



Assure - Essential Saver Tariff Research

Early research findings

12th November 2025

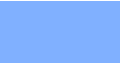




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Background & objectives

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Research objectives



Study aim

Provide SSC with a broad and deep level of insight into customers' attitudes, experiences and behaviours to inform a successful delivery and evaluation of the Assure – Essential Saver trial

1. Customer motivations for joining the tariff
2. Customer experience and understanding of the tariff
3. Impact on key target metrics linked to customer situation/behaviours – affordability, wellbeing & brand perception
4. Impact on customer water usage behaviours

Methodology & Sample

2



Methodology of entire project

QUALITATIVE

Phase 1: 'engaged' cohort
15x recruits

1a: Behavioural insights interview (x15)
1b: Communications review interview (x15)
1c: Diary exercises (approx. 5 x15) - pre & mid
All remote: online, telephone, text, post

Phase 2: main trial cohort
8x recruits

2a: Qualitative interview (x8)
All remote: online, telephone

Phase 3: main trial & 'getting it right'
12x recruits

3a: Co-creation workshop (x1)
All remote: online

Optional extra: larger, F2F co-creation (x2)

QUANTITATIVE

Pre-trial survey: main trial cohort

Online survey, up to 1,000 participants

Optional extra: 25x telephone top-up

Mid-trial survey: main cohort

Online survey, up to 1000

Optional extra: 25x tel top-up

Post-trial survey: main trial cohort

Online survey, up to 1000 participants

Optional extra: 25x telephone top-up

Optional extra: triangulation analysis with customer data (meter readings & bills)

BEHAV. SCIENCE

A. Develop behavioural framework
B. Advise on communications
C. Inform questions for quant and qual

C. Inform questions quant & qual
D. Interpret results (cognitive bias)

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E. Provide recommendations for future

Qualitative sample: 'engaged cohort' and 'main trial cohort'

'Engaged cohort'

15x participants

Recruitment method: SSC invited Assure rejection pool to apply for the tariff. Qa recruited to the 'engaged cohort' according to target quotas.

Financial situation: majority either were genuinely concerned about bills in the future (7) or sometimes struggled and fell into arrears (6).

Household make-up: mix of single occupancy and two-person households, with a few 3 or 4 person families.

Health conditions and disabilities: majority reported that someone in their household had a disability or health condition (11).

Method: each took part in 2x 60 minute interviews over the phone in October/November 2025, plus 5x diary activities spaced out over 10 months.

'Main trial cohort'

8x participants

Recruitment method: SSC invited customers in target ACORN codes to apply for the tariff. Qa recruited interviews according to target quotas.

Financial situation: 3x 'sometimes struggled' with bills, 3x 'never struggled but were concerned about affordability', and 2x have 'never struggled'. Overall, less financially vulnerable than the engaged cohort.

Household make-up: majority (6) live in single or two-person households – fewer families / children.

Health conditions and disabilities: 2 participants had a disability or health condition, lower proportion than the engaged cohort.

Method: each took part in 1x 45-60 minute interview over the phone. Main engagement with the tariff is signing up, which was between 2-5 months previous, and then a pre-stage survey.

Pre-trial survey of new recruits to set a baseline

- Recruitment to AES was undertaken by SSC, primarily using a targeted email invite
- After recruitment and onboarding to AES, contact details of customers who had not opted out of receiving surveys from SSW/CW were sent to Qa Research
- An email invitation (and 1 reminder) was issued to those with an email inviting them to complete a survey – others were invited to take part by phone
- Surveying took place 26 June to 27 October 2025, over 6 batches
- 922 joined AES trial during the surveying period
- 808 contacts provided to Qa for surveying (782 with email, 26 with phone only)
- From these, 182 surveys were completed (22.5% response rate).



Who is currently on the Assure – Essential Saver tariff vs survey sample

Profile of the **922 trialists** available for Pre-stage research:



- Gender split is 50:50
- 9% aged under 35
- 20% aged 35-49
- 71% aged 50 or over



- 41% live in single person households
- 43% live in 2 person households
- 29% on PSR



- 84% are South Staffs customers
- 16% are Cambridge.

- Pre-stage survey sample is broadly in-line with this profile
- Main difference - 91% of respondents aged 50 or over

Additional profile of the **182 respondents** to the Pre-stage survey:



- 51% have a self-reported vulnerability
- 34% state they're on PSR



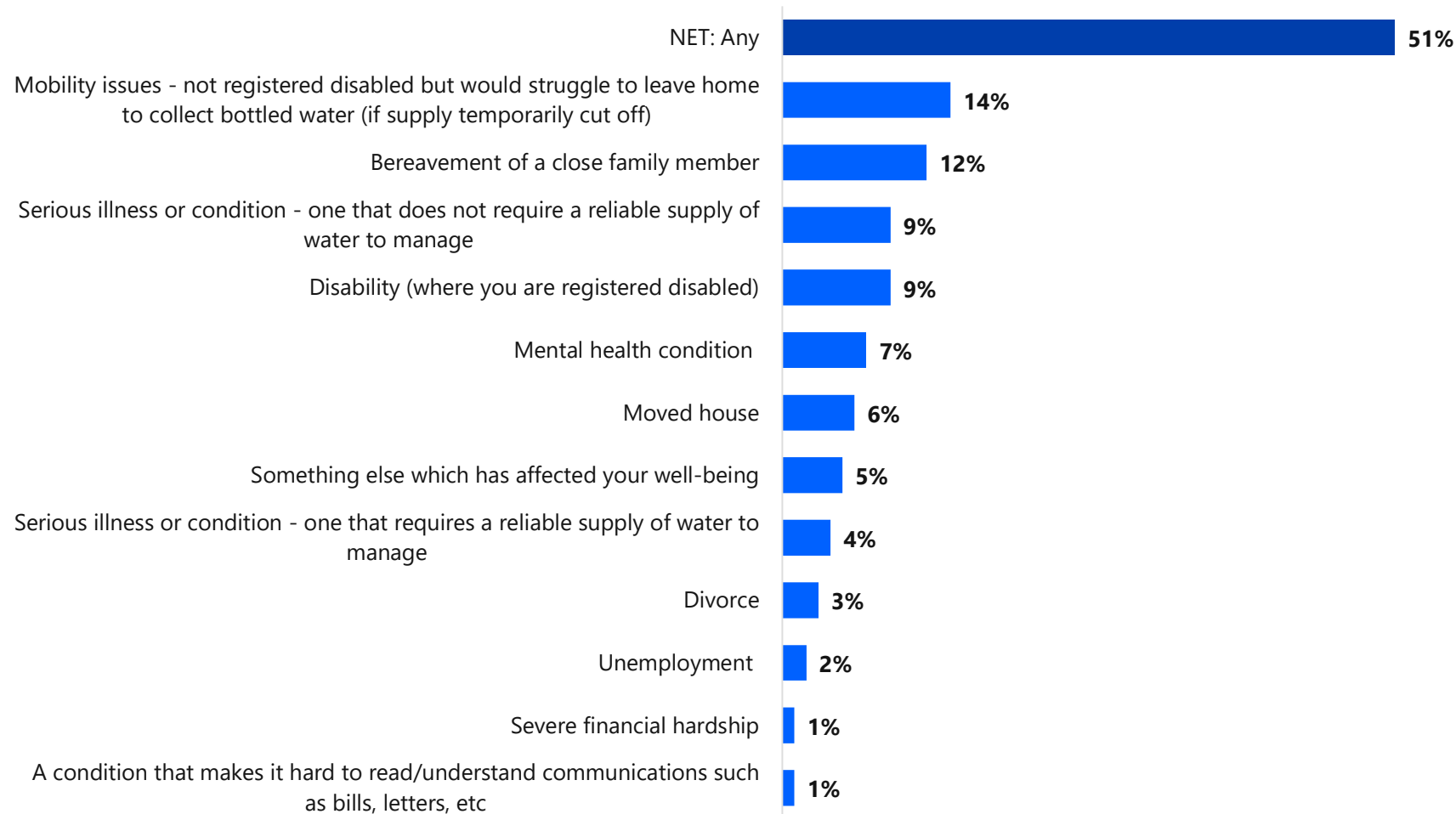
- 92% are White / 6% BAME
- 5% don't have English as first language



- SSC Segments
 - 47% - *Engaged Loyal Carers*
 - 38% - *Savvy switchers*
 - 14% - *Don't bother me*
 - Other segments not represented at all.

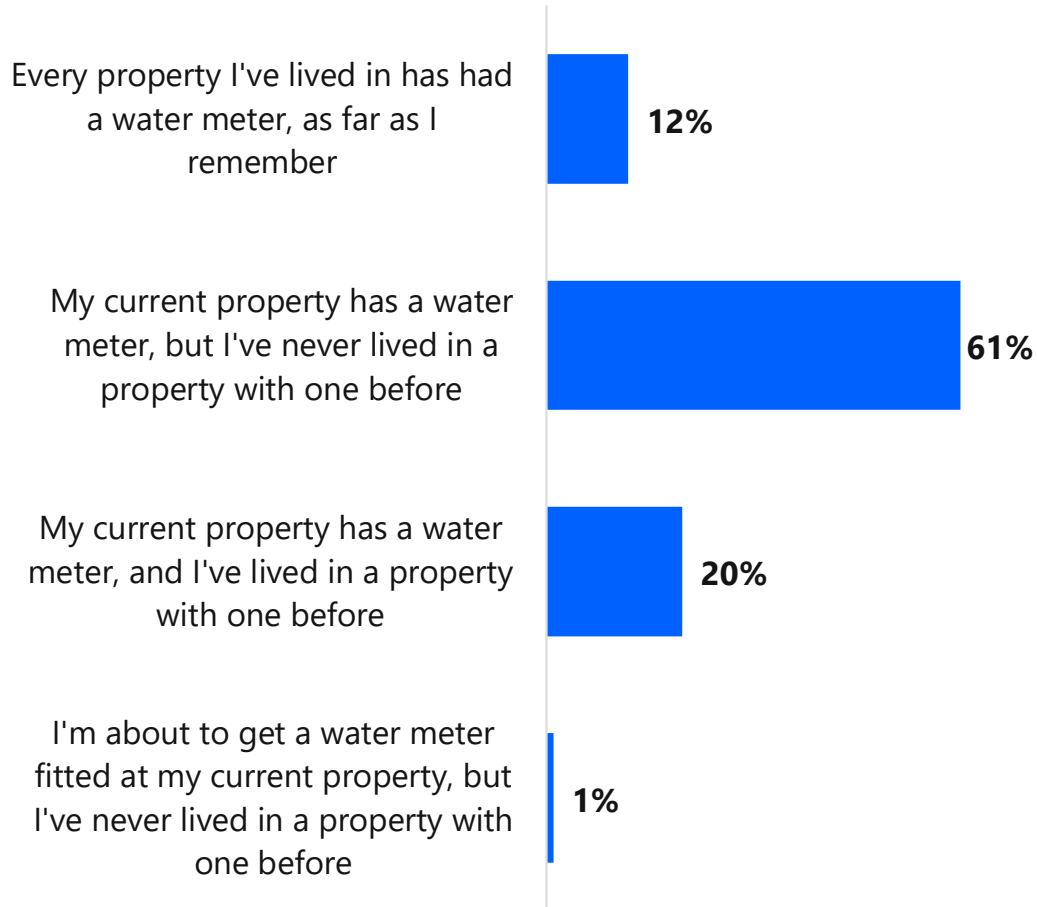
51% self-report at least one vulnerability in their household

Q14. Can you tell us if, in the last 12 months, you or anyone in your household has experienced any of the following?



Trialists have experience of living with a meter

Q5. Which of the following best describes your experience of living with a water meter?



Most respondents are owner-occupiers:



- 74% Own outright
- 12% Own with mortgage
- 14% Rent

Mix of property types:

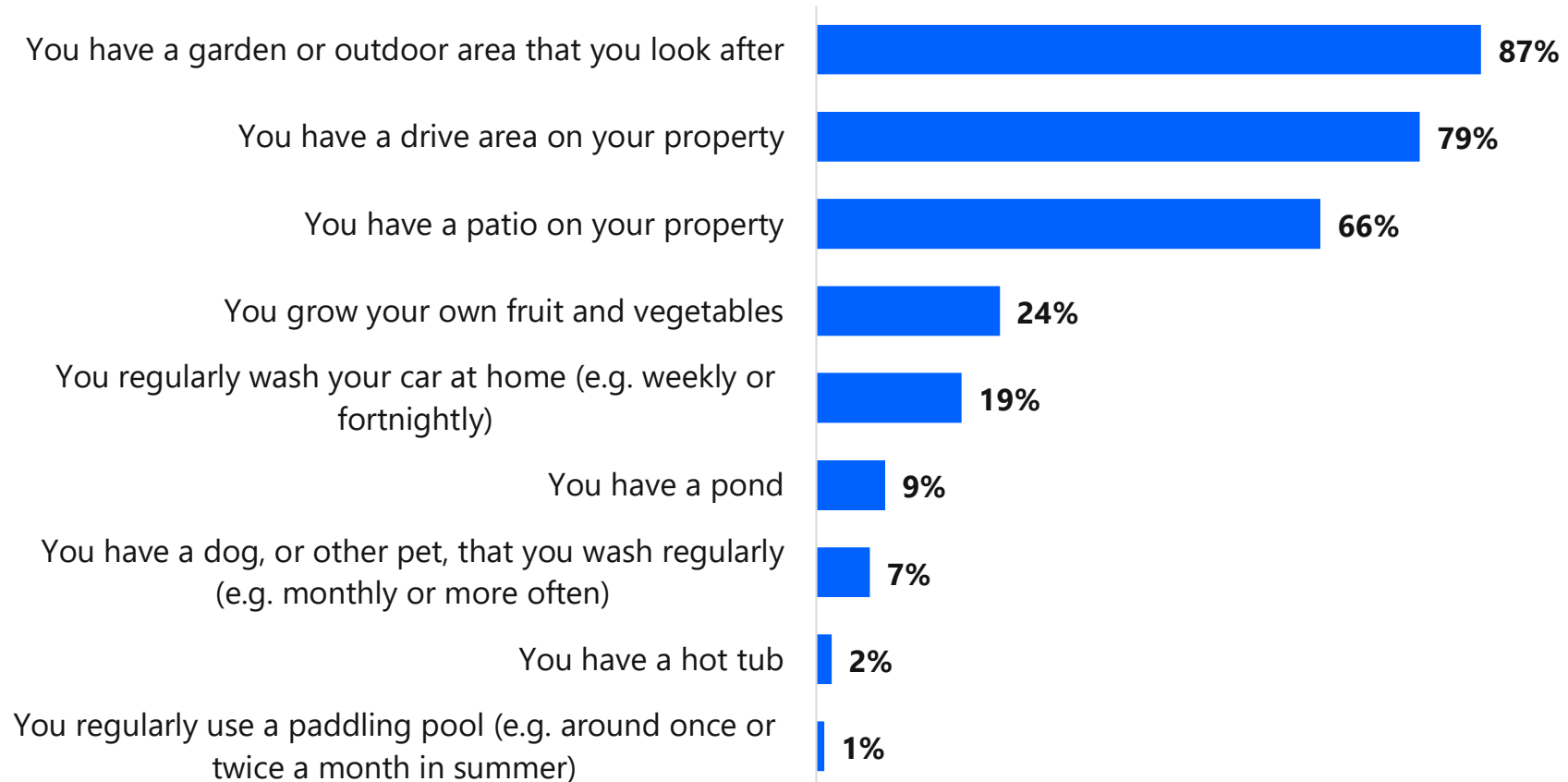


- 37% Semi-detached
- 25% Detached
- 15% Terraced
- 10% Bungalow
- 13% Flat/maisonette

Majority of trialists have a garden and drive

Q12. We would like to understand a little more about your home and/or property and the features of it that might mean you use water. From the list below, please select all that apply to you.

Q13. Which, if any, of the following apply to you and your household?



Customer Groups – triallists vs survey sample vs qualitative cohorts

Trialists were allocated to one of 3 Customer Groups;

Group 1

- Meters read at a normal pace (once a year in CAM and twice a year in SSW)
- Billed at a normal rate (once or twice yearly)
- Welcome pack
- Bill insert with water saving advice linked to the trial.
- **Customer commitment: Sign-up**

12% of all trialists / 15% of survey sample

- Qualitative: some frustration at bills being based on estimated usage.

Group 2

- Encourage customers to read their meter often
- Billed more often
- Welcome pack
- Bill inserts with water saving advice linked to the trial.
- Regular monthly emails with water saving tips
- **Customer commitment: Sign-up / Read meter / Upload readings / Read bill**

71% of all trialists / 66% of survey sample

- Qualitative: many customers not able to read meters (inaccessible / disability). Not all are opted into marketing and even then, very few are reading tips.

Group 3

- SSW/CW read customers meter more often
- Billed more often
- Welcome pack
- Bill inserts with water saving advice linked to the trial.
- **Customer commitment: Sign-up / Read bills**

17% of all trialists / 19% of survey sample

- Qualitative: unclear whether billing is occurring as consistently as planned, very few claim to receive regular bills or meter reads.

Key Findings

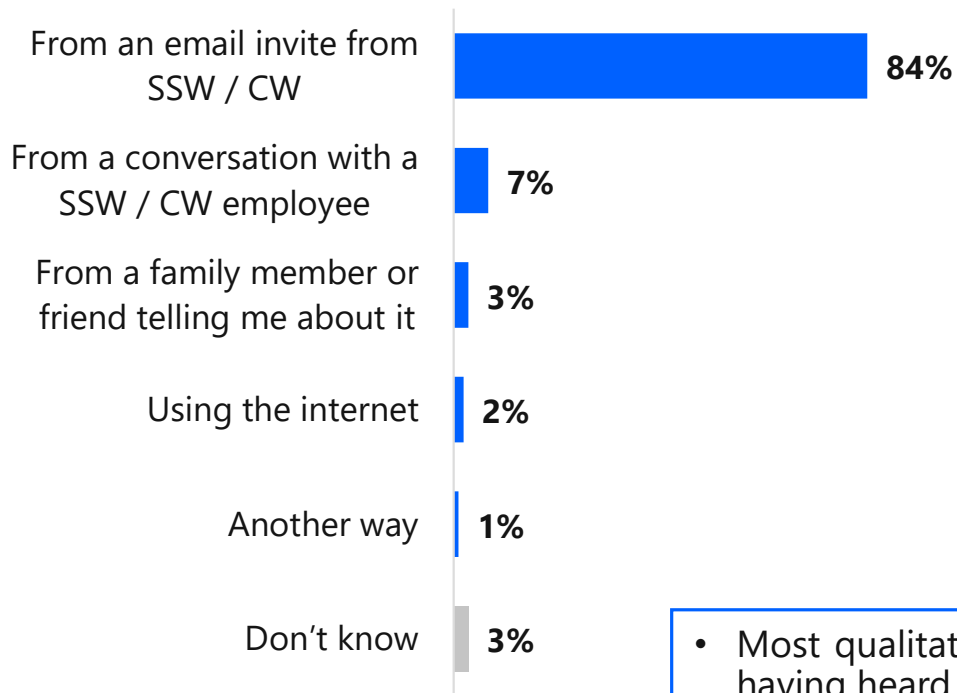
Motivations for joining Assure – Essential Saver tariff

3a



Emails have driven take-up, attracting trialists to save money

Q15. How did you first hear about the Assure Essential Saver Tariff?



Q16. Why did you decide to sign-up for the tariff?

Reason	Count	Percentage
To save money	117	64%
Need to save money (e.g. high CoL)	30	16%
To help save water	23	13%
Bills are expensive / have increased	12	7%
Have financial difficulties or low income	11	6%
It generally made sense or sounded good	10	5%
It's appropriate for my living circumstances	8	4%
I fit the criteria	6	3%

- Most qualitative participants responded to a direct email from SSW / CW, with one having heard about it from a friend. Some had recommended it to family / friends.
- Some surprise at being eligible, as income / savings typically excludes from schemes.
- Reason for signing up is to save money. For some it is a pressing need while others it's more of a 'nice to have' and 'why not?'

Key Findings

Customer understanding and experience of the tariff

3b



Qualitative participants generally did not understand how the Tariff works

- Across the qualitative cohorts, very few customers fully understood the mechanics of the Tariff or what they had signed up to or how the discount was applied.
- All customers receive information on the tariff, but very few claimed to have seen:
 - Welcome pack with an explanation
 - Link to an explainer video
- Only one participant in the main customer cohort could explain accurately how the discount worked.
- Lots of questions and areas of confusion were outstanding.
- Existing comms do address many of these questions, but these aren't cutting through.
- Impact is that many trial customers often don't feel like active partners in the tariff, but passive recipients of a somewhat confusingly-structured discount.

Behavioural effects:

Simplification / ambiguity aversion
Messenger effect

"To be honest I'm using it the same as before, because **I'm not sure when [the Tariff] is applied.** I don't know if there's, like, a time frame, a certain time in the day or if you use it at night or something."

"The more water I save, the more I get rewarded, or not necessarily rewarded, the cheaper that my tariff would become, I think. **But I don't really know.**"

"If it's 60% off 150 litres... **I don't understand** what that means."

Dual purpose of tariff is not resonating with many customers

- Assure – Essential Saver is designed to with two purposes:
 1. Support customer affordability and wellbeing by reducing bills for low-income households
 2. Encourage customers to use less water to reduce PCC overall
- The primary motivation for customers joining the Tariff is financial. Water-saving, if considered at all, seen as a bonus or *'nice to have'*.
- The water-saving premise is that customers get a discount without changing their water usage behaviours, but that financial savings would be even higher if a household also reduced their water use.
- However, this message isn't quite landing. Customers in the qualitative interviews are usually not clear on why the Tariff would motivate them to save water.
- This is partly down to customers not understanding the mechanics of the Tariff, although there are other behavioural and attitudinal factors involved.

Behavioural effects:

Simplification / ambiguity aversion

"If they're trying to drive lower water use, actually, **that tariff does nothing** because they're giving it [discount] to you on what [water] you've got to use"



Key Findings

Customer water usage behaviours & possible impact of the tariff

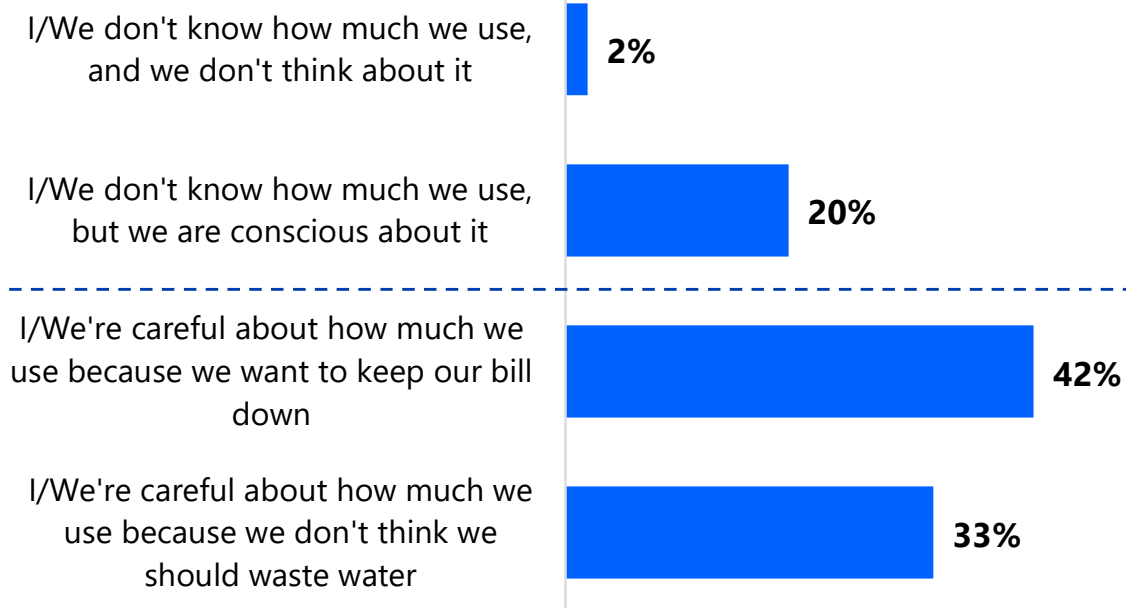
3C



75% claim they're careful about how much water they use



Q17. Which one of the following statements most closely applies to your use of water in your household



Behavioural effects:

Altruism
Fairness
Relativity

- 'Engaged cohort' generally conscious of water use due to low income and personal attitudes to wasting resources. Some opportunity for further water saving mainly among families.
- 'Main trial cohort' mostly made up of small, lower-income households, who already use very little water.
- Environmental attitudes varied, with not many linking water use to environmental motivations.
- Small degree of pushback due to negative press on industry leaks - 'why should I have to save?'
- More careful around their energy usage than water as it is more expensive and easier to track.

High levels of awareness of most water saving techniques

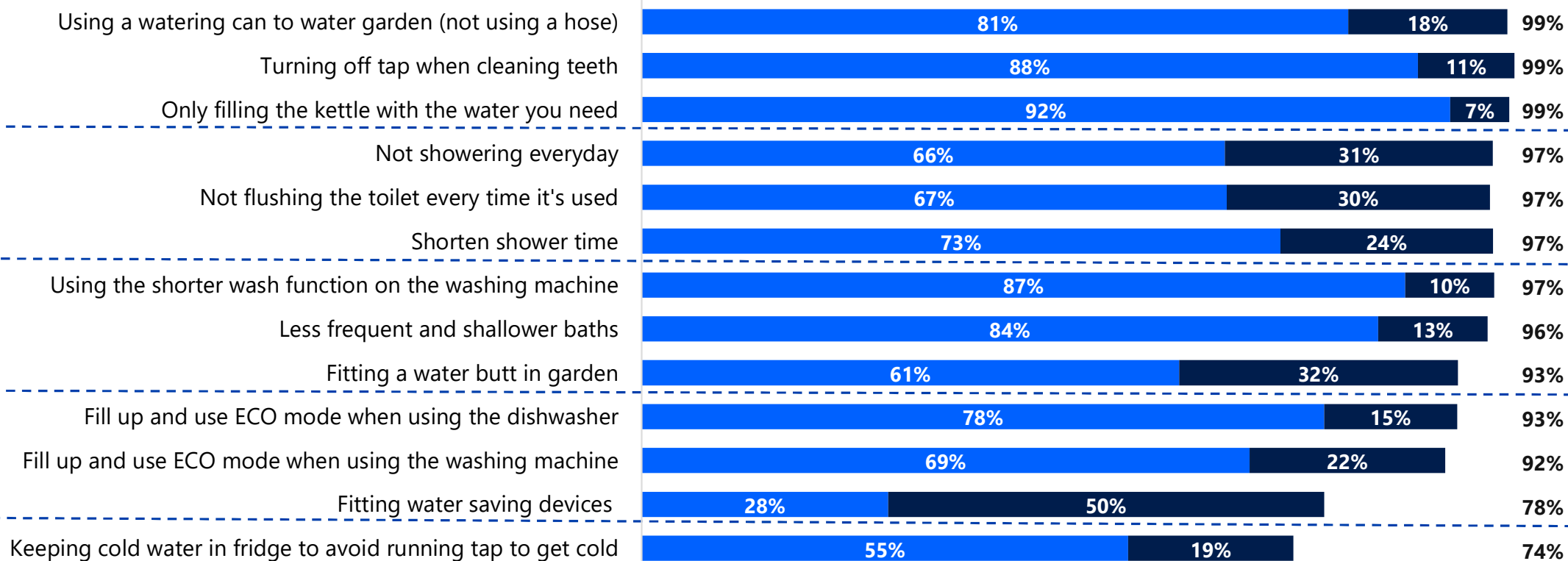


Q18a. Which of the following water saving tips are you aware of, and which are done in your Household? (PROMPTED)

■ Aware and do it

■ Aware but don't do it

**NET:
Aware**



Excludes Not applicable

The intention is there to reduce usage while on AES



Q20. Thinking about your household's use of water while you are on the Assure Essential Saver Tariff, which of the following statements do you currently agree with most?

We don't plan to do anything different to the way we currently use water

13%

We will try to reduce water usage and hope we will use less

71%

We plan to make a big effort to reduce water usage and expect to use a lot less

15%

Don't know

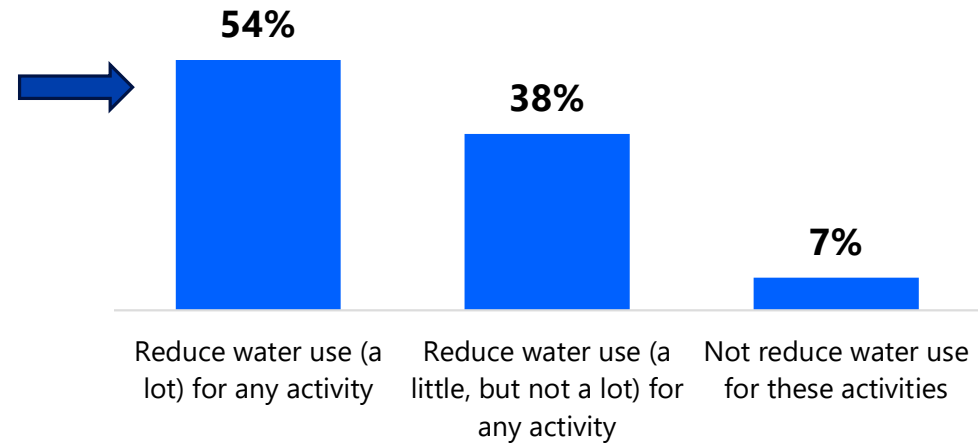
1%

Behavioural effects:

Saliency
Altruism

85% 'Already reducing our water usage'
22% 'We can't reduce it any further'

Q22. For each of the following [12] household uses of water, please indicate if you expect to reduce your water use as result of being on AES.



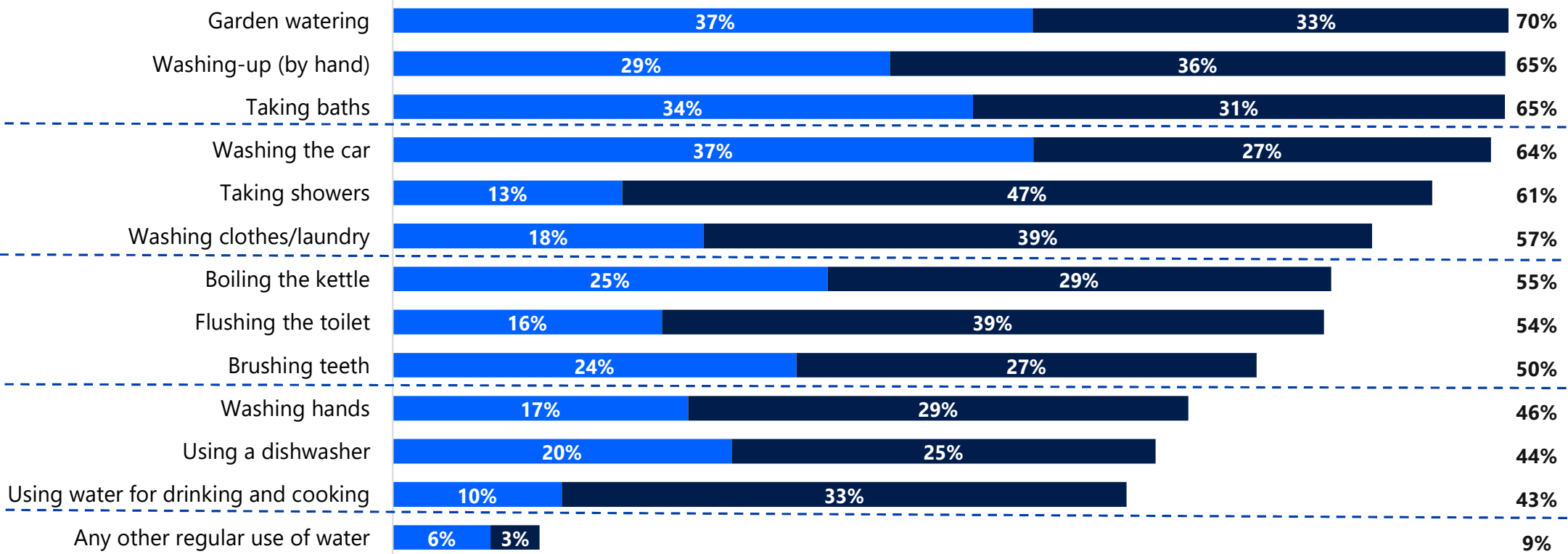
Trialists claim they'll reduce water use for many household activities



Q22. For each of the following household uses of water, please indicate if you expect to reduce your water use as result of being on the Assure Essential Saver Tariff or if there's likely to be no change? (PROMPTED)

■ Reduce water use for this activity a lot ■ Reduce water use for this activity a little

**NET:
Reduce**



Excludes Not applicable

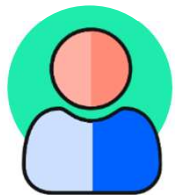
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Quotes about attitude changes from the 'engaged cohort'

”

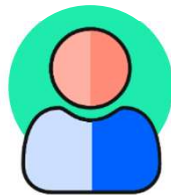
"We also made the effort to educate ourselves and practice what we have learnt to our everyday use. We have learnt that we do not need the amount of water that we used to use and we will continue to use this saving activity"

**4-person HH, 2 kids,
group 1, email**



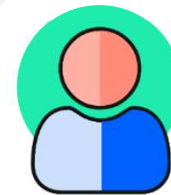
"My attitude has changed since I am on a tariff. Especially when I realised my friends with similar households spend way less on their water bills. I feel quite enthusiastic as I believe it is possible to save more water therefore to save more money"

**4-person HH, 3
kids, group 2, email**



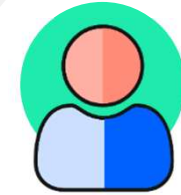
"Before I would let it run for awhile and not think twice. Water saving is a priority not just for environment but for my pocket too. My attitude has changed, it has made me more conscious of saving more water. I hope saving water reduces my bills."

**4-person HH, 2 kids,
group 3, email**



"With the unpredictable nature of being a carer, this is actually better for me. It's a new activity as I was in the habit of washing up just a mug by itself to clear space, not particularly thinking of the amount of water doing this regularly was using up."


**3-person HH, 1 kid,
group 3, email**





Easy and simple changes are most likely to drive usage reductions

Q23. Reasons for selecting activities to reduce water use for – showing % NET: Agree –

Behavioural effects:
Saliency
Empowerment
Fairness

 **79%** - “*I **know how** me/my household can reduce my water use for these activities*”

 **75%** - “It’s **relatively easy** for me/my household to reduce water use for these activities”

 **73%** - “Reducing water use for these activities will make the **biggest difference** to my/our water bill”

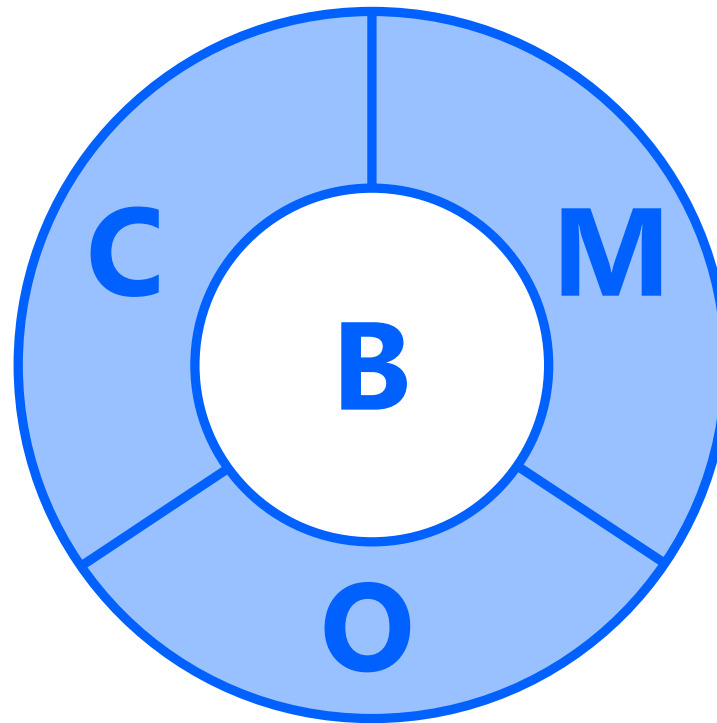
 **66%** - “These are the activities I/my household **use most water** for.”

Qualitative participants focused on activities where it would be **relatively easy for them to cut down**, such as making better use of leftover water, larger loads of laundry done less frequently, and waiting for the washing up to accumulate before doing it. However, participants had **clear boundaries** around where they were **not willing to cut down**, particularly where it may cause conflict in the household. Motivation is also influenced by external factors such as very hot weather.

Behavioural framework – why are customers not saving water?

Capability

- Household disabilities or characteristics e.g. autism, arthritis that preclude saving water
- Larger households feel unable to cut down water due to children e.g. laundry, baths
- Personal assumption already doing everything, that 'other people' are the problem



Opportunity

- Limited feedback on water use e.g. smart meter or regular bill feedback – no yardstick to improve against
- Many already very careful with water use – not much more they can do
- Lack of knowledge regarding the link between water and energy use

Motivation

- Already saving money by doing nothing
- Not understanding Tariff or how it motivates water saving
- Some willing to pay for extra water use as it feels affordable / worth it
- Unclear on reason to save water beyond money saving – environment does not feature for some customers

Behavioural effects:

Relativity
Salience
Empowerment
Altruism
Information asymmetry

Key Findings

Early indicators of tariff impact on affordability

3d



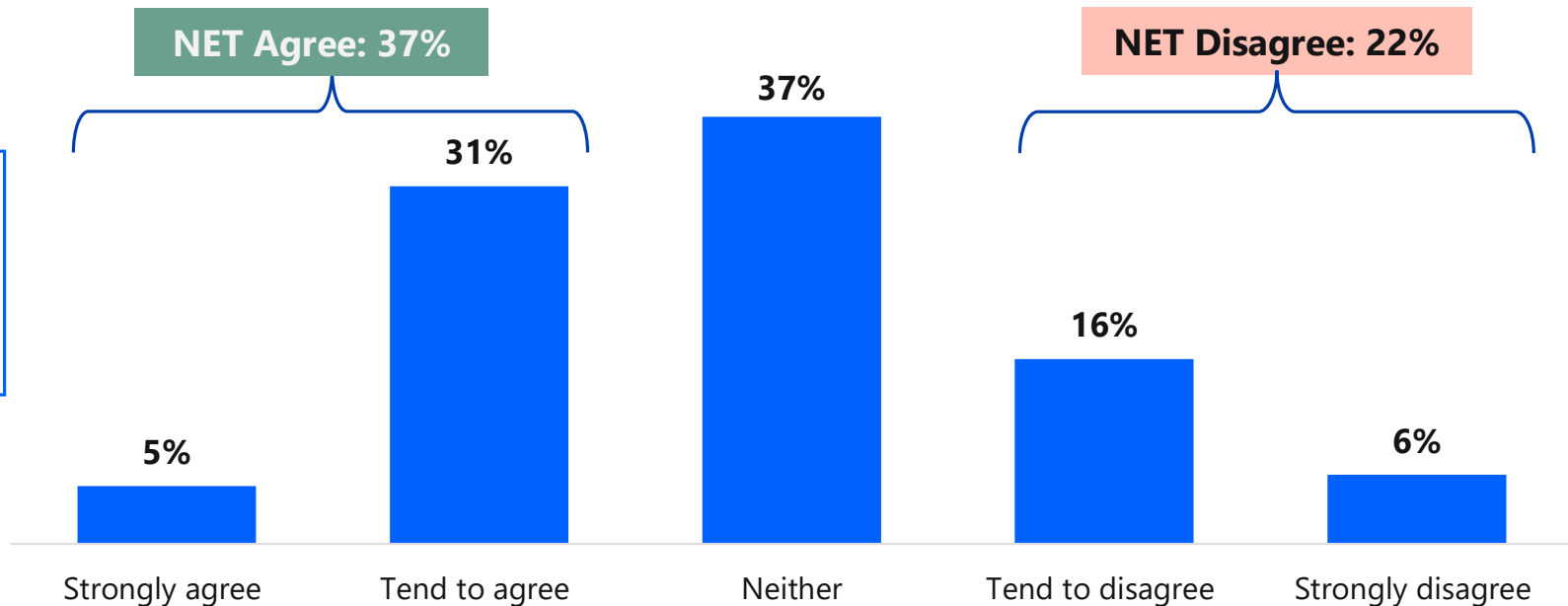
Limited evidence that survey respondents struggle with paying water bills



90% *"I always pay my water bill, and other household bills, on time"*

8% *"I always pay my water bill on time, but sometimes struggle, or am late, paying other bills"*

Q28. How much do you agree or disagree that the water charges that you pay are affordable for you?



SSC Tracker
(Sept-Oct 2025);
NET Agree: 46%

Lack of consistent billing makes it hard for customers to track impact



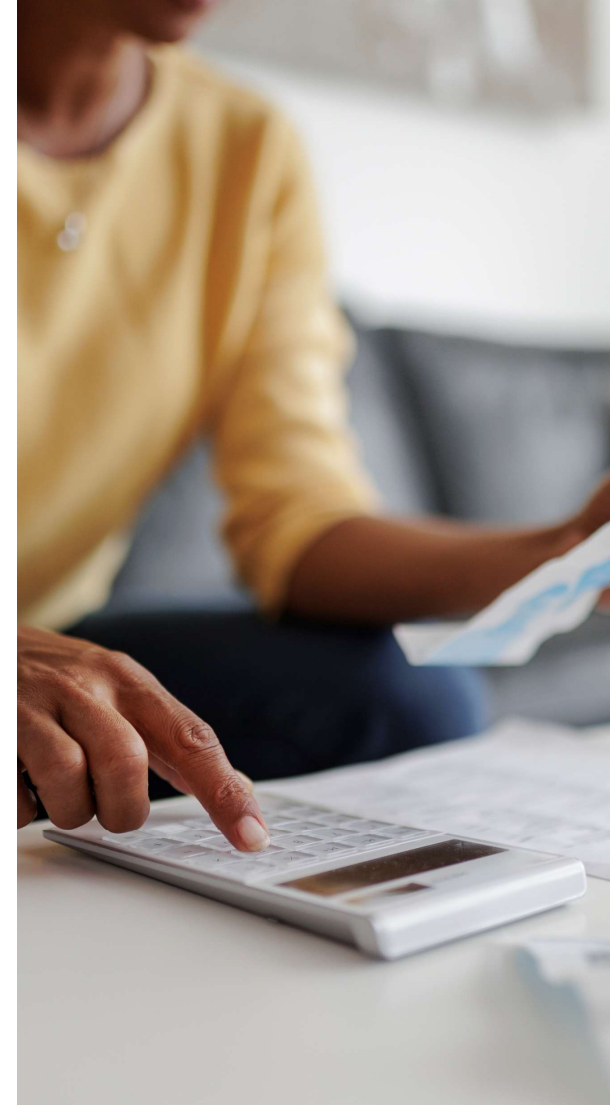
- Low understanding of how bills are calculated and how meter readings work.
- When prompted to look closer, some were frustrated at receiving an estimated bill.
- Main trial participants very rarely reported having seen a water bill since being on the Tariff, despite SSC data showing the date of their last bill. Either customers are not reading their bills or not receiving them.
- Most couldn't work out how much they were saving on the Tariff as there was no standout 'discount'.
- Either way, most customers struggled to pinpoint a tangible financial impact because of billing.
- A stronger understanding of the financial workings of the Tariff has the potential to help customers visualise the financial impact as well as motivate further water savings. This could include:
 - Monthly bills with accurate meter reads
 - Running total of £ saved while on tariff
 - Running total of £ saved by everyone on the tariff – idea to be part of a community, something bigger
 - Visual indication of how much water used in 'essential' and 'discretionary' categories
 - Encouragement to save more money by saving water.

Mixed evidence so far about impact on cost of water bills

"To be honest, I don't really notice the saving ... I think it's **only like a few pounds** I was expecting my bill to dramatically drop, but because **they have already gone up**, they've kind of **come back down** to maybe what I was paying. "
– *Main trial cohort*

"Our water saving efforts **are in vain** if our meter is **not going to be read**. So at the moment we wonder whether it has been **worth it**."
– *Engaged cohort*

Behavioural effects:
Empowerment
Relativity
Messenger effect
Simplification



Qualitative evidence suggests a small impact on cost of water bills

Household affordability:

- Household finances fall into two camps – struggling to make ends meet, and those who don't struggle but qualify for the Tariff on a technicality e.g. have additional income that doesn't count towards the household income threshold such as savings/capital
- Water bills are low on the list of financial pressures – energy / council tax are much higher and therefore the bigger ones to worry about
- However, a noticeable increase in water bills in April led some households to look for discounts and ways to limit water bills

Early indications of impact on affordability:

- **Engaged cohort** – even within a cohort of 15, there was a mixture of whether the bills had or had not decreased (6 had decreased, 4 had stayed the same). Generally, customers who reported having lower bills were happy with small changes and small savings – what was important was the balance between effort and financial outcome. However, those who had put in effort but not seen any financial reward felt disappointed and demotivated, which damaged trust in and perception of SSW / CW. This was particularly the case where participants received an estimated bill.
- **Main trial cohort** – despite the issues noted on the previous slide, some participants had noticed varying levels of savings either on the bill or through their direct debit. For one participant, they had made significant savings that they could spend on other essentials, whereas another felt that the savings only offset recent increases.

Key Findings

Impact of AES on key measures

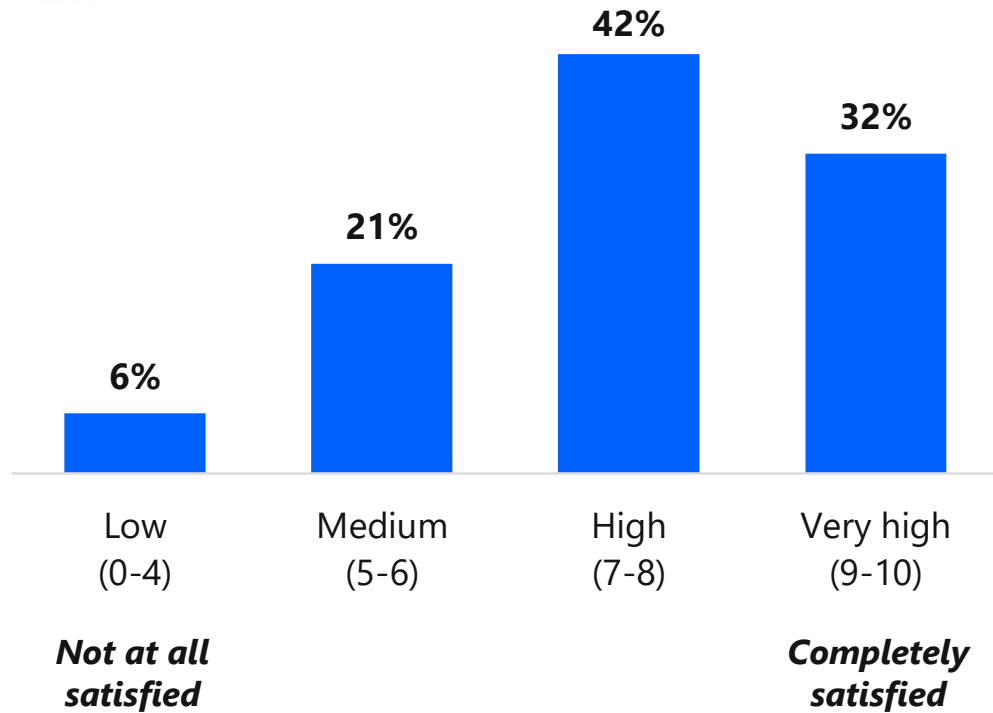
3e



Life satisfaction compares favourably with the UK average



Q25. Overall, how satisfied are you with your life nowadays?



5%

15%

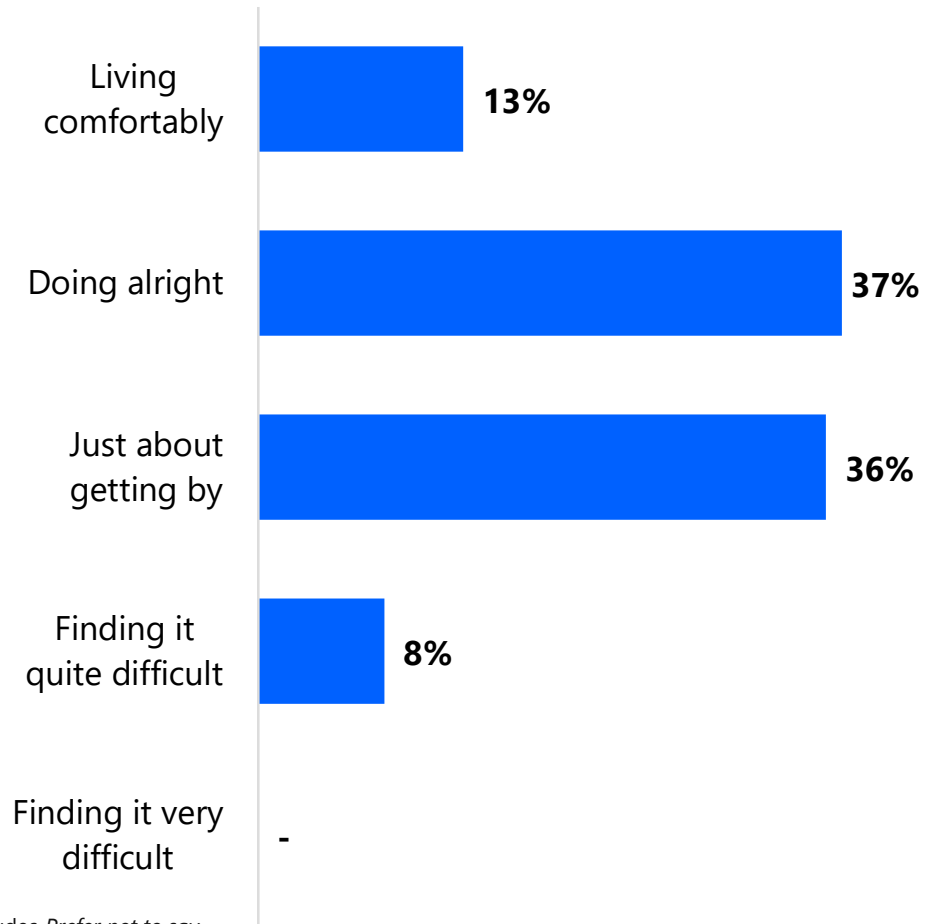
54%

26%

Source: Annual Population Survey, ONS (UK, Jan-Mar 2025)

Excludes *Prefer not to say*

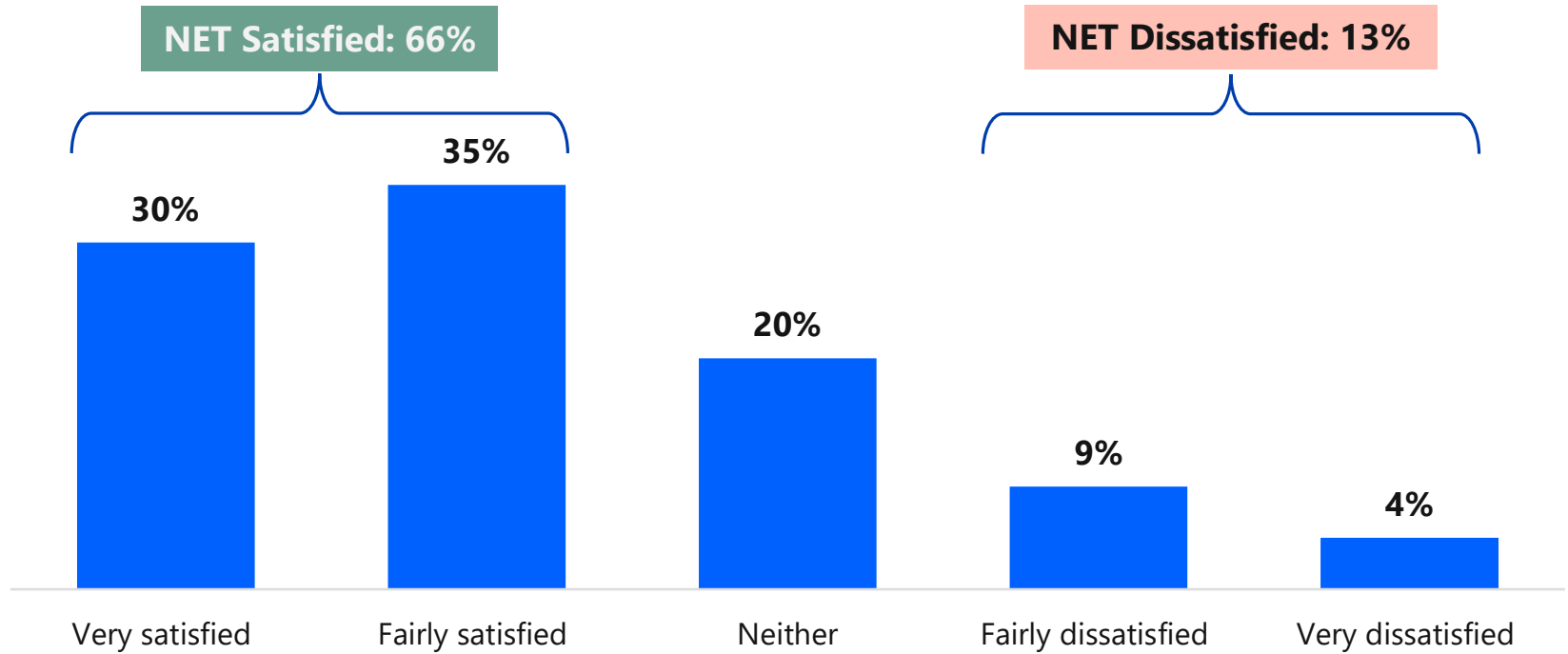
Q26. Overall, how well would you say you are currently managing financially?



Excludes *Prefer not to say*

Value for money ratings are high

Q2. How satisfied are you with the value for money of the clean water supply and services you receive?



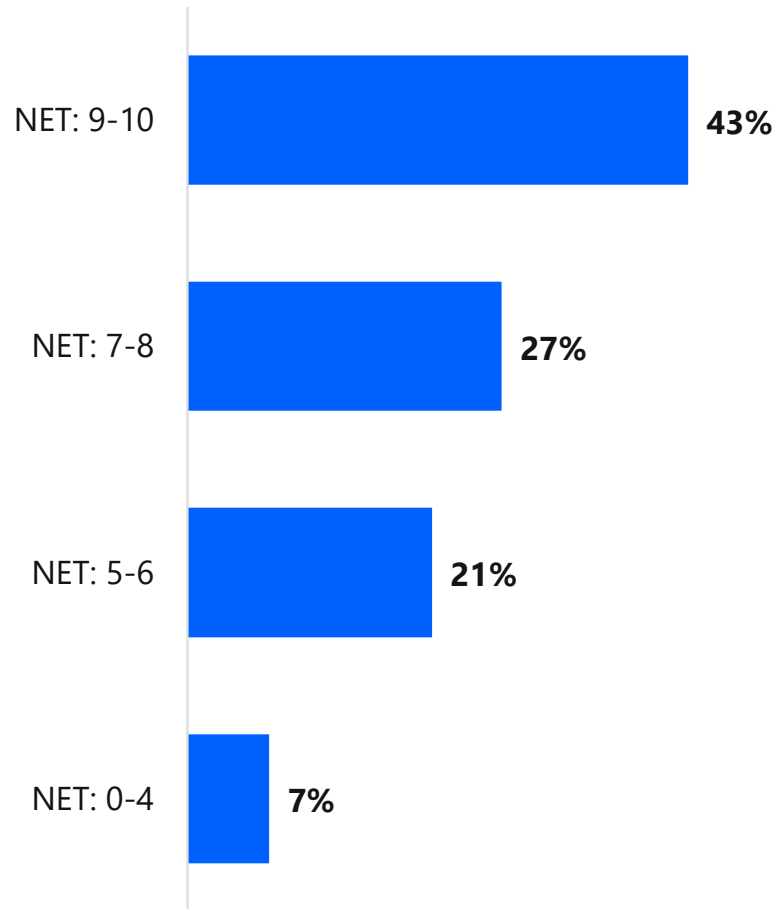
SSC Tracker (Sept-Oct 2025)

NET Satisfied: 55%

Trialists have comparatively high scores for KPIs



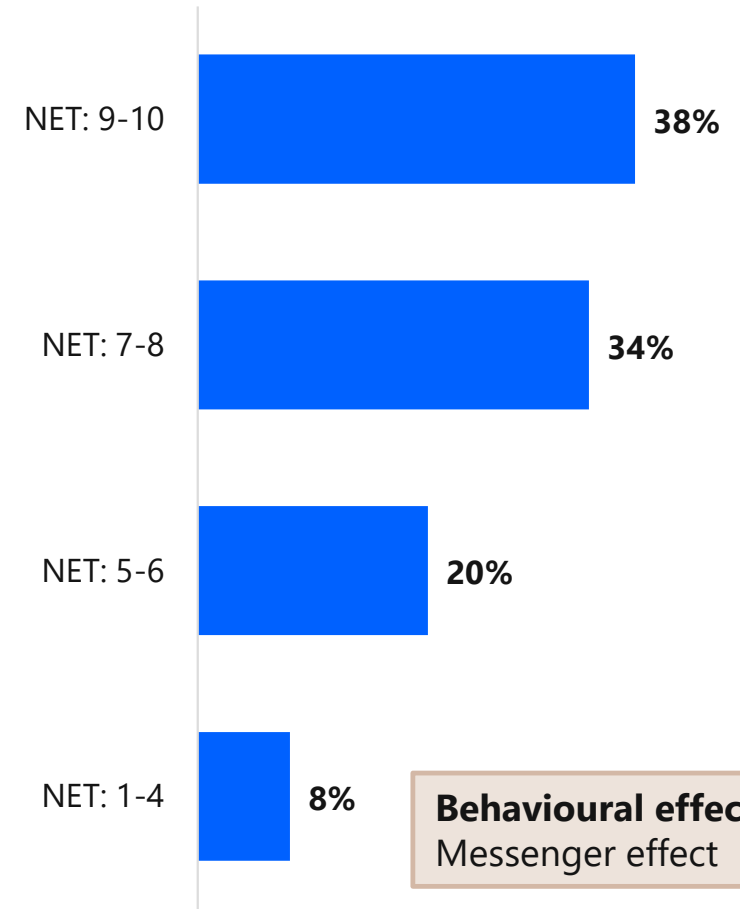
Q1. How satisfied would you say you are with the overall service provided by (Cambridge Water / South Staffs Water)?



**MEAN:
7.63**

SSC Tracker
(Sept-Oct
2025);
**Mean score
6.77**

Q3. How much do you trust (Cambridge Water / South Staffs Water)?



**MEAN:
7.53**

SSC Tracker
(Sept-Oct
2025);
**Mean score
6.75**

**Behavioural effects:
Messenger effect**

Positive experiences with the Tariff may mean positive perceptions of SSC

- For qualitative participants who had not encountered any issues with their water bill before the Tariff, their initial perception of SSC tended to be **neutral** or **mildly positive**, with perceptions becoming **more positive** after the Tariff due to the savings.
- For some, SSC had seemed like a **'faceless'** company ahead of the Tariff, and several customers had found their water bill difficult to pay, sometimes falling into arrears.
- Therefore, this group have found that their perceptions of SSC have **improved**, as the bills are **more affordable**, removing a stressor from their lives.
- For the participants who have **not** seen a reduction in bills, the experience of trying to reduce water and therefore money has been a **frustrating** one.
- A small number of participants have had **issues with their water bills previously**, such as leaks and errors in billing, so perceptions of SSC were **already unfavourable**. Where they have seen a **discount**, this has **improved**, but where they have **not**, this has served as **confirmation** that they feel negatively towards SSC.
- The responses are directly tied to the **financial impact of the Tariff** – perceptions of the company correlate with the perception **reward for efforts to reduce water use**.



Diary activity 5: popular words to describe SSC now on the tariff



Behavioural effects:

Fairness
Information asymmetry
Messenger effect



Friendly – those with experience of customer service have found them helpful and approachable.

Responsive – prompt responses to queries and the perception that SSC were interested in helping customers through the Tariff.

Reliable – referring to both a constant water supply without interruption and positive perception of offering affordability tariffs.

Affordable – for those who had seen a tangible reduction in their water bills, contrasting with their feelings towards SSC before the Tariff.

Expensive – for those who have not seen any change since joining the Tariff, water bills are still seen as expensive, and in some cases, **unaffordable**.

Anonymous – where participants had received an estimated bill, and where staff from SSC had not been out to do a meter read.

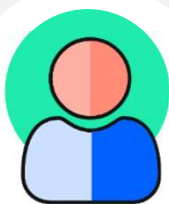
Disappointing – when participants have put in effort to not see any reward, this can lead to feelings of frustration but also disappointment.

Slow – without a smart meter the process is 'clunky', reducing the efficiency of the Tariff and billing.

“ Quotes on perceptions from ‘engaged cohort’ ”

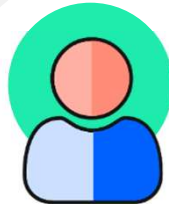
“[It] has really helped in managing household expenses. On the occasions I’ve contacted customer service, they’ve been friendly and helpful, which makes the company feel approachable.”

**4-person HH, 2 kids,
group 1, email**



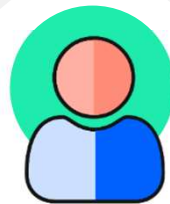
“I like this tariff and the Cambridge Water team has been amazing and very helpful.”

**2-person HH, 1 kid,
group 2, email**



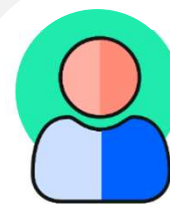
“I am just grateful that the Tariff exists and helps me out with my bills.”

**4-person HH, 3 kids,
group 2, email**



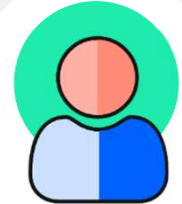
“Still very expensive and the bills are very confusing.”

**5-person HH, 2 kids,
group 3, WhatsApp**



“The fact I’m on this tariff should surely mean that they do not estimate my bill which they have done. Surely the whole point of me being on this sort of saver would equate to the need for accuracy. The reply I received from SSW when I queried this was blunt.”

**3-person HH, group
3, email**



Conclusions

4



Conclusions

- 1** Range of customers recruited to the Assure Essential Saver tariff
- 2** The structure of the Tariff isn't always clear to customers
- 3** Customers display some appetite to reduce water use
- 4** But there are some barriers to behavioural change
- 5** Early indicators suggest mild progress on key metrics
- 6** Future survey waves will be able to track the 'say-do' gap
- 7** Opportunities to be bolder with messaging for the rest of the tariff

Conclusions

- **Recruits to the Assure Essential Saver tariff:** there is a mix of households, but the majority appear to be older customers in smaller households, and with relatively low water usage and who find their water bills reasonably affordable.
- **The structure of the Tariff isn't always clear:** very few qualitative participants fully understood the Tariff or had clear expectations. This limited their ability to feel like active partners or make the link between discount and water saving.
- **Customers display some appetite to reduce water use:** although the majority of customers were already using very small amounts of water, they were open to hearing about new ways of saving water that they might not have considered.
- **But there are some barriers to behavioural change:** some related to capability and opportunity, but there were also challenges with motivating customers to save water based on a lack of understanding of the tariff or reasons why they should save water.
- **Early indicators suggest mild progress on key metrics:** qualitative data suggests a small increase in affordability, wellbeing and brand perception, but a lot of this is based on the assumptions about the Tariff and the fact that it exists, rather than actual bill reductions. This is due to a lack of 'real time' accurate feedback on bills.
- **Future survey waves will be able to track the 'say-do' gap:** future surveys will track reported behaviours, which will be triangulated with meter readings/ bills.
- **There are also opportunities to be bolder with messaging for the rest of the tariff:** including being clearer with reasons for water saving or changing the communications about how much money has been saved.

Updated behavioural framework

Behavioural effect	Description	Research evidence	Opportunities
Simplification / Ambiguity aversion	Information overload leads to an innate desire to simplify things and avoid ambiguity.	Customers currently not understanding the tariff and either putting it out of mind, or simplifying incorrectly. Leads to missed link between water saving and tariff.	Bold, simple message linking tariff (and savings) to water use.
Altruism	People like to be seen to do the right thing for society.	Impact of altruism on water use currently low because few understand WHY reducing water use is altruistic.	Share environmental / social reason for reduced water use.
Fairness	People don't like inequity and unfairness.	Some unfairness of why SSC asking customers to be the ones to reduce water use when there are leaks. Some limits to a household's capability to save water.	Illustrate what SSC are doing as part of the effort to save water. Keep tips reasonable / doable.
Messenger effect	The messenger is as important as the message.	Largely positive perceptions of SSC but risk of eroding trust and impact of messages if tariff not impactful.	Demonstrate tariff is worthwhile to avoid erosion of trust.
Relativity	People think in relative rather than absolute terms.	No yardstick of current water use / improvements so no relativity to motivate or validate water saving. Perceptions of discount warped by recent bill rises.	No billing based on estimated use. Clearly show £ saved so far on bill plus total of whole tariff.
Salience	We are drawn to what is novel and seems relevant to us.	Assume tips not relevant as 'others are the problem' and 'I know all this', many identify as low water users.	Case studies 'like me'. Tips for self-perceived low water users.
Information asymmetry	Where one party has more information than another it can lead to a lack of trust.	Customers not receiving feedback on meter reads, or any financial or water use progress where they have tried to change behaviours. Tariff feels passive.	Consistent/regular billing and metering. Share in clear, simple format what info SSC does have.
Empowerment	Need to feel we can make a difference to be motivated.	Feeling as though they have done all they can. Unclear on the impact of certain water saving and whether it is worth the hassle / effort to change.	Tips about the potential impact of reducing water e.g. if you do x tip then it will save x water.

Recommendations

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Recommendations to get the best out of the rest of the trial

Billing

- Bill as regularly and as accurately as possible, avoiding estimated bills where possible
- Clearly show how much money has been saved from the tariff – purpose to show real benefits, better chance of feeling the impact
- Give feedback on water usage – above or below 'essential use', above or below average household of similar size, reduced or increased since start of trial.

Communications

- Clear directive linking water saving to saving even more money – purpose to overcome confusion about why water saving is even mentioned
- Overcome marketing 'opt-out' barrier to receiving water saving advice – better 'experiment' and more chance of impact from comms
- Incorporate bolder messaging on the environmental reasons for saving water – low awareness currently.

Next stage

QUALITATIVE

Phase 1: 'engaged' cohort
15x recruits

1a: Behavioural insights interview (x15)
1b: Communications review interview (x15)
1c: Diary exercises (approx. 5 x15) - pre & mid
All remote: online, telephone, text, post

Phase 2: main trial cohort
8x recruits

2a: Qualitative interview (x8)
All remote: online, telephone

Phase 3: main trial & 'getting it right'
12x recruits

3a: Co-creation workshop (x1)
All remote: online

Optional extra: larger, F2F co-creation (x2)

QUANTITATIVE

Pre-trial survey: main trial cohort

Online survey, up to 1,000 participants

Optional extra: 25x telephone top-up

Mid-trial survey: main cohort

Online survey, up to 1000

Optional extra: 25x tel top-up

Post-trial survey: main trial cohort

Online survey, up to 1000 participants

Optional extra: 25x telephone top-up

Optional extra: triangulation analysis with customer data (meter readings & bills)

BEHAV. SCIENCE

A. Develop behavioural framework
B. Advise on communications
C. Inform questions for quant and qual

C. Inform questions quant & qual
D. Interpret results (cognitive bias)

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E. Provide recommendations for future

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This research was carried out in compliance with ISO 20252, (the International Standard for Market & Social research), The Market Research Society's Code of Conduct & UK Data Protection law.

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