles look quite complex from the proposition: NHH customers don't engage in this

## Proposition 3: to encourage businesses to adopt water recycling



“

“Shouldn't be saying this, but for most businesses it's the **financial aspect.**”  
(High volume / high complexity)

“If it's going to be **expert advice** it should be from the **water and sewerage company.**”  
(High volume / high complexity)

”

## Proposition 3: to encourage businesses to adopt water recycling

**Response to overall idea:** implementing water recycling measures resonates with high volume users and those on an environmental platform

### ★ Hooks and highlights

- ✓ **High volume users** can see the benefit of adopting water recycling measures from a **cost saving** perspective
- ✓ Audit and expert advice show proactivity from water providers
- ✓ Generic information a good starting point to see what options are out there but would then move towards audit/expert advice if they wanted to act
- However, many high volume users have already adopted water recycling measures
- ✓ Water recycling is particularly useful where **non-potable water is adequate** e.g. irrigation or cleaning
- ✓ Good to see a **cost benefit analysis** to help determine whether it's worth it

### ? Concerns and questions

- ? The '**green accreditation**' did not **garner appeal** – need further information as to why it's needed
- ? Some worry about **water quality** e.g. customer facing businesses related to food/hygiene
- ? Those who would benefit often **already have measures** in place; additional investment would not be economic (would have been beneficial at start of business)
- ? Considered a **large undertaking** – need time, effort, money
- ? **Not worth the cost** or **disruption** for low-volume users - may not see a return on savings

### Improvements

- Develop 'green accreditation' further to help businesses understand why it would be beneficial and who would recognise it
- Water company should provide expert advice; outside the scope of a water retailer who are considered more of a 'middle man'
- Target new businesses as they set up

### Target audience:










- High volume users
- Those with large businesses and space
- Those who can afford the initial investment (in terms of cost but also time and effort)

Note: proposition 3 covered with higher volume users only



## Proposition 3: to encourage businesses to adopt water recycling

### Is the proposition overcoming barriers?

CAPABILITY		Lack of data	✓	Assessment during audit and expert advice
		How to use less?	✓	Offers advice on how to recycle water
OPPORTUNITY		When to use less?	✓	Offers advice on when to recycle water
		No cost benefit	✓	Cost benefit analysis and financial support
MOTIVATION		Water scarcity - unaware	✓	Not actively, but alerted through water recycling scheme existing
		Bans not a threat	✗	
		Defer responsibility	✓	Providers offering support
		No incentives to use less	✓	Bill saving, green accreditation
		No consequence (doing nothing)	✗	

This proposition relies on NHH customers reading up on information and taking up scheme support

NHH customers driven by cost but potentially, later down the line, driven by environmental factors

Wholesaler considered better placed to provide audits and expert advice; retailers are more middle men and customer service focused (fine to provide generic information)

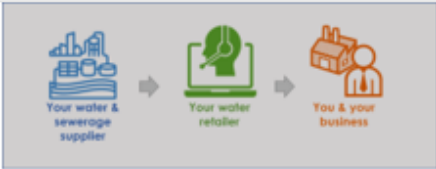
Note: proposition 3 asked about mostly to high volume users




## Proposition 4: to encourage businesses to consider water efficiency actions

4


### PROPOSITION: TO ENCOURAGE BUSINESSES TO CONSIDER WATER EFFICIENCY ACTIONS



**A**  **INCENTIVES & REBATES**  
 For businesses that take action to reduce water usage


- Leak repairs
- Replace appliances
- Change behaviour

With evidence, as well as cost savings on your bills, you will receive incentives/rebates via **your water retailer**

**B**  **ACCREDITATION SCHEME**  
 Businesses that take action to reduce water usage will be able to apply for certification

- Demonstrates pro-environmental behaviours
- Recognised in procurement

Scheme run by a **water and sewerage sector body** (covering all of England & Wales)

**C**  **WEB BASED RESOURCES**  
 Accessed online, businesses will be able to use tools and resources – and view case studies of similar businesses in your sector / region / size

- Self-audits
- Video guides
- Case studies
- Cost benefit examples

Funded by **water and sewerage sector body** – promoted by your **water retailer**

“

“The only issue with an accreditation scheme is there are **so many now...** even if I said I was the most water efficient, it **isn't really going to increase my trade.**”  
 (Low volume / low complexity)

“At the end of the day **we all want money off** – we don't really want a sticker.”  
 (Low volume / low complexity)

”

Note: proposition 4 asked about mostly to low volume users

## Proposition 4: to encourage businesses to consider water efficiency actions

**Response to overall idea:** incentives feel most relevant for businesses that are able to make significant changes and web based resources feel most relevant for those whose businesses are 'standard' and aren't set up in a unique or niche way.



### Hooks and highlights

#### A - Incentives and rebates

- ✓ Always great to get incentives
- ✓ Added motivation to act and get behaviour change advice

#### B - Accreditation scheme

- Environmental accreditation does appeal on the whole; but less so in the context of water saving as it is not yet widely considered/known to be an environmental concern

#### C - Web based resources

- ✓ Useful to be able to access when you like
- ✓ Case studies especially useful to see examples of what changes might look like for a business like yours



### Concerns and questions

#### A - Incentives and rebates

- ☐ Some feel they wouldn't be eligible for rebates as they're already very careful with water usage
- ☐ Don't want to compromise quality of service by being even *more* water efficient

#### B - Accreditation scheme

- ☐ Doubt the value of this accreditation – how is it different from others e.g. ISO 14001
- ☐ Feels more relevant for large companies
- ☐ Sector dependent e.g. in hospitality sector, accreditation wouldn't influence customer choice

#### C - Web based resources

- ☐ Some feel their businesses are too unique for online resources including case studies

### Improvements

- Give examples of small behaviours that would be eligible for **incentives and rebates**
- Show how this **accreditation scheme** differs from others and who would recognise it
- Offer a web-chat option as a **resource** to talk to a real person about your unique business










#### Target audience:

- High volume users who would see significant cost savings by changing behaviours
- Low volume users who can relate to case studies



## Proposition 4: to encourage businesses to consider water efficiency actions

### Is the proposition overcoming barriers?

CAPABILITY		Lack of data	✗	
		How to use less?	✓	Web-based resources outlining water efficiency actions
OPPORTUNITY		When to use less?	✓	Case studies
		No cost benefit	✓	Savings on bills
MOTIVATION		Water scarcity - unaware	✗	
		Bans not a threat	✗	
		Defer responsibility	✗	
		No incentives to use less	✓	Incentives and rebates offered when businesses take action
		No consequence (doing nothing)	✗	

Proposition relies on NHH customers to take action

Accreditation scheme fine to be run by water sector but need to know more about end benefit of being accredited – how does it compare to what is already out there and who will recognise it?

Note: proposition 4 asked about mostly to low volume users





# Strategic implications

## Short term perspective

- NHH not engaging with water resilience issue: cost drivers (for the most part) are paramount
- Retailer market dynamics not driving water efficiency (but they hold the relationship with customers)
- In terms of propositions, customers are busy and need help to navigate the services available, most don't have time or inclination to self-serve. They need guidance to find the right information and ensure they get the most out of it

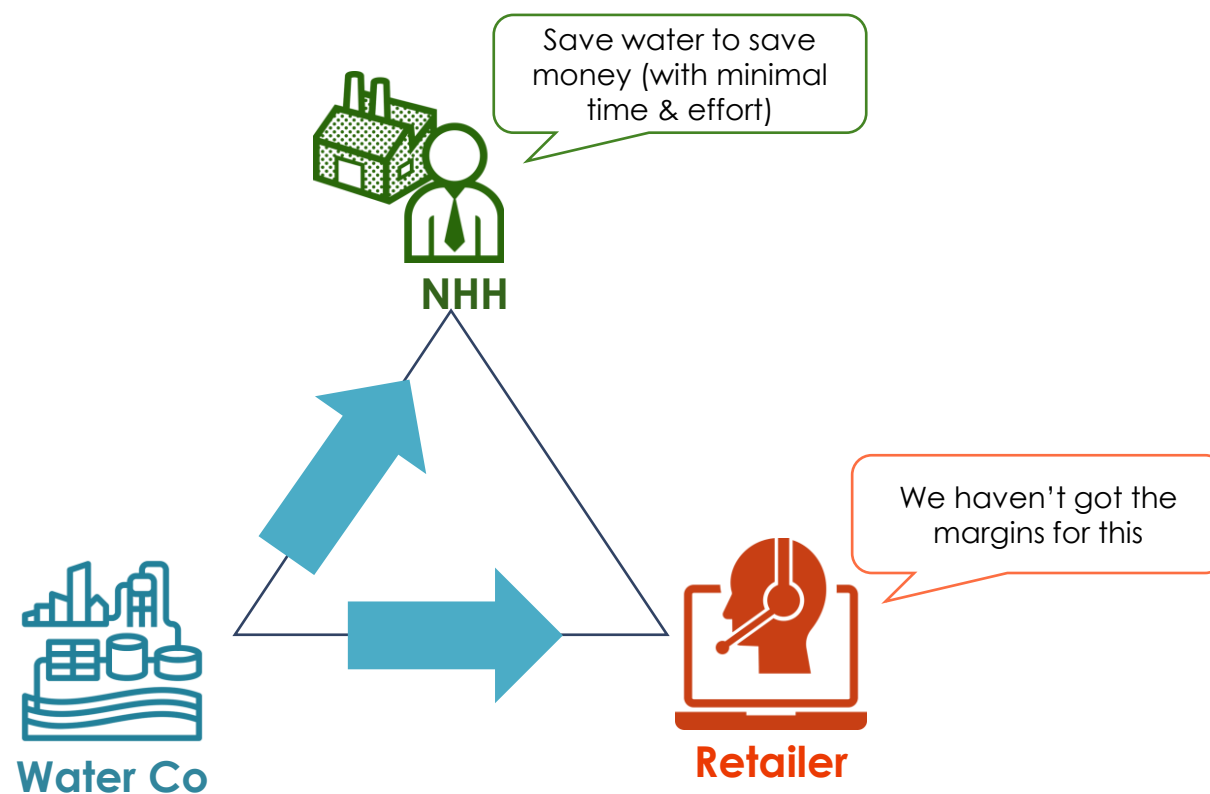
**In the current context, the time, effort and investment can only come from the water companies.**

This is born out by the propositions that are working best:

- Leak alerts with incentives
- In-person audit & install

**Implement short term strategy targeting higher water users**

- Develop the 'proactively offered' propositions
- Expand focus to all higher volume users (domestic and non domestic use)



# Long term perspective

Water scarcity is a reality: there are societal & environmental reasons to reduce use - as well as cost benefits

- Frequent droughts & restrictions
- Interventions: communication, new technology, incentives, penalties?

**Propositions that are not of interest to NHH today rely on motivations beyond cost benefit – and require effort and potentially investment.**

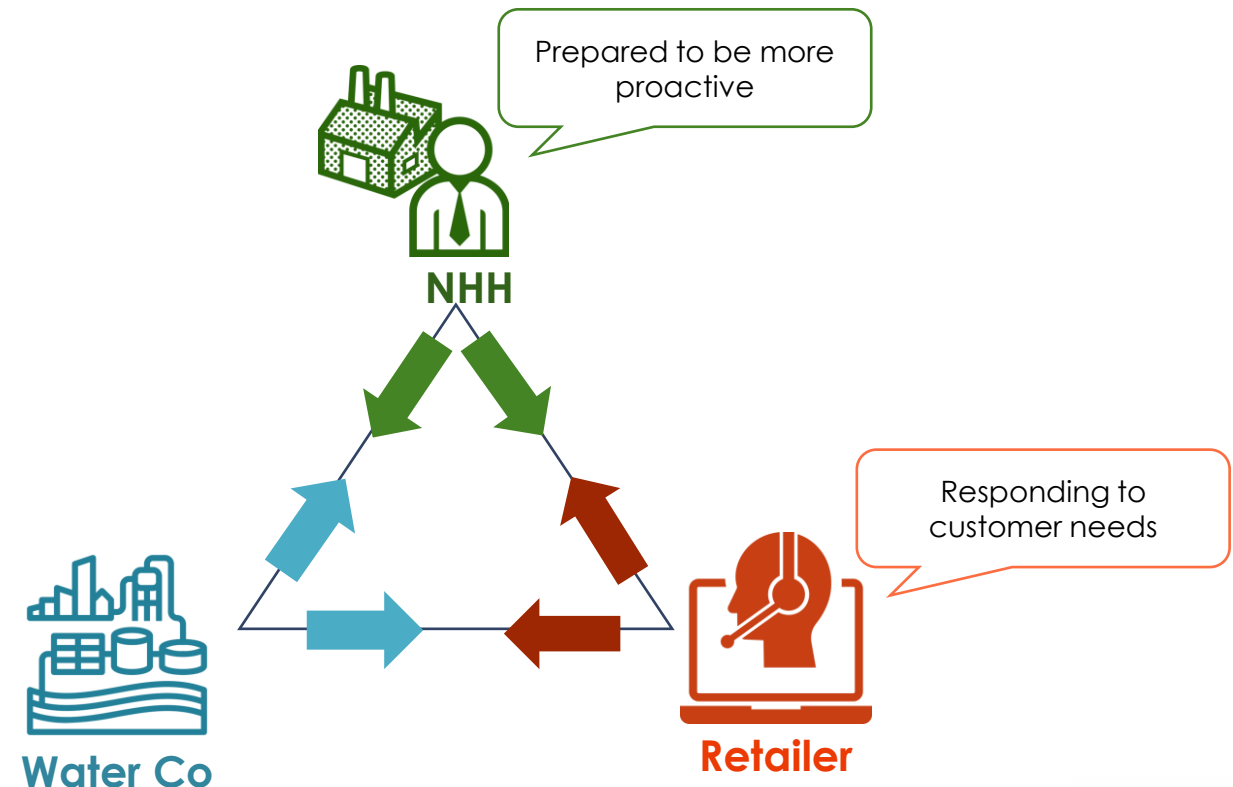
These propositions have potential to engage NHH once wider societal & environmental drivers exist:

- Self service tools
- Generic advice (e.g. on recycling)
- Accreditation schemes



**Implement long term strategy targeting all NHH**

- Mainstream messaging communicating the existential need to use less water: 'all do our bit'
- Drive new norms, shaping customer needs and wants





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Ofwat standards for high-quality research:	How addressed in this project:
Useful and contextualised	This research took an iterative approach using 3 stages to understand the views of retailers, wholesalers (in facilitated discussions with retailers) and the views of NHH via a literature review and primary research. The three stages purposefully moved the project along to achieve actionable outcomes: stage one was 'Exploring barriers'; stage 2 'Developing solutions'; and stage 3 'Proposition response'. At each stage the purpose and context of the work was explained fully to participants.
Fit for purpose	<p>As well as iterative, the project was a collaborative effort with active participation from Affinity, Anglian, Cambridge and E&amp;S Water. Full documentation was prepared (invitation text, screeners, proposition stimulus, workshop and discussion guides) and reviewed by the WRE client team. Suitable methods were chosen:</p> <ul style="list-style-type: none"> <li>• Retailers were initially forewarned by the WRE team and then recruited by Blue Marble to online (video) depths.</li> <li>• The retailer:wholesaler sessions were designed to be collaborative meetings, working on the challenges that the industry faces and identifying where each party could support water efficiency initiatives. To protect commercial confidences, only one retailer was represented in each of the 4 sessions.</li> <li>• The NHH sample was contacted by the Retailer and invited to opt in/out of the research – then Blue Marble recruited the sample from a database provided by WRE. Interviews took place at a time of NHH customer choosing – and either via phone or video as preferred.</li> </ul>
Neutrally designed	Our team's extensive experience in designing research stimulus and discussion guides ensured our lines of questioning were neutral and not leading. In particular, the different propositions were presented in a balanced way so that NHH customers were not unwittingly guided towards any particular response and could freely express their opinions.
Inclusive	Our approach was designed to capture the views of as many Retailers as wanted to participate (all were invited) and a wide cross-section of the NHH population in the east of England region. The sample was drawn from Everflow's customer base located in Anglian Water's region. A screening process was used to capture the profile of participating NHH customers but there were no exclusions – we interviewed all businesses who were happy to participate.
Continual	WRE to advise
Shared in full with others	The research findings are included in this full report for WRE to share as required. Feedback emails both thanking participants and providing a summary of what is happening with the research will go to all participating NHH customers.
Ethical	Blue Marble is a company partner of the MRS. All of its employees abide by the MRS code of conduct and as such all of our research is in line with their ethical standards.
Independently assured	WRE to advise

