West Country Water Resources – research materials

Qualitative – pre-reading pack

Qualitative – reference pack and home task

Qualitative – HH and NHH recruitment screeners, discussion guides and showcards session 1

Qualitative – HH and NHH discussion guides and showcards session 2

Qualitative – stakeholders discussion guide and showcards

Quantitative – household survey

Quantitative – non household survey

Business plan 2025-2030

Wessex Water
YTL GROUP

FOR YOU. FOR LIFE.

West Country Water Resources

Customer Engagement, 2021

Water Resources Customer Engagement, 2021

Thank you for your time and involvement. This reading pack provides some background information helpful for the sessions. We appreciate you reading this in advance.

Industry Structure and Who's Who

In England and Wales, Water Companies are responsible for providing their customers with safe clean water and taking their wastewater (sewage and dirty water that flows into drains) away to be treated. There are also other agencies and public bodies, known as regulators, that make sure that the Water Companies provide high standards of service, at a fair price, as well as protecting the environment.

Water Companies

In our sessions we are only considering the supply of water.

Water companies are responsible for taking water from the environment, treating it to the required high standards and then distributing it via a network of pipes, reservoirs, treatment works and pumping stations to all customers in their area. 24/7. They bill customers for their water supply, install and read meters, and help customers with problems or complaints.

The Regulators

Defra (Department for the Environment, Food and Rural Affairs)

Defra is the UK government department responsible for safeguarding the natural environment including water. Defra is supported by many agencies and public bodies, including Ofwat, the Environment Agency and the Drinking Water Inspectorate.

Ofwat

Ofwat's role is to:

- Make sure that water companies deliver their water and wastewater services efficiently
- Set the rules that water companies follow to decide what prices to charge customers
- Make sure that water supplies and wastewater services are resilient into the future

Drinking Water Inspectorate (DWI)

The Drinking Water Inspectorate (DWI) makes sure that water supplies in England and Wales are safe and drinking water quality is acceptable to consumers.

Environment Agency (EA)

The Environment Agency is responsible for protecting and enhancing the environment. It works with Water Companies to identify where investment is needed to improve the environment. This may include reducing the amount of water that water companies can take from the natural environment and improvements to wastewater discharged to the environment.

Consumer Council for Water (CCW)

The Consumer Council for Water is the watchdog for household and business water consumers in England and Wales. Their aim is to secure a safe, reliable service, and a fair deal for water consumers. CCW is independent and represents household and business customers.

Water Resources

The aim of these sessions is to explore your views on how we manage our water resources and the supply of water in the future. Population growth, climate change and the need to protect the environment are all putting increasing pressure on water resources.

From brushing our teeth to washing our clothes, preparing our food to taking a shower, across industry, agriculture and the environment, the reliable supply of water underpins almost every aspect of human life. Few of us ever question if water will flow when we turn on our taps. Yet without further action the National Infrastructure Commission, an independent body that advises the UK government, predicts there is roughly a 1 in 4 chance over the next 30 years that large numbers of households will have their water supply cut off for an extended period because of a severe drought.

To meet this challenge, some of the organisations responsible for England's water supplies have come together to understand the future water needs for England from 2025 to 2050 and beyond. Regional groups have been formed with water companies in that region, key water users, the Environment Agency and other stakeholders. By putting aside company boundaries and considering the needs of the whole region, they aim to develop the best plan that reduces the risk of water shortages whilst protecting the environment.

West Country Water Resources Group

West Country Water Resources Group is an alliance of the three water companies (South West Water including Bournemouth Water, Wessex Water and Bristol Water) that cover the south west region of England (see map). Each of the water companies carries out long term planning to maintain water supplies to customers without harm to the environment, but the challenges are getting bigger. By using a coordinated approach and looking closely at how the region's water resources are managed, West Country Water Resources Group aims to understand what water is available both now and in future, the current and future needs of all users, and the options to make sure there continues to be an affordable, resilient, and sustainable water supply for the public, industry, and the natural environment for future generations. The regional plan will cover both the public water supply and other water users such as farming and industry.

Source: West Country Water Resources Group

Water Shortages

During the sessions we will be talking about where our water comes from, water usage and how water use may be restricted. This section provides some background information for these discussions, and we will add further information during the sessions.

We would like you to read the following information about what may happen when there are water shortages. Water companies monitor how much water is available and how much is being used by customers, and have an early warning system if the amount of water for public supply reduces too much. There are four stages:

1. Water companies ask customers to use less water voluntarily – these requests may be made by letter, social media or in press reports
2. Hosepipe bans are imposed
3. Non-essential use bans are imposed

And if the situation continues to get worse….

4. Emergency severe water supply restrictions occur (rota cuts and standpipes)

Hosepipe bans

During a hosepipe ban households cannot use a hosepipe for example to…

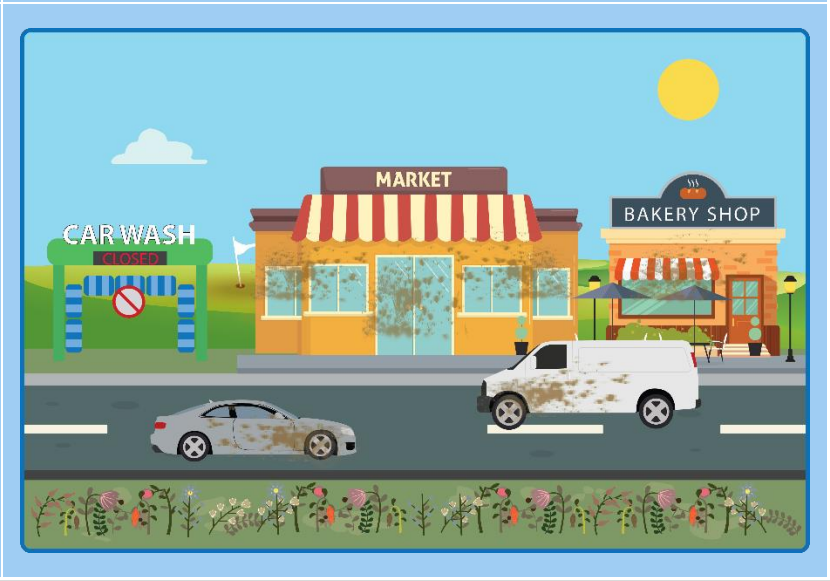
- Clean the car
- Water the garden
- Clean windows
- Fill a pond
- Clean driveways

Non-essential use ban

During a non-essential use ban… households cannot use hosepipes (as above) AND businesses cannot…

- Water outdoor plants/gardens; clean vehicles/windows
- Fill swimming pools
- Operate a mechanical vehicle-washer

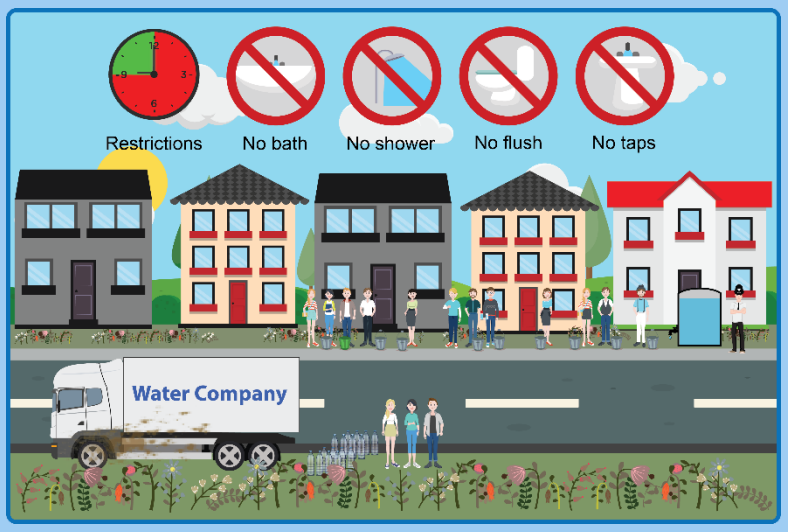
This does <u>not</u> affect schools and hospitals.



Severe supply restrictions

A severe supply restriction involves stopping all water supplies into households and businesses. People need to collect water from **standpipes** and tanks in the street.

In urban areas this is impractical, and instead water is supplied to properties for a few hours a day in rotation. This is called **rota cuts**.



We rarely experience emergency water restrictions like rota cuts and standpipes

Some may recall the drought of 1976 when parts of England and Wales had their water supply cut off for up to 17 hours a day, and standpipes (outdoor taps installed on the streets to dispense water) were in use. South East Wales, Devon, East Midlands, South East Yorkshire and East Anglia all had water restrictions. By late August London had 90 days water supply left, Leeds only 80 days.

Please click on the links to learn more about the 1976 drought.

http://www.bbc.co.uk/newsbeat/article/40358961/what-the-drought-of-1976-looked-like-as-this-years-heatwave-continues#:~:text=The%2040%2Dyear%20high%20has,since%20the%20summer%20of%201976.

https://www.countryfile.com/countryfile/great-drought-of-1976-what-happened-and-what-was-the-impact-on-britain/

https://www.youtube.com/watch?v=YLLwd51UXY0

Since 1976, there has been considerable investment in water resources, treatment and supply networks which has significantly reduced the likelihood of this happening today. However, there have been close calls in recent years, with northwest water companies narrowly avoiding having to impose hosepipe restrictions.

https://www.thetimes.co.uk/article/hosepipe-ban-in-northwest-cancelled-after-recent-downpour-l8kt3xxkg

https://www.plymouthherald.co.uk/news/plymouth-news/water-hosepipe-ban-heatwave-weather-1738755

It's possible that population growth, changing weather patterns due to climate change and other events mean restrictions such as hosepipe bans or more severe supply restrictions may happen in the future unless we take action.

https://www.bristolpost.co.uk/news/bristol-news/bristol-running-out-water-vulnerable-2875024

https://www.nationalgeographic.co.uk/environment-and-conservation/uks-looming-water-crisis

During the Covid-19 lockdown period last year, the demand for water increased substantially during the hot weather. You may have experienced requests from your water company for customers' help in reducing usage by using water carefully, limiting use of hosepipes, not filling paddling pools etc.

https://www.plymouthherald.co.uk/news/plymouth-news/south-west-water-urges-every-4220765

https://www.bathecho.co.uk/news/community/wessex-water-increase-demand-water-dry-weather-90578/

https://www.itv.com/news/2020-06-01/avoid-using-sprinklers-in-evening-gardeners-urged-amid-high-water-demand

It can be difficult to imagine how the more severe emergency restrictions would impact on our lives today. To see what it could mean you may wish to watch the video "Day Zero: how Cape Town stopped the taps running dry".

https://www.youtube.com/watch?v=J9tF4vEHjaE

"Day Zero" was the date when it was predicted that Cape Town in South Africa, home to over 4 million people, would run out of water. The public water supply would be turned off, leaving residents to collect their daily water ration of 25 litres per person per day from water collection points. To delay Day Zero, many actions were taken, including restricting residents to using a maximum of 50 litres per person per day for many months. This is approximately a third of the amount of water each person in the UK uses each day on average.

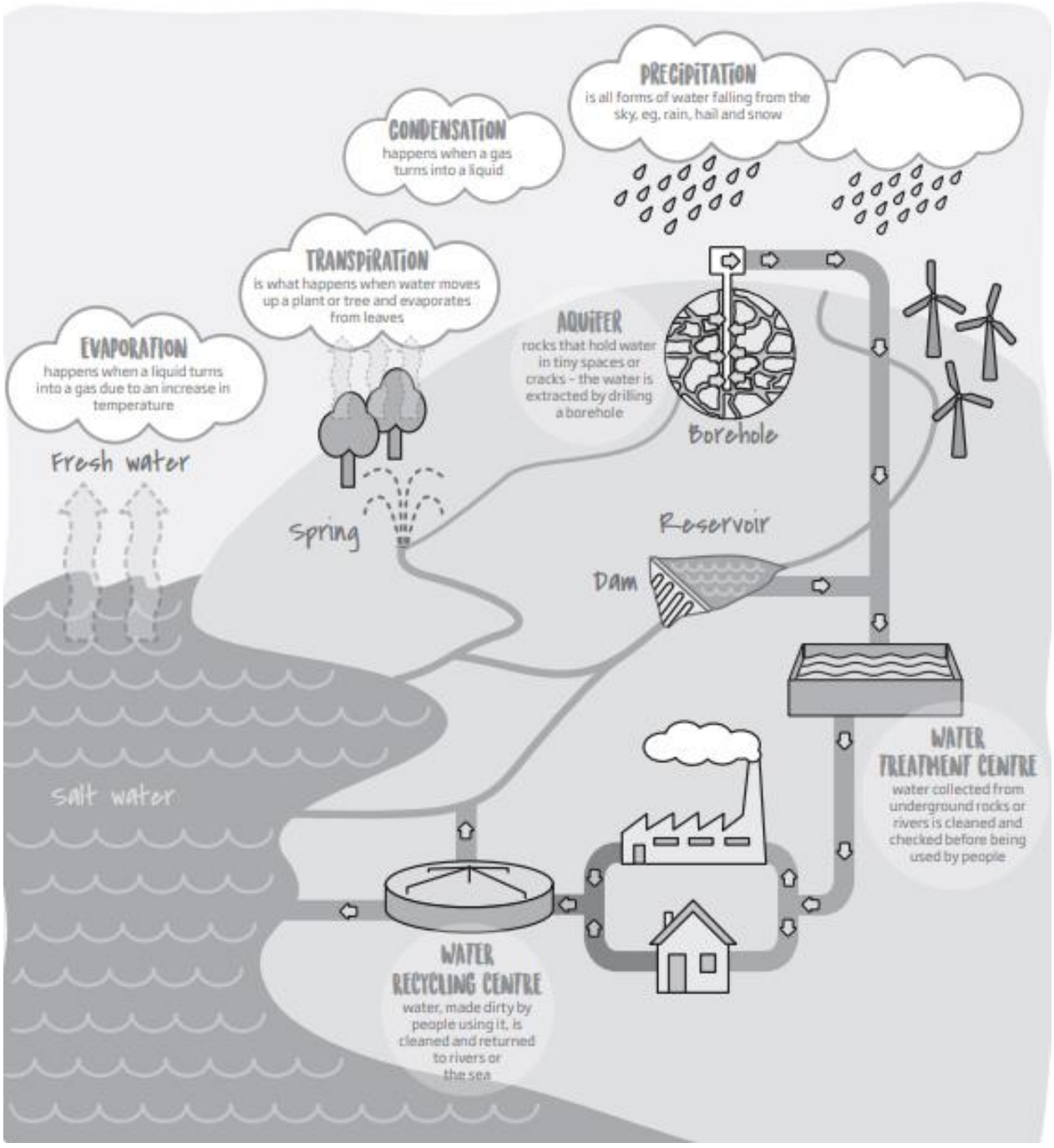
The aim of water resource planning is to avoid issues such as experienced in Cape Town.

Please take a little time to think about how water restrictions would affect you, your family, and others, and discussing this with your family and friends.

Before the session you may wish to review your own water bill to remind yourself how much you currently pay for your water supply and how much water you use.

Glossary of Terms

The water cycle:



Source: Wessex Water

Other sources of information

That's all the reading for our sessions, but below are some more links for other information about the water industry in general.

West Country Water Resources Group	https://www.wcwrg.org/
DEFRA	https://www.gov.uk/government/organisations/department-for-environment-food-rural-affairs
DWI	http://www.dwi.gov.uk/
Environment Agency	https://www.gov.uk/government/organisations/environment-agency
OFWAT	https://www.ofwat.gov.uk/
CCWater	https://www.ccwater.org.uk/

West Country Water Resources

Water Resources Option Pack

We appreciate you reading this pack in advance

Introduction

This reference pack provides some information about the different type of options that water companies may put in their plans for water resources. We will be talking about the options in our next session, so please read through the information and maybe discuss it with your family and friends.

Once you've read through the reference pack, we'd like you to complete a couple of short exercises at the end. There is a **separate form** – to capture your answers.

There are no right or wrong answers, we are interested all in your views.

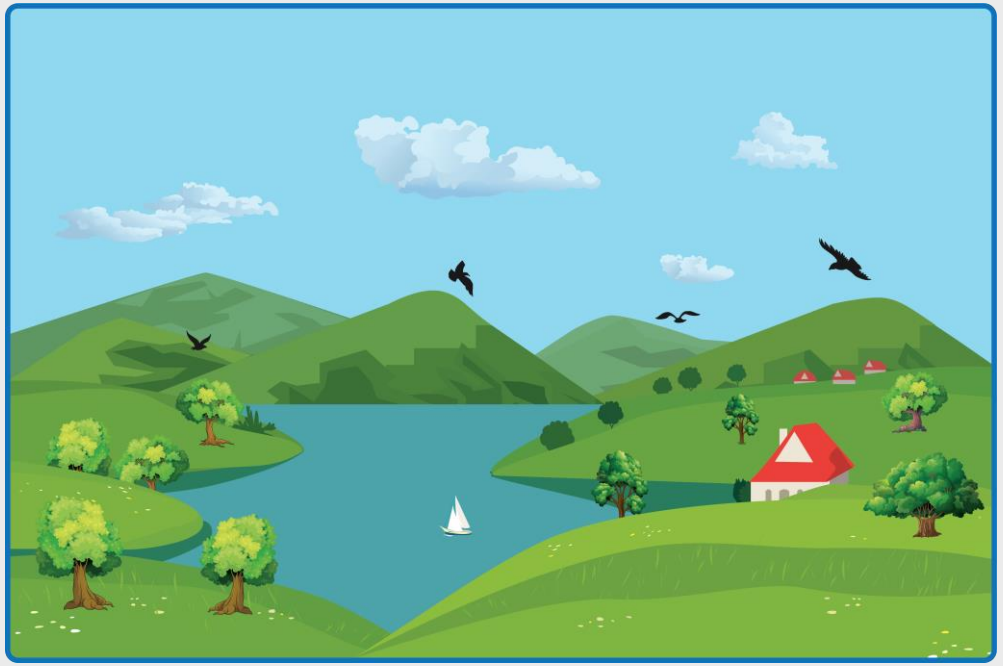
The choices we are asking you to make in the exercise are typical of decisions that the water companies have to make when developing their water resources plans. We will be discussing these choices during the next session, so you will have opportunities to change your mind.

Supply Options

Reservoir to store water

What is it?

New reservoirs can be built to store water when it is available



Already used?

Yes, widely across the UK

Pros

- ✓ Reliable - provides large volumes of additional water when it's needed, e.g. in summer
- ✓ Will deliver the amount of water that is planned for under most conditions
- ✓ Once built, they can be used for recreation (e.g. fishing, sailing) and can support a range of wildlife

Cons

- × Long time to plan, get permission for, and build
- × High impact and disruption on communities, landscape and the natural environment during construction
- × Is less flexible to future changes including weather patterns

Cost	VERY HIGH
Amount of water it can provide	VERY HIGH

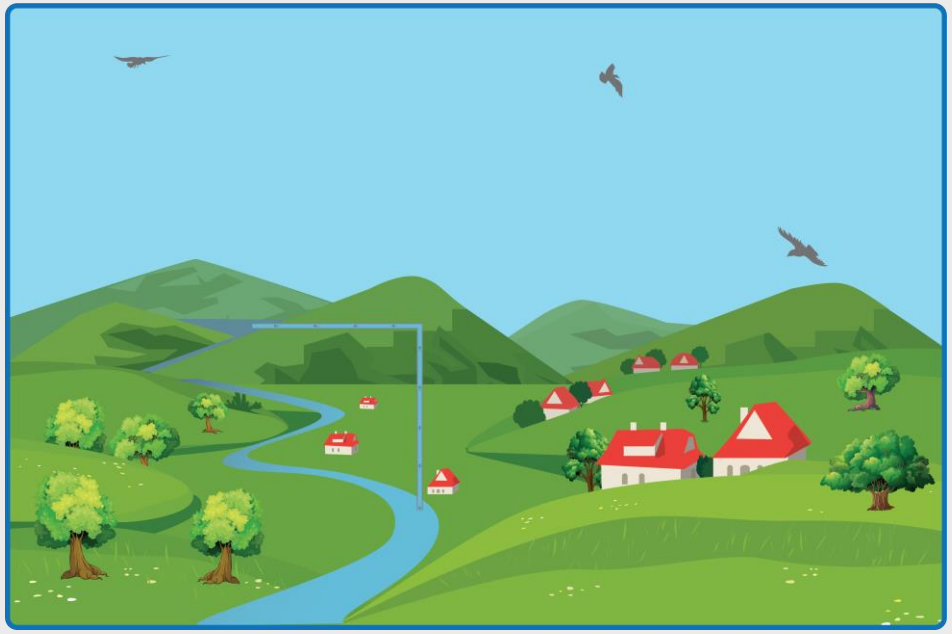
Pumped water storage in winter

What is it?

During dry years, reservoirs may not naturally refill over the winter, so additional water is pumped back uphill into a reservoir during winter - where it is stored for use in summer. The water may also be pumped from the reservoir into more distant areas that need water during the summer.

Already used?

Limited use in the UK



Pros

- ✓ Simple technology – just requires pumping
- ✓ Can store water for use when the weather is dry reducing the risk of water restrictions
- ✓ During dry conditions water can still be released from the reservoir to maintain the downstream river flow reducing the risk of harm to the plants and wildlife

Cons

- × Water has to be pumped which uses lots of energy
- × Amount of water that can be stored is limited to the capacity of the reservoir
- × Is less flexible to future changes including weather patterns

Cost	MEDIUM
Amount of water it can provide	MEDIUM

Taking water from the sea (Desalination)

What is it?

Taking sea water and treating it, including removing the salt, so it can be used for water supply.

Already used?

Limited use in UK but more common worldwide.

Pros

- ✓ Reliable source of large volumes of additional water
- ✓ Water is always available, even in times of drought
- ✓ The treatment works can be built in a modular fashion so more flexible to future changes

Cons

- × Restricted to areas where there is a coastline or estuary
- × High environmental impact - uses lots of energy and produces large quantities of salt by-product that needs to be safely disposed of
- × Advanced treatment that is costly to operate

Cost	HIGH
Amount of water it can provide	HIGH

Recycling treated wastewater

What is it?

Treated wastewater is taken, either directly or mixed with water in a river or reservoir, and recycled through a water treatment works for re-treatment to a very high standard so that it can be used for water supply. All public drinking water has to pass high legal and quality safety standards.

Already used?

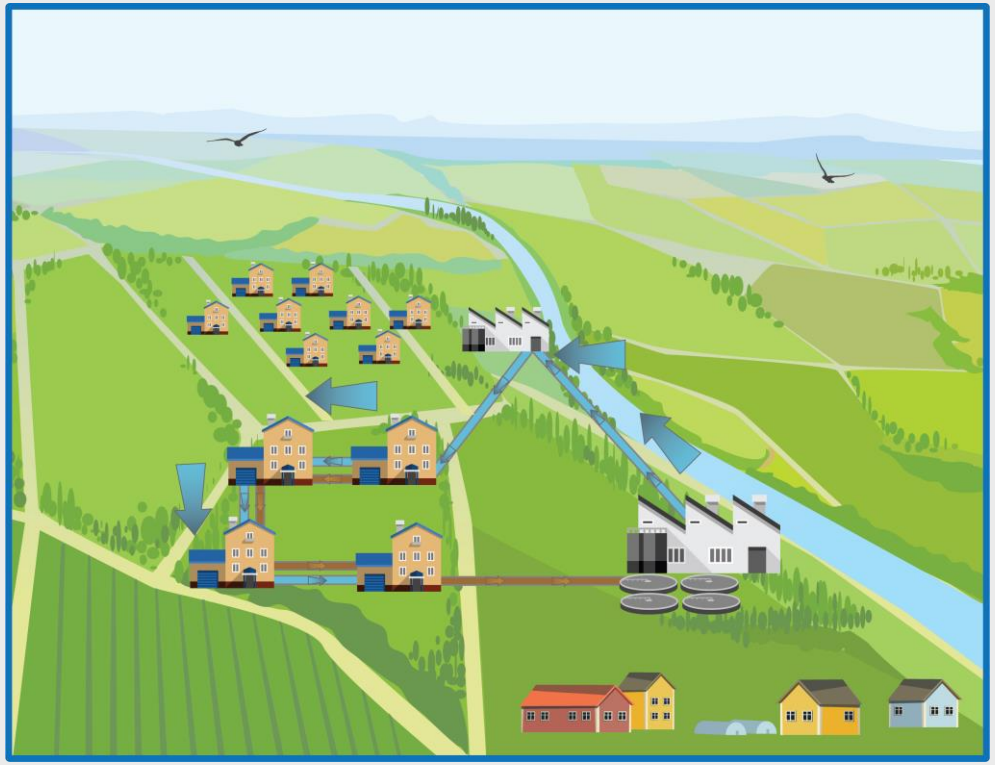
Recycling does already happen as part of the existing water supply system.

Pros

- ✓ Reliable source of large volumes of water
- ✓ Water is available, even in times of drought
- ✓ The treatment works can be built in a modular fashion so more flexible to future changes

Cons

- × Not as flexible to future changes e.g. if demand alters or there are changes to the wastewater
- × Requires additional levels of treatment which uses more chemicals and energy
- × Advanced treatment that is costly to operate



Cost	HIGH
Amount of water it can provide	HIGH

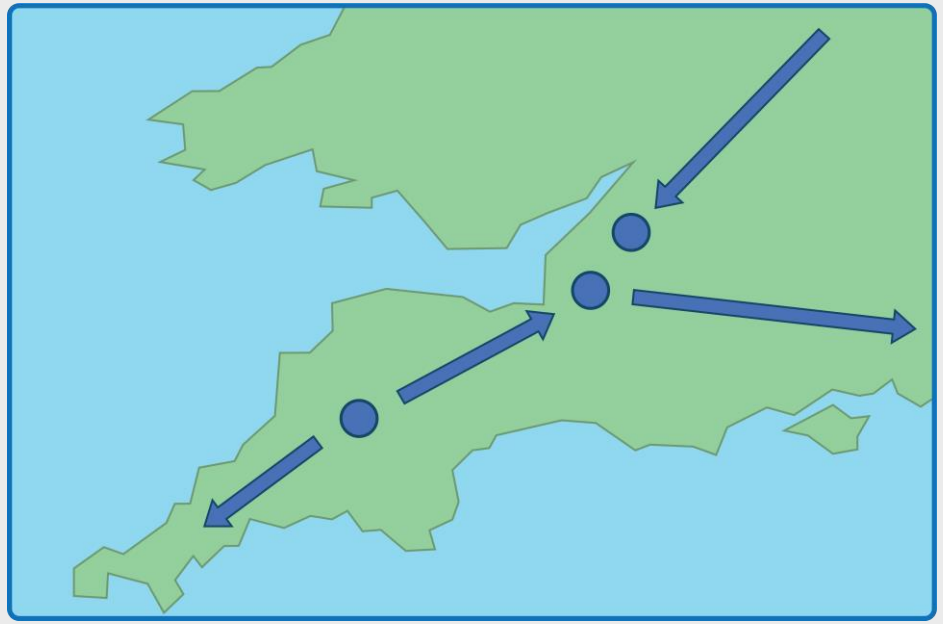
Transferring water

What is it?

Sharing water with other water companies. Water may be transferred within a company, between companies or between regions and so the distance the water has to travel depends on the source and where it is going to. Water may be transferred via dedicated pipelines, or using rivers (with some connecting pipelines).

Already used?

Yes, by UK companies



Pros

- ✓ Can provide large volumes of additional water to supplement local resources
- ✓ Increases the connections in the water supply system, making it more flexible
- ✓ Using the river system may give opportunities for environmental improvement due to better flows

Cons

- × Water supplies are not 100% guaranteed if neighbouring companies go into drought
- × Water is heavy - so may need lots of energy to move it long distances if pumped
- × Water companies providing water may need to use different/new sources of water in their area - which may affect the taste, or hardness of water

Cost	MEDIUM
Amount of water it can provide	HIGH

Demand Options

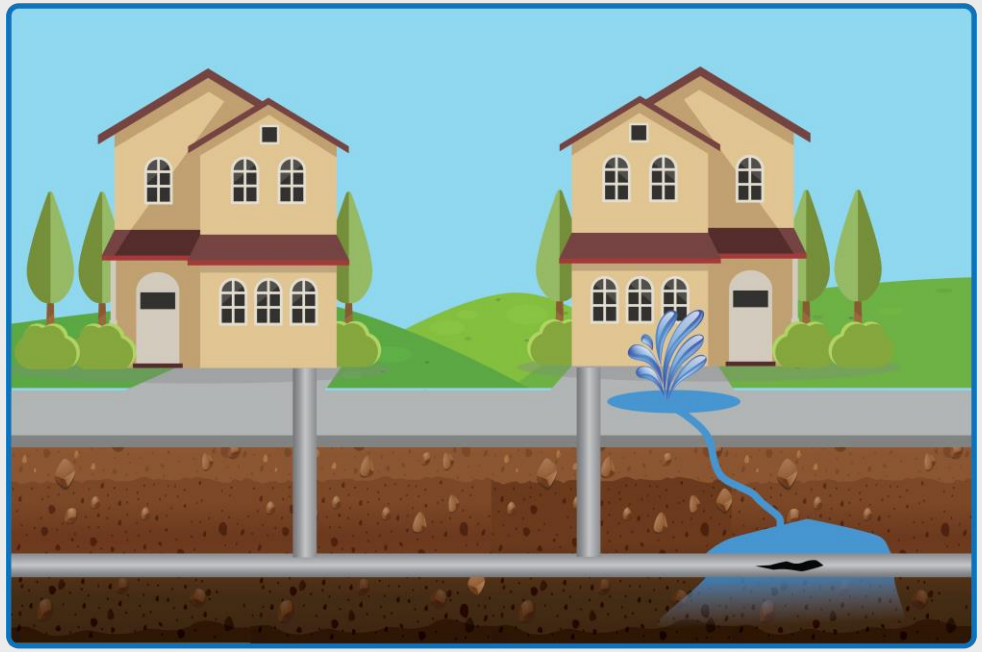
Leakage reduction

What is it?

The repair of leaks and bursts on pipes, valves etc. to prevent the loss of treated water from the water supply network.

Already used?

Yes by UK water companies.



Pros

- ✓ Keeps more water in the supply system
- ✓ Reduces the need to take more water from rivers, reservoirs and underground
- ✓ Less water has to be treated, reducing the amount of energy and chemicals used and waste produced

Cons

- × Leaks may be hard to find and expensive to fix, e.g. deep in the ground
- × Fixing leaks can cause disruption and congestion from road works
- × Around a quarter of leakage is from pipes owned by customers

Cost	MEDIUM
Amount of water it can provide	MEDIUM

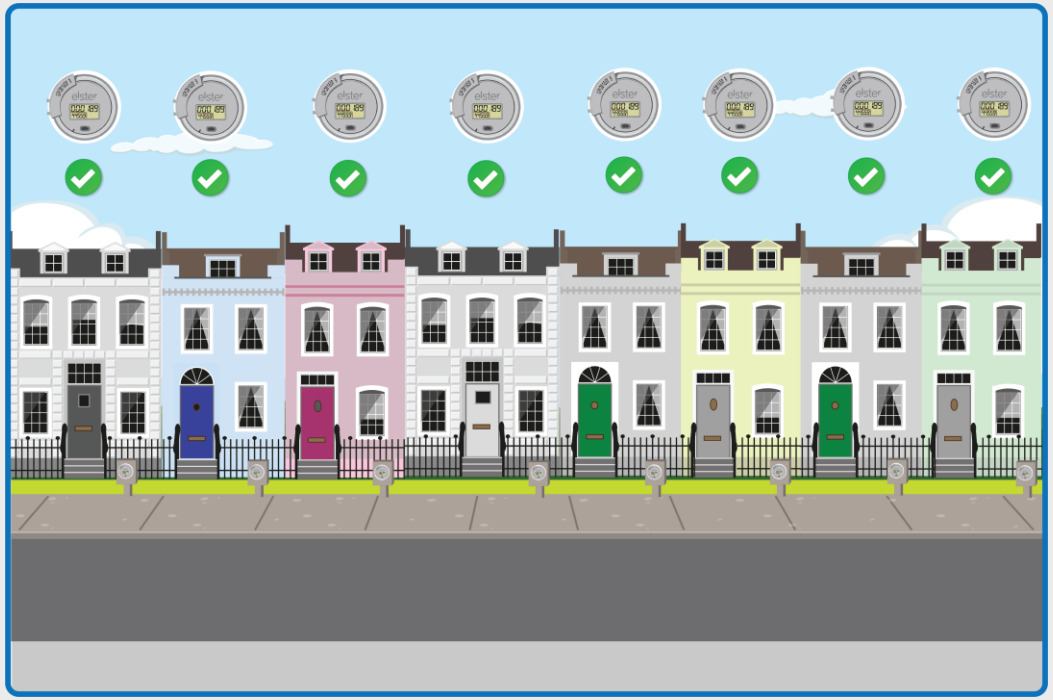
Compulsory metering

What is it?

Metering involves charging customers for the amount of water they use. Compulsory metering involves all households in a community being put on a meter.

Already used?

Metering can be compulsory if the area is classed as water stressed.



Pros

- ✓ Easy to install & minimal disruption
- ✓ On average households use around 15% less water when they have a meter fitted
- ✓ Customers pay for the water they use - lower water use can lead to lower bills

Cons

- × Water savings are not guaranteed
- × Needs lots of customers to change their behaviours to use less water and maintain this over time
- × May penalise some customers e.g. high water users

Cost	LOW
Amount of water it can provide	LOW

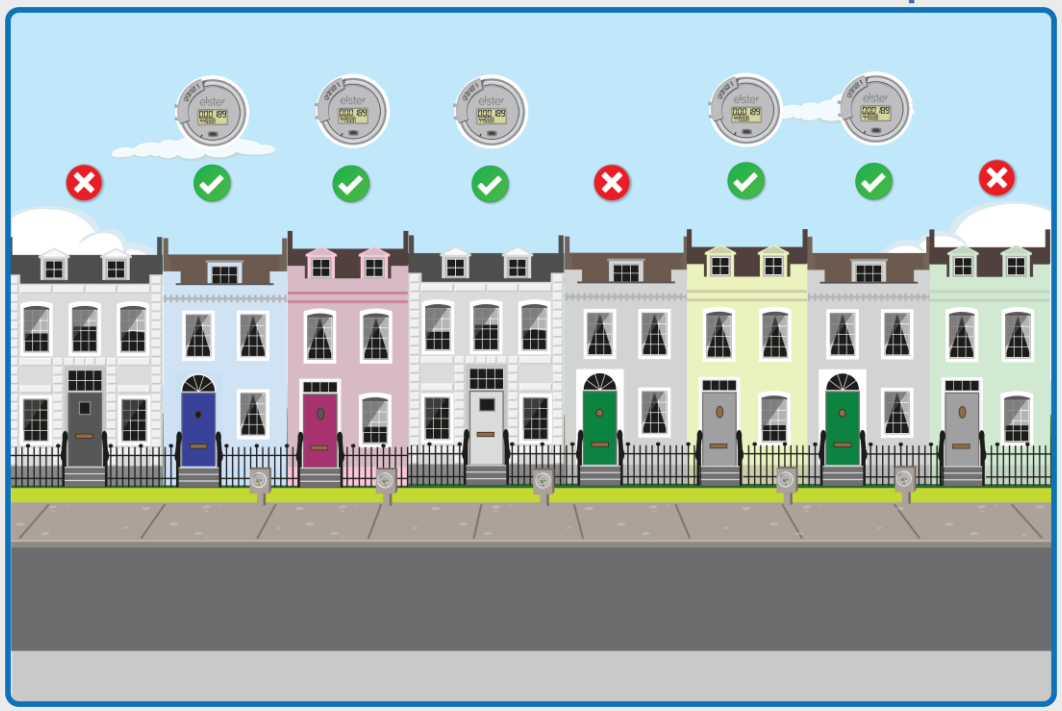
Voluntary metering

What is it?

Metering involves charging customers for the amount of water they use. Customers are encouraged to have a meter installed to save money – but customers have the option to switch back. Businesses and new houses all have water meters.

Already used?

Yes, by all UK water companies.



Pros

- ✓ Easy to install & minimal disruption
- ✓ On average households use around 15% less water when they have a meter fitted
- ✓ Customers pay for the water they use - lower water use can lead to lower bills

Cons

- × Water savings are not guaranteed
- × Needs lots of customers to change their behaviours to use less water and maintain this over time
- × Depends on how many customers choose to switch to a meter

Cost	LOW
Amount of water it can provide	LOW

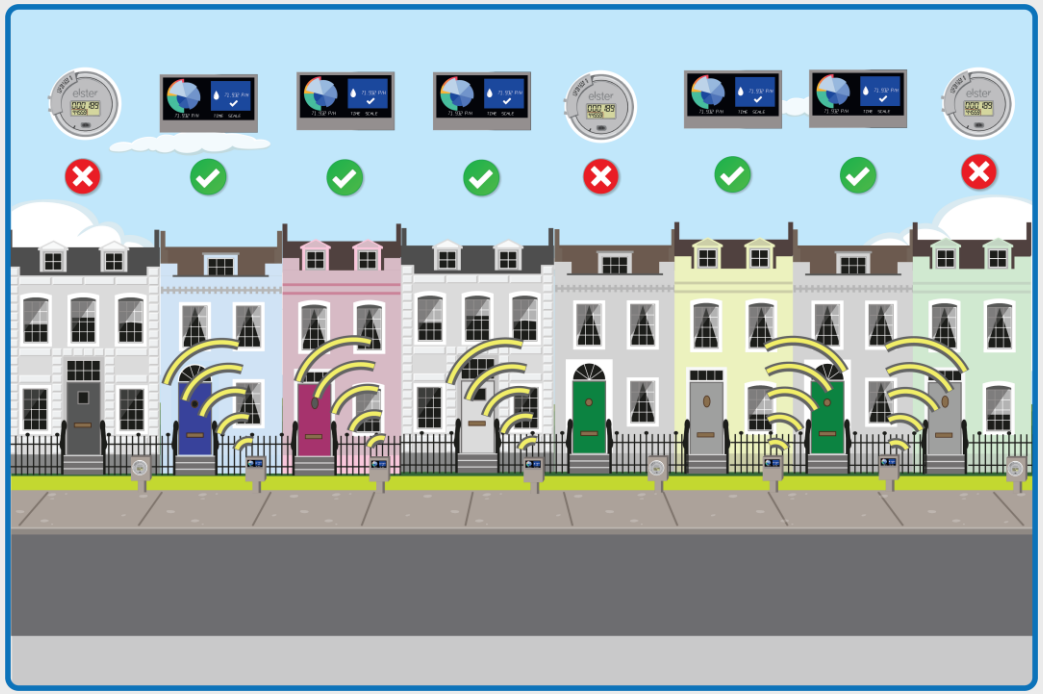
Smart metering

What is it?

Metering involves charging customers for the amount of water they use. This is the same as voluntary metering but customers are encouraged to have a smart meter installed

Already used?

Trialled by UK water companies.



Pros

- ✓ Easy to install & minimal disruption
- ✓ Customers have better information about their day to day water usage which may help them use less water
- ✓ Helps to identify customer-side leakage, especially hard to find small leaks

Cons

- × Water savings are not guaranteed
- × Needs lots of customers to change their behaviours to use less water and maintain this over time
- × Depends on how many customers choose to switch to a smart meter

Cost	LOW
Amount of water it can provide	LOW

Using water tariffs to encourage water saving

What is it?

Different prices are charged depending on the use of water. For example, customers' properties are fitted with smart meters which are used to charge a lower fee based on an amount of water considered to be 'essential use' and a higher fee for 'discretionary use'

Already used?

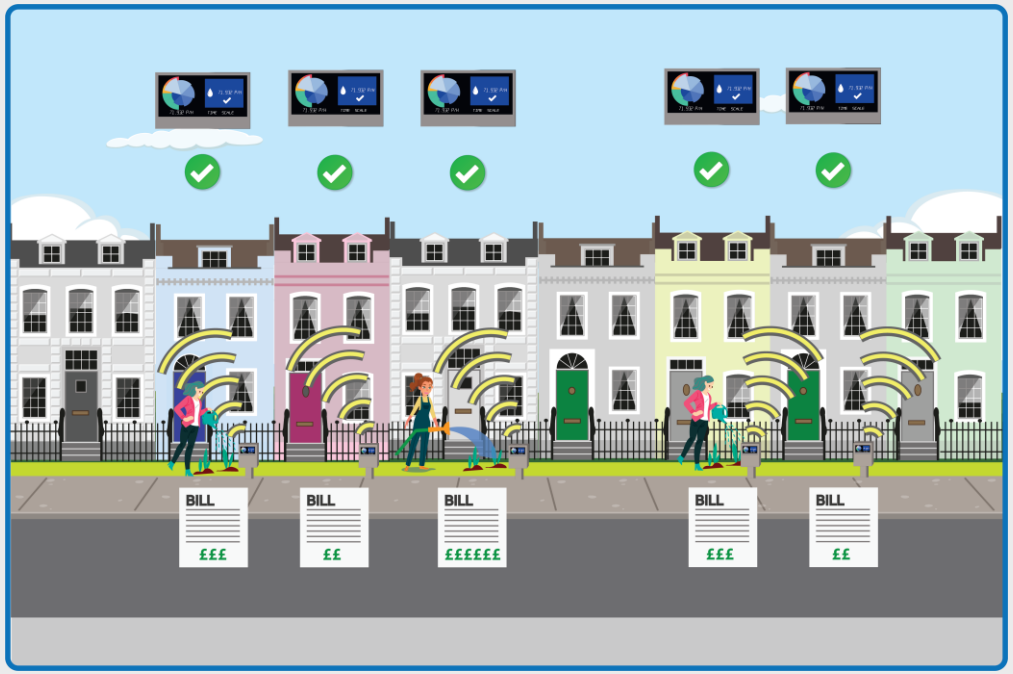
Not currently used by UK water companies for the purpose of reducing water demand.

Pros

- ✓ Smart meters are easy to install & minimal disruption
- ✓ Encourages customers to take responsibility for their water use
- ✓ May result in greater reductions in water demand than metering alone

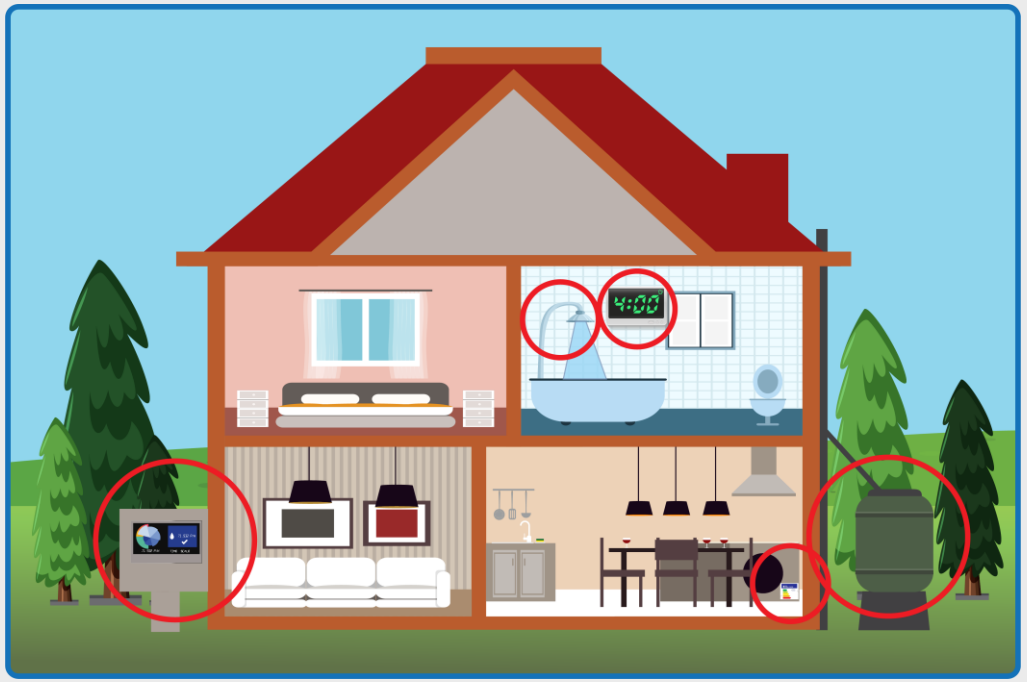
Cons

- × Water savings are not guaranteed as the approach is unproven
- × Needs lots of customers to change their behaviours to use less water and maintain this over time
- × May penalise some water customers e.g. high users



Cost	LOW
Amount of water it can provide	LOW

Using awareness campaigns, incentives and education to encourage water saving



What is it?

Initiatives to encourage customers and businesses to use less water, including awareness campaigns, providing incentives to reduce water consumption such as funding community projects. Companies may also provide audits and water saving devices such as Save-a-Flush, water butts, tap aerators, shower timers and water efficient shower heads.

Already used?

Yes, by UK water companies.

Pros

- ✓ Basic water saving devices are easy to install and minimal disruption
- ✓ Encourages customers to take responsibility for their water use
- ✓ May result in greater reductions in water demand than metering or tariffs alone

Cons

- × Water savings are not guaranteed
- × Needs lots of customers to change their behaviours to use less water and maintain this over time
- × Some elements, such as incentives, have not been widely used and so the water savings aren't known

Cost	LOW
Amount of water it can provide	LOW

West Country Water Resources

Exercises

We appreciate you completing these exercises and sending back the form in advance of our next session

There are no right or wrong answers – we are interested in your views. We will be discussing your choices in the next session, so you will have the opportunity to change your mind.

We have included forms for you to complete in both word and excel format – please use whichever you prefer or you can just copy and paste into an email. For exercise 2, the excel form will automatically do the calculations, but if you use word you'll have to do them manually

Exercise 1: Your views of the different options

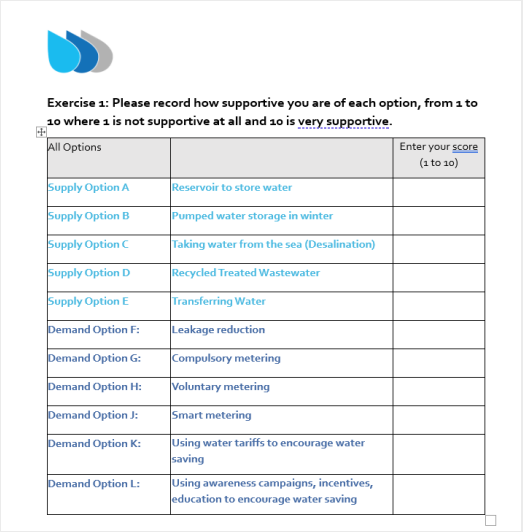
This reference pack has provided some information about the type of options that water companies may put in their plans for water resources. We'd like to know how supportive you are of each option, so please can you score each option from 1 to 10, where:

1	2	3	4	5	6	7	8	9	10
Not at all supportive									Very supportive

There are no right or wrong answers, we are interested in your views.

We will be discussing these options during the next session and so you will have opportunities to change your mind.

Please use the separate form to record your answers



Exercise 1: Please record how supportive you are of each option, from 1 to 10 where 1 is not supportive at all and 10 is very supportive.

All Options		Enter your score (1 to 10)
Supply Option A	Reservoir to store water	
Supply Option B	Pumped water storage in winter	
Supply Option C	Taking water from the sea (Desalination)	
Supply Option D	Recycled Treated Wastewater	
Supply Option E	Transferring Water	
Demand Option F:	Leakage reduction	
Demand Option G:	Compulsory metering	
Demand Option H:	Voluntary metering	
Demand Option J:	Smart metering	
Demand Option K:	Using water tariffs to encourage water saving	
Demand Option L:	Using awareness campaigns, incentives, education to encourage water saving	

Exercise 2: How do we provide the additional water needed in West Country Region by 2050

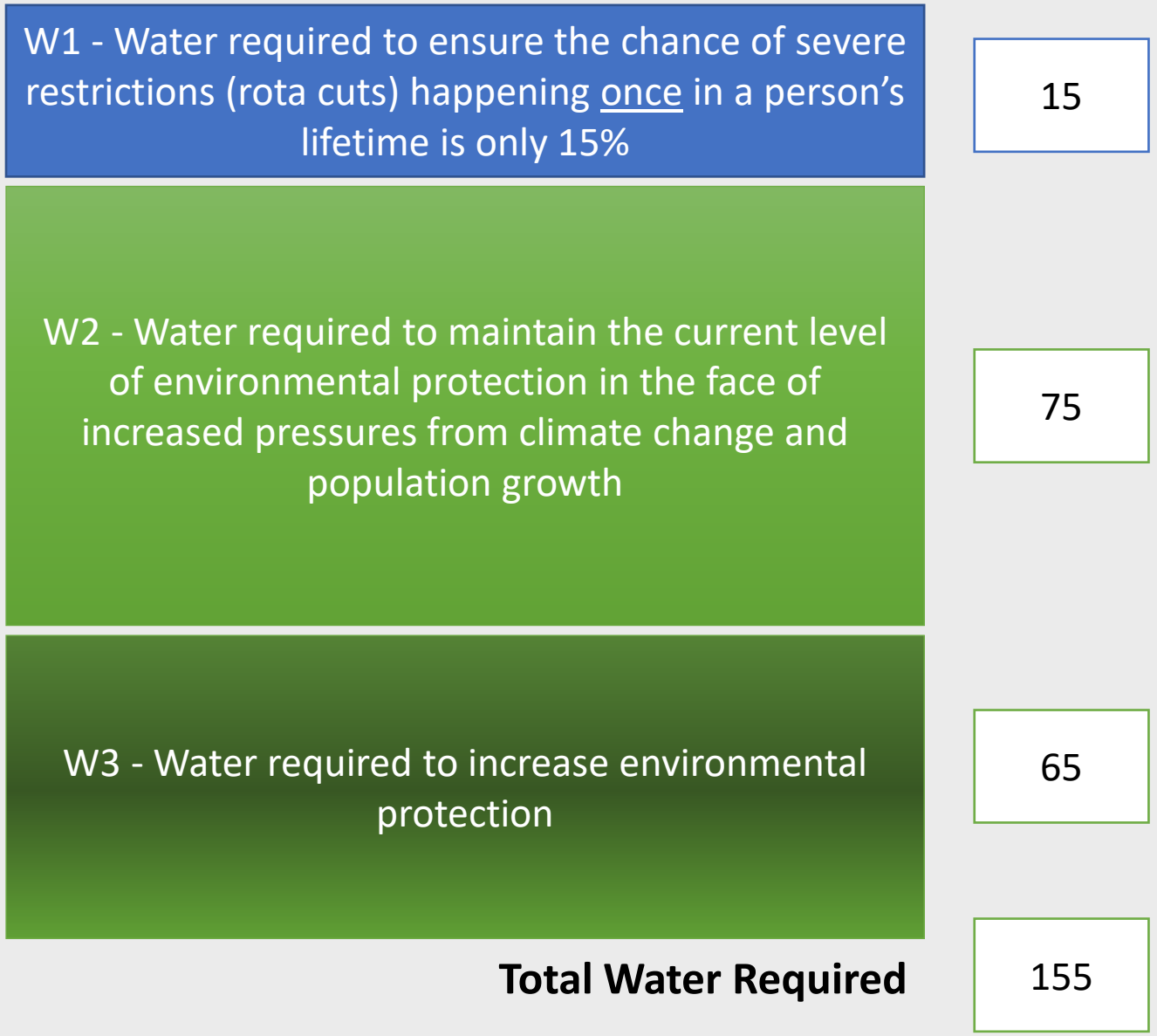
Imagine that you have been put in charge of water resources in the West Country Region.

By 2050 you have to make sure there is sufficient water available to meet the demands of over 5 million people in this region.

A number of factors will influence how much water is required in total:

- How much water is required to reduce the risk of severe water restrictions (e.g. risk of rota cuts is reduced to 15% in a person's lifetime)

- How much water is left in rivers and streams to provide different levels of environmental protection.



Exercise 2: How do we provide the additional water needed in West Country Region by 2050

As the person in charge you have to decide:

(A) How much water in total is needed. To meet all requirements the total units needed would be 155 but you can choose to provide more or less than this.

(B) What supply and demand options (see over) you think are the best way to provide the total water you think we need

1) The supply options are those that you have read about in this pack. Each of the supply options you can pick as many times as you think necessary
2) The demand options can only be selected once as they would apply to all water users, and should be built up in sets, i.e. can only select demand option N2 if already selected option N1
   i. For the exercise, demand options M1 and M2 are about leakage reduction (see Demand Option F that you have read about in this pack)
   ii. The Demand options G to L are all options that water companies can use to help and encourage customers to use less water, but the options do not directly reduce the amount of water used. Customers have to change their behaviours, like turning off the tap, having shorter showers, using water butts etc. So Demand options N1 to N3 give examples of what changes in water use that customers would have to make to gain the amount of water units shown

Exercise 2: Your options and how much additional water they would provide

What options would you select?

Remember you have to decide how much water into total you would want. This can be more or less than 155 units

Supply Option List:

Supply Option A: Reservoir to store water (50 units)

Supply Option B: Pumped water storage in winter (30 units)

Supply Option C: Taking water from the sea (Desalination) (25 units)

Supply Option D: Recycled Treated Wastewater (25 units)

Supply Option E: Transferring Water (25 units)

Each of the supply options you can select as many times as you think necessary

Demand Option List:

Demand Option M1: Additional leakage reduction by Water Companies (up to 50 units)

Demand Option M2: Demand Option M1 + Fixing Customer Pipes (up to 20 units)

Demand Option N1: Water efficiency awareness (10 units)
This means most customers take basic steps to reduce their water usage e.g. don't leave taps running, shorter showers, fit a save-a flush to toilets, more use of water butts

Demand Option N2 : Demand Option N1 + Metering (10 units)
This means most customers take the steps in Option N1 plus e.g. limiting showers to 4 mins, limited baths, install water efficient taps, shower heads and save-a-flush, and most customers use water butts or reuse water in the garden

Demand Option N3: Demand Option N1 + more water efficient homes and appliances (20 units)
This means most customers take the steps in option N1 plus e.g. installing water efficient appliances, all old toilets with large cisterns replaced with dual flush, any internal plumbing leaks fixed (e.g leaking toilets, dripping taps), some properties use recycled water to flush toilets

The demand options can only be selected once as they would apply to all water users, and should be built up in sets, i.e. can only select demand option N2 if already selected option N1

Exercise 2: Example

This example has been provided to show how to complete the exercise. The units of water and options selected in this example have been randomly selected and are not in any way representative of our views.

Please select what you think is appropriate and remember, there are no right or wrong answers

Step 1 - How much water is required?		Maximum amount of water required	How much do you want to provide?
Water Required W1: Water required to ensure that the chance of severe restrictions (rota cuts) happening once in a person's lifetime is only 15%	W1	Up to 15 units	10
Water Required W2: Water required to maintain the current level of environmental protection in the face of increased pressures from climate change and population growth	W2	Up to 75 units	75
Water Required W3: Water required to increase environmental protection	W3	Up to 65 units	45
Total water required (W)			130
Step 2 - Pick the supply and/or demand options to provide the amount of water required			
Supply Options			
Supply Option A: Reservoir to store water	A	50 units per reservoir	
Supply Option B: Pumped water storage in winter	B	30 units per storage system	
Supply Option C: Taking water from the sea (Desalination)	C	25 units per desalination plant	
Supply Option D: Recycled Treated Wastewater	D	25 units per recycling plant	50
Supply Option E: Transferring Water	E	25 units per transfer system	25
Total from Supply Options (S)			75
Demand Options			
Demand Option M1: Leakage Targets for Water Companies	M1	Up to 50 units	30
Demand Option M2: Demand Option M1 + Fixing Customer Pipes	M2	Up to 20 units	10
Demand Option N1: Water efficiency awareness	N1	10 units	10
Demand Option N2 : Demand Option N1 + Metering	N2	10 units	10
Demand Option N3: Demand Option N2 + more water efficient homes and appliances	N3	20 units	
Total from Demand Options (D)			60
Water balance = Total from supply options (S) + Total from demand options (D) - Total water required (W)			5

WCWRG - WRMP Customer Research

Recruitment Questionnaire

Recruitment

Good morning/afternoon/evening. My name is ..... from Feedback Market Research. We are carrying out research on behalf of (see schedule below) looking at its plans for managing water resources both in the short and longer term.

I would be grateful if you could spare two to three minutes to see if you are eligible to attend a focus group discussion we are holding with *<relevant company recruiting for>* about this subject. Please can I speak to the person who is either solely or jointly responsible for paying your water bill? Thank you.

Any answer you give will be treated in confidence in accordance with the Market Research Society Code of Conduct

Focus Group Specification

	Monday 21 June	Wednesday 23 June	Thursday 24 June	Tuesday 6 July
6-7.30pm – part 1	Group 1: South West Water (SWW) – Mixed SEG & age	Group 4: Bristol Water C2DE, mixed ages	Group 6: Wessex Water C2DE, mixed ages	Group 8: Bournemouth Water - Mixed SEG & age
8-9.30pm – part 1	Group 2: Future customers – 18-24, not bill payers 3 x SWW, 3 x Bristol Water 3 x Wessex Water	Group 5: Bristol Water ABC: mixed ages	Group 7: Wessex Water ABC1: mixed ages	
TBC		Group 3: Older customers – 65+, 3 x SWW 3 x Bristol Water 3 x Wessex Water		

Water resource options – reconvened sessions SAME RESPONDENTS AS ABOVE

	Monday 28 June	Wednesday 30 June	Thursday 1 July	Tuesday 13 July
6-7.30pm – part 2	Group 1: South West Water	Group 4: Bristol Water	Group 6: Wessex Water	Group 8: Bournemouth Water
8-9.30pm – part 2	Group 2: Future customers	Group 5: Bristol Water	Group 7: Wessex Water	
TBC		Group 3: Older customers		

Q1. Do you or any members of your family work in the following industries? READ OUT

1. Market research
2. Journalism
3. PR
4. Water industry

INTERVIEWER: IF YES THANK & CLOSE

Q2. And can I confirm you are either jointly or solely responsible for paying your water bill to *<relevant company recruiting for>*

1. Yes
2. No (Thank & close)

NB. This question does not apply to Group 2 – Future customers

Q3. As we are unable to do face to face focus groups because of Covid-19, they will be held online. Do you have a good internet connection which can support zoom type meetings where you are talking to several other people?

2. Yes 2. No (Thank & close)

Q4. You will also need to have a laptop or desktop computer, which has speakers and an in-built camera. Do you have both of these?

1. Yes 2. No (Thank & close)

NB. **Please make sure that they have the appropriate kit. No smartphones or tablets**

Q5. Please can you confirm that *<relevant company recruiting for>* provides your household's water supply. (If Bristol Water or Bournemouth Water - another company will provide your sewerage service, but we are only interested in your water supply).

NB. Please refer to above specification. Participants need to be recruited on the basis of which company provides their water supply only.

1. South West Water (group 1) – Devon: Exeter, Exmouth, Barnstable, Tiverton, Plymouth, Torquay, Sidmouth, Okehampton, Honiton, Paignton, Ilfracombe, Newton Abbot, Bideford, Tavistock – Cornwall: Penzance, Newquay, Truro, Bodmin, Falmouth, Bude, Launceston, Liskeard, Redruth, Liskeard, Helston
2. Future Customers (group 2) 3 x SWW, 3 x Bristol & 3 x Wessex
3. Older customers (group 3) 3 x SWW, 3 x Bristol & 3 x Wessex
4. Bristol Water (groups 4 & 5) – Bristol, Frome, Shepton Mallet, Frome, Street, Weston-super-Mare, Wells, Glastonbury, Midsomer Norton, Chipping Sodbury, Keynsham, Clevedon, Portishead, Avonmouth
5. Wessex Water (groups 6 & 7) – Bath, Warminster, Yeovil, Chippenham, Salisbury, Devizes, Trowbridge, Taunton, Bridgwater, Shaftesbury, Blandford Forum
6. Bournemouth Water (group 8) – B'mouth, Poole, Christchurch, Beaulieu, Ringwood, Lymington

Q6. Have you taken part in a market research focus group?

1. No Go to Q8
2. Yes, once in the last 3 months THANK AND CLOSE
3. Yes, once in the last 6 months CONTINUE to Q7
4. Yes, twice or more in the last 6-12 months CONTINUE to Q8

Q7. What was the subject(s) of the focus group?

1. Water THANK AND CLOSE
2. Other CONTINUE

Q8. RECORD GENDER

2. Male 2. Female

Please ensure equal split of four males & four females in each group

Q9. We are looking for a range of different people to take part in our research. May I ask what is the job title of the main wage earner of your household or, if you are the main wage earner, your own job & title?
IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS 'E'. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT?

TYPE IN JOB TITLE. PROBE

What are/were his/her/your qualifications/responsibilities?

CODE BELOW

1. Group 1 – ABC1 x 4, C2DE x 4, plus 1
2. Group 2 – N/A
3. Group 3 – Each company to have one ABC1 & C2DE, other 3 C1C2)
4. Group 4 – C2DE
5. Group 5 – ABC1
6. Group 6 – C2DE
7. Group 7 – ABC1
8. Group 8 - ABC1 x 4, C2DE x 4, plus 1

Please recruit according to above spec.

Q10. Which of the following age bands do you fall into? READ OUT

1. Groups 1, 4, 5, 6, 7 & 8 - 18-45 x 4, 46+ x 4
2. Group 2 – All 18-24
3. Group 3 – All 65+

Please recruit according to above spec.

Q11. On a scale of 1 to 10, where 1 = extremely dissatisfied and 10 = extremely satisfied, how satisfied are with the service you receive from *<relevant company recruiting for>*?

If 1, 2 or 10 THANK AND CLOSE
If 3 to 9 CONTINUE

Q12. If you were in a group discussion with a group of total strangers, how do you think you'd feel and behave? READ OUT

I'd feel nervous and probably wouldn't say much	1	Thank & Close
I'd enjoy meeting new people and would join in	2	Continue
I am not shy when in front of a crowd and would be outspoken and make an effort	3	Continue
I would be able to articulate myself in a clear & concise manner	4	Continue
I'd switch off if I found it boring	5	Thank & Close
I'd feel a bit anxious but would try to join in	6	Thank & Close

Q13. Do you have water meter? READ OUT

1. Yes 2. No

Please ensure a minimum two or three metered customers in each group, except group 2 (future customers)

Q14. Do you or any members of your family have any long term physical health issues? READ OUT

1. Yes - one or two in each group please (not future customers) 2. No

Q15. How many people usually live in your household (including yourself)? Please include both adults and children.

1. Just me (go to Q18)
2. 2 people (go to Q16)
3. 3-4 people (go to Q16)
4. 5 people (go to Q16)
5. 6 plus people (go to Q16)

NB. Please ensure good mix of different numbers in households – 3 single or double occupancy, 4 households with 3 to 4 people and 3 households with 5 to 6 people

Please try to include at least two recruits from 5 or more people

Q16. Do you have any dependents living at home?

1. Yes (go to Q17) 2. No (go to Q18)

Q17. And what are the ages of the children?

1. 0 – 5 years old
2. 6 – 11 years old
3. 12 – 18 years old

Q18. Which the following best describes your ethnic group?

1. White British
2. Mixed - White and Black Caribbean
3. Mixed - White and Black African
4. Mixed - White and Asian
5. Indian
6. Pakistani
7. Bangladeshi
8. Black Caribbean
9. Black African
10. Chinese
11. Other

Please try to include at least two recruits that are not White British

Thank you. I can confirm that you are eligible to take part in the research. The group would last for three hours in total, but would be split into two 90 minute sessions; and, there will be up to 10 other people like yourself coming to participate in the discussion. As a thank you for your time you would be provided with £70 in total. Would you like to take part?

1. Yes 2. No

If yes - thank you very much. For the first session you will receive £35 which includes a short reading activity as part of the preparation. You will then receive a further £35 for completing the second session

Respondent email address (for pre-task):

This research was conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm my credentials or those of Feedback Market Reserach please call the MRS free on 0500 396999.

West Country Water Resources Group (WCWRG) - Strategic Water Resources Plan

Household Topic Guide – Session 1

Information for observers	**N/A**

- Key to topic guide:
  - Black: information for the moderator to say (note this is not intended as a script to be read verbatim)
  - Green: instructions for the moderator

Session One – Introduction	**5 mins (5)**

- Facilitator to introduce himself/herself, explain the format of the discussions, and set out objectives of the discussion today and next week: *to explore your views on how we manage our water resources and supply of clean water in the future*.
- ICS are independent and working on behalf of the West Country Water Resources Group which is the three water companies in the south west – Wessex Water, Bristol Water and South West Water, including Bournemouth Water
- Explain MRS code of conduct and rights to anonymity
- Explain session etiquette
  - We want to make sure we hear everyone's views, so to ensure you don't talk over each other, please raise your hand using the on screen option and we'll make sure you have your say.
  - Also, please make sure your volume is switched to a suitable level.
- Explain observers may review the sessions, and sessions are recorded for internal use

General introduction	**5 mins (10)**

- Respondents to very briefly introduce themselves – name, who lives at home, and whether metered or not
  - Ask whether any customers have had reason to contact their water company in the last couple of years? Check if any contacts were bill related, or service related
- We shared some pre-reading for the sessions to give an overview of how the water industry works in England and Wales. Are there any questions about it? Did anyone look at the extra information and watch the videos? – any thoughts on that?
  - Probe to check understanding of who the regulators are and their remit.
  - Probe to check understanding of the key terms such as water resources, demand etc.
- In these sessions we want to explore your views on how water companies manage our water resources in the future. Previously each water company has separately planned how they will manage their water supply in future. But water companies are working together to form more joined-up regional plans. Given it can take a long time to plan new infrastructure, plans will be put in place to look at water supplies to 2050 and beyond.
- Water companies in the south west have come together to form West Country Water Resources Group and over the next few years, they will develop a regional plan for the south west region to ensure there is enough water to meet everybody's needs as well as protecting the environment.

- Check any questions before starting the next session.

Water resources introduction	15 mins (25)

- To begin with, we'd like you to answer a couple of polls to help get used to the technology and get started
  - **Exercise:** Polls:
    - Which best describes your views on water
      - There is plenty and we do not need to worry (it does rain all the time!)
      - There is enough if we are all careful
      - Water is scarce and if we are not careful we may run out
    - To what extent could your household use less water
      - My household would struggle to use less water
      - My household could use a LITTLE less water
      - My household could use a LOT less water
  - If anyone answered 'there is plenty' probe why they think that and what water sources they are thinking about
  - For those that said they would struggle to use less water– why is this? Have you already taken steps to lower your water use?
  - Overall, to what extent would you say you take water for granted?
- Very briefly to get sense of their understanding only - We'd now like to think about where your water comes from. What do you think are the main sources of clean water? What do you think the water companies do to ensure you have water in your taps? How do you think water is collected and stored?
- Exclude for SWW groups: What do you think of the type of water that is supplied to you? Is it hard, soft, do you like the taste? Probe what they think of their current supply, do they like it or even notice? In the past have you ever had water that tastes different, or is harder or softer? At your current property or a different one? What do you think of it? Why? Probe if they notice that water can taste differently, or have different hardness. Did they like/dislike/not bothered and what factors influenced this?
- Water companies plan to ensure there is sufficient water for all homes and businesses in their area. Showcard 1 (supply demand graph)
  - On the graph there is the demand line – which shows how much water is predicted to be used for drinking, showering, watering gardens, etc and also by businesses and industry including agriculture, but also the water that is lost through leaking pipes – both customer pipes and the mains owned by the water companies. The supply line on the graph shows how much water is available to be used for all those reasons.
  - What do you think happens when there is a hot, dry summer or low rainfall? What do you think happens to supply and to demand?
- Showcard 2 (supply demand graph). So now looking at this next graph – what do you think is happening here? Probe for trends: demand– increased population, drier weather increasing demand, leakage; supply - changing weather patterns (climate change), supply reductions due to environmental pressures (e.g. sensitive habitats).
- Water companies plan for there to be more supply than demand – the bigger the size of the surplus or "buffer" between demand and supply in normal times, the less chance there is of demand exceeding supply in times of drought.

- What do you think happens if there is more demand than supply? Probe for impacts on people, businesses and the impact on the environment.
- How do you think water companies manage this? Probe for shifting demand down or supply up. Check customers understand water companies go through four stages to try to reduce demand (outlined in pre-reading)

- Has anyone heard any media messages around future water supplies? What have you heard? Probe if they are aware of future pressures on water, what may cause them and when
- With pressures such as a growing population, as well as changing weather patterns, without action we could face more restrictions in the future – more frequent and more severe water restrictions. How do you feel about that? Probe if they think we should plan for the future and how soon?

Water restrictions	**20 mins (45)**

- As part of the pre-reading we gave you some information on the types of water service restrictions that may be imposed in times of drought and during more extreme water shortages/severe drought. Showcards 3 – Types of restrictions.
  - Any questions on these restrictions? Check they understand non-essential use bans are in addition to hosepipe bans; and that with rota cuts and standpipes, water would be available for emergency services, hospitals and the vulnerable.
  - Were you aware of any of these potential restrictions on some uses of water before you did the pre-reading? Which types of restrictions had you heard of?
  - Has anyone experienced any of these? How did this impact on your household? What do you think about them and who may be affected?
- How acceptable are each of these restrictions? Probe each restriction in turn. Under what circumstances would rota cuts be acceptable? Probe how extreme and unusual the weather would need to be for rota cuts, are they ever acceptable?
- Imagine that severe water restrictions – that means standpipes or rota cuts – are imposed for at least one month.
  - **Exercise:** Showcard 4. Looking at the showcard please tick which ones would not be a problem/issue for you, and cross which ones would be a problem/issue for you.
    - Probe differences, agreement and why people think the impact would/would not be an issue, how they think they would cope/behave
    - Confirm what customers were thinking the impact on the environment may be
- The risk of water restrictions is very low in any one year, but we live for a lot of years, so assuming we live for 80 years, currently the risk of experiencing rota cuts/standpipes **once** during your lifetime is about 40% for you and future generations. Check they understand this risk explanation.
  - **Exercise:** Showcard 5 (risk of water restrictions). Please select what you think the level of risk of rota cuts/standpipes should be? Remind them that the r% risk is about experiencing it once in a lifetime
    - Probe differences, agreement, how much they are considering future generations, whether their discussion on the impacts of severe water restrictions has influenced their decision.
- We asked you about the risk of experiencing rota cuts/standpipes in your lifetime. We'd like you to now consider how acceptable trade-offs between the frequency of less severe restrictions like hose pipe and temporary use bans, and the risk of severe restrictions.
  - **Exercise:** Showcard 6. Please select which option you would prefer – I am willing to accept (options re-ordered between groups):

- Option 1/C
    - more frequent, less severe restrictions like hose pipe bans
    - so there is less risk of severe restrictions like rota cuts
    - but there may still be a need to take water from the environment at times of water shortages
- Option 2/B
    - more frequent, less severe restrictions like hose pipe bans
    - so that additional water does not need to be taken from the environment at times of water shortages
    - but the risk of severe restrictions stays the same
- Option 3/A
    - no change to the frequency of less severe restrictions like hosepipe bans
    - even if the risk of severe restrictions may increase
    - and there may still be a need to take water from the environment at times of water shortages
- Probe differences, agreement, how acceptable the less severe restrictions are,
- When you answered this, what frequency were you thinking about for the less severe restrictions? Probe if they were thinking every year, every 5 yrs etc. What about how long these less severe restrictions would be applied for? Probe whether they think it could be e.g. all summer. Would this change your choice?

Best value planning	**20 mins (65)**

- Water companies plan for there to be more supply than demand in all but the most extreme situations – the size of this surplus or 'buffer' reflects how resilient the water supply system is to extreme situations; that is, the bigger the buffer, the lower the likelihood of restrictions or the need to take more water from the environment during drought periods. There are different ways to change the size of this surplus/buffer such as increasing the amount of water supply, or reducing demand.
    - What do you think it is important to consider when looking at options to make sure there is a surplus/buffer between supply and demand? Probe bills, certainty/confidence in investment delivering what planned, levels of service, environmental impacts.
- Use showcard 2 as a reminder - Currently there is enough water to meet demand – but the surplus or "buffer" between what is demanded and what is able to be put into supply is getting smaller. In future there won't be enough water to meet everyone's needs unless either supply is increased or demand reduced.
    - What options do you think water companies have to reduce demand? Probe metering, providing water saving advice, leakage reduction, etc.
    - What sort of options do you think there are to increase supply of water? Probe storing more water, or moving it about, etc
    - Keep these to a cursory check to see what they flag prior to the hometask.
- The water companies in the south west are working together to ensure that there is a gap/buffer between supply and demand across the whole region, even in times of severe drought. They are looking at how the water supply system would perform under different future situations. Because no one knows what the weather will be like in the future or what other shocks may happen (such as Covid-19, flooding), water companies test investment plans under a range of "what if"

scenarios to see if they can meet all customers water needs under each scenario – or if restrictions or taking more water out of the environment will be needed.

- At the moment there is enough water to meet demand, but their planning shows that by 2050 there may not be enough water to meet future demand and continue to protect the environment unless action is taken. So they are developing a regional water resources plan and have identified some factors that they will use to evaluate the different options
    - **Exercise:** Showcard 7: Please rank the four factors in order of importance – from 1 being the most important to 4 being the least (order changed between groups)
        - Reducing the demand for water
        - Improving the environment
        - Improving supply resilience
        - Benefitting and affordable for society
    - Probe differences, agreement, what influenced their views and priorities
    - If time - On the showcard we gave some examples of how the factors are assessed. Did any of these stand out to you? Which ones and why? Probe what factors influenced their priorities – were there any key ones (probe both negative and positive)
- Are there any situations you can think about, where your priorities might change? Probe to see if they identify a balance/tipping point where priorities would change e.g. there's a limit to environmental improvements if it impacts on cost/affordability too much, limit on how much demand can be reduced etc or something where environmental damage might mean the environment takes precedent over costs as long as affordability is supported effectively
- Would your priorities change if you thought about the next, say 5-10 years compared to thinking about year 2050? Probe to see if they are more willing to accept supply risks, environmental impacts, unwilling to change water use etc, in the shorter term.

Environmental drivers	**15 mins (80)**

- We'd now like to think about the potential impact of taking water from the environment. What do you think the impact is currently? Is it acceptable or not? Probe whether they think the current level of environmental protection is ok.
    - Has anyone ever noticed signs of environmental stress e.g. dried up stream, low rivers. Or heard about it? probe to understand their level of awareness
- We'd now like to understand your views on how the West Country Water Resources group should take the environment into account when developing their long-term water resource plans.
    - **Exercise:** Showcard 8. Explain that in both cases there will be a need to either find additional , alternative sources of water or reduce demand, but that option B means that have to find even more sources/reduce demand further to improve the environment. Please can you select which option you prefer:
        - Maintain the current levels of environmental protection
        - Improve the levels of environmental protection
    - Probe reasons for their choice, what influenced their views, what factors did they consider e.g. impact on bills, changes to supply resilience risk
- If not already discussed - What did you think the current levels of protection for the environment are? Probe if they think current levels are ok, or whether they think its poor, impacting biodiversity etc and it may mean rivers run dry in drought periods
- **Exercise:** Poll. When improving the environment, should:
        - All catchments be improved by a little

        - Larger improvements be carried out on a smaller number of catchments
        - Probe reasons for their choice, what influenced their views, what factors did they consider, were they thinking of specific examples e.g. chalk streams
- In times of drought and in emergencies, water companies can apply to take more water from the environment (eg from rivers) to keep up with demand – when water levels may already be low, and wildlife affected or harmed. How do you feel about that? Probe whether they think it's acceptable to take more water out of the environment at times of drought, and what factors/conditions influence this
    - Do your views on the acceptability change depending on whether it's any part of the environment in general, or in sensitive areas where there is a particular abundance of wildlife or protected wildlife?
    - What about if it's close to where you live?
    - Do you think companies should be allowed to take more water out of the environment to prevent any restrictions on water use or just the most severe? Probe where they see the balance between impacts on customers and the environment

Partnership	**10 mins (90)**

- The West Country Water Resource Group is looking closely at how the region's water resources are managed and developing a regional plan will cover both the public water supply and other water users such as farming and industry. How do you feel about that? Probe to see if they are generally supportive of regional planning or not. Do they have any concerns?
- The three water companies – SWW, Bristol and Wessex – are all working together looking at water resources from a regional perspective. This may mean that they share more water resources and transfer water between companies. How do you feel about that? Probe to see if they are generally supportive or not and if they flag any concerns
- **Exercise**: Poll When they are planning for the future, and assessing whether there will be a surplus or deficit of water, do you think they should
        - Consider England as a whole and take action at a national level
        - Consider the entire south west region as a whole and take action at a regional level
        - Consider any surplus/deficit at company level and take action at company level
        - Consider any surplus/deficit at area level within a company and take action at area level
    - Probe reasons for their choice, what influenced their views, what factors did they consider.
    - Should customers in an area with a predicted supply deficit do more to manage demand than others in areas with predicted surplus of water? Probe to understand inter-area/company/region fairness
- If not already covered - How do you feel about sharing sources of water, not just with other water companies, but also with other users such as farmers and industry who take their water directly from the environment? Probe to see if they feel any users should take priority, any concerns e.g. who pays, everyone 'doing their bit' etc
    - Are there any situations where you feel that water shouldn't be shared with other users? Or particular types of user? Probe to see if they raise any restrictions on sharing and why
- Different water users may view the regional plan differently depending on their circumstances, where they are, what they need the water for.

- How do you feel about being asked to reduce the amount of water you use, to ensure other users e.g. farmers and industry, have a reliable supply? Probe to see if they support this in principle, any sectors they don't support and why
- What about if water companies invested in more supply options which may have a small impact on customer's bills, and which helped ensure other users have a reliable water supply? Probe to see if they support this in principle, any sectors they don't support and why

End of session 1 – set exercise to be completed before next session	**<5 mins (90)**

- We are nearly done for today.
- Thank you for your input today. In the next session we will be looking at the options and plans in a bit more detail. You will be emailed some information to read around the types of options that companies may put in their plans, that we will be discussing in more detail next time. It would be great if you could read the information, and complete the short exercises at the end. You may wish to discuss with members of your household or friends.
- Before we finish, has there been anything that has surprised or concerned you? Is there anything that we have missed from the discussion that we need to consider next time?
- Are there any other comments?
- Thank and close.

WCWRG - WRMP Customer Research

Non Household Recruitment Questionnaire

Recruitment

Good morning/afternoon/evening. My name is ..... from Feedback Market Research. We are carrying out research on behalf of (see schedule below) looking at its plans for managing water resources both in the short and longer term.

I would be grateful if you could spare two to three minutes to see if you are eligible to attend a focus group discussion we are holding with *<relevant company recruiting for>* about this subject. Please can I speak to the person who has decision making / budget responsibilities for your water supply? Thank you.

Any answer you give will be treated in confidence in accordance with the Market Research Society Code of Conduct

Focus Group Specification

Friday 16 July	Sector	Turnover	No. of employees	Water Co.
1.30-3pm – part 1	Tourism / Leisure x 3 Agriculture x 2 Housing developers x1 Food & drink manufacture x1 Laundrette / hairdresser x 1 School / hospital x 1	Mix of SMEs (soft quotas) Up to £249k x3 £250 - £499k x3 £500 + x3	Mix as follows: 1-4 x2 5-9 x2 10-49 x2 50-149 x2 150+ x1	South West Water x2 Bournemouth Water x1 Wessex Water x 3 Bristol Water x3

Tuesday 20 July	
1.30-3pm – part 2	Water resource options – reconvened sessions SAME RESPONDENTS AS ABOVE

Q1. Do you or any members of your family work in the following industries? READ OUT

1. Market research
2. Journalism
3. PR
4. Water industry

INTERVIEWER: IF YES THANK & CLOSE

Q2. And can I confirm you have decision making / budget responsibilities for your water supply

1. Yes
2. No (Thank & close)

Q3. As we are unable to do face to face focus groups because of Covid-19, they will be held online. Do you have a good internet connection which can support zoom type meetings where you are talking to several other people?

2. Yes
2. No (Thank & close)

Q4. You will also need to have a laptop or desktop computer, which has speakers and an in-built camera. Do you have both of these?

1. Yes
2. No (Thank & close)

NB. **Please make sure that they have the appropriate kit. No smartphones or tablets**

Q5. Please can you confirm that *<relevant company recruiting for>* provides your household's water supply. (If Bristol Water or Bournemouth Water - another company will provide your sewerage service, but we are only interested in your water supply).

NB. Please refer to above specification. Participants need to be recruited on the basis of which company provides their water supply only. PLEASE ENSURE MIX OF TOWNS OF CITIES IN EACH WATER COMPANY

1. South West Water x3 – Devon: Exeter, Exmouth, Barnstable, Tiverton, Plymouth, Torquay, Sidmouth, Okehampton, Honiton, Paignton, Ilfracombe, Newton Abbot, Bideford, Tavistock – Cornwall: Penzance, Newquay, Truro, Bodmin, Falmouth, Bude, Launceston, Liskeard, Redruth, Liskeard, Helston
2. Bristol Water – Bristol, Frome, Shepton Mallet, Frome, Street, Weston-super-Mare, Wells, Glastonbury, Midsomer Norton, Chipping Sodbury, Keynsham, Clevedon, Portishead, Avonmouth
3. Wessex Water – Bath, Warminster, Yeovil, Chippenham, Salisbury, Devizes, Trowbridge, Taunton, Bridgwater, Shaftesbury, Blandford Forum
4. Bournemouth Water – B'mouth, Poole, Christchurch, Beaulieu, Ringwood, Lymington

Q6. Have you taken part in a market research focus group?

1. No Go to Q8
2. Yes, once in the last 3 months THANK AND CLOSE
3. Yes, once in the last 6 months CONTINUE to Q7
4. Yes, twice or more in the last 6-12 months CONTINUE to Q8

Q7. What was the subject(s) of the focus group?

1. Water THANK AND CLOSE
2. Other CONTINUE

Q8. On a scale of 1 to 10, where 1 = extremely dissatisfied and 10 = extremely satisfied, how satisfied are with the service you receive from *<relevant company recruiting for>*?

If 1, 2 or 10 THANK AND CLOSE
If 3 to 9 CONTINUE

Q9. Which industry sector does your business operate in (Standard Industrial Classification)?

1.	Tourism / Leisure	x3	NB. Need to include hotels, preferably 2; as well as restaurants/bars
2.	Agriculture / horticulture	x2	Can include garden nurseries
3.	Housing developers	x1	
4.	Food & drink manufacture	x1	
5.	Laundrette / hairdresser	x1	Can include car wash
6.	School / hospital	x1	

Please recruit according to above spec.

Q10. Please can you indicate the number of employees your business has? READ OUT

1.	1-4	x2
2.	5-9	x2
3.	10-49	x2
4.	50-149	x2
5.	150+	x1

Please recruit according to above spec.

Q11. Please can you indicate the size your business by annual revenue / turnover? READ OUT

Please record capture exact turnover, as well as turnover in the following categories (soft quotas).

1. Up to £99k
2. £100 - £249k
3. £250 - £499k
4. £500k+

Please recruit according to above spec.

Thank you. I can confirm that you are eligible to take part in the research. There are two sessions each lasting 90 minute sessions; and, there will be up to 10 other people participating in the discussion. As a thank you for your time you would be provided with £100 in total, to yourself or your chosen charity. Would you like to take part?

1. Yes 2. No

If yes - thank you very much. The thank you payment will be paid in two parts - £50 would be paid for the first session which includes a short reading activity as part of the preparation. You will then receive a further £50 for completing the second session, which will include a very short exercise to complete.

Respondent email address (for pre-task):

This research was conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm my credentials or those of Feedback Market Research please call the MRS free on 0500 396999.

West Country Water Resources Group (WCWRG) - Strategic Water Resources Plan

Non-household Topic Guide – Session 1

Information for observers	**N/A**

- Key to topic guide:
  - Black: information for the moderator to say (note this is not intended as a script to be read verbatim)
  - Green: instructions for the moderator

Session One – Introduction	**5 mins (5)**

- Facilitator to introduce himself/herself, explain the format of the discussions, and set out objectives of the discussion today and next week: *to explore your views on how we manage our water resources and supply of clean water in the future*.
- ICS are independent and working on behalf of the West Country Water Resources Group which is the three water companies in the south west – Wessex Water, Bristol Water and South West Water, including Bournemouth Water
- Explain MRS code of conduct and rights to anonymity
- Explain session etiquette
  - We want to make sure we hear everyone's views, so to ensure you don't talk over each other, please raise your hand using the on screen option and we'll make sure you have your say.
  - Also, please make sure your volume is switched to a suitable level.
- Explain observers may review the sessions, and sessions are recorded for internal use

General introduction	**10 mins (15)**

- Respondents to very briefly introduce themselves – name, what type of business they work at, approximate size of business, their role
  - Ask whether any businesses have had reason to contact their water company in the last couple of years? Check if any contacts were bill related, or service related
  - What are the main ways in which your business uses water?
- We shared the pre-reading for the sessions which we sent out to household customers. Are there any questions about it?
- In these sessions we want to explore your views from a business perspective on how water companies manage our water resources in the future. Previously each water company has separately planned how they will manage their water supply in future. But water companies are working together to form more joined-up regional plans. Given it can take a long time to plan new infrastructure, plans will be put in place to look at water supplies to 2050 and beyond.
  - Stress that we would like them to answer from the perspective of their business
- Water companies in the south west have come together to form West Country Water Resources Group and over the next few years, they will develop a regional plan for the south west region to ensure there is enough water to meet everybody's needs as well as protecting the environment.
  - Check any questions before starting the next session.

Water resources introduction	15 mins (30)

- To begin with, we'd like you to answer a couple of polls to help get used to the technology and get started
    - **Exercise:** Polls:
        - Which best describes your personal views on water
            - There is plenty and we do not need to worry (it does rain all the time!)
            - There is enough if we are all careful
            - Water is scarce and if we are not careful we may run out
        - To what extent could your business use less water
            - My business would struggle to use less water
            - My business could use a LITTLE less water
            - My business could use a LOT less water
    - For those that said their business would struggle to use less water– why is this? Have you already taken steps to lower your water use?
        - And what about those that said their business could save water? What is stopping this from happening?
    - Overall, to what extent would you say your business takes water for granted?
- Very briefly to get sense of their understanding only - We'd now like to think about where your water comes from. What do you think are the main sources of clean water? How do you think water is collected and stored?
- What do you think of the type of water that is supplied to your business? Is it hard, soft?
    - Do you apply any treatment to change the water in any way before use? Why is this necessary?
- Water companies plan to ensure there is sufficient water for all homes and businesses in their area. Showcard 1 (supply demand graph)
    - On the graph there is the demand line – which shows how much water is predicted to be used for drinking, showering, watering gardens, etc and also by businesses and industry including agriculture, but also the water that is lost through leaking pipes – both customer pipes and the mains owned by the water companies. The supply line on the graph shows how much water is available to be used for all those reasons.
    - What do you think happens when there is a hot, dry summer or low rainfall? What do you think happens to supply and to demand?
- Showcard 2 (supply demand graph). So now looking at this next graph – what do you think is happening here? Probe for trends: demand– increased population, drier weather increasing demand, leakage; supply - changing weather patterns (climate change), supply reductions due to environmental pressures (e.g. sensitive habitats).
- Water companies plan for there to be more supply than demand – the bigger the size of the surplus or "buffer" between demand and supply in normal times, the less chance there is of demand exceeding supply in times of drought.
    - What do you think happens if there is more demand than supply? Probe for impacts on people, businesses and the impact on the environment.
    - How do you think water companies manage this? Probe for shifting demand down or supply up. Check customers understand water companies go through four stages to try to reduce demand (outlined in pre-reading)

- Has your business received any notifications or heard any media messages around future water supplies? What have you heard? Probe if they are aware of future pressures on water, what may cause them and when
- With pressures such as a growing population, as well as changing weather patterns, without action we could face more restrictions in the future – more frequent and more severe water restrictions. How do you feel about that? Probe if they think we should plan for the future and how soon?

Water restrictions	**20 mins (50)**

- We'd now like to discuss the types of water service restrictions that may be imposed in times of drought and during more extreme water shortages/severe drought. Showcards 3 – Types of restrictions – focus on the non-essential use bans.
    - Any questions on these restrictions? Check they understand non-essential use bans are in addition to hosepipe bans; and that with rota cuts and standpipes, water would be available for emergency services, hospitals and the vulnerable.
    - Were you aware of any of these potential restrictions on some uses of water? Which types of restrictions had you heard of?
    - Has anyone experienced any of these? How did this impact on your business? What do you think about them and who may be affected?
- How acceptable are non- essential use bans? Under what circumstances would non-essential use bans be acceptable Probe non-essential use bans and then rota cuts.
    - What about rota cuts? Under what circumstances would rota cuts be acceptable? Probe how extreme and unusual the weather would need to be for rota cuts, are they ever acceptable?
- Imagine that severe water restrictions – that means standpipes or rota cuts – are imposed for at least one month.
    - **Exercise:** Showcard 4. Looking at the showcard please tick which ones would not be a problem/issue for your business, and cross which ones would be a problem/issue for you.
        - Probe differences, agreement and why people think the impact would/would not be an issue, how they think their business would cope/behave, could they still operate?
        - Were they thinking about it from the perspective of their direct business activities, or also the potential impact on their employees, customers etc?
        - Confirm what they were thinking the impact on the environment may be
- The risk of water restrictions is very low in any one year, but we live for a lot of years, so assuming we live for 80 years, currently the risk of experiencing rota cuts/standpipes **once** during your lifetime is about 40% for you and future generations. Check they understand this risk explanation.
    - **Exercise:** Showcard 5 (risk of water restrictions). Please select from the perspective of your business what you think the level of risk of rota cuts/standpipes should be? Remind them that the % risk is about experiencing it once in a lifetime
        - Probe differences, agreement, how much they are considering future generations, whether their discussion on the impacts of severe water restrictions has influenced their decision.
- We asked you about the risk of experiencing rota cuts/standpipes in your lifetime. We'd like you to now consider how acceptable trade-offs between the frequency of less severe restrictions like hose pipe and temporary use bans, and the risk of severe restrictions.

- **Exercise:** Showcard 6. Please select which option you would prefer – I am willing to accept (options re-ordered between groups):
- Option 1/C
  - more frequent, less severe restrictions like non-essential use bans
  - so there is less risk of severe restrictions like rota cuts
  - but there may still be a need to take water from the environment at times of water shortages
- Option 2/B
  - more frequent, less severe restrictions like non-essential use bans
  - so that additional water does not need to be taken from the environment at times of water shortages
  - but the risk of severe restrictions stays the same
- Option 3/A
  - no change to the frequency of less severe restrictions like non-essential use bans
  - even if the risk of severe restrictions may increase
  - and there may still be a need to take water from the environment at times of water shortages
- Probe differences, agreement, how acceptable the less severe restrictions are. Confirm they are answering from a business perspective,
- When you answered this, what frequency were you thinking about for the less severe non-essential use restrictions? Probe if they were thinking every year, every 5 yrs etc. What about how long these less severe restrictions would be applied for? Probe whether they think it could be e.g. all summer. Would this change your choice?

Best value planning	**25 mins (75)**

- Water companies plan for there to be more supply than demand in all but the most extreme situations – the size of this surplus or 'buffer' reflects how resilient the water supply system is to extreme situations; that is, the bigger the buffer, the lower the likelihood of restrictions or the need to take more water from the environment during drought periods. There are different ways to change the size of this surplus/buffer such as increasing the amount of water supply, or reducing demand.
  - What do you think it is important to consider when looking at options to make sure there is a surplus/buffer between supply and demand? Probe bills, certainty/confidence in investment delivering what planned, levels of service, environmental impacts.
- Use showcard 2 as a reminder - Currently there is enough water to meet demand – but the surplus or "buffer" between what is demanded and what is able to be put into supply is getting smaller. In future there won't be enough water to meet everyone's needs unless either supply is increased or demand reduced.
  - What options do you think water companies have to reduce demand? Probe metering, providing water saving advice, leakage reduction, etc.
  - What sort of options do you think there are to increase supply of water? Probe storing more water, or moving it about, etc
  - Keep these to a cursory check to see what they flag. Probe anything that is from a business specific perspective.

- The water companies in the south west are working together to ensure that there is a gap/buffer between supply and demand across the whole region, even in times of severe drought. They are looking at how the water supply system would perform under different future situations. Because no one knows what the weather will be like in the future or what other shocks may happen (such as Covid-19, flooding), water companies test investment plans under a range of "what if" scenarios to see if they can meet all customers water needs under each scenario – or if restrictions or taking more water out of the environment will be needed.
- At the moment there is enough water to meet demand, but their planning shows that by 2050 there may not be enough water to meet future demand and continue to protect the environment unless action is taken. So they are developing a regional water resources plan and have identified some factors that they will use to evaluate the different options
    - **Exercise:** Showcard 7: Please rank the four factors in order of importance to your business – from 1 being the most important to 4 being the least (order changed between groups)
        - Reducing the demand for water
        - Improving the environment
        - Improving supply resilience
        - Benefitting and affordable for society
    - Probe differences, agreement, what influenced their views and priorities
    - If time - On the showcard we gave some examples of how the factors are assessed. Did any of these stand out to you? Which ones and why? Probe what factors influenced their priorities – were there any key ones (probe both negative and positive)
- Are there any situations you can think about, where your priorities might change? Probe to see if they identify a balance/tipping point where priorities would change e.g. there's a limit to environmental improvements if it impacts on cost/affordability too much, limit on how much demand can be reduced etc or something where environmental damage might mean the environment takes precedent over costs as long as affordability is supported effectively
- Would your priorities change if you thought about the next, say 5-10 years compared to thinking about year 2050? Probe to see if they are more willing to accept supply risks, environmental impacts, unwilling to change water use etc, in the shorter term.

Environmental drivers	**15 mins (90)**

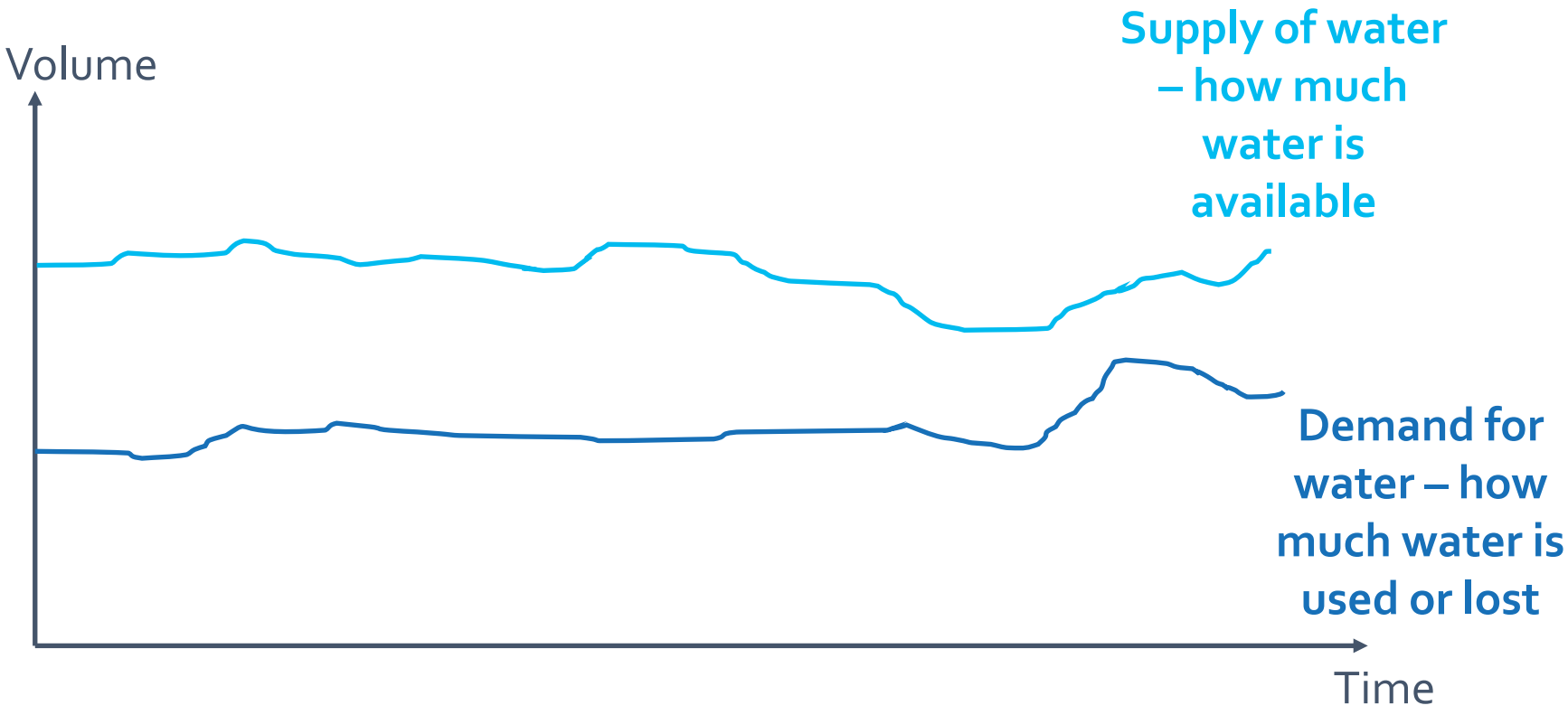
- We'd now like to think about the potential impact of taking water from the environment. What do you think the impact is currently? Is it acceptable or not? Probe whether they think the current level of environmental protection is ok.
- Does the local environment have a key impact on your business? Is it a concern to your business? Probe to understand if environmental concerns are key to business, or they benefit from environment etc
- We'd now like to understand your views on how the West Country Water Resources group should take the environment into account when developing their long-term water resource plans.
    - **Exercise:** Showcard 8. Explain that in both cases there will be a need to either find additional , alternative sources of water or reduce demand, but that option B means that have to find even more sources/reduce demand further to improve the environment. Please can you select which option you prefer:
        - Maintain the current levels of environmental protection
        - Improve the levels of environmental protection
    - Probe reasons for their choice, what influenced their views, what factors did they consider e.g. impact on bills, changes to supply resilience risk, potential benefits for their business

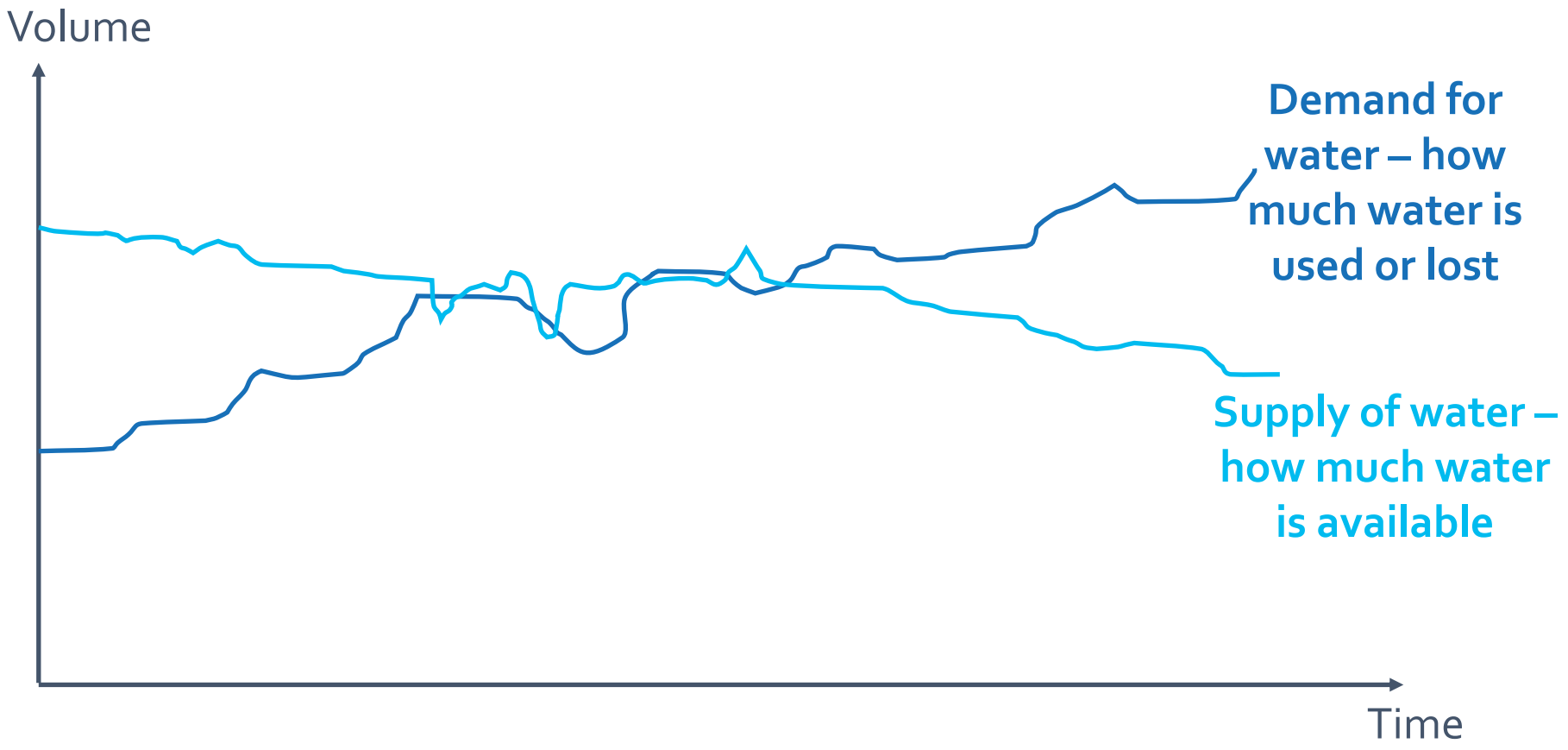
- If not already discussed - What are your company's views on the current levels of protection for the environment? Probe if they think current levels are ok, or whether they think its poor, impacting biodiversity etc and it may mean rivers run dry in drought periods, how environmentally aware their business is
- **Exercise:** Poll. When improving the environment, does your business think that:
    - All rivers and streams should be improved by a little
    - Larger improvements be carried out on a smaller number of rivers and streams
    - Probe reasons for their choice, what influenced their views, what factors did they consider, were they thinking of specific examples e.g. chalk streams
- In times of drought and in emergencies, water companies can apply to take more water from the environment (eg from rivers) to keep up with demand – when water levels may already be low, and wildlife affected or harmed. What are your businesses' views on that? Probe whether they think it's acceptable to take more water out of the environment at times of drought, and what factors/conditions influence this
    - Do your views on the acceptability change depending on whether it's any part of the environment in general, or in sensitive areas where there is a particular abundance of wildlife or protected wildlife?
    - What about if it impacts your business directly?
        - Or is close to where your business is located?
    - Do you think companies should be allowed to take more water out of the environment to prevent any restrictions on water use like hosepipe bans, non-essential use bans or just the most severe rota cuts? Probe where they see the balance between impacts on customers and the environment

End of session 1 – set exercise to be completed before next session	**<5 mins (90)**

- We are nearly done for today.
- Thank you for your input today. In the next session we will be looking at the options and plans in a bit more detail. You will be emailed some information to read around the types of options that companies may put in their plans, that we will be discussing in more detail next time. It would be great if you could read the information, and complete the short exercises at the end. You may wish to discuss with members of your household or friends.
- Before we finish, has there been anything that has surprised or concerned you? Is there anything that we have missed from the discussion that we need to consider next time?
- Are there any other comments?
- Thank and close.

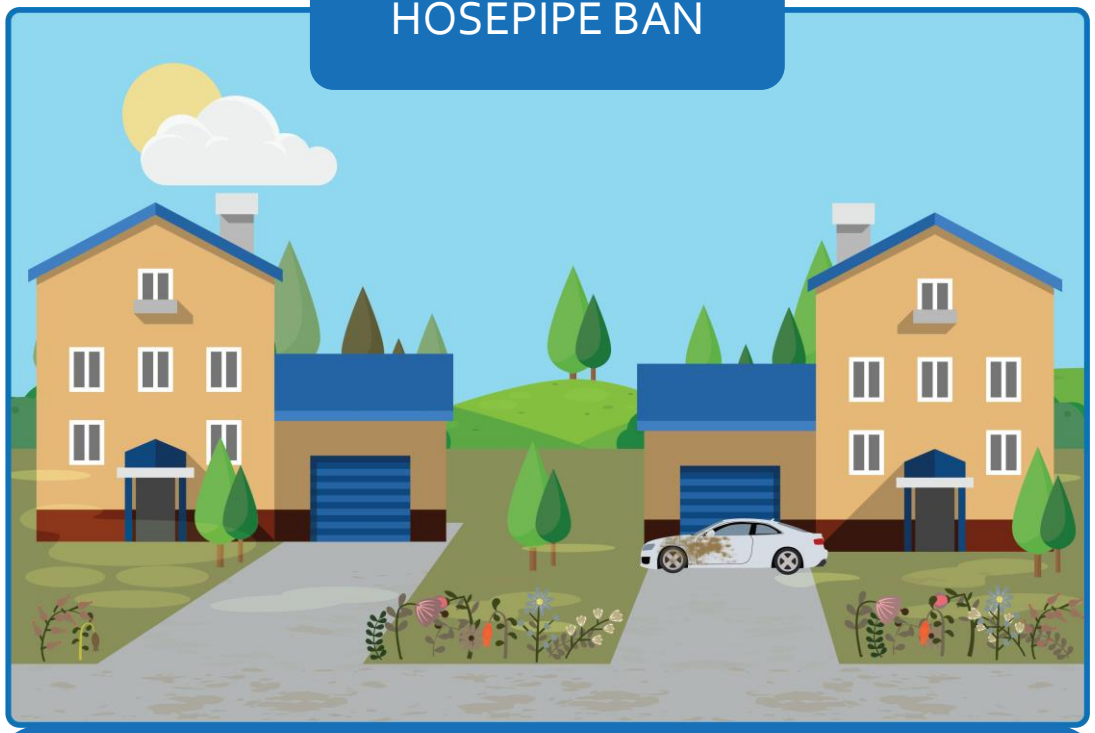
West Country Water Resources


Volume
Supply of water – how much water is available
Demand for water – how much water is used or lost
Time


Volume
Demand for water – how much water is used or lost
Supply of water – how much water is available
Time

Water restrictions

HOSEPIPE BAN



During a hosepipe ban households cannot use a hosepipe for example to…

- Clean the car
- Water the garden
- Clean windows
- Fill a pond
- Clean driveways

NON-ESSENTIAL USE BAN

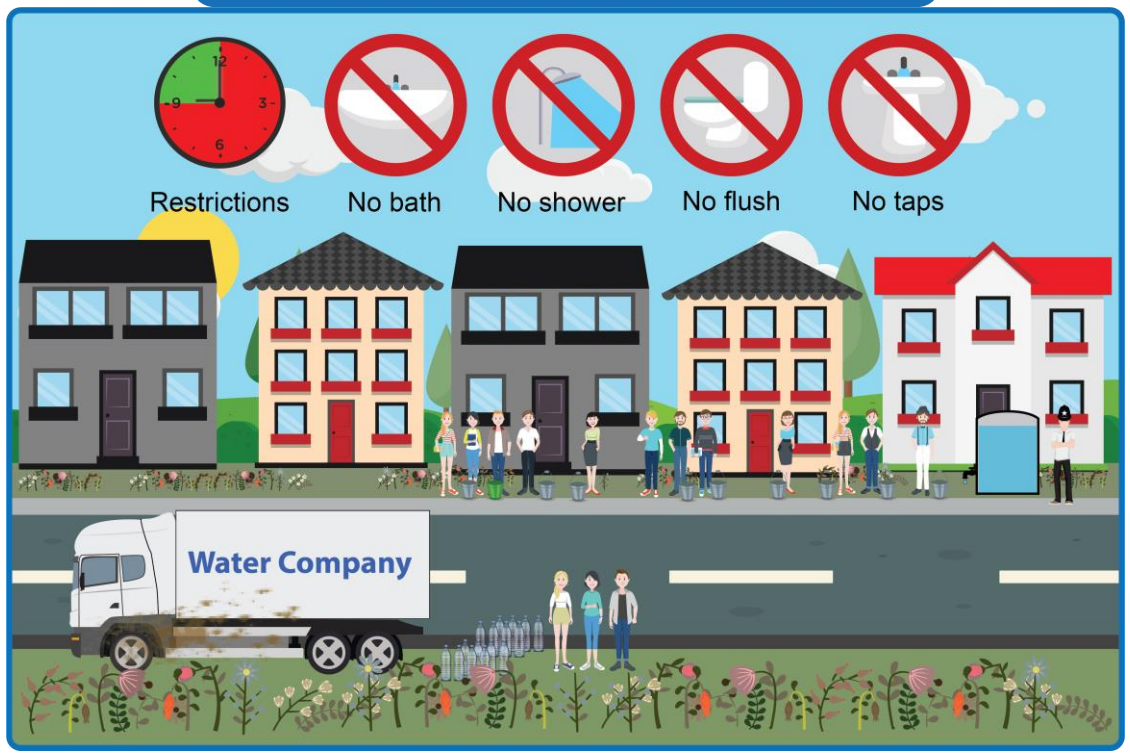
During a non-essential use ban households cannot use hosepipes AND businesses cannot…

- Water outdoor plants/gardens; clean vehicles/ windows
- Fill swimming pools
- Operate a mechanical vehicle-washer

This does not affect schools and hospitals.

Water restrictions

SEVERE WATER RESTRICTIONS



A severe supply restriction involves stopping all water supplies into households and businesses. People need to collect water from **standpipes** and tanks in the street.

In urban areas this is impractical, and instead water is supplied to properties for a few hours a day in rotation. This is called **rota cuts**.

To help supply water, extra water may be taken from the environment when rivers are already low so there may be an impact on rivers and wildlife

Assuming severe water restrictions e.g. rota cuts/standpipes - are enforced for at least one month

Please tick which ones would not be a problem/issue for you
Please cross which ones would be an issue for you

- Reduced fire fighting capacity
- We take extra water from the environment causing a severe impact on rivers and wildlife
- Unable to shower or bath
- Schools and nurseries are shut
- Vulnerable people may have to rely on bottled water deliveries
- Businesses that use water, (e.g., hairdressers, laundries, factories) are closed
- Households can only flush the toilet a couple of times a day
- Dishwashers, washing machines don't work

The risk of severe water restrictions is very low in any one year

But we live for a lot of years… so the risk of experiencing rota cuts/standpipes once during your lifetime is currently 40% for you and for future generations

What should the level of risk of rota cuts/standpipes in my lifetime be?	
1	40% risk is OK
2	Lower risk – 25%
3	Much lower risk - 15%

I am willing to accept……

Option A

- No change to the frequency of less severe restrictions like hose pipe bans
- even if the risk of severe restrictions may increase
- and there may still be a need to take water from the environment at times of water shortages

Option B

- More frequent, less severe restrictions like hose pipe bans
- so that additional water does not need to be taken from the environment at times of water shortages
- but the risk of severe restrictions stays the same

Option C

- More frequent, less severe restrictions like hose pipe bans
- so there is less risk of severe restrictions like rota cuts
- but there may still be a need to take water from the environment at times of water shortages

Please rank the four factors in order of importance – from 1 being the most important to 4 being the least important

Factors	Examples of how the factors are assessed
Benefitting and affordable for society	• Cost to customers and customer affordability • Intergenerational equity – costs are spread over time across different generations • Meeting the needs of other stakeholders and water users

Improving the environment	• Reducing the
	  • amount of water taken from environmentally sensitive water sources
	  • carbon emissions/energy use
	• Enhancing the environment e.g. biodiversity improvements

Improving supply resilience	• Reducing the
	  • risk of severe water restrictions
	  • frequency of temporary use restrictions, hose pipe bans
	• Improving the resilience of the water supply system to other risks such as flooding, extreme cold weather

Reducing the demand for water	Reducing the amount of
	  • water each person uses
	  • leakage
	  • water used by businesses, industry and agriculture

Option A

Maintain the current levels of environmental protection

Increased pressures from climate change and population growth means that there is less water available from existing water sources

Option B

Improve the levels of environmental protection

As for option A, increased pressures means there is less water available from existing water sources;
AND
Less water can be taken from the environment and some sources can no longer be used

West Country Water Resources Group (WCWRG) - Strategic Water Resources Plan

Household Topic Guide – Session 2

Information for observers	**N/A**

- Key to topic guide:
  - Black: information for the moderator to say (note this is not intended as a script to be read verbatim)
  - Green: instructions for the moderator

Session Two – Introduction and Recap	**5 mins (5)**

- Facilitator to welcome back, recap on the objectives and confirm observers
- Reiterate no right or wrong answers, and MRS code of conduct.
- This session we are going to look in more detail at the options companies have to manage demand and supplies of water, in order to ensure there is a buffer, and demand is met.
- Remind of session etiquette
- Before we start – any questions from last week, or anything that you want to clarify?

Reference Pack	**5 mins (10)**

- After the last session we sent you some information on different options and asked you to complete a couple of exercises.
  - Exercise: Poll I found the home task (pick as many as you like)
    - Easy/ hard/ confusing / challenging / interesting / boring
    - Return to discuss poll results at end of hometask section
- Thanks for sending back your views of the options and for completing the water planning exercise. We've collated everyone's responses and will share that as we talk about the options. Firstly any thoughts on the information that you read? Was anything not clear? Not interesting? Probe to see if there was anything they didn't understand, any of the information they weren't interested in?

Options – supply and demand	**20 mins (30)**

- Last week we talked about how water resource plans look to ensure there is enough water available to meet the demand from customers and other users. And if there is not enough, that this can be addressed by either increasing supplies, or reducing demand
- Showcard 1 – Supply and Demand options: We sent you some more information on both the supply options and the demand options that West Country Water Resources Group are considering as part of their plan.
  - Are there any that you want to ask questions on, clarify any of the information? Did all the options make sense?
  - Were there any options that you hadn't heard of before?
  - Was any of the information about an option surprising?

- Any options that you were particularly drawn to or disliked? Any options that you don't think should be considered further?
- Probe for an initial view of the options, any misunderstandings, any of the pros/cons or summary data that they hadn't previously known about or considered?

- This section will present back the results of the home task (supply and demand option scores) in summary terms for each group. The analysis and presentation will be tailored to the group's results and areas to explore further identified beforehand to include the following points
- Showcards S and D - Supply Demand options preferences: Results of support for supply and demand options
  - Is this what you expected? Are you surprised by any of the results? Do you agree, disagree? Why? Probe what influenced their views, did they change their views because of any of the information provided?
    - Are there any options that you really don't support? Why not? Probe the factors driving their choices. What would make the option more acceptable to you?
    - Is there anything that would make an option less acceptable to you?
  - Explore the relative priorities for the different options. What factors influenced your decisions? Probe whether anything dominated their views e.g. cost, carbon, other environmental factors, whether they think it will work (e.g. demand options)
- Overall the results indicate that you prefer <*tbc* supply/demand options>. Is that what you expected? Why do you prefer that type of option?
  - Probe the factors influencing any overall preferences for supply over demand (or vice versa) options
    - Did you consider the amount of water provided? How did this influence your decision-making? Probe whether they'd thought any options would not be enough on their own, would it change their preferences if they knew it didn't provide enough water etc?
- Now that we've discussed the results, would you change your mind over any of your scores? Probe what changes and what factors influence this

Planning – supply and demand	**15 mins (45)**

- In the 2nd exercise we asked you to imagine you were in charge of planning water resources for 2050 and identify how much water in total you would want and what options to select to meet that need. These are the types of choices that water companies make in their planning. What factors influenced your decisions? Probe whether anything dominated their views e.g. amount of water, reliability, cost, environmental improvements?
- This section will present back the results of the home task (supply/demand plan approaches) in summary terms for each group. The analysis and presentation will be tailored to the group's results and areas to explore further identified beforehand to include the following points
- Amount of water
  - Level of environmental improvements vs. water restrictions
  - What factors influenced their decision making?
    - Did they take what supply/demand options they needed into account when deciding the amount of water
- Supply vs. demand options

- Balance of supply vs. demand options. Does the balance align with scores for each option?
- What factors influenced their decision making? e.g. amount of water, how realistic demand options were, cost, environmental factors, uncertainty of options etc

- When you were deciding on your plan, how did you think about potentially providing new supplies or water, or reducing water usage against a risk that there may be severe water restrictions in future? Probe if they took the requirement as a given, or were willing to accept the risk. How does it compare to responses from session 1
    - If we described building new supply options as a type of insurance policy against the risk of severe water restrictions in future, would that change your views? Probe to see if they appreciate it's a risk not definite need and if that changes their support
    - Does needing to build new supply options change your willingness to reduce your water usage? Probe to see if they are willing to reduce demand to avoid building anything, or accept more resilience risk etc. Would it change your choices about demand options? Probe to see if they thik it would make all customers more/less likely to reduce demand i.e. impact on the uncertainty of demand reductions
- When you were making your choices did you think about cost? Or the impact on bills and/or affordability? Probe to see if they considered the impact on bills etc
    - Thinking about costs, would that change any of your decisions about supply or demand measures?
    - What about the level of environmental protection you chose?
- Now that we've discussed the results, would you change your mind over any of your choices? Probe what changes and what factors influence this
- At the start of the session we asked you what you thought about the home task – this is what you said - Show results of Poll - I found the home task ….
    - Explore reasons – especially if they found it challenging, hard.

Regional planning - sharing water resources	**20 mins (65)**

To gain as broad a range of views across all companies, customers will not be told whether they live in a water provider or recipient area at this stage as this may vary over time

- Showcard Supply option – Transfers. Regional plans may involve sharing water resources, rather than each company supplying their own customers from sources of water within their area. Water resources may be shared within a company area, between water companies within a region, or between different regions of the UK. How do you feel about that?
    - Some water resources are already shared between water companies. Does that change your views? Probe to see if acceptability increases if they know it already happens
- So as a customer, depending where you live – your local area may provide water ***or*** may receive water to meet the local demands, and this may change over time. It may mean that new water sources that local areas need are built somewhere else in the region – such as a new reservoir that serves more than one company and their customers.
    - How do you feel about that? Why? Probe what are the factors influencing their decisions, are they assuming that they live in a supplier or recipient area?
    - Is it important for water companies to be self-sufficient? Probe to see if there are any concerns about control, funding, equity etc

- Does your view of the supply and demand options depend on whether your area is a supplier or recipient of water? Probe what drives their views.
    - Did you think about supplier/recipient status when giving your views on the different supply or demand options? Probe if they had thought of it, is it an issue to them? Would you change your mind about any of the options if your area is a supplier of water? Or a recipient? Why? Probe if there's any options they'd rule out, what drives their decisions
    - Did you make any assumptions about which options would work in your local area? Why? Probe to see if there's any options they dismissed e.g. because it wouldn't work in their area as no space etc, what type of assumptions they made
- If not already covered: Transfers of water from one company or region can be made to ensure everyone has a good level of service (i.e. a low risk of severe water restrictions like rota cuts), or to protect the environment across the region. How do you feel about that? Probe what factors may influence their acceptance of transfers
- **Exercise** - Each scenario has a question at the start (5 point scale) – please vote whether you agree to disagree with the following statement:
    - **Voting statement 1: "I am happy that water from my area can be moved to another part of the region to protect the environment in that area"** How do you feel about water being moved from one area to another to protect the other area e.g. move water from A to B to protect environment around B? Probe views on local and regional environment; how far can B be before they are not supportive, are they willing to see environment traded off across the region/country.
    - **Wessex and Bristol - Voting statement 2: "I am willing to accept that my water may change e.g. taste, hardness, so that water from my area can be transferred to another area"** How do you feel about some customers having to have water from a source they like less so that water can be transferred to another area? Probe what factors influence their choice, whether they think other customers should be forced into this?
    - **Voting statement 3: "I am willing to use less water so that water from my area can be transferred to another area"** How do you feel about customers being asked to use less water, so there is more that can be transferred to another region? Probe what factors influence their choice, would they trust other customers to do this for them? What level of change are they willing to go to – water efficiency devices, changing behaviours etc
    - **Voting statement 4: "I am happy that water from my area can be transferred to another area that has more leakage or less metering"** How do you feel about customers being asked to provide water to another area, when that area has less metering and uses more water, or has more leakage? Probe what factors influence their choice.
        - Does the performance of companies matter? Different water companies have different levels of performance around water used by customers, how many customers have a water meter and leakage levels. Do these differences change how you feel about water sharing and transfers? Probe what impacts their views, do differences matter, how much?
    - Select 1-2 statements to explore further, moderators to ensure discussions cover all statements across the groups
- If not already covered: Are there conditions that should be attached to water transfers – to ensure they are acceptable to customers? Probe whether need to even service up, recipients need to be good performers to receive water, etc.
- If not already covered: Are there any times when water transfers shouldn't happen? Should it be guaranteed? Probe whether they think a water provider area should be able to stop sharing water

e.g. to avoid hosepipe or non essential use ban in their area, or increased abstraction in their or different area

- If not already covered: Who do you think should pay for water transfer schemes that improve the resilience of water supplies? Should it be shared evenly across the region, or should each company pay for the water it needs? Probe what drives views
- We've been asking you about sharing water between different water companies. There are other companies and organisations that are also allowed to take water directly from the environment rather than use the public water supply. So if there was a drought situation and their water supply was no longer available, how do you feel about the water company sharing their water with these other abstractors? Probe whether it depends on type of industry – e.g. agriculture, canals, cooling water, or process water for industry – any other conditions etc

Policy issues and constraints on the plan	**15 mins (80)**

- There are some policy issues that are being discussed nationally and can impact on the plans that your water company and the region will develop:
- Daily water use- How do you feel about everyone in the country having to reduce their daily water usage?
    - It's been suggested that there should be a target amount of water used per person per day by 2050. This is approx. 20-25% reduction across households – and it's been estimated that this would require all customers to take the steps shown as a minimum (showcard 2)
        - Exercise: Emoji – can you select the emoji that best reflects how you feel about customers being expected to reduce water usage like this by 2050
        - Prove if they think that is realistic, acceptable that government tells people what to do, do they think customers can achieve it consistently, is there anything they think is unrealistic e.g. 4 min showers?
- Leakage (Demand showcard on Leakage)- How do you feel about water companies reducing leakage? Water companies have leakage targets already. The potential target for the future is to halve leakage by 2050?
        - Exercise: Emoji – can you select the emoji that best reflects how you feel about a target of halving leakage by 2050?
        - Probe what factors drive their views, do they see any problems in meeting the target, what may be the implications for them?
    - What do you think this would do to bills? Probe if they recognise it may be expensive and put bills up. If so do they still support leakage reductions
    - To meet this target, leakage on customer supply pipes – the pipes that go from the water main into a customers' property e.g. under the drive – would also have to be fixed. How do you feel about that? Probe to see if the flag any issues such as who pays, disruption etc

- Not all of the following topics will be covered by each group – moderators will ensure coverage across the groups
- (A) Affordability - Different people are able to afford different levels of bills. How do you think the regional plan should take affordability into account? What factors influence this? Should it vary by company, region? Probe what influences their views
- [Groups – younger customers and 65+ to cover + mixed gp as min]

(B) Intergenerational fairness - Some of the options for the plan are about securing the water supply for the future. How do you feel about customers paying now for things that will mostly benefit future generations? Probe what influences their views

- (C) Inter-area fairness - Different groups of customers may have different views of the options, plans, and the conditions that make it acceptable or not. Should plans go ahead only if the majority in the company area agree? Or is it OK if there's disagreement across the region? Probe what influences their views, should we take company differences into account, supplier/recipient status, other issues in the area? Where do they think the balance of agreement should be, should this stop plans going ahead?

Regional planning – timing of investment	**10 mins (90)**

- Knowing when to invest is also difficult as future demand is uncertain, and some supply options take a long time to build. When do you think water companies should invest – earlier when the requirements are less certain, or wait and see what happens? Probe what influences their views, and whether they recognise that waiting may carry a higher level of risk of water restrictions.
    - If they don't recognise the trade off; Investing earlier may increase bills whereas waiting increases the risk of severe water restrictions. Does this change your views? Probe what influences their decision, what level of risk are they willing to carry?
    - **Exercise**: Showcard 3 - Select which option you prefer
        - Option 1
            - Increased risk of hose pipe bans
            - Same risk of severe restrictions like rota cuts
            - Investment in new supply options can be delayed to get more certainty about future needs
        - Option 2
            - Same risk of hose pipe bans
            - Less risk of severe restrictions like rota cuts
            - Investment in new supply options goes ahead, even though there is a risk they may not be needed or the wrong size
        - Probe the factors influencing their choices
- If we told you that by 2039 it's predicted there may be more demand for water than the amount of water available i.e. there is no longer a 'surplus/buffer', would this change your views? Probe what changes and why?
    - Would you be more or less willing to undertake demand measures knowing this?
    - What about your support for supply options? Probe if this makes them more/less willing to invest up front despite the uncertainty

General feedback and close	**<5 mins (90)**

- Thank you for your input again. That is the last of these sessions.
- Before we finish, has there been anything that has surprised or concerned you? Are there any other comments?
- Explain how the information will be used, where to go to learn more about water resource plans.
- Session feedback polls
- Thank you and close

West Country Water Resources Group (WCWRG) - Strategic Water Resources Plan

Non-household Topic Guide – Session 2

Information for observers	**N/A**

- Key to topic guide:
  - Black: information for the moderator to say (note this is not intended as a script to be read verbatim)
  - Green: instructions for the moderator

Session Two – Introduction and Recap	**5 mins (5)**

- Facilitator to welcome back, recap on the objectives and confirm observers
- Reiterate no right or wrong answers, and MRS code of conduct.
- This session we are going to look in more detail at the options companies have to manage demand and supplies of water, in order to ensure there is a buffer, and demand is met.
- Remind of session etiquette
- Before we start – any questions from last week, or anything that you want to clarify? Remind that we'd like them to answer from the perspective of their business

Environmental drivers	**10-15 mins (20 max)**

- We'd like to start with thinking about the potential impact of taking water from the environment. What do you think the impact is currently? Is it acceptable or not? Probe whether they think the current level of environmental protection is ok.
- Does the local environment have a key impact on your business? Is it a concern to your business? Probe to understand if environmental concerns are key to business, or they benefit from environment etc
- We'd now like to understand your views on how the West Country Water Resources group should take the environment into account when developing their long-term water resource plans.
  - **Exercise:** Showcard 8. Explain that in both cases there will be a need to either find additional , alternative sources of water or reduce demand, but that option B means that have to find even more sources/reduce demand further to improve the environment. Please can you select which option you prefer:
    - Maintain the current levels of environmental protection
    - Improve the levels of environmental protection
  - Probe reasons for their choice, what influenced their views, what factors did they consider e.g. impact on bills, changes to supply resilience risk, potential benefits for their business
- If not already discussed - What are your company's views on the current levels of protection for the environment? Probe if they think current levels are ok, or whether they think its poor, impacting biodiversity etc and it may mean rivers run dry in drought periods, how environmentally aware their business is
- **Exercise:** Poll. When improving the environment, does your business think that:
    - All rivers and streams should be improved by a little

        - Larger improvements be carried out on a smaller number of rivers and streams
        - Probe reasons for their choice, what influenced their views, what factors did they consider, were they thinking of specific examples e.g. chalk streams

- In times of drought and in emergencies, water companies can apply to take more water from the environment (eg from rivers) to keep up with demand – when water levels may already be low, and wildlife affected or harmed. What are your businesses' views on that? Probe whether they think it's acceptable to take more water out of the environment at times of drought, and what factors/conditions influence this
    - Do your views on the acceptability change depending on whether it's any part of the environment in general, or in sensitive areas where there is a particular abundance of wildlife or protected wildlife?
    - What about if it impacts your business directly?
        - Or is close to where your business is located?
    - Do you think companies should be allowed to take more water out of the environment to prevent any restrictions on water use like hosepipe bans, non-essential use bans or just the most severe rota cuts? Probe where they see the balance between impacts on customers and the environment

Options – supply and demand	**10-15 mins (30)**

- Last week we talked about how water resource plans look to ensure there is enough water available to meet the demand from customers and other users. And if there is not enough, that this can be addressed by either increasing supplies, or reducing demand
- We sent you some more information on both the supply options and the demand options that West Country Water Resources Group are considering as part of their plan.
    - Before we look at what household customers have told us are their preferred options, are there any that you want to ask questions on, clarify any of the information? Did all the options make sense?
    - Probe for an initial view of the options, any misunderstandings, any of the pros/cons or summary data that they hadn't previously known about or considered?
- Showcards S and D - Supply Demand options preferences: Results of support for supply and demand options based on overall household customer preferences
    - We asked household customers about their preferred options and these are the results.
        - Is this what you would have expected? Are you surprised by any of the results?
        - From the perspective of your business do you agree, disagree? Why? Probe what influences their views
        - Any options that you feel are particularly appropriate for your business. Or any that wouldn't be appropriate for your business? Any options that you don't think should be considered further? Probe the factors driving their choices. What would make the option more acceptable to you?
        - Is there anything that would make an option less acceptable to your business?
        - Probe the factors influencing their views and whether anything dominated their views e.g. cost, carbon, other environmental factors, whether they think it will work (e.g. demand options)

Showcard – all options (supply and demand)

- Overall the results indicate that household customers prefer leakage and then supply options over demand options linked to metering. Is it the same for your business? Probe the factors influencing any overall preferences for supply over demand (or vice versa) options
    - We asked household customers to complete a small water planning exercise and they typically opted for approx. 60% of the water needed in future to be provided by new supply options with 40% provided by reducing demand and leakage. What are your views on this from a business perspective? Probe whether the split feel about right, too much/little supply etc? what factors are influencing

Regional planning - sharing water resources	**20 mins (50)**

To gain as broad a range of views across all companies, customers will not be told whether they live in a water provider or recipient area at this stage as this may vary over time

- Showcard Supply option – Transfers. Regional plans may involve sharing water resources, rather than each company supplying their own customers from sources of water within their area. Water resources may be shared within a company area, between water companies within a region, or between different regions of the UK. How do you feel about that? Would it impact your business in any way?
    - Some water resources are already shared between water companies. Does that change your views? Probe to see if acceptability increases if they know it already happens
- So as a business customer, depending where you live – your local area may provide water ***or*** may receive water to meet the local demands, and this may change over time. It may mean that new water sources that local areas need are built somewhere else in the region – such as a new reservoir that serves more than one company and their customers.
    - How do you feel about that? Why? Probe what are the factors influencing their decisions, are they assuming that they live in a supplier or recipient area?
    - Is it important for water companies to be self-sufficient? Probe to see if there are any concerns about control, funding, equity etc
- Does your view of the supply and demand options depend on whether your area is a supplier or recipient of water? Probe what drives their views.
    - Did you think about supplier/recipient status when giving your views on the different supply or demand options? Probe if they had thought of it, is it an issue to them? Would you change your mind about any of the options if your area is a supplier of water? Or a recipient? Why? Probe if there's any options they'd rule out, what drives their decisions
    - Did you make any assumptions about which options would work in your local area? Why? Probe to see if there's any options they dismissed e.g. because it wouldn't work in their area as no space etc, what type of assumptions they made
- If not already covered: Transfers of water from one company or region can be made to ensure everyone has a good level of service (i.e. a low risk of severe water restrictions like rota cuts), or to protect the environment across the region. How do you feel about that? Probe what factors may influence their acceptance of transfers
- **Exercise** - Each scenario has a question at the start (5 point scale) – please vote whether you agree to disagree with the following statement:
    - **Voting statement 1: "I am happy that water from my area can be moved to another part of the region to protect the environment in that area"** How do you feel about water being moved from one area to another to protect the other area e.g. move water from A to B to protect environment around B? Probe views on local and regional environment;

how far can B be before they are not supportive, are they willing to see environment traded off across the region/country.

- **Voting statement 2: "I am willing to accept that the water supplied to my business may change e.g. taste, hardness, so that water from my area can be transferred to another area"** How do you feel about some customers having to have water from a different source so that water can be transferred to another area? Probe what factors influence their choice, whether they think other customers should be forced into this?
- **Voting statement 3: "My business is willing to use less water so that water from my area can be transferred to another area"** How do you feel about business customers being asked to use less water, so there is more that can be transferred to another region? Probe what factors influence their choice, would they trust other customers to do this for them? What level of change are they willing to go to – water efficiency devices, changing behaviours etc
- **Voting statement 4: "I am happy that water from my area can be transferred to another area that has more leakage"** How do you feel about customers being asked to provide water to another area, when that area has more leakage? Probe what factors influence their choice.
    - Does the performance of companies matter? Different water companies have different levels of performance around water used by customers, how many customers have a water meter and leakage levels. Do these differences change how you feel about water sharing and transfers? Probe what impacts their views, do differences matter, how much?
- Select 1-2 statements to explore further, moderators to ensure discussions cover all statements across the groups

- If not already covered: Are there conditions that should be attached to water transfers – to ensure they are acceptable to business customers? Probe whether need to even service up, recipients need to be good performers to receive water, etc.
- If not already covered: Are there any times when water transfers shouldn't happen? Should it be guaranteed? Probe whether they think a water provider area should be able to stop sharing water e.g. to avoid hosepipe or non essential use ban in their area, or increased abstraction in their or different area
- If not already covered: Who do you think should pay for water transfer schemes that improve the resilience of water supplies? Should it be shared evenly across the region, or should each company pay for the water it needs? Probe what drives views

Partnership	**15 mins (65)**

- We've been asking you about sharing water between different water companies. There are other companies and organisations that are also allowed to take water directly from the environment rather than use the public water supply. So if there was a drought situation and their water supply was no longer available, how do you feel about the water company sharing their water with these other abstractors? Probe whether it depends on type of industry – e.g. agriculture, canals, cooling water, or process water for industry – any other conditions etc
- The West Country Water Resource Group is looking closely at how the region's water resources are managed and developing a regional plan will cover both the public water supply and other water users such as farming and industry.
- **Exercise**: Poll When they are planning for the future, and assessing whether there will be a surplus or deficit of water, do you think they should
    - Consider England as a whole and take action at a national level

        - Consider the entire south west region as a whole and take action at a regional level
        - Consider any surplus/deficit at company level and take action at company level
        - Consider any surplus/deficit at area level within a company and take action at area level
    - Probe reasons for their choice, what influenced their views, what factors did they consider.

- **Should business customers in an area with a predicted supply deficit do more to manage demand than businesses in areas with predicted surplus of water**? Probe to understand inter-area/company/region fairness
- If not already covered - How do you feel about sharing sources of water, not just with other water companies, but also with other users such as farmers and industry who take their water directly from the environment? Probe to see if they feel any users should take priority, any concerns e.g. who pays, everyone 'doing their bit' etc
    - Are there any situations where you feel that water shouldn't be shared with other users? Or particular types of user? Probe to see if they raise any restrictions on sharing and why
- **Different water users may view the regional plan differently depending on their circumstances, where they are, what they need the water for, businesses or households.**
    - How do you feel as a business user about being asked to reduce the amount of water you use, to ensure other large users e.g. farmers and industry, have a reliable supply? Probe to see if they support this in principle, any sectors they don't support and why
    - What about if water companies invested in more supply options which may have a small impact on bills, and which helped ensure other users have a reliable water supply? Probe to see if they support this in principle, any sectors they don't support and why

Policy issues and constraints on the plan	**15 mins (80)**

- There are some policy issues that are being discussed nationally and can impact on the plans that your water company and the region will develop:
- Only include if not already covered - Leakage - Water companies have leakage targets already. The potential target for the future is to halve leakage by 2050? How does your business feel about that as a target to reduce leakage? Probe if they recognise it may be expensive and put bills up. If so do they still support leakage reductions
    - To meet this target, leakage on customer supply pipes – the pipes that go from the water main into a customers' property, both household and businesses– would also have to be fixed. How do you feel about that? Probe to see if the flag any issues such as who pays, disruption etc
- **(A) Affordability** - Different customers and businesses are able to afford different levels of bills. **How do you think the regional plan should take affordability into account, particularly with respect to businesses**? What factors influence this? Should it vary by company, region? Probe what influences their views
- **(B) Intergenerational fairness** - Some of the options for the plan are about securing the water supply for the future. **How do you feel about business customers paying now for things that will mostly benefit future generations and businesses**? Probe what influences their views
- (C) Inter-area fairness - Different groups of customers may have different views of the options, plans, and the conditions that make it acceptable or not. Should plans go ahead only if the

majority in the company area agree? Or is it OK if there's disagreement across the region? Probe what influences their views, should we take company differences into account, supplier/recipient status, other issues in the area? Where do they think the balance of agreement should be, should this stop plans going ahead?

Regional planning – timing of investment	**10 mins (90)**

- Knowing when to invest is also difficult as future demand is uncertain, and some supply options take a long time to build. When do you think water companies should invest – earlier when the requirements are less certain, or wait and see what happens? Probe what influences their views, and whether they recognise that waiting may carry a higher level of risk of water restrictions.
    - If they don't recognise the trade off; Investing earlier may increase bills whereas waiting increases the risk of severe water restrictions. Does this change your views? Probe what influences their decision, what level of risk are they willing to carry?
    - **Exercise**: Showcard 3 - Select which option you prefer
        - Option 1
            - Increased risk of non essential use bans
            - Same risk of severe restrictions like rota cuts
            - Investment in new supply options can be delayed to get more certainty about future needs
        - Option 2
            - Same risk of non essential use bans
            - Less risk of severe restrictions like rota cuts
            - Investment in new supply options goes ahead, even though there is a risk they may not be needed or the wrong size
- If we told you that by 2039 it's predicted there may be more demand for water than the amount of water available i.e. there is no longer a 'surplus/buffer', would this change your views? Probe what changes and why?
    - Would you be more or less willing as a business to undertake demand measures knowing this?
    - What about your support for supply options? Probe if this makes them more/less willing to invest up front despite the uncertainty

General feedback and close	**<5 mins (90)**

- Thank you for your input again. That is the last of these sessions.
- Before we finish, has there been anything that has surprised or concerned you? Are there any other comments?
- Explain how the information will be used, where to go to learn more about water resource plans.
- Session feedback polls
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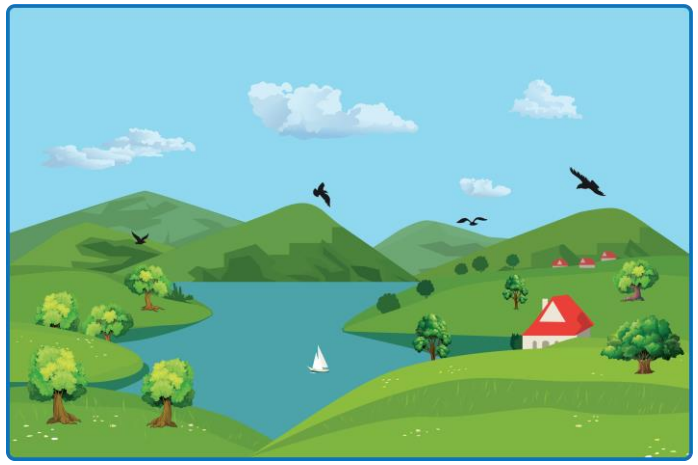
West Country Water Resources

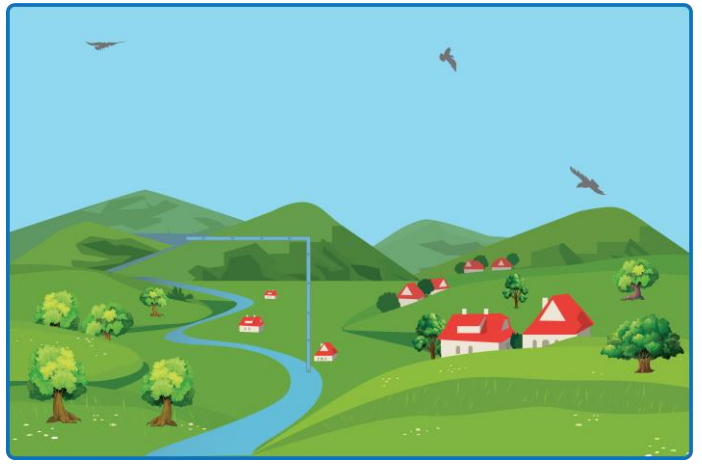
Session 2

Supply Options

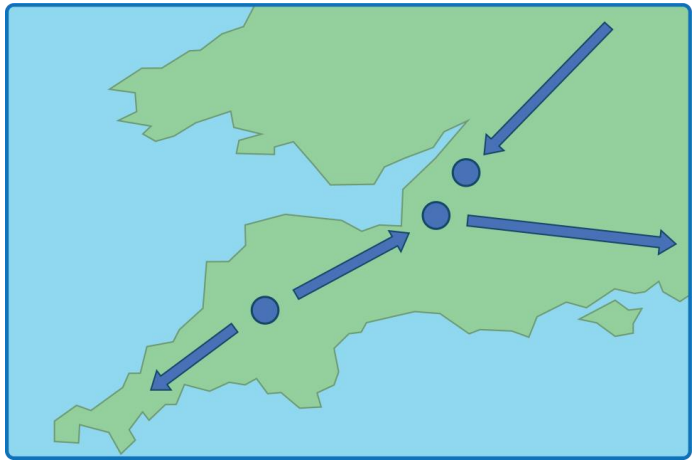
Reservoir to store water



Pumped water storage in winter

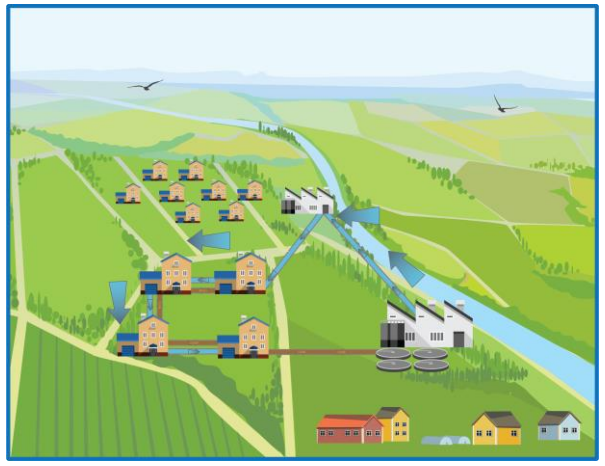


Transferring water



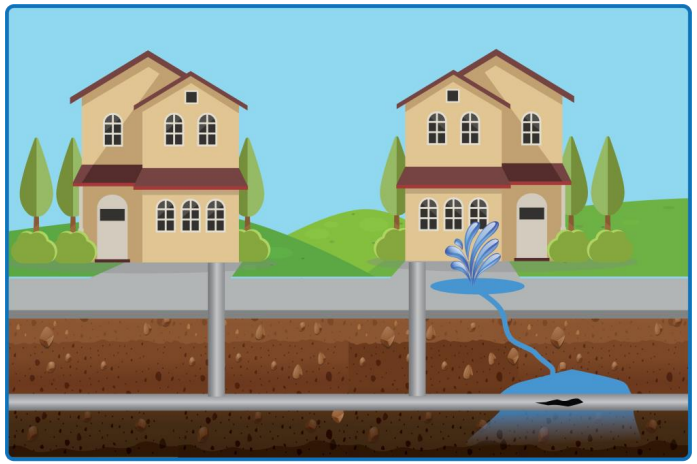
Taking water from the sea (Desalination)

Recycling treated wastewater



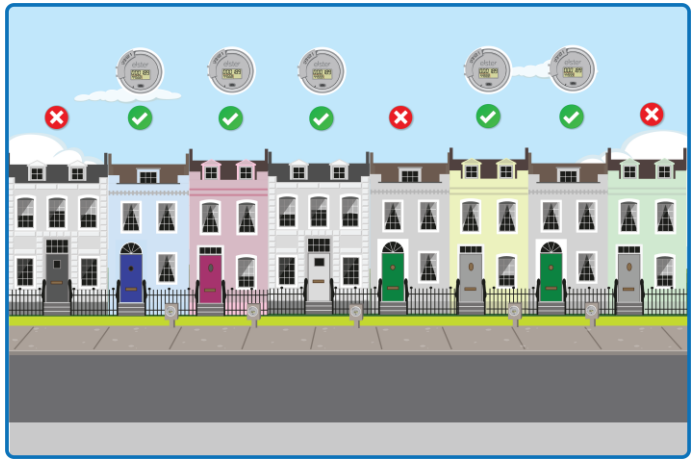
Demand Options

Leakage reduction

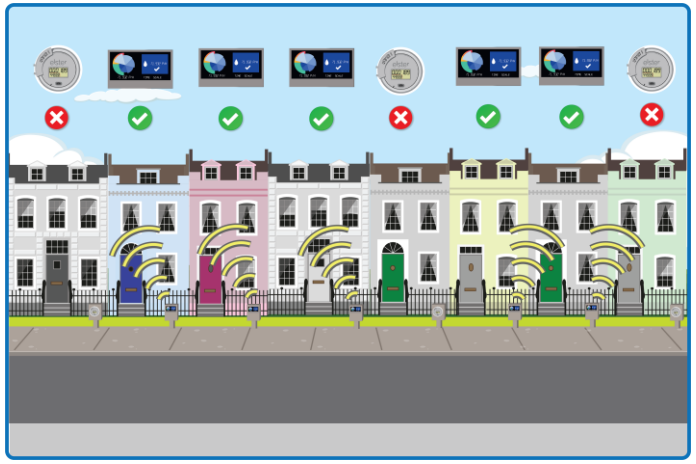


Compulsory metering

Voluntary metering

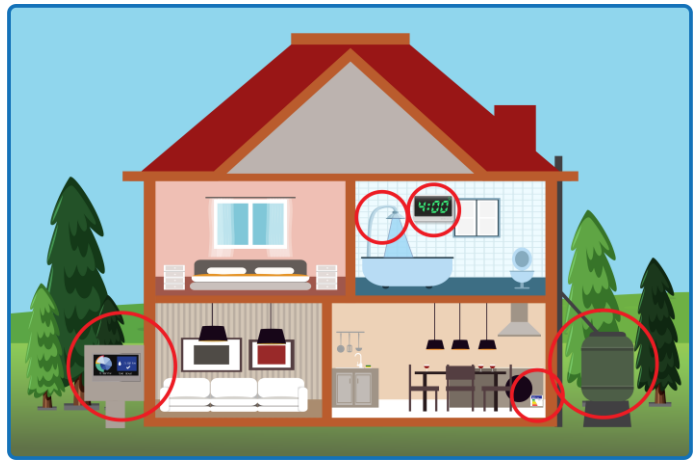


Smart metering



Using water tariffs to encourage water saving

Using awareness campaigns, incentives and education to encourage water saving



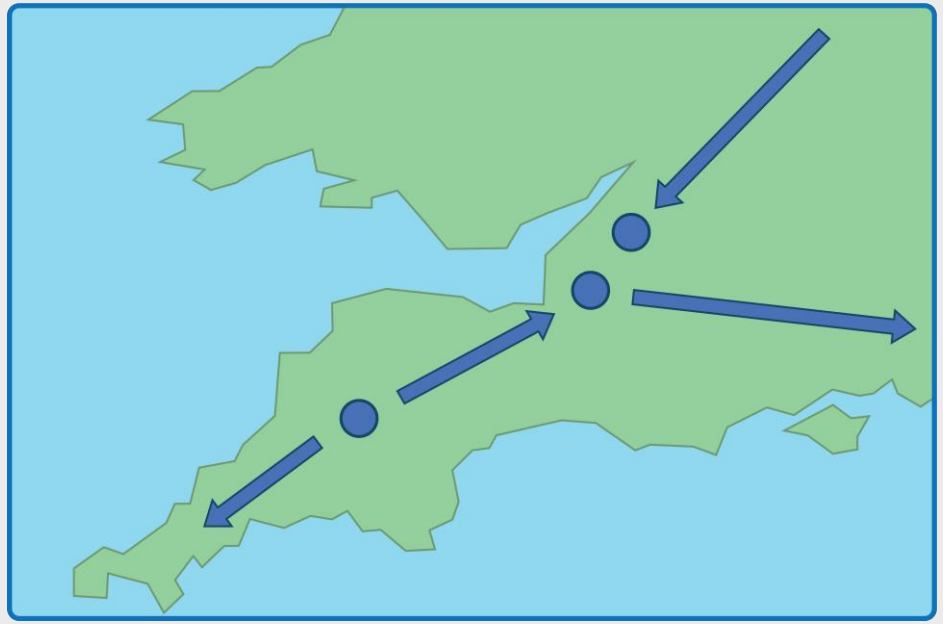
Transferring water

What is it?

Sharing water with other water companies. Water may be transferred within a company, between companies or between regions and so the distance the water has to travel depends on the source and where it is going to. Water may be transferred via dedicated pipelines, or using rivers (with some connecting pipelines).

Already used?

Yes, by UK companies



Pros

- ✓ Can provide large volumes of additional water to supplement local resources
- ✓ Increases the connections in the water supply system, making it more flexible
- ✓ Using the river system may give opportunities for environmental improvement due to better flows

Cons

- × Water supplies are not 100% guaranteed if neighbouring companies go into drought
- × Water is heavy - so may need lots of energy to move it long distances if pumped
- × Water companies providing water may need to use different/new sources of water in their area - which may affect the taste, or hardness of water

Cost	MEDIUM
Amount of water it can provide	HIGH

The target reduction in water consumption means .....

- Don't leave taps running
- 4 min showers and very limited baths
- Install water efficient taps, shower heads
- All old toilets with large cisterns replaced with modern dual flush
- Install water efficient appliances – washing machines, dishwashers
- Any internal plumbing leaks fixed (e.g washers, toilet overflows)
- Rainwater storage so that rainwater can be used for external water uses
- Some properties use recycled water to flush toilets

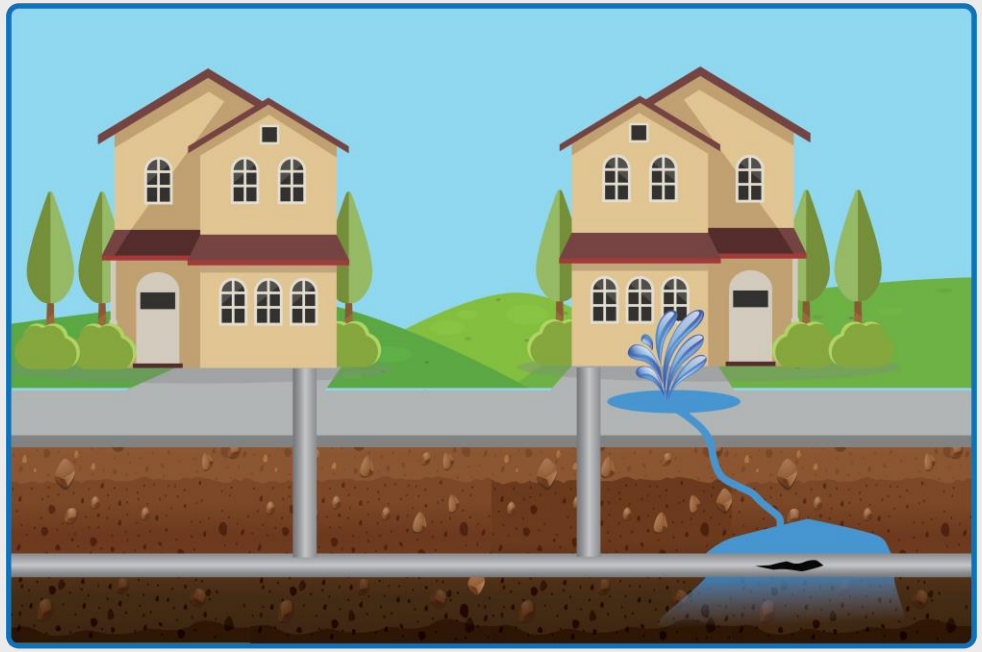
Leakage reduction

What is it?

The repair of leaks and bursts on pipes, valves etc. to prevent the loss of treated water from the water supply network.

Already used?

Yes by UK water companies.



Pros

- ✓ Keeps more water in the supply system
- ✓ Reduces the need to take more water from rivers, reservoirs and underground
- ✓ Less water has to be treated, reducing the amount of energy and chemicals used and waste produced

Cons

- × Leaks may be hard to find and expensive to fix, e.g. deep in the ground
- × Fixing leaks can cause disruption and congestion from road works
- × Around a quarter of leakage is from pipes owned by customers

Cost	MEDIUM
Amount of water it can provide	MEDIUM

In the next 20 years, I prefer.....

Option 1

- Increased risk of hose pipe bans
- Same risk of severe restrictions like rota cuts
- Investment in new supply options can be delayed to get more certainty about future needs

Option 2

- Same risk of hose pipe bans
- Less risk of severe restrictions like rota cuts
- Investment in new supply options goes ahead, even though there is a risk they may not be needed or the wrong size

West Country Water Resources Group (WCWRG) - Strategic Water Resources Plan

Topic Guide – Stakeholders

Introduction	**5 mins (5)**

- Facilitator to introduce himself/herself.
- ICS are independent and working on behalf of the West Country Water Resources Group which is the three water companies in the south west – Wessex Water, Bristol Water and South West Water, including Bournemouth Water
- Explain work under MRS code of conduct and rights to anonymity
- Explain session etiquette
    - We want to make sure we hear everyone's views, so to ensure you don't talk over each other, please raise your hand using the on screen option and we'll make sure you have your say.
    - Also, please make sure your volume is switched to a suitable level.
- Explain observers may review the sessions, and sessions are recorded for internal use

General introduction to the session	**5 mins (10)**

Showcard: WCWRG

- Briefly introduce the showcard - WCWRG members, intro to research – emphasise that planning is at relatively early stages so research is looking at broad principles only to inform next stages
- We shared the pre-reading that we sent to customers for your information. Can we just check if there are any questions or feedback about it?
    - Check any questions
- Set out that the objective of the discussion today is to explore their views and perspectives on this feedback from customers to see how it aligns with their objectives and views, where there are differences, discuss options etc
    - Their feedback will be included in the report to WCWRG to use as they develop the plan – this won't be a one-off, they will be carrying out further engagement with stakeholders throughout development of the plan – today is about focussing on customer feedback so far
    - Key highlights/findings – not fully comprehensive given time available as we ant it to be them talking more than us!
- Also interested in where their priorities for future research would be so we can feed back to WCWRG

Showcard: Customer Research

- Highlight broad cross section of customers across all company areas, ages. Briefly explain format of sessions Showcard - summary of no. of customers, demographics etc
- Respondents to very briefly introduce themselves – name, organisation, location, specific areas of interest in relation to water resources planning, and how much previous knowledge etc they have of WCWRG

Water resources introduction	

- During the session, we thought we'd demo some of the exercises we used with customers to elicit their views independently that we could then use to direct the group discussions
    - **Exercise:** Polls:
        - We asked customers a couple of polls….. what do you think the majority answered:
            - Which statement best describes your views on water
                - Water is scarce and if we are not careful we may run out
                - There is enough if we are all careful
                - There is plenty and we do not need to worry (it does rain all the time!)
            - To what extent could your household use less water
                - My household could use a LOT less water
                - My household could use a LITTLE less water
                - My household would struggle to use less water
    - **Showcard : Attitudes to Water results**

Water restrictions	

- Intro – we discussed the principles of supply and demand planning with customers to build their understanding and then supply restrictions, exploring their views and what it would mean to them. The purpose was to ensure that they did appreciate the potential impact and severity of the severe water restrictions like rota cuts and standpipes
    - Check all stakeholders are comfortable with what severe restrictions are and the implications
- We then explored the acceptable level of risk of severe restrictions with customers, so we'd like you to do the same exercise too…. so from the viewpoint of your organisation
- The risk of water restrictions is very low in any one year, but we live for a lot of years, so assuming we live for 80 years, currently the risk of experiencing rota cuts/standpipes **once** during your lifetime is about 40% for you and future generations. Check they understand this risk explanation.
    - **Exercise:** Showcard 5 (risk of water restrictions). Please select what you think the level of risk of rota cuts/standpipes should be? Remind them that the r% risk is about experiencing it once in a lifetime

- **Showcard results - Customer support for increasing resilience to extreme droughts**

Best value planning	

- We then explored customers priorities for the factors to be considered in best value planning – again we'd like you to complete the exercise and prioritise the factors from the viewpoint of your organisation
- Use what is relevant of the following intro
- The water companies in the south west are working together to ensure that there is a gap/buffer between supply and demand across the whole region, even in times of severe drought. They are looking at how the water supply system would perform under different future situations. Because

no one knows what the weather will be like in the future or what other shocks may happen (such as Covid-19, flooding), water companies test investment plans under a range of "what if" scenarios to see if they can meet all customers water needs under each scenario – or if restrictions or taking more water out of the environment will be needed.

- At the moment there is enough water to meet demand, but their planning shows that by 2050 there may not be enough water to meet future demand and continue to protect the environment unless action is taken. So they are developing a regional water resources plan and have identified some factors that they will use to evaluate the different options
    - **Exercise:** Showcard 7: Please rank the four factors in order of importance – from 1 being the most important to 4 being the least (order changed between groups)
        - Reducing the demand for water
        - Improving the environment
        - Improving supply resilience
        - Benefitting and affordable for society
- **Showcard results - Customer views and priorities for best value planning**

Environmental drivers	

- We explored how customers felt the West Country Water Resources group should take the environment into account when developing their long-term water resource plans. At this relatively early stage in the planning process, specific schemes are not available so the discussion focussed on general principles
- **Showcard results - Customer support for protecting and/or improving the environment (2 slides)**

Supply and demand options	

- We asked customers to undertake some reading about the different supply and demand options between the two sessions and complete an exercise to identify their preferred options
- We also asked them to complete a mini water planning exercise, selecting the amount of supply they needed to reduce the risk of restrictions and protect the environment, and what supply/demand options they wanted to meet it.

- **Showcard results - Customer preferences for supply or demand options**

Sharing Water	

- We explored various principles and policy issues linked to sharing water both between waters companies - in both the south west region, and nationally.
    - Things such as equity between companies in terms of service performance
    - Support for reducing demand to share water
- We also discussed sharing with other sectors

- **Showcard results - Customer views on sharing water including with other sectors**

Planning ahead	

- And finally - we sought customers views on whether the West Country Water Resources group should plan ahead and invest given the uncertainties – first by exploring their understanding of where uncertainty exits and also the implications of investing too early

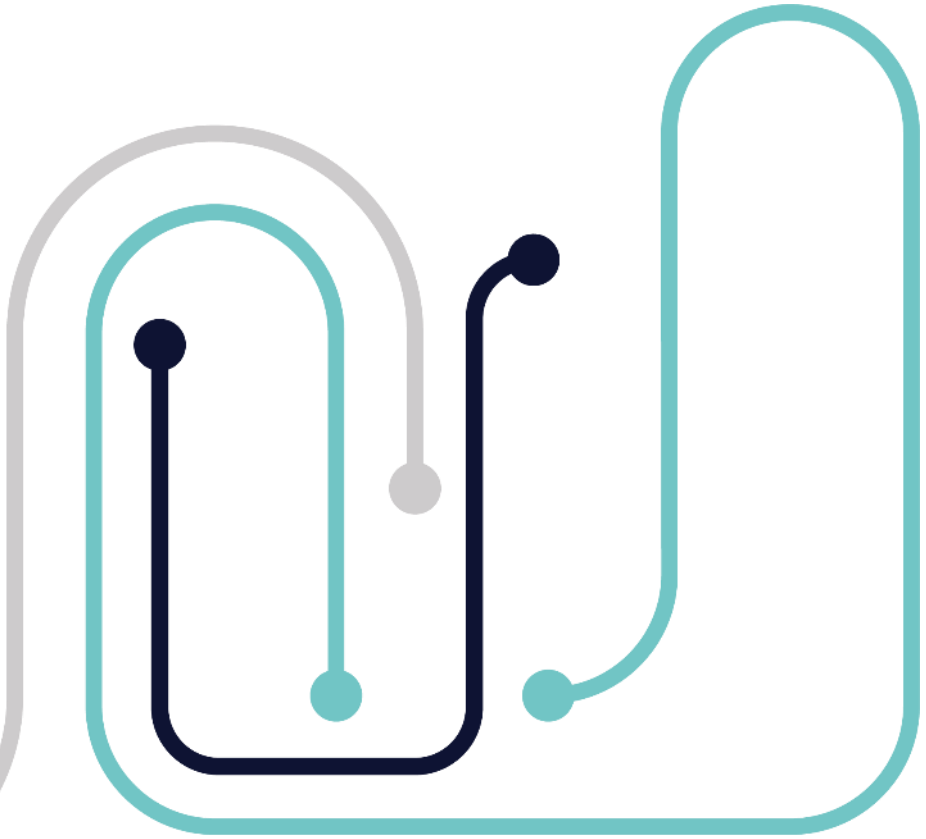
- **Showcard results - Customer views on how much the water companies should plan ahead, given future uncertainties**

West Country Water Resources

Regional Water Resources Planning

Customer Research

June - July 2021

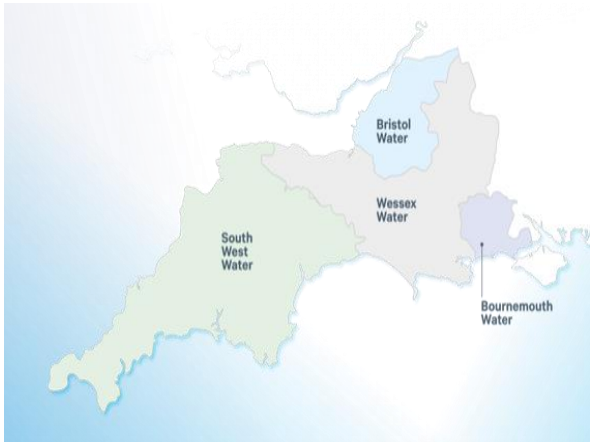


ICS

eftec

West Country Water Resources Group (WCWRG) – Customer Research

- WCWRG are developing a 25 year plan for the strategic management of water resources in the South West of England
- Bristol Water, South West Water (including Bournemouth Water) & Wessex Water are core members
  - Advisory members – Environment Agency & Natural England
  - Associate members include NFU & Canal and River Trust



- ICS and eftec are undertaking customer research to support development of the regional plan
- The first stage is qualitative research with customers to provide insight on the broad policy and strategic issues that frame the regional plan and the planning objectives
- Objectives for today are to:
  - Explore your views and perspectives on this feedback from customers
  - Understand how it aligns with your objectives and views

Participant demographics

8 focus groups were conducted - total 60 participants

Each group met for two 1.5 hr sessions

Each participant completed hometask between sessions, including a mini water resource planning exercise

SEG	ABC1	32%
	C2DE	52%
	Future	10%

27 33

6 Future customers (aged 18-24)

10 Aged 18-24

27 Aged 18-45

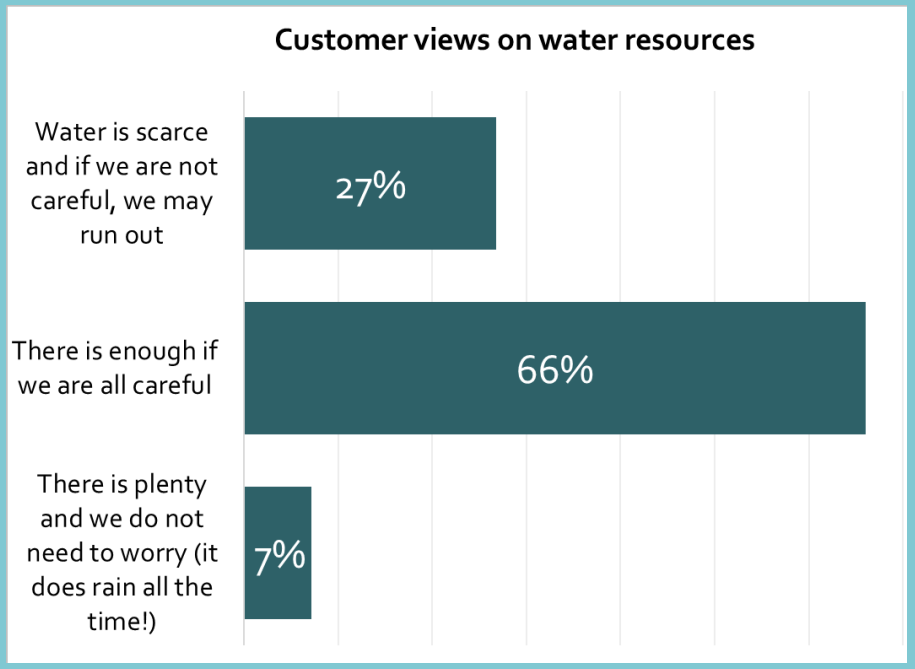
15 Aged 46+

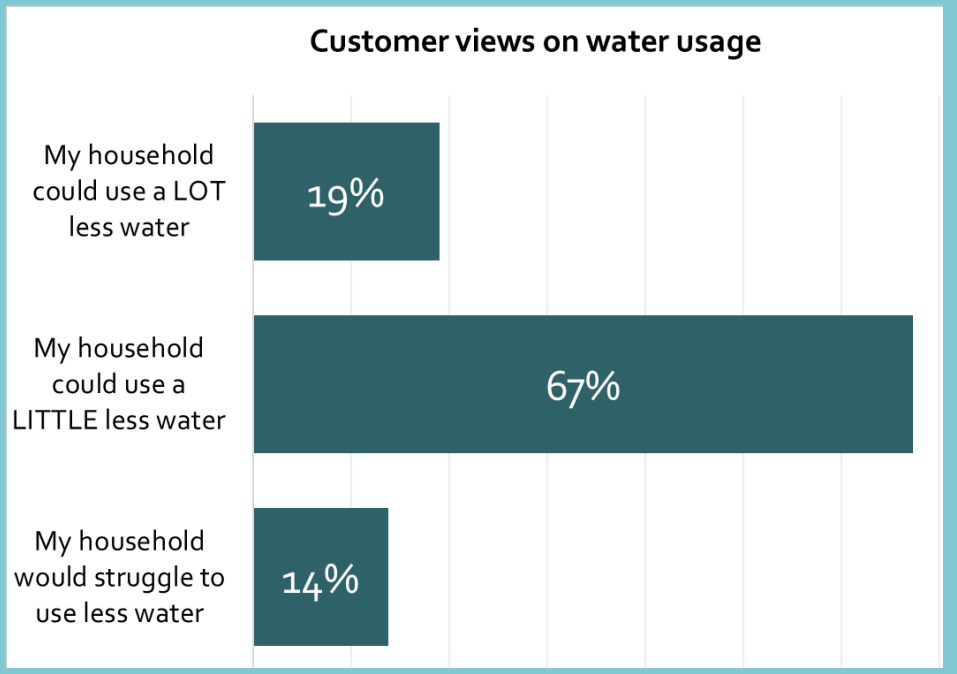
8 Aged 65+

Customer views on water

"I know that water is scarce... but for me as a household I don't really suppose I associate it"
Female, C2DE, 18-45

"my family uses loads of water and it's not sacred at all. We just expect it always to be there"
Female, ABC1, 46+



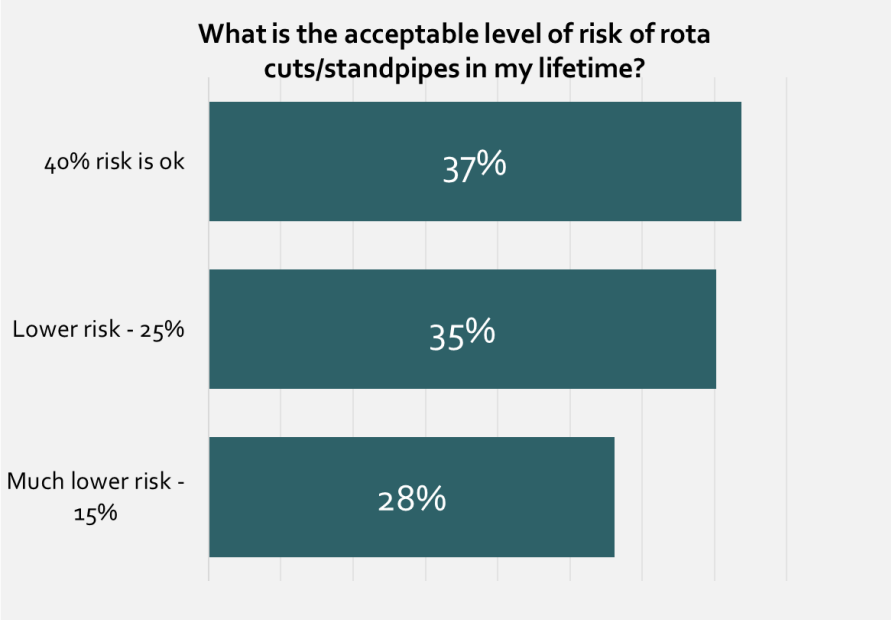


"with the weather and the climate, and the waters drying up quicker – if we're not careful we could run out"
Female, C2DE, 46+

"wrong approach to ask me how to use less water, I think we've got to use the technology to use less water"
Male, ABC1, 65+

Customer support for increasing resilience to extreme droughts

- Customers asked about their support to reduce the risk of severe water restrictions - rota cuts or standpipes
  - from current risk 1 in 200 years
  - to 1 in 500 years
- Over 60% of customers supported a reduction in the level of risk



"40% doesn't seem that high"
Female, C2DE, 18-45

"as good as it will get" [recognition of climate change pressures]
Male, ABC1, 18-45

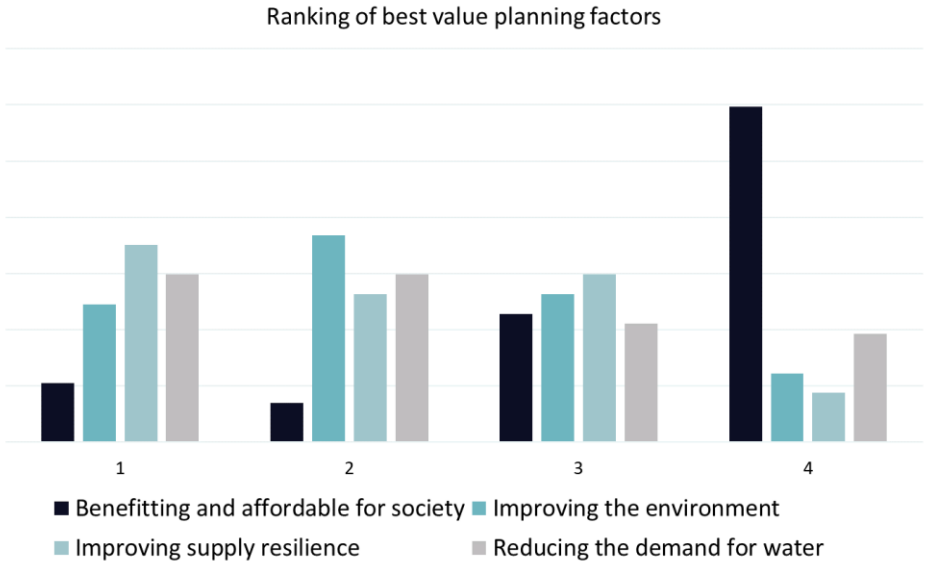
"it's an inconvenience but it's not gonna kill you"
Male, ABC1, 18-45

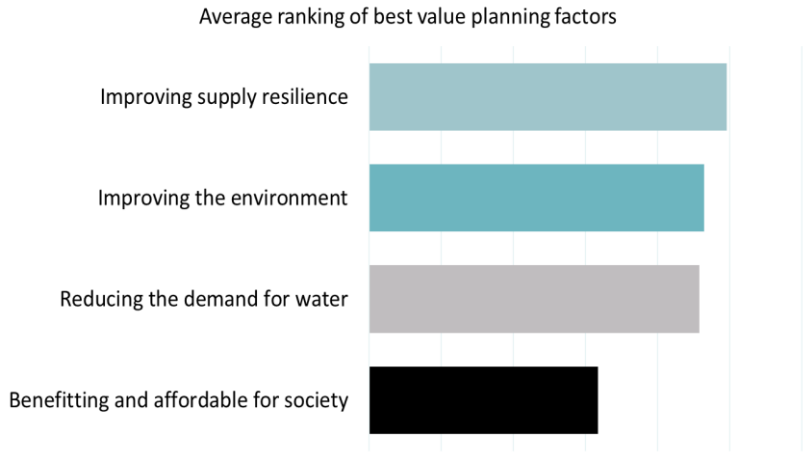
"Quite shocking, because I see that as quite a high chance. I think if someone was to say to me, you've got a 40% chance of winning the lottery, I think that's not a bad chance"
Female, C2DE, 18-45

"in a country that rains all the time, and we're quite a wealthy country. It shouldn't happen."
Female, ABC1, 46+

Customer views and priorities for best value planning

- Supply resilience was overall the top priority, with benefitting and affordable for society the least
  - Future customers ranked environment, then affordability as their priorities, with supply resilience their lowest priority
  - Older customers prioritised reducing demand

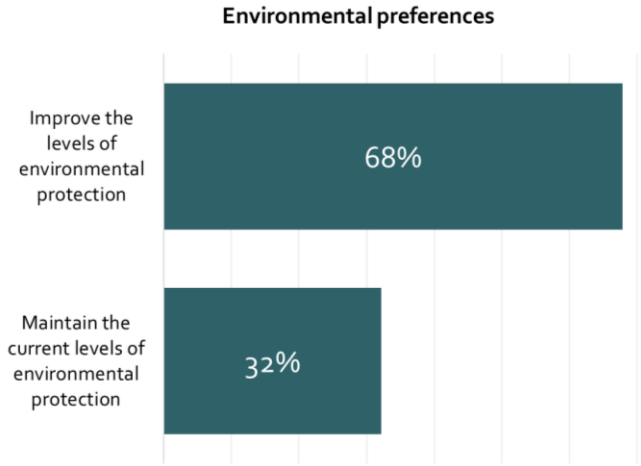


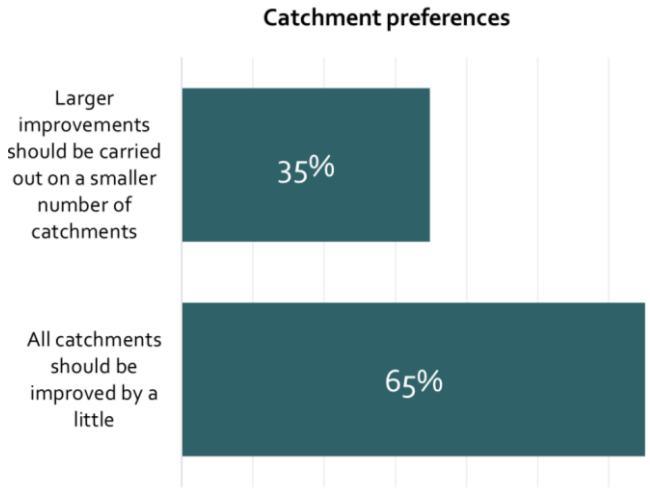


"Can you put a price on your children's future?"
Male, C2DE,18-45

Customer support for protecting and/or improving the environment

- Strong support for improving and protecting the environment in the context of water resources
- Message was consistent across the various ways we asked customers
  - Basic preferences (note this is without any cost implications)
  - Trade-offs
  - Mini water planning exercise – selected >90% environmental improvement

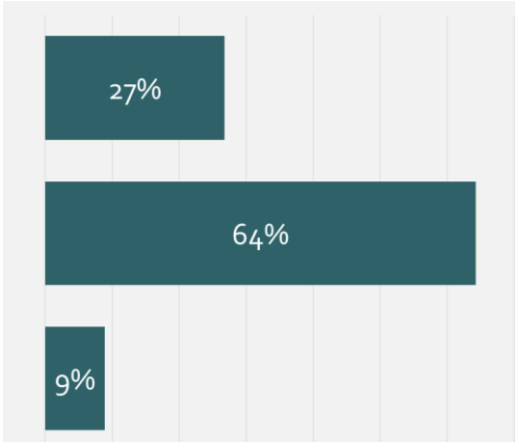




"as humans we kind of get sucked into the city life and forget that there's actually wildlife out there and things that we are destroying"
Male, ABC1, 18-45

Customer support for protecting and/or improving the environment

- Strong support for protecting the environment even when considering trade-offs with water restrictions – customers expect both supply resilience and environmental protection



Option 1
- More frequent, less severe restrictions like hose pipe bans
- so there is less risk of severe restrictions like rota cuts
- but there may still be a need to take water from the environment at times of water shortages

Option 2
- More frequent, less severe restrictions like hose pipe bans
- so that additional water does not need to be taken from the environment at times of water shortages
- but the risk of severe restrictions stays the same

Option 3
- No change to the frequency of less severe restrictions like hose pipe bans
- even if the risk of severe restrictions may increase
- and there may still be a need to take water from the environment at times of water shortages

"I don't think we should be taking water, which is a natural thing, from the environment, just because we can't sort of have shorter showers, or regulate things properly"
Male, ABC1, 18-45

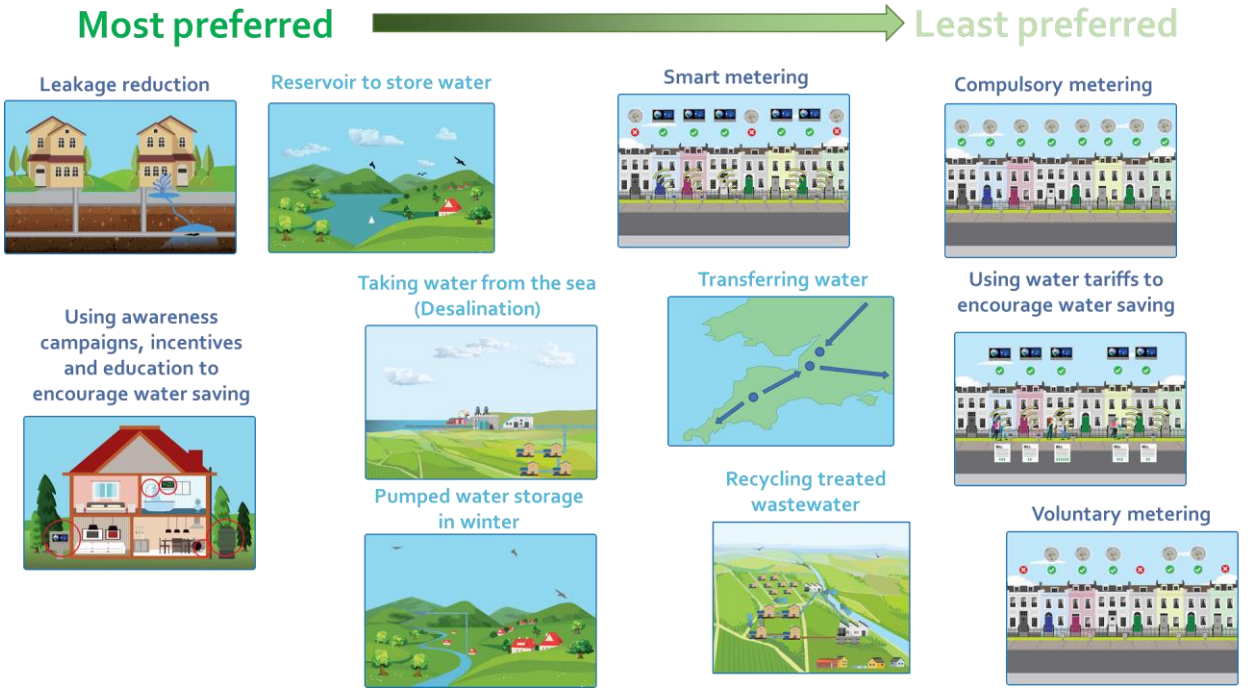
"less severe restrictions like hosepipe bans are something we can all manage in our daily lives, but the effect on the environment would actually be the greater risk, so I would choose to go with less environmental damage"
Male, ABC1, 18-45

Customer preferences for supply or demand options

- Leakage seen as waste so high priority – however some customers are starting to recognise the challenges in reducing leakage
- Supply options tend to be preferred over demand
  - Water planning exercise emphasised this further as highlighted "real" implications
- Consistently very low support for voluntary metering – linked to messaging about whether customers trust people to reduce demand consistently

"fix the initial problem of the actual mains, then you're solving part of the issue" technology's out there to do it, but they're just not willing to do it"
Male, 18-45

"if you increase the supply, then hopefully then you won't need to take as much from the environment"
Male, Future customer, 18-24



Customer views on sharing water including with other sectors

- Customers generally supportive of sharing water between water companies in the south west
  - Strong support for sharing water if it means the environment is protected
  - Typically customers expect recipients of water to meet same standards for leakage, usage, metering etc
  - c.50% support water resource planning at a national level (England)
- Support for sharing with other sectors was more nuanced
  - Agriculture often highlighted as important to share and support
  - Industry and other users had more mixed reactions – often provoking comments regarding profits/fat cats/benefits to society etc
  - Overall customers were less aware of other users and any potential implications

"if they're growing crops, if they've got livestock, then we absolutely need to make sure they have enough water to keep that going"
Male, C2DE, 18-45

"I'd be a bit nervous ..... if they come back and they want ours and we only have enough for ourselves"
Female, C2DE, 18-24

Customer views on how much the water companies should plan ahead, given future uncertainties

- 90% of customers supported investment in new supply options
  - Uncertainties presented as the risk the supply options may not be needed or the wrong size
- Consistent with their priority for supply resilience and protecting the environment
- Sometimes customers caveated that cost must be equitable and spread out over the life of the asset

"I think with reservoirs, that should be something that's implemented now. Because even though – alright, the demand might not be there – if we've got these infrastructures in place then come 10-20 years down the line, when the demand is there, we don't want to be in a position where there's rota cuts and stuff, we'd rather be ahead of the game"
Male, Future customer, 18-25

"You've only got to look at the Covid thing that's happened.... if you can plan for the future now, there's less of a panic."
Female, C2DE, 18-45

WCWRG Customer and Stakeholder Research – Household survey

Main Survey – Household

Version date: 24th January 2022

RECORD:
RESPONDENT ID
DATE OF INTERVIEW
SURVEY MODE
VERSION
START TIME
FINISH TIME
DURATION

INTRODUCTION

The West Country Water Resource Group (WCWRG) was formed in 2017. It is a partnership of the three water companies that supply the West Country – Bristol Water, South West Water (including Bournemouth Water), and Wessex Water. WCWRG is responsible for producing a long-term, strategic plan for managing water resources in the region for households and businesses.

MAP 1: THUMBNAIL ROLLOVER - MAP OF SW ENGLAND AND 3 COMPANY AREAS SHOWN

The WCWRG plan will set out the actions and investments that are needed from 2025 to 2080 to ensure there is a secure water supply system for everyone in the region. This includes actions to increase resilience to droughts, adapt to climate change, and help protect and enhance the environment.

Your responses to this survey will help WCWRG understand customer views on some of the important choices for putting together the best long-term plan for the region. Your views, along with input from other organisations - public bodies, other water users including farming and industry, and interest groups - will help shape the approach that is taken forward.

The survey will last about 15 minutes and it is important that as many people as possible complete it. All answers that you give will be treated in confidence. The information we collect will be used for research purposes only and the data will be analysed at an overall level. It will not be possible to identify any particular individual or address in the results.

Our privacy policy which outlines how we collect and use your information can be viewed here.

LINK TO SURVEY SCRIPTER PRIVACY POLICY.

SECTION A: RESPONDENT SCREENING & QUOTAS

NEW SCREEN; TIME STAMP

Please can you confirm your full postcode (e.g. LS4 5AB, M18 2SE)? This will help us confirm your water supply company and the area where you live.

WCWRG is working with a partner agency, Watermelon Research, who host this survey, collate your responses and hold them for the duration of the project. Your postcode information will only be used to determine your water supply company. It will not be stored and it will not be passed on to any other party. Watermelon Research adhere to the General Data Protection Regulation (GDPR) and Data Protection Act (DPA 2018) and secure handling of data. To read more about Watermelon Research and to view their privacy policy, including how your data is used please click HERE. Some data will be held by the project lead beyond the completion of the project for verification purposes, but will not contain any personally identifiable information.

Q1. Please enter your home postcode below:

RESPONSE OPTIONS

1 FULL POSTCODE – VALIDATE AGAINST LOOK-UP LIST

2 I don't want to give my postcode

AUTOCODE WATER COMPANY

Q1A RECORD IF IOS POSTCODE IN SWW REGION

ASK IF Q1 = 1; DISPLAY BASED ON POSTCODE LOOK-UP

Q2. Please confirm the following is correct:

A **Your water supply company is** [WATER COMPANY FROM LOOK-UP]

RESPONSE OPTIONS

1 YES

2 NO

3 Don't know

IF Q2 = 1 RECORD WATER COMPANY FROM LOOK-UP

Q2A

1 Bournemouth Water

2 Bristol Water

3 South West Water

4 Wessex Water

Q2B. ASK IF Q1 = 2 OR Q2 = 2 **Which company provides your water supply?**

SINGLE CODE

1	Bournemouth Water	CONTINUE
2	Bristol Water	CONTINUE
3	South West Water	CONTINUE
4	Wessex Water	CONTINUE
6	Other	THANK & CLOSE
6	Don't know	THANK & CLOSE

NEW SCREEN - RESPONDENT QUOTA QUESTIONS

Q3. Are you responsible for paying the utilities' bills in your household (such as water, electricity, and gas), or are you jointly responsible with someone else?

SINGLE CODE

1	Solely responsible	CONTINUE
2	Jointly responsible	CONTINUE
3	Not responsible	THANK & CLOSE
4	Don't know	THANK & CLOSE

Q4. Please can you indicate your age:

SINGLE CODE

1	16-17	THANK & CLOSE
2	18-24	CONTINUE
3	25-30	CONTINUE
4	31-44	CONTINUE
5	45-54	CONTINUE
6	55-64	CONTINUE
7	65-74	CONTINUE
8	75+	CONTINUE

AUTOCODE AGE QUOTAS

Q5. Please indicate your gender:

SINGLE CODE

1	Male
2	Female
3	Prefer to identify another way
4	Prefer not to say

Q6. Are you the main income earner in your household?

SINGLE CODE

1	Yes	ASK Q7
2	No	ASK Q7
3	Joint – my partner and I earn similar incomes	ASK Q7
4	No income earners	AUTOCODE Q7 = 6 AND SKIP TO SECTION B

Q7. ASK IF CODE 1 OR 2 AT Q7 **Main income earner's occupation (if the main income earner is retired, please select their occupation before retirement).**

Rollover each occupation type for more information.

ROLLOVER 1: MORE INFORMATION ON OCCUPATION

SINGLE CODE

1	Higher managerial, administrative or professional	A
2	Intermediate managerial, administrative or professional	B
3	Supervisory or clerical and junior managerial, administrative or professional	C1
4	Skilled manual worker	C2
5	Semi or unskilled manual worker	D
6	Casual worker, dependent on state pension only, or dependent on state welfare	E

SECTION B: THE WCWRG PLAN

TIME STAMP

The WCWRG long-term plan for managing water supplies will:

- **Make sure there is enough water available to meet the needs of households and businesses in the West Country, reducing the chance of water shortages that could occur in the event of an extreme drought; and**

- **Help to protect and improve the environment by taking less water from sensitive habitats, and where possible use options that have a positive impact on biodiversity and the quality local environment for people and communities.**

The WCWRG plan will set out which options will be used to achieve this, including:

- **New sources of water supply, such as new reservoirs or extending existing ones, or pipelines to move water around the West Country**

- **Measures to help households and businesses use less water**

- **Improving the water supply network to reduce leakage from pipes**

Each of these options has pros and cons and the plan will need to find a balance between the extra water made available, improvements to the environment, and the cost to customers. It will also need to balance meeting targets in coming years for water companies to reduce leaks, reduce water use by customers, and reduce carbon emissions.

NEW SCREEN

Understanding the views of customers is important for WCWRG to find the right balance in the plan, including which options to take forward and how quickly to roll them out.

The next few screens provide some extra information about the plan, what it would achieve and some of the wider considerations for WCWRG. You will then also be asked for your views on them. Please read the information carefully as it will help you answer the questions in the rest of the survey.

WATER SHORTAGES AND TOLERANCE FOR POTENTIAL DROUGHT IMPACTS
TIME STAMP

Water companies need to prepare for drought conditions and want to understand customer views on various actions that might be needed to save water. Voluntary and less severe restrictions on water use would be applied first, but in extreme drought conditions more severe restrictions may be needed. Actions taken now to increase the resilience of the water supply system will impact not only your current household, but also wider society and future generations.

SHOWCARD 1: INCREASING THE RESILIENCE OF THE WATER SUPPLY SYSTEM

Q8. How aware were you of the level of disruption that would be caused by severe water use restrictions – rota-cuts and standpipes - during drought if they were needed to be used?

SINGLE CODE

1 Very aware
2 Somewhat aware
3 Not at all aware
4 Don't know

Q9. If severe water use restrictions during drought were needed, how much do you think each of the following would impact on your life?

RESPONSE OPTIONS

A A lot
B Somewhat
C Not much
D None at all
E Don't know

STATEMENTS
ROTATE

1 Running water only available for 2-4 hours per day (no water from taps the rest of the time, including for household appliances such as washing machines and dishwashers, and no flushing toilets outside of this time)
2 Significant reductions in water pressure (water would be available from taps, but with a very slow flow)
3 Reduce overall household water use, such as by limiting showers to 4 minutes per day (the average shower time in England is around 7-8 minutes), and limiting the use of washing machines and the water available for washing dishes
4 Closure of restaurants and cafes, leisure centres and gyms, and other service establishments due to health and safety (no water available for flushing toilets or sprinkler systems)
5 Closure of schools and childcare services due to no water being available for use during the day
6 Closure of public transport (e.g. rail stations) due to health and safety (no water available for flushing toilets or sprinkler systems)

PROTECTING AND IMPROVING THE ENVIRONMENT
TIME STAMP

Water companies are required to reduce the negative impact they have on the rivers and other sources of water supply and take steps to further protect and improve the wider environment. Reducing water abstraction will help protect sensitive habitats, but water companies can go beyond this to enhance biodiversity and ensure that the environment benefits local communities.

SHOWCARD 2: PROTECT AND IMPROVE THE ENVIRONMENT

Q10. Improving the environment by reducing water taken from sensitive habitats will mean that other water supply sources will need to be developed and that people will have to use less water. To what extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

SINGLE CODE

1 Water companies should build new storage options (e.g. reservoirs to protect the environment and minimise the chance of severe water use restrictions during drought.
2 Fixing leaks in the water supply network is the best way to reduce the amount of water taken from the environment – even if it means that disruption from roadworks would increase and customer bills would go up to pay for it
3 The priority for water companies should be to minimise the risk of people being affected by severe water use restrictions during drought – even if that means less protection for the environment
4 I'm happy to help protect the environment by taking steps to reduce the amount of water I use by using water saving devices and fixing dripping taps, and limiting the amount of water I use for showering, washing clothes and gardening

CARBON REDUCTION
TIME STAMP

The actions water companies take to supply water produce carbon emissions. All companies are working to reduce and minimise as far possible the overall level of carbon from their activities. Currently there is a commitment for the water companies to balance carbon emissions from day-to-day activities (i.e. "net zero") by 2030. Water companies can also act to go beyond current commitments to reduce carbon. These actions will increase their contribution to reducing the future impacts of climate change.

SHOWCARD 3: REDUCING CARBON EMISSIONS

Q11. Do you think that water companies should go beyond current commitments and invest in reducing their carbon emissions faster than current plans - even if it meant using funds that could be used to improve service or reduce costs?

SINGLE CODE

1 Yes – reducing carbon emissions to help tackle climate change should be the main priority
2 Yes – reducing carbon emissions is important, but it is not the only important thing to consider
3 Maybe – it depends on the amount of investment required, and what the money would be spent on otherwise
4 No – the agreed targets are sufficient and once met the focus should be on delivering other priorities
5 No – the agreed targets already go too far and water companies should focus on other priorities
6 Don't know
7 Other

REDUCING WATER LEAKAGE
TIME STAMP

SHOWCARD 4: REDUCING LEAKAGE FROM PIPES

One of the ways water companies can reduce the amount of water taken from the environment is by reducing leakage from pipes. Water companies can invest more to further reduce leakage beyond standard fix and repair actions, or they can focus resources on other priorities.

Q12. What extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

1 It should be the responsibility of customers to fix leaks on their own property
2 The level of leaks and loss of water from the water supply network should be minimised as far as possible regardless of the cost
3 The cost of fixing leaks on customers' property should be shared across all customers
4 Leaks should only be fixed if the benefits of reducing lost water outweigh the repair costs
5 Leaks should be fixed even if the repair or replacement of pipes causes significant disruption to local communities through extensive roadworks

CUSTOMER WATER USE
TIME STAMP

One of the ways water companies can reduce the amount of water taken from the environment is by helping households reduce their water use. If all households across the West Country reduce their water use, it can lower demand for water and help maintain more water in the environment.

SHOWCARD 5: HELPING TO REDUCE THE AMOUNT OF WATER PEOPLE USE

Q13. To what extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

1 Everyone can play a role in saving and using water wisely to ease the pressure on this finite resource
2 I would be happy to reduce my water use if I was given recommendations on changes that I could make
3 New buildings should be required to be more water efficient
4 Government and water companies should support households to save water, for example by providing water saving devices and encouraging them to less use
5 Government should set a target for the amount of water that households can use in the future
6 I would be interested in having a smart meter to help me understand my water usage
7 I am already doing everything I can to help save water

TIME STAMP

Water companies must consider a range of factors when planning water supply to customers.

Q14. The long-term plan for managing water supplies in the West Country will need to find a balance between the extra water made available, improvements to the environment, the cost to customers, and meeting targets to reduce leakage, water use and carbon emissions. Please can you rank each of the following in order from the "most important" to the "least important" to you:

RANKING

A Most important
B 2nd most important
C 3rd most important
D 4th most important
E 5th most important
F Least important

STATEMENTS

ROTATE

1 Improving how the water system copes with drought and unexpected events to make sure there is always enough water available for customers and businesses
2 Protecting and improving the environment, including by using options that reduce the amount of water taken from sensitive habitats
3 Reducing the carbon emissions from supplying water
4 Reducing leaks from pipes across the water supply network
5 Helping customers to reduce their water use
6 Making sure that the plan is affordable for all customers

SECTION C: CHOICE TASK

In the next set of questions, you will be shown different options for the WCWRG plan and how far it goes to:

- **Increase the resilience of the water supply system to reduce the chance of severe water use restrictions being needed during an extreme drought**

- **Protect and improve the environment by reducing the amount of water taken from sensitive habitats, as well as improving biodiversity and having a positive impact on the local environment for people and communities**

Alongside:

- **Reducing carbon emissions**
- **Reducing leaks from pipes**
- **Helping to reduce the amount of water people use, and**
- **The impact on customers' bills**

You will be shown several different options for the plan – each time comparing between three possible options. You will be asked which option you prefer most, and then of the remaining two, which you prefer. An example is shown below.

EXAMPLE CHOICE CARD – MOCK UPS

There will be 8 of these questions in total. When answering them, please take your time to carefully read the descriptions that are provided. The responses to these questions will be used by WCWRG to help put together the long-term plan for managing water supplies in the region.

NEW SCREEN – BUDGET REMINDER

DISPLAY BUDGET REMINDER 1 IF Q2A = 1, 2 OR 4; OR Q2B = 1, 2, OR 4

DISPLAY BUDGET REMINDER 2 IF Q2A = 3 OR Q2B = 3

NEW SCREEN

[FOR THE FIRST QUESTION] **Please consider these three different options for the WCWRG plan.**

PRESENT 1ST CHOICE CARD
USE PROGRESSIVE RESPONSE FORMAT [BEST / 2ND BEST]
FIRST PREFERENCE QUESTION **Which option do you prefer?**
SECOND PREFERENCE QUESTION **Of the remaining two, which option do you prefer?**

REPEAT FOR CHOICES 2 – 8

RECORD CHOICE CARD NUMBER
INCLUDE TIME STAMPS FOR EACH CHOICE CARD
INCLUDE 3 SECOND DELAY BEFORE NEXT CHOICE CARD APPEARS

CHOICE	MOST PREFERRED	2ND MOST PREFERRED	LEAST PREFERRED
CARD 1			
CARD 2			
…			
CARD X			

SECTION D: FOLLOW-UP QUESTIONS

TIME STAMP

Q15. Thank you for answering those questions. Considering the information and instructions provided, how easy or difficult was it to answer which option for WCWRG plan was your most preferred?

SINGLE CODE

1	Very easy	GO TO Q17
2	Fairly easy	GO TO Q17
3	Neither easy nor difficult	GO TO Q17
4	Fairly difficult	ASK Q16
5	Very difficult	ASK Q16

Q16. ASK IF CODE 4 OR 5 AT Q15 **Were the questions difficult to answer because…?**

1	It was hard to decide which options were best	
2	Not enough information was provided about the choices to help you answer	
3	The instructions for the questions were not clear	
4	Other (please state)	RECORD

Q17. How important was each part of the options that you were shown to the choices that you made?

RESPONSE OPTIONS

1 Very important (considered it in all choices)
2 Quite important (considered it in most choices)
3 Not very important (ignored it in most choices)
4 Not at all important (ignored it in all choices)
5 Don't know

ROTATE ATTRIBUTE LIST

A Risk of severe water use restrictions during drought
B Protect and improve the environment
C Reducing carbon emissions
D Reducing leakage from pipes
E Helping to reduce the amount of water people use
F The impact on customer bills

Q18. To what extent did you consider the following when making your choices?

RESPONSE OPTIONS

1 A lot
2 Somewhat
3 A little
4 Not at all
5 Don't know

LIST
ROTATE

A The impact that the WCWRG plan would have on my household
B The impact that the WCWRG plan would have on other people I know (e.g. family and friends)
C The impact that the WCWRG plan would have on my neighbourhood and community (e.g. your town)
D The impact that the WCWRG plan would have on wider society (e.g. the West Country, the UK)
E The impact that the WCWRG plan would have on businesses and the economy

Q19. The overall cost of the long-term plan to 2080 will depend on the specific options – actions and investments – that are eventually put forward. To what extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree
F Don't know

STATEMENTS
ROTATE

1 My household would be prepared to pay more on our water bill to reduce the likelihood that severe water use restrictions during drought would be needed in the future (from around 2030 onwards)
2 My household would be willing to pay more on our water bill so that customers who are less able to pay have lower and more affordable bills
3 My household would be prepared to pay more on our water bill to protect the environment, even if the area protected is not somewhere we would visit.
4 The investments required by the plan should not increase water bills for customers
5 Water bill increases would be acceptable if financial assistance schemes were in place to protect the most vulnerable customers
6 My household would prefer to keep bills as low as possible now even if that means future generations will see reductions in service reliability and/or larger bill increases

As part of the long-term plan that is being developed, WCWRG is looking at options to make it easier to move and share water between places – including between the West Country companies (Bristol Water, South West Water (including Bournemouth Water and Wessex Water) and other parts of the country (e.g. the South East and Midlands).

Q20. To what extent do you agree with the following statements about sharing water?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

1 We all live in the same country and we should all share our water
2 No area of the country should be dependent on water being transferred in from elsewhere
3 It's ok to share within a region but not across the whole country
4 If one area of the country has more water than it needs then it makes sense to share

---

Q21. If water was being moved from your area to another part of the West Country or another part of the country where there is less available – which of the following would be most important to you?

Please rank what assurances would you need for this to be acceptable order from the "most important" to the "least important" to you?

RANKING

A Most important
B 2nd most important
C 3rd most important
D Least important

STATEMENTS
ROTATE

1 The quality of my water supply must stay the same (e.g. taste, appearance, level of hardness, etc.)
2 The risk of severe water use restrictions during drought must not increase to be more than the area where the water is going to (i.e. the chance of disruption to water supply remains lower in the area giving the water than in the area the water is going to)
3 That the area where the water is going has reduced leaks from pipes as far as possible
4 That everyone in the area that the water is going to was doing their bit to use less water

---

Q22. Given the repair works required to reduce leakage, how bothered would you be by the impact that each of the following would have on your life?

RESPONSE OPTIONS

A A lot
B Somewhat
C Not much
D None at all
E Don't know

STATEMENTS
ROTATE

1 The increase in traffic and travel time due to disruption caused by replacing pipes in streets
2 The nuisance to residential areas caused by replacing pipes (e.g. dust in the air, noise from work)
3 The disruption to businesses caused by replacing pipes (e.g. blocked parking and access)
4 The need for households to fix leaking pipes on their property (and associated costs)
5 The need for businesses to fix leaking pipes on their property (and associated costs)

SECTION E: RESPONDENT PROFILE

TIME STAMP

Thank you for answering those questions. The final part of the survey is about you and your household. This information will help check that we have surveyed a range of customers.

Q23. How long have you lived in the West Country region?

DISPLAY WCWRG THUMBNAIL AND ROLLOVER MAP

SINGLE CODE

1 Less than 1 year
2 2 years
3 3 – 5 years
4 6 – 10 years
5 11 – 20 years
6 21 – 30 years
7 More than 30 years
8 Prefer not to say

Q24. Does your property have a water meter?

SINGLE CODE

1 Yes
2 No
3 Don't know

Q25. Do you live in…?

SINGLE CODE

1 City or town centre (i.e. close to main retail and commercial areas)
2 Suburbs or housing development on edge of town or city (i.e. mostly residential area)
3 Mainly rural area (i.e. countryside or village)
4 Other [RECORD]

Q26. Which of the following best describes your household?

SINGLE CODE

1 Single working age adult
2 Single retired age adult
3 Two adults of working age
4 Two adults of retired age
5 Two adults, one working age, one retired age
6 More than two adults, no children (below 18 years old)
7 Single parent family with fewer than 3 children (below 18 years old)
8 Two parent family with fewer than 3 children (below 18 years old)
9 Family with 3 or more children (below 18 years old)
10 Other [RECORD]
11 Prefer not to say

Q27. How many people in your household, including yourself, are there in each of the following age groups?

NUMERICAL DROPDOWN (INCLUDE ZERO)

AGE GROUP

1 Up to 5 years (less than 5 years)
2 5 to 15 years
3 16 to 64 years
4 65+ years

NEW SCREEN

Q28. Do any of the following apply to you or any members of your household?

RESPONSE OPTIONS

1 No
2 Yes – me
3 Yes – household member
4 Prefer not to say

VULNERABLE CUSTOMER

1 Have restricted mobility or disability
2 Have chronic illness and/or on dialysis
3 Need a constant supply of water for medical equipment and medication
4 Are blind or partially sighted
5 Are deaf or hard of hearing
6 Have a mental health condition
7 Have additional communication needs (language, dyslexia or learning difficulties)
8 Are of pensionable age
9 Are in a vulnerable situation, e.g. recovering from an operation/accident or just had a baby/have children under 5
10 Are an unpaid carer for a person with any of the above

Q29. All water companies have a Priority Services Register. Have you heard of this?

The Priority Services Register (PSR) is the water company's register of vulnerable customers and offers extra support to customers with additional needs. This support includes communications in Braille, large print or a language other than English, a password system to help protect against bogus callers and extra assistance in the event of water supply interruptions (e.g. bottled water delivered). The register means the water company can identify and respond quickly to the needs of customers who require extra care and they are able to offer extra consideration for those who are older, have a disability or additional needs.

SINGLE CODE

1	Yes	ASK Q30
2	No	SKIP TO Q32
3	Don't know	SKIP TO Q32

Q30. SHOW IF CODE 1 AT Q23 **Is your household registered with your current water supplier(s) Priority Services Register?**

SINGLE CODE

1	Yes	ASK Q31
2	No	SKIP TO Q32
3	Don't know	SKIP TO Q32

Q31. SHOW IF CODE 1 AT Q29 **Please can you indicate the reason(s) that your household is registered on the Priority Services Register?**

MULTICODE

1 Medically dependent on water such as kidney dialysis, medical conditions that require showers or baths to ease conditions or need water to take medication
2 Physical issues, such as limited mobility or have young children that make it difficult to leave the house to collect water supplies from shops or water collection points
3 Need information in alternative formats e.g. large format bills/braille bills
4 Other [RECORD]

NEW SCREEN

Q32. Which of the following best describes your current employment status?

SINGLE CODE

1 Self-employed
2 Employed full-time (30 hours per week or more)
3 Employed part-time (8 – 29 hours per week)
4 Employed working less than 8 hours a week
5 Student
6 Unemployed – seeking work
7 Unemployed – not seeking work/other
8 Looking after the home/children full-time
9 Retired
10 Unable to work due to temporary sickness
11 Unable to work due to long-term sickness or disability
12 Other [RECORD]
13 Prefer not to say

Q33. At what level did you complete your education? If you are still studying, which level best describes the highest level of education you have obtained until now?

SINGLE CODE

1 O levels / CSEs / GCSEs (any grades)
2 A levels / AS level / higher school certificate
3 NVQ (Level 1 and 2). Foundation / Intermediate / Advanced GNVQ / HNC / HND
4 Other qualifications (e.g. City and Guilds, RSA/OCR, BTEC/Edexcel)
5 First degree (e.g. BA, BSc)
6 Higher degree (e.g. MA, PhD, PGCE, post graduate certificates and diplomas)
7 Professional qualifications (teacher, doctor, dentist, architect, engineer, lawyer, etc.)
8 No qualifications
9 Prefer not to say

Q34. Please can you indicate your total household income before tax and other deductions (including pensions)?

Please note this information will be used to check that we have surveyed a range of customers. It will be not be possible to identify any particular individual or address in the results.

SINGLE CODE

	Per month	Per year
1	Up to £499	Up to £5,999
2	£500 - £1,083	£6,000 - £12,999
3	£1,084 - £1,365	£13,000 - £16,385
4	£1,366 - £1,646	£16,386 - £19,747
5	£1,647 - £2,166	£19,748 - £25,999
6	£2,167 - £2,666	£26,000 - £31,999
7	£2,667 - £3,000	£32,000 - £35,999
8	£3,001 - £3,500	£36,000 - £41,999
9	£3,501 - £4,000	£42,000 - £47,999
10	£4,001 - £5,333	£48,000 - £63,999
11	£5,334 - £7,999	£64,000 - £95,999
12	£8,000 and over	£96,000 and over
13	Don't know	
14	Prefer not to say	

Q35. The Covid pandemic, increasing household bills and price rises have affected household finances. Please could you indicate whether your household situation has improved or gotten worse over the past 12 months and what you expect over the next 12 months?

RESPONSE OPTIONS

A Much improved
B Somewhat improved
C About the same
D Somewhat worse
E Much worse

STATEMENTS

1 How has the financial situation of your household changed over the last 12 months?
2 How do you expect the financial position of your household to change over the next 12 months?

Q36. Thinking about your current situation and household bills, how affordable is your water bill?

SINGLE CODE

1 I do not have any problems in paying my water bill
2 I rarely find it difficult to pay my water bill
3 I sometimes find it difficult to pay my water bill
4 I always find it difficult paying my water bill
5 Prefer not to say

Q37. Which the following best describes your ethnic group?

SINGLE CODE

1 White British
2 White Irish
3 Any other White background (please specify)
4 Mixed – White and Black Caribbean
5 Mixed – White and Black African
6 Mixed – White and Asian
7 Any other Mixed background (please specify)
8 Indian
9 Pakistani
10 Bangladeshi
11 Any other Asian background (please specify)
12 Black Caribbean
13 Black African
14 Any other Black background (please specify)
15 Chinese
16 Other [RECORD]
17 Prefer not to say

NEW SCREEN – CURRENT WATER BILL

Q38. What is the total amount your household pays for both water and sewerage services?

A RECORD – ALLOW £ PER MONTH OR £ PER YEAR
B APPROX. AMOUNT

SINGLE CODE – RANGES

1	Less than £13 per month	Less than £150 per year
2	£13 - £16 per month	£151 - £200 per year
3	£17 - £20 per month	£201 - £250 per year
4	£21 - £24 per month	£251 - £300 per year
5	£25 - £28 per month	£301 - £350 per year
6	£29 - £32 per month	£351 - £400 per year
7	£33 - £37 per month	£401 - £450 per year
8	£38 - £41 per month	£451 - £500 per year
9	£42 - £45 per month	£501 - £550 per year
10	£46 - £50 per month	£551 - £600 per year
11	More than £50 per month	More than £600 per year
12	Don't know	Don't know

Q39. Considering all of the information that you have been given, overall, how easy or difficult was it to answer the questions in this survey?

SINGLE CODE

1 Very easy
2 Fairly easy
3 Neither easy nor difficult
4 Fairly difficult
5 Very difficult
6 Don't know / prefer not to say

Q40. Finally, did you think this survey was (select all that apply):

MULTICODE

1 Interesting
3 Too long
4 Difficult to understand
5 Educational
6 Unrealistic / not credible
7 Other [RECORD]

8 None of these

SURVEY CLOSE

That's the end of the survey; please ensure you click on the continue button to submit your answers. Thank you for your time and help, it is very much appreciated.

Priority Services Register

More information about the Priority Services Register and other support that may be available, is provided here:
https://www.ccwater.org.uk/households/extra-free-help-priority-services/

TIME STAMP

WCWRG Customer and Stakeholder Researcher – Non-household survey

Main Survey – non-household
Version date: 7th February 2022

RECORD:
RESPONDENT ID
DATE OF INTERVIEW
SURVEY MODE
VERSION
START TIME
FINISH TIME
DURATION

INTRODUCTION

The West Country Water Resource Group (WCWRG) was formed in 2017. It is a partnership of the three water companies that supply the West Country – Bristol Water, South West Water (including Bournemouth Water), and Wessex Water. WCWRG is responsible for producing a long-term, strategic plan for managing water resources in the region for households and businesses.

MAP 1: THUMBNAIL ROLLOVER - MAP OF SW ENGLAND AND 3 COMPANY AREAS SHOWN

The WCWRG plan will set out the actions and investments that are needed from 2025 to 2080 to ensure there is a secure water supply system for everyone in the region. This includes actions to increase resilience to droughts, adapt to climate change, and help protect and enhance the environment.

Your responses to this survey will help WCWRG understand customer views on some of the important choices for putting together the best long-term plan for the region. Your views, along with input from households and other organisations - public bodies, other water users including farming and industry, and interest groups - will help shape the approach that is taken forward.

The survey will last about 15 minutes and it is important that as many people as possible complete it. All answers that you give will be treated in confidence. The information we collect will be used for research purposes only and the data will be analysed at an overall level. It will not be possible to identify any particular individual or address in the results.

Our privacy policy which outlines how we collect and use your information can be viewed here.

LINK TO SURVEY SCRIPTER PRIVACY POLICY.

SECTION A: RESPONDENT SCREENING & QUOTAS

NEW SCREEN; TIME STAMP

Q0. Please can you confirm that you are the person who is responsible for your organisation's decision-making with respect to utility services, and in particular water and wastewater services?

Please answer all questions in this survey on behalf of your organisation.

RESPONSE OPTIONS

1	YES	CONTINUE
2	NO	THANK & CLOSE

Q1. Please can you confirm the full postcode of your organisation (e.g. LS4 5AB, M18 2SE)? This will help us confirm your water services supply company and the area where your organisation is based.

If your organisation has multiple sites, please provide the location where you are based.

WCWRG is working with a partner agency, Watermelon Research, who host this survey, collate your responses and hold them for the duration of the project. Your postcode information will only be used to determine your water supply company. It will not be stored and it will not be passed on to any other party. Watermelon Research adhere to the General Data Protection Regulation (GDPR) and Data Protection Act (DPA 2018) and secure handling of data. To read more about Watermelon Research and to view their privacy policy, including how your data is used please click HERE. Some data will be held by the project lead beyond the completion of the project for verification purposes, but will not contain any personally identifiable information.

RESPONSE OPTIONS

1	FULL POSTCODE – VALIDATE AGAINST LOOK-UP LIST
2	I don't want to give my postcode

AUTOCODE WATER COMPANY

Q1A RECORD IF IOS POSTCODE IN SWW REGION

ASK IF Q1 = 1; DISPLAY BASED ON POSTCODE LOOK-UP

Q2. Please confirm the following is correct:

A **Your organisation's water supply company is** [WATER COMPANY FROM LOOK-UP]

RESPONSE OPTIONS

1 YES
2 NO
3 Don't know

IF Q2 = 1 RECORD WATER COMPANY FROM LOOK-UP

Q2A

1 Bournemouth Water
2 Bristol Water
3 South West Water
4 Wessex Water

Q2B. ASK IF Q1 = 2 OR Q2 = 2 **Which company provides your water supply?**

SINGLE CODE

1	Bournemouth Water	CONTINUE
2	Bristol Water	CONTINUE
3	South West Water	CONTINUE
4	Wessex Water	CONTINUE
6	Other	THANK & CLOSE
6	Don't know	THANK & CLOSE

Q3. What is the main activity of your organisation?

SINGLE CODE

1 Agriculture, forestry and fishing
2 Mining and quarrying
3 Manufacturing
4 Electricity, gas, steam and air conditioning supply
5 Water supply; sewerage, waste management and remediation activities
6 Construction
7 Wholesale and retail trade; repair of motor vehicles and motorcycles
8 Transportation and storage
9 Accommodation and food service activities
10 Information and communication
11 Financial and insurance activities
12 Real estate activities
13 Professional, scientific and technical activities
14 Administrative and support service activities
15 Public administration and defence; compulsory social security
16 Education
17 Human health and social work activities
18 Arts, entertainment and recreation
19 Other service activities
20 Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use
21 Activities of extraterritorial organizations and bodies

AUTOCODE SECTOR

1	Primary industry, such as agriculture and mining	CODE 1 - 2
2	Secondary industry, such as manufacturing and construction	CODE 3 - 6
3	Tertiary industry, such as retail and services	CODE 7 – 21

SECTION B: THE WCWRG PLAN

TIME STAMP

The WCWRG long-term plan for managing water supplies will:

- **Make sure there is enough water available to meet the needs of households and businesses in the West Country, reducing the chance of water shortages that could occur in the event of an extreme drought; and**

- **Help to protect and improve the environment by taking less water from sensitive habitats, and where possible use options that have a positive impact on biodiversity and the quality of the local environment for people and communities.**

The WCWRG plan will set out which options will be used to achieve this, including:

- **New sources of water supply, such as new reservoirs or extending existing ones, or pipelines to move water around the West Country**

- **Measures to help households and businesses use less water**

- **Improving the water supply network to reduce leakage from pipes**

Each of these options has pros and cons and the plan will need to find a balance between the extra water made available, improvements to the environment, and the cost to customers. It will also need to balance meeting targets in coming years for water companies to reduce leaks, reduce water use by customers, and reduce carbon emissions.

NEW SCREEN

Understanding the views of customers is important for WCWRG to find the right balance in the plan, including which options to take forward and how quickly to roll them out.

The next few screens provide some extra information about the plan, what it would achieve and some of the wider considerations for WCWRG. You will then also be asked for your organisation's views on them. Please read the information carefully as it will help you answer the questions in the rest of the survey.

WATER SHORTAGES AND TOLERANCE FOR POTENTIAL DROUGHT IMPACTS
TIME STAMP

Water companies need to prepare for drought conditions and want to understand customer views on various actions that might be needed to save water. Voluntary and less severe restrictions on water use would be applied first, but in extreme drought conditions more severe restrictions may be needed. Actions taken now to increase the resilience of the water supply system will impact not only your organisation, but also wider society and future generations.

SHOWCARD 1: INCREASING THE RESILIENCE OF THE WATER SUPPLY SYSTEM

Q4. How aware were you of the level of disruption that would be caused by severe water use restrictions – rota-cuts and standpipes - during drought if they were needed to be used?

SINGLE CODE

1 Very aware
2 Somewhat aware
3 Not at all aware
4 Don't know

Q5. If severe water use restrictions during drought were needed, how much do you think each of the following would impact on your organisation?

RESPONSE OPTIONS

A A lot
B Somewhat
C Not much
D None at all
E Don't know

STATEMENTS

ROTATE

1 Running water only available for 2-4 hours per day (no water from taps the rest of the time)
2 Significant reductions in water pressure (water would be available from taps, but with a very slow flow)
3 Reducing domestic uses of water, such as by limiting showers to 4 minutes per day (the average shower time in England is around 7-8 minutes), and limiting the use of washing machines and the water available for washing dishes
4 Closure of businesses such as restaurants and cafes, leisure centres and gyms, and other service establishments due to health and safety (no water available for flushing toilets or sprinkler systems)
5 Closure of schools and childcare services due to no water being available for use during the day
6 Closure of public transport (e.g. rail stations) due to health and safety (no water available for flushing toilets or sprinkler systems)

PROTECTING AND IMPROVING THE ENVIRONMENT
TIME STAMP

Water companies are required to reduce the negative impact they have on the rivers and other sources of water supply and take steps to further protect and improve the wider environment. Reducing water abstraction will help protect sensitive habitats, but water companies can go beyond this to enhance biodiversity and ensure that the environment benefits local communities.

SHOWCARD 2: PROTECT AND IMPROVE THE ENVIRONMENT

Q6. Improving the environment by reducing water taken from sensitive habitats will mean that other water supply sources will need to be developed and that households and businesses will have to use less water. To what extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

SINGLE CODE

1 Water companies should build new storage options (e.g. reservoirs to protect the environment and minimise the chance of severe water use restrictions during drought.
2 Fixing leaks in the water supply network is the best way to reduce the amount of water taken from the environment – even if it means that disruption from roadworks would increase and customer bills would go up to pay for it
3 The priority for water companies should be to minimise the risk of people being affected by severe water use restrictions during drought – even if that means less protection for the environment
4 I'm happy to help protect the environment by taking steps to reduce the amount of water that my organsiation uses by using water saving devices and fixing dripping taps, and limiting the amount of water used for our operations

CARBON REDUCTION
TIME STAMP

The day-to-day water supply activities of water companies produce carbon emissions. All water companies are working to reduce and minimise as far possible the overall level of carbon from their activities. Currently there is a commitment for water companies to balance carbon emissions from day-to-day activities (i.e. "net zero") by 2030. Water companies can also act to go beyond current commitments to reduce carbon. These actions will increase their contribution to reducing the future impacts of climate change.

SHOWCARD 3: REDUCING CARBON EMISSIONS

Q7. Do you think that water companies should go beyond current commitments and invest in reducing their carbon emissions faster than current plans - even if it meant using funds that could be used to improve service or reduce costs?

SINGLE CODE

1 Yes – reducing carbon emissions to help tackle climate change should be the main priority
2 Yes – reducing carbon emissions is important, but it is not the only important thing to consider
3 Maybe – it depends on the amount of investment required, and what the money would be spent on otherwise
4 No – the agreed targets are sufficient and once met the focus should be on delivering other priorities
5 No – the agreed targets already go too far and water companies should focus on other priorities
6 Don't know
7 Other

REDUCING WATER LEAKAGE
TIME STAMP

SHOWCARD 4: REDUCING LEAKAGE FROM PIPES

One of the ways water companies can reduce the amount of water taken from the environment is by reducing leakage from pipes. Water companies can invest more to further reduce leakage beyond standard fix and repair actions, or they can focus resources on other priorities.

Q8. What extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

1 It should be the responsibility of customers to fix leaks on their own property
2 The level of leaks and loss of water from the water supply network should be minimised as far as possible regardless of the cost
3 The cost of fixing leaks on customers' property should be shared across all customers
4 Leaks should only be fixed if the benefits of reducing lost water outweigh the repair costs
5 Leaks should be fixed even if the repair or replacement of pipes causes significant disruption to local communities through extensive roadworks

CUSTOMER WATER USE
TIME STAMP

One of the ways water companies can reduce the amount of water taken from the environment is by helping households and businesses reduce their water use. If all customers across the West Country reduce their water use, it can lower demand for water and help maintain more water in the environment.

SHOWCARD 5: HELPING TO REDUCE THE AMOUNT OF WATER CUSTOMERS USE

Q9. To what extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

1 Everyone can play a role in saving and using water wisely to ease the pressure on this finite resource
2 My organisation would reduce its water use if given recommendations on changes that could be made
3 New buildings should be required to be more water efficient
4 Government and water companies should support organisations to save water, for example by providing water saving devices and encouraging them to less use
5 Government should set a target for the amount of water that organisations can use in the future
6 My organisation would be interested in having a smart meter to help understand water usage
7 My organisation is already doing everything it can to help save water

TIME STAMP

Water companies must consider a range of factors when planning water supply to customers.

Q10. The long-term plan for managing water supplies in the West Country will need to find a balance between the extra water made available, improvements to the environment, the cost to customers, and meeting targets to reduce leakage, water use and carbon emissions. Please can you rank each of the following in order from the "most important" to the "least important" to you:

RANKING

A Most important
B 2nd most important
C 3rd most important
D 4th most important
E 5th most important
F Least important

STATEMENTS

ROTATE

1 Improving how the water system copes with drought and unexpected events to make sure there is always enough water available for customers and businesses
2 Protecting and improving the environment, including by using options that reduce the amount of water taken from sensitive habitats
3 Reducing the carbon emissions from supplying water
4 Reducing leaks from pipes across the water supply network
5 Helping customers to reduce their water use
6 Making sure that the plan is affordable for all customers

SECTION C: CHOICE TASK

In the next set of questions, you will be shown different options for the WCWRG plan and how far it goes to:

- **Increase the resilience of the water supply system to reduce the chance of severe water use restrictions being needed during an extreme drought**

- **Protect and improve the environment by reducing the amount of water taken from sensitive habitats, as well as improving biodiversity and having a positive impact on the local environment for people and communities**

Alongside:

- **Reducing carbon emissions**
- **Reducing leaks from pipes**
- **Helping to reduce the amount of water customers use, and**
- **The impact on customers' bills**

You will be shown several different options for the plan – each time comparing between three possible options. You will be asked which option you prefer most, and then of the remaining two, which you prefer. An example is shown below.

EXAMPLE CHOICE CARD – MOCK UPS

There will be 8 of these questions in total. When answering them, please take your time to carefully read the descriptions that are provided. The responses to these questions will be used by WCWRG to help put together the long-term plan for managing water supplies in the region.

Please remember to answer the questions on behalf of your organisation.

NEW SCREEN – DISPLAY BUDGET REMINDER

NEW SCREEN

[FOR THE FIRST QUESTION] **Please consider these three different options for the WCWRG plan.**

PRESENT 1ST CHOICE CARD
USE PROGRESSIVE RESPONSE FORMAT [BEST / 2ND BEST]
FIRST PREFERENCE QUESTION **Which option does your organisation prefer?**
SECOND PREFERENCE QUESTION **Of the remaining two, which option does your organisation you prefer?**

REPEAT FOR CHOICES 2 – 8

RECORD CHOICE CARD NUMBER
INCLUDE TIME STAMPS FOR EACH CHOICE CARD
INCLUDE 3 SECOND DELAY BEFORE NEXT CHOICE CARD APPEARS

CHOICE	MOST PREFERRED	2ND MOST PREFERRED	LEAST PREFERRED
CARD 1			
CARD 2			
…			
CARD X			

SECTION D: FOLLOW-UP QUESTIONS

TIME STAMP

Q11. Thank you for answering those questions. Considering the information and instructions provided, how easy or difficult was it to answer which option for WCWRG plan was your organisation's most preferred?

SINGLE CODE

1	Very easy	GO TO Q17
2	Fairly easy	GO TO Q17
3	Neither easy nor difficult	GO TO Q17
4	Fairly difficult	ASK Q16
5	Very difficult	ASK Q16

Q12. ASK IF CODE 4 OR 5 AT Q15 **Were the questions difficult to answer because…?**

1	It was hard to decide which options were best	
2	Not enough information was provided about the choices to help you answer	
3	The instructions for the questions were not clear	
4	Other (please state)	RECORD

Q13. How important was each part of the options that you were shown to the choices that you made?

RESPONSE OPTIONS

1	Very important (considered it in all choices)
2	Quite important (considered it in most choices)
3	Not very important (ignored it in most choices)
4	Not at all important (ignored it in all choices)
5	Don't know

ROTATE ATTRIBUTE LIST

A	Risk of severe water use restrictions during drought
B	Protect and improve the environment
C	Reducing carbon emissions
D	Reducing leakage from pipes
E	Helping to reduce the amount of water people use
F	The impact on customer bills

Q14. To what extent did you consider the following when making your choices?

RESPONSE OPTIONS

1 A lot
2 Somewhat
3 A little
4 Not at all
5 Don't know

LIST

ROTATE

A The impact that the WCWRG plan would have on my organisation
B The impact that the WCWRG plan would have on other customers
C The impact that the WCWRG plan would have on the local community where my organisation operates
D The impact that the WCWRG plan would have on wider society (e.g. the West Country, the UK)
E The impact that the WCWRG plan would have on the economy

Q15. The overall cost of the long-term plan to 2080 will depend on the specific options – actions and investments – that are eventually put forward. To what extent do you agree or disagree with the following statements?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree
F Don't know

STATEMENTS
ROTATE

1 My organisation would be prepared to pay more on its water bill to reduce the likelihood that severe water use restrictions during drought would be needed in the future (from around 2030 onwards)
2 My organisation would be willing to pay more on its water bill so that customers who are less able to pay have lower and more affordable bills
3 My organisation would be prepared to pay more on its water bill to protect the environment, even if the area protected is not somewhere close to us.
4 The investments required by the plan should not increase water bills for customers
5 Water bill increases would be acceptable if financial assistance schemes were in place to protect the most vulnerable customers
6 My organisation would prefer to keep bills as low as possible now even if that means future generations will see reductions in service reliability and/or larger bill increases

As part of the long-term plan that is being developed, WCWRG is looking at options to make it easier to move and share water between places – including between the West Country companies (Bristol Water, South West Water (including Bournemouth Water and Wessex Water) and other parts of the country (e.g. the South East and Midlands).

Q16. To what extent do you agree with the following statements about sharing water?

RESPONSE OPTIONS

A Strongly agree
B Agree
C Neither agree nor disagree
D Disagree
E Strongly disagree

STATEMENTS
ROTATE

1 We all live in the same country and we should all share our water
2 No area of the country should be dependent on water being transferred in from elsewhere
3 It's ok to share within a region but not across the whole country
4 If one area of the country has more water than it needs then it makes sense to share

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Q17. If water was being moved from your area to another part of the West Country or another part of the country where there is less available – which of the following would be most important to your organisation?

Please rank the statements from the "most important" to the "least important" to your organisation.

RANKING

A Most important
B 2nd most important
C 3rd most important
D Least important

STATEMENTS
ROTATE

1 The quality of my organisation's water supply must stay the same (e.g. taste, appearance, level of hardness, etc.)
2 The risk of severe water use restrictions during drought must not increase to be more than the area where the water is going to (i.e. the chance of disruption to water supply remains lower in the area giving the water than in the area the water is going to)
3 That the area where the water is going has reduced leaks from pipes as far as possible
4 That everyone in the area that the water is going to was doing their bit to use less water

Q18. Given the repair works required to reduce leakage, how bothered would you be by the impact that each of the following would have to your organisation?

RESPONSE OPTIONS

A A lot
B Somewhat
C Not much
D None at all
E Don't know

STATEMENTS
ROTATE

1 The increase in traffic and travel time due to disruption caused by replacing pipes in streets
2 The nuisance to residential areas caused by replacing pipes (e.g. dust in the air, noise from work)
3 The disruption to businesses caused by replacing pipes (e.g. blocked parking and access)
4 The need for households to fix leaking pipes on their property (and associated costs)
5 The need for businesses to fix leaking pipes on their property (and associated costs)

SECTION E: RESPONDENT PROFILE

TIME STAMP

Thank you for answering those questions. Please could you now answer some final questions about your organisation. This information will help check that we have surveyed a range of customers.

Q19. How long has your organisation operated in the West Country region?

DISPLAY WCWRG THUMBNAIL AND ROLLOVER MAP

SINGLE CODE

1 Less than 1 year
2 2 years
3 3 – 5 years
4 6 – 10 years
5 11 – 20 years
6 21 – 30 years
7 More than 30 years
8 Prefer not to say
9 Don't know

Q20. How many employees are there in your organisation?

Please answer for the total number of employees based in the UK.

SINGLE CODE

1 0-9
2 10-49
3 50-249
4 250+

Q21. How many sites does your organisation have?

SINGLE CODE

1 1 site
2 2 sites
3 3 – 5 sites
4 6 – 10 sites
5 More than 10 sites
6 Don't know

Q22. Which of these statements best describes your organisation's attitude and use of water?

SINGLE CODE

1 Water usage does not receive much management attention and we do not have a strong focus on environmental issues
2 Water usage does not receive much management attention but we are keenly interested in environmental issues
3 Water usage receives a fair amount of management attention

Q23. What is your organisation's annual turnover?

Please note this information will be used to check that we have surveyed a range of organisations.

SINGLE CODE

1 Up to £49,999
2 £50,000 - £99,999
3 £100,000 - £249,999
4 £250,000 - £499,999
5 £500,000 - £999,999
6 £1,000,000 - £1,999,999
7 £2,000,000 - £4,999,999
8 £5,000,000 - £9,999,999
9 £10,000,000 - £49,999,999
10 £50,000,000 or more

NEW SCREEN – CURRENT WATER BILL

Q41. Approximately how much does your organisation pay for water and sewerage services combined?

Please note this information will be used to check that we have surveyed a range of customers.

A RECORD AS WHOLE £ PER YEAR
B APPROX. AMOUNT

1 Less than £250 per year
2 £251 to £400 per year
3 £401 to £900 per year
4 £901 to £1,400 per year
5 £1,401 to £5,000 per year
6 £5,001 to £10,000 per year
7 £10,001 to £25,000 per year
8 More than £25,000 per year

Q24. Considering all of the information that you have been given, overall, how easy or difficult was it to answer the questions in this survey?

SINGLE CODE
1 Very easy
2 Fairly easy
3 Neither easy nor difficult
4 Fairly difficult
5 Very difficult
6 Don't know / prefer not to say

Q25. Finally, did you think this survey was (select all that apply):

MULTICODE
1 Interesting
3 Too long
4 Difficult to understand
5 Educational
6 Unrealistic / not credible
7 Other [RECORD]
8 None of these

SURVEY CLOSE

That's the end of the survey; please ensure you click on the continue button to submit your answers. Thank you for your time and help, it is very much appreciated.

TIME STAMP