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SWW NHH WRMP Research August 2022

Full Colour Thinking from Turquoise for South West Water

September 2022

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Introduction and background.

Water companies are required to prepare and maintain a Water Resources Management Plan on a five yearly cycle. The Plan sets out how they plan to manage supply and demand for the next 25 years. It examines strategic issues that affect available water and demand and details how they intend to maintain the balance between water supply and demand to ensure customers receive a continued reliable supply. The South West Water Plan covers both South West Water and Bournemouth Water following the merger in April 2016.

South West Water have started the process of updating their 2019 Plan as part of the 5-year planning cycle to produce their Water Resources Management Plan 2024 (WRMP24).

In developing their WRMP24 plan South West Water needed to speak with non household customers to better understand their interest and engagement with different demand side options.

Turquoise Thinking Ltd were commissioned to conduct this research and the following document reports the key findings.



Specific research objectives.

The overall objective of the research was to explore non household customer views of demand side options and water efficiency measures.

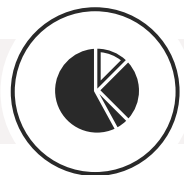
Additional objectives included:-

01



How do non household customers view water in their business and what do they currently do to be water efficient?

02



How open are they to the suggested demand side options. What would they engage with? What would work for them?

03



How open are they to looking at getting demand down given the big Government targets?

04



Who would they expect to deliver and offer these demand side options? Are they open to being approached by South West Water / Bournemouth Water about this?

Research methodology.

A qualitative methodology was undertaken in order to meet the research objectives.

Four online focus groups were conducted on Wednesday 24th August and Tuesday 31st August 2022 via Teams/Zoom, each lasting 90 minutes in duration. The topic guide utilised was designed in conjunction with the Client. The demand side options shared and tested with respondents were condensed/combined between the first two groups and the second two groups.

Group One

- Business decision makers
 - Variety of sectors
 - From **Devon**
- Wednesday 24th August

Group Two

- Business decision makers
 - Variety of sectors
 - From **Devon**
- Wednesday 24th August

Group Three

- Business decision makers
 - Variety of sectors
 - From **Cornwall**
- Tuesday 31st August

Group Four

- Business decision makers
 - Variety of sectors
 - From **Bournemouth**
- Tuesday 31st August

A range of business types were represented within the groups – farmers, developers, restaurant owners, café owners, schools, hoteliers, bed and breakfast owners, bar owners and healthcare.



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Summary of Key Findings.

Summary of Key Findings.

Amongst the NHH customers interviewed there was little knowledge or experience of the business retail market. Most were still with their incumbent suppliers. Those who did know about it largely believed the savings on offer to not be that great.

As such it was perfectly acceptable in their minds to have contact from their wholesaler. South West Water / Bournemouth Water are in charge of / control of the product so it would make sense for water efficiency advice etc to come from them.

Although water is taken for granted by the majority steps have been taken by the NHH customers interviewed to ensure water is not wasted, dual flush toilets, more economical taps etc. Many believe that they are doing all that they can but would welcome help and advice to save more. Money saving would be the biggest motivator to be more efficient but there is a growing sense of social responsibility to be more conscientious and use water sparingly.

Recent drought and water shortage messaging has brought the physical amount of water available more to the forefront of customer's minds. In reality they gave it little thought before (unless they were farmers). They hope that SWW/BW are doing all they can to ensure supply can meet demand in the future and believe if they are being asked to take steps themselves to help get demand down then SWW/BW should be leading by example and doing all they can to preserve supplies / fix leaks themselves.

When introduced to the idea of the WRMP customer's are positive. The key element they are drawn to is the reduction of leakage believing that this would have the biggest impact on supply. They do not initially see themselves as part of the solution with regards to getting their usage/demand down.

Government targets for water use reduction seem quite steep to most businesses. Many do not know how or where they could save more water without help and guidance.

When introduced to the various demand side options customers were generally positive but believe it must be presented alongside what SWW/BW are doing as well so that the onus doesn't entirely fall on the customer.

They like the suggestions where water is reused e.g. rainwater collection and the recycling of effluent as believe this could have a big impact and signals where more focus should be in the future. Equally smart metering and visits which could help identify leaks would also be beneficial as this has a cost benefit to the customer as well as saving water. To encourage action and behaviour change it is likely to need some form of incentivisation and greater education.

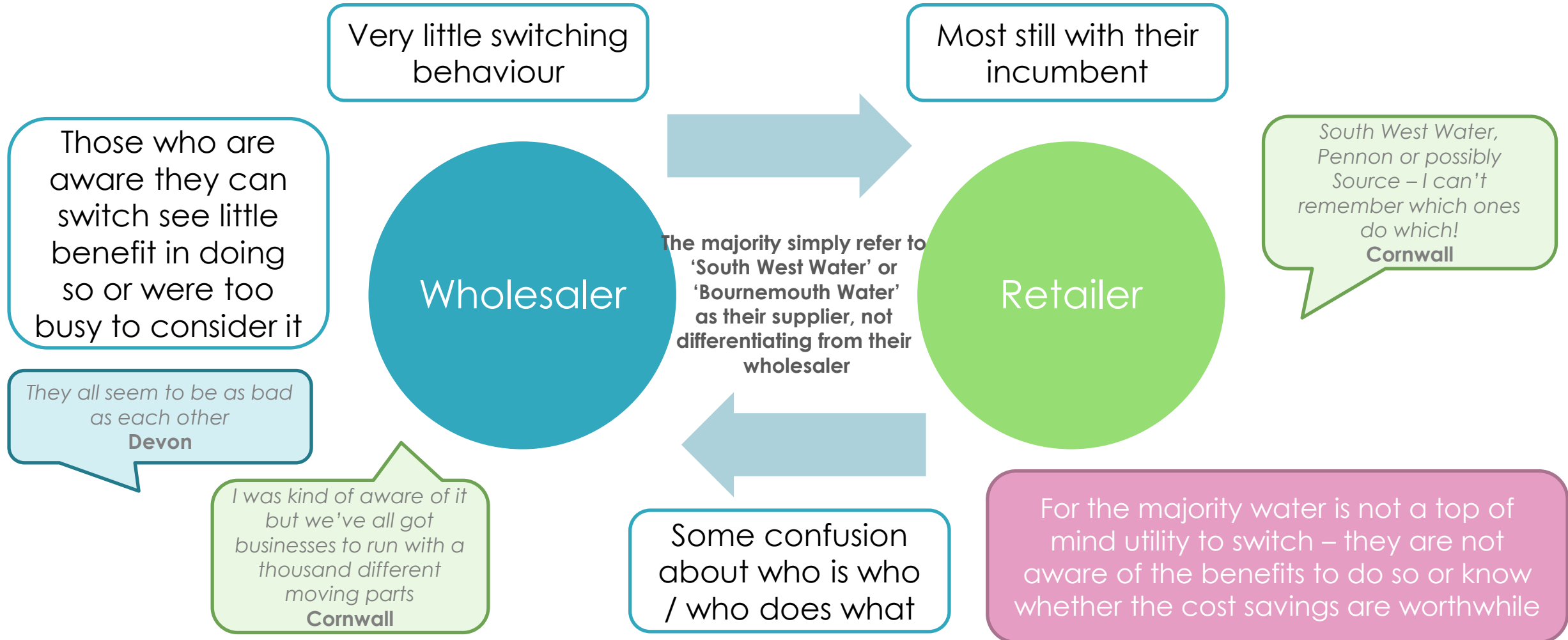


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**Understanding of Retailer /
Wholesaler Relationship.**

Understanding of retailer / wholesaler relationship

There were mixed awareness levels of the wholesaler / retailer dynamic.

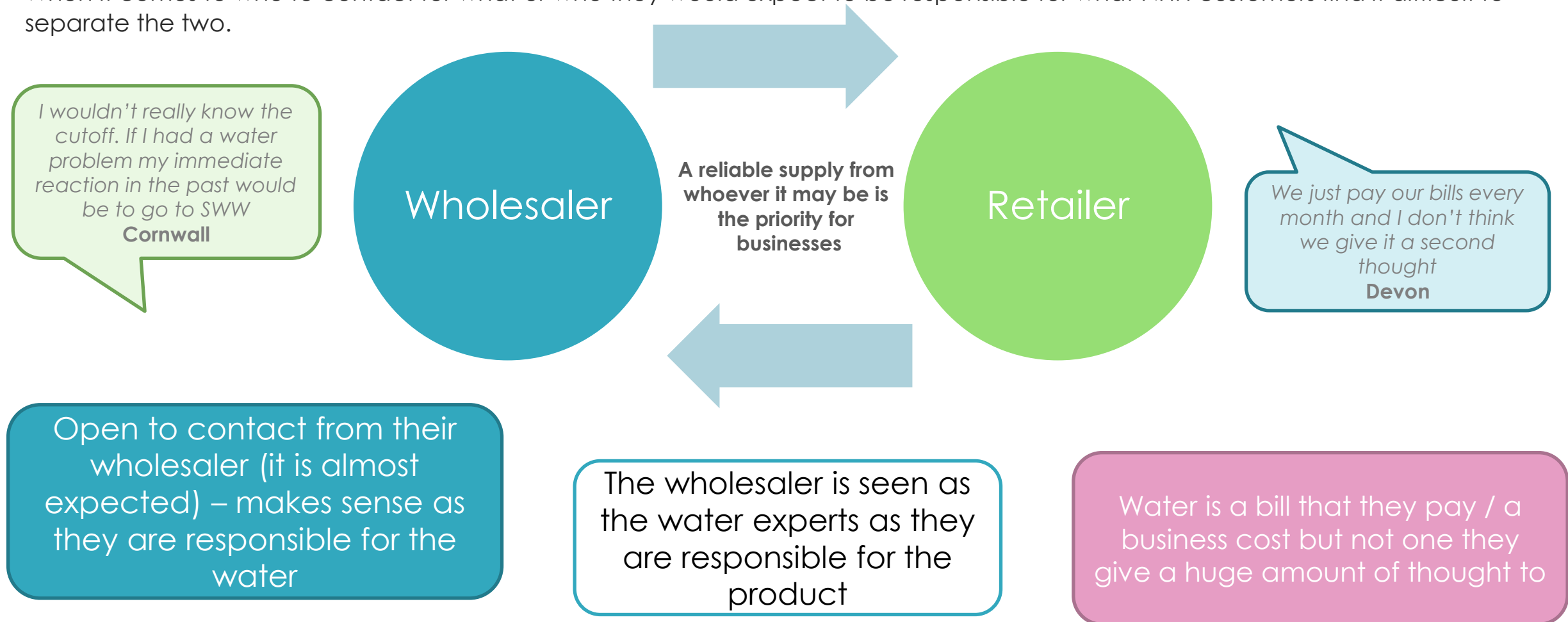


Understanding of retailer / wholesaler relationship

Their expectations of their wholesaler / retailer are quite simplistic



When it comes to who to contact for what or who they would expect to be responsible for what NHH customers find it difficult to separate the two.





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Understanding of the supply /
demand impacts of water.

Understanding of the supply / demand impacts of water

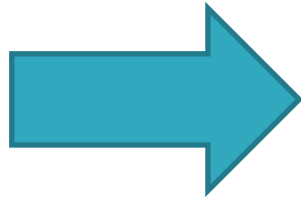
In reality little thought is given to where water comes from



As we see repeatedly with household customers water is taken for granted and that is also true for non household customers (even amongst businesses where water is required for their business to run). Customers are so used to turning on a tap and it being there that they don't really give much thought beyond that. The only instance where this is potentially different is for farmers.



At a simplistic level believe water supply comes from....



Relies on rainfall

Rivers

Reservoirs

Farmers typically have much greater awareness

Use boreholes – much more aware of water levels / amount of rain as how deep they have to go can differ

See the impact on the land from intense periods of dry weather

More conscious of water as a precious resource although all NHH customers said they value water

We very rarely have a situation where you turn the tap on and it isn't there
Cornwall

You still need plenty of rain to keep your borehole topped up
Devon

Understanding of the supply / demand impacts of water

Until recently the majority would not have believed water availability was an issue.



The majority of NHH customers have never had issues with their water, it is always there. This almost creates a false sense of security. Water availability is definitely more top of mind now given recent news of droughts and hosepipe bans however, it took the events of the Summer for customers to really consider or give any thought to whether there is enough water to meet customer needs. Equally they are still getting the service they require despite water supplies running low.

If there's really an issue they should contact everybody, send information and advice
Cornwall



We're all aware of a drought situation at the moment and I think we all know that leakage is a big problem in our Victorian system
Cornwall

It's not finite, we've noticed how very low the river water has got
Devon

There is belief that if it really was a big problem there would be more direct contact about it – this highlights a comms opportunity for SWW/BW to draw greater attention to the need to be more water conscious.

Some NHH customers have witnessed significant leaks going on for extended period of times which are at odds with a saving water / water shortage message. This mindset would need to be addressed.

Bournemouth would appear to have enough water to sustain the population at the moment at least
Bournemouth

Understanding of the supply / demand impacts of water

When asked what they believe may impact on future water availability a number of different elements are cited.



Given the current situation customers see climate change and the amount of rainfall (or lack thereof) as having the biggest impact on supply. With regards demand it is population growth (and in Devon and Cornwall in particular) seasonal population growth that will see demand increase.

What impacts supply / the amount of water available

Climate change / the amount of rainfall

Failing infrastructure / the amount of leaks / water wasted / lost

The amount of rain that we do or don't get. That can cause a problem because it doesn't replenish the water supply
Bournemouth

Increased commercial use, as businesses get bigger they take more water
Bournemouth

What impacts demand

Population growth

Seasonal population growth

More developments / housing

Simply increased usage (often commercially or by industry)

In reality the only elements where change / improvements can be made is tackling leaks and decreasing demand

How much comes in and how much goes out
Cornwall

Understanding of the supply / demand impacts of water

The majority hope that water companies are making plans to ensure future supply can meet demand.

When shown the slide detailing the supply and demand balance and seeing how potentially the balance could be tipped with demand outweighing supply non household customers were all in agreement that they hoped there are plans in place to ensure supplies are secured. Interestingly at this stage there is little consideration on their part for how they could decrease their demand, instead the majority believe the solution is investment in infrastructure and sorting out leaks.



I'd like to think that they do but they certainly haven't said that
Bournemouth

Customers don't feel they are informed of what plans are so can only hope

Hopefully they are thinking about planning for the future
Cornwall

It would be a good idea to try and reduce the water leakage underground from the damaged pipes
Bournemouth

See securing the supply – limiting leaks and investing more as the solution

I don't think there's much long term investment in a lot of the utility services generally
Bournemouth

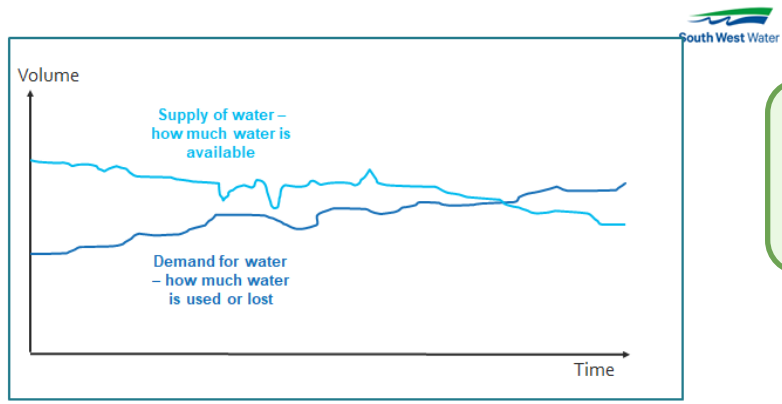
I think the retailers and the wholesalers should educate people on how to save water
Cornwall

Only the minority say at this point that more education / assistance is required around saving water

You can't control population growth, you can't control the climate change but you can improve the resilience of water supplies
Devon

Non household customers need to be better informed / educated that they can be part of the solution

Supply Demand balance



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**Introduction to WRMP & current
behaviour regarding water
efficiency.**

Introduction to WRMP & current behaviour regarding water efficiency

Non household customers responded positively to the principles of the WRMP but are more likely to see leakage as being more important rather than decreasing demand.



I'd be disappointed if they weren't engaged in that level of thought
Cornwall

Reactions to WRMP

Seen to be a good thing – positive that these plans are in place / happen / are thought about.

However, customers simply do not know about it or appreciate all of the different elements involved – can see how it is difficult to manage the balance.

Can't see anything to be missing or that hasn't been considered – SWW/BW are the experts.

It's hard to argue against them planning ahead
Devon

Key areas of importance

Leakage comes out as the top priority – many have witnessed or experienced leaks and see this as tangible wastage that needs to be rectified / addressed.

Increasing supplies is another area that is seen to be important whether it be through more reuse of water / grey water or desalination.

South West Water have left a mains water pipe leaking since before the weekend
Devon

They may be doing quite a lot but their actual way of publicising it or putting it out there just doesn't seem to exist
Bournemouth

This further demonstrates how education and guidance is required in order to get buy in for greater water efficiency measures

I think one of the great opportunities is salt water. We're obviously surrounded by ocean so there's plenty of opportunity from that point of view
Bournemouth

Introduction to WRMP & current behaviour regarding water efficiency



When questioned most thought they were doing all they could to be water efficient.

As customers value water and it is something they pay for (it is a cost to the business) they do give thought to how much they are using. All were of the opinion that they certainly were not wasteful with water. A variety of different water saving or water efficiency devices have already been utilised and implemented by customers. Developers also indicated how they are always interested in new ways to be more water efficient.

Water efficiency measures currently utilised

Leakage checks

Modern toilet fixtures and fittings

Water saving taps

Water butts

Farmers using boreholes

Fittings into shower heads to reduce consumption

Encouraging better behaviour amongst staff, only running a full dishwasher, not giving water to a table unless asked etc.

We looked at making sure we had no leaks, making sure all of the fixtures and fittings are modern
Bournemouth

Dual flush toilets, shower heads that put more air in the water we can do all of that – give me something better and I'll use it
Devon Developer

Demonstrates a desire amongst NHH customers to be more efficient with their water however, universal behaviour change is required to fully drive down water usage in some sectors.

However, you can make positive changes and improvements to technology and the devices you are using but you can't impact how people / customers behave / use the water (highlighted by those in the hospitality industry in particular). Examples being long showers when staying in hotels, leaving the tap running because they're not paying for it themselves etc.

If people like having a long shower they won't probably do it at home because they're saving but they think oh I've paid for a hotel so might as well enjoy it
Cornwall

You can't change people's habits. You can put in all of this really efficient stuff but some people are just going to use more water by their habits
Devon

Introduction to WRMP & current behaviour regarding water efficiency

The Government bringing in a target to reduce NHH water consumption by 9% was seen to be a big ask.



Many felt that they had already done all they can to reduce their water consumption so would see it as a challenge to reduce further.

That's going to be a big challenge
Cornwall

Non household customers potentially don't see how lots of businesses all making small changes can add up – this mindset may need to be challenged by SWW/BW.

Also there was some minor scepticism as a decrease in usage means less product sold so surely this would not be in the best interests of SWW/BW.

However, suggestions were made as to how they might be encouraged to look at reducing their consumption further.





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Reactions to demand side options.

Demand options



Option 1 - Smart metering for all NHH customers or targeted at specific sectors

This option would see existing dumb meters exchanged for a smart meters, which can offer increased visibility of usage from more frequent reading.

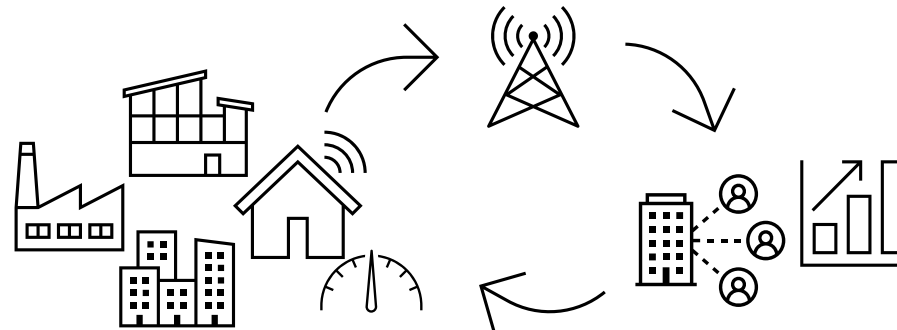
Readings are taken either as 'drive-by' automated readings or by connecting to a wireless network to transmit regular meter readings back to SWW.

Smart metering is unlikely to deliver large reductions in usage but will act as an enabler for other options to reduce wasted water and help to promote water efficiency, such as:

- Quick identification of continuous high flows (minimising waste due to leakage)
- Improved data for companies and increased engagement with water use to highlight benefits of water saving technology such as water recycling or rainwater harvesting
- Can also be a pre-requisite for incentives and tariff changes in the future

This can be offered to:

- all NHH customers above a set usage level (>600l/day), or
- targeted at the top 50% of highest users from specific sectors with sites containing large underground networks, such as education, sports and recreation grounds, and farms.



Reactions to demand side options

Smart meters are a familiar concept with many noting that their electricity meters have made them more conscious of their consumption.



Initial Reactions to Smart Metering

Open to the idea, seems like a sensible move to help people understand their usage.

Can see how it would be good for the highest users and those in particular industries – lower volume users showed interest in it too as many are cost conscious and keen to save money.

Experience with other smart meters indicates they would be more conscious of their usage.

Good that it could help identify anomalies / leaks quicker.

Unsure how much impact it could have on supply / water saving in reality.

For the highest users it's making them more accountable and perhaps with the incentives for them to look at ways they can perhaps reduce or recycle some of their water
Bournemouth

I am more conscious of it when I see a smart meter
Bournemouth

Good for spotting leaks
Cornwall

I think it's a good idea because I do my water pump readings every month and if it's above average I know I have a problem somewhere
Devon

Most business users are inherently conscious of cost in any form
Cornwall

Potentially harder to make savings like you can with electricity but seen to be good to help identify leaks which is a positive.



Appealing and a useful tool to understand water usage / behaviour.

Demand options



Option 2 - Business Efficiency Visits

This option would target water efficiency savings for non-household customers within certain sectors.

Customers would be offered a Business Efficiency Visit (BEV), either in-person or virtually, during which they will be given water efficiency advice on ways to save water and reduce waste.

During in-person visits, water efficiency devices will be retro-fitted to bathrooms and kitchens and simple wastage fixes will take place where feasible to fix leaky loos and taps.

Leak detection services will be offered for large sites with large underground networks as well as advice on options for water recycling or using alternative water sources.

Virtual visits will take a similar approach but the customer would be responsible for installing efficiency devices and will be given advice on how to check for and fix minor leaks on toilets and taps.



Reactions to demand side options

Guidance offered through Business Efficiency Visits could help non household customers identify new ways to save water



Initial Reactions to Business Efficiency Visits (BEV)

This could almost be like a collaborative partnership between the water company and businesses – reiterates a team effort / approach to saving water.

A minority saw the offering as condescending insinuating that they wouldn't be able to identify leaky toilets – would potentially be more appealing if it made less obvious suggestions / things they hadn't thought of before

Potentially seen to have greater value to more large scale users where greater savings could be made

However there is interest amongst small users too who could potentially access this help / guidance online rather than requiring a virtual visit

Farmers may need incentivising / grant support to take forward some of the recommendations.

I think you could probably standardise a lot of businesses. You could do a lot of it online
Bournemouth

I think it sounds really smart but the only way that I think farmers will actually take some of the initiatives forward is some sort of shared grant support
Devon

I think that would be really, really worthwhile
Devon

It wouldn't make a lot of difference in my business but I see that in big scale it would make quite a big difference
Cornwall

Would value expert / advice guidance as many feel they are already doing all they can to save water.



Appealing and if free and offered in a convenient format could see high take-up.

Demand options



Option 3 – Sector specific water efficiency advice

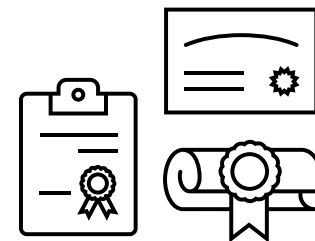
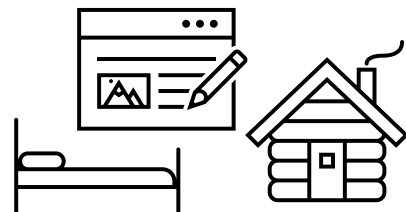
This option seeks to increase water efficiency within an element of the tourist sector that remains a component of household demand. The initiative assumes that South West Water will work in partnership with Airbnb, or similar accommodation providers to reduce water use amongst their members.

This option follows a tiered approach to engaging with this element of the customer base:

- All home owners/hosts will be offered “social norms feedback” and seasonal messaging through billing mailshots.

Properties are offered the opportunity to apply for a water efficiency certification (Bronze, Silver, Gold), which can be used in marketing and displayed at the property:

- Bronze – Receipt of targeted advice, a self-install water efficient device pack, and water efficiency materials to display at the property to encourage water saving behaviours amongst guests.
- Silver – Pre-arranged professional home visit with retrofit and advice (including leaky loo find and fix), along with water efficiency materials to display at the property.
- Gold – To be decided, but could include a more challenging water calculator-based targets for fixtures and fittings (akin to new-build targets), in addition to water efficiency materials for display.



Reactions to demand side options

As certification is already commonplace in the hospitality industry it was seen to be feasible that this could be a good addition.



Initial Reactions to Sector Specific Water Efficiency Advice

Don't necessarily see how this would make consumers pick one establishment over another – potentially more like a nice to have.

Businesses in this industry like to have certifications as it helps with marketing so for them it was seen to be a good idea.

A positive initiative but in reality how much impact will it have on driving down supply?

Comes back to education – all very well having the certification but need the customers / consumers / patrons to change their behaviour as well to see any significant change.

South West Water would need to lead some sort of marketing campaign so that people understood what the bronze, silver and gold meant
Devon

I think if it was recognised UK wide I would be keen to adopt any kind of marketing
Bournemouth

I think it's a good idea but I think it will have very little difference on people choosing one Airbnb over another
Cornwall

Until there is an understanding that water efficiency is something we need to be thinking about not sure how much impact it will have
Cornwall

This would need to go hand in hand with a broad scale education of consumers in general about water efficiency / usage to have any impact.



Although a good idea not sure how much impact it would have.

Demand options



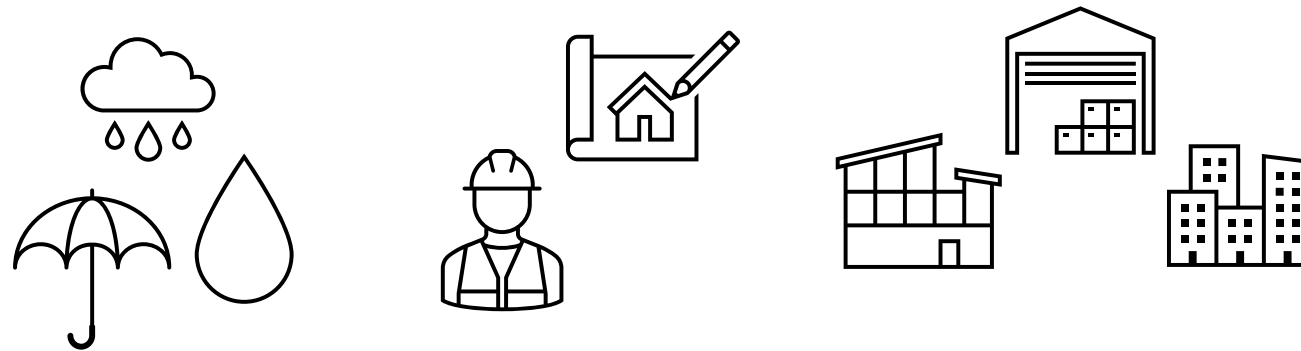
Option 4 – Rainwater harvesting for new developments

This option is work with developers to provide rainwater harvesting systems to provide a non-potable supply for use within the new commercial properties.

Water is collected from roof runoff and a sustainable drainage system is created. The collected water goes through a basic level of treatment. Rainwater harvesting is included in the development to meet planning conditions.

SWW have already implemented small scale pilots through our WaterShed schemes, including installing rainwater harvesting tanks at a primary school in Exmouth to be used to flush toilets.

Funding for these would either be fully or part funded by water companies, with remaining setup costs and ongoing costs covered by the individual owner of each building.



Reactions to demand side options

Rainwater harvesting for new developments was very warmly received by all.



Initial Reactions to Rainwater harvesting for new developments

Positively received – would like to see more rainwater harvesting in general so this is seen as a positive step in the right direction.

Can see how this would have a large scale impact on supply and demand.

All behind this but particularly developers who want to use more innovative and sustainable technologies and initiatives in their developments.

We should have much more emphasis on going forward with these sustainable systems that harvest water and make it more reusable
Devon

It makes a lot of sense
Cornwall

It's a no brainer, it's a way of being efficient with what's already there
Bournemouth

Absolutely bang on
Devon

It's a brilliant use of recycling water that would otherwise just go into the sewers, I think it's a great idea
Bournemouth

Currently limited to new commercial developments non household customers would like to see more rainwater harvesting and usage in the future



Appealing and moving more in the direction customers would like water companies to go in the future

Demand options



Option 5 – Reusing treated wastewater effluent

This option would see treated wastewater effluent from industrial customers being reused for supply to industrial customers.

This reclaimed water could be used for industrial/commercial use for:

- Cooling
- Heating
- Washing and cleaning areas
- Greywater

This would not be used for potable water.



Reactions to demand side options

The idea of reusing treated wastewater effluent was also received very positively.



Initial Reactions to Reusing treated wastewater effluent

Again like the rainwater harvesting this was positively received as it could have a large impact on water usage for the appropriate businesses.

Understand the limitations in terms of who this could be targeted at but do not see that as an issue.

A number assumed things like this would be happening already.

This should be happening already
Devon

It's a good idea if there's a business case behind it
Cornwall

The hope would be that this would be just the start of more water recycling.



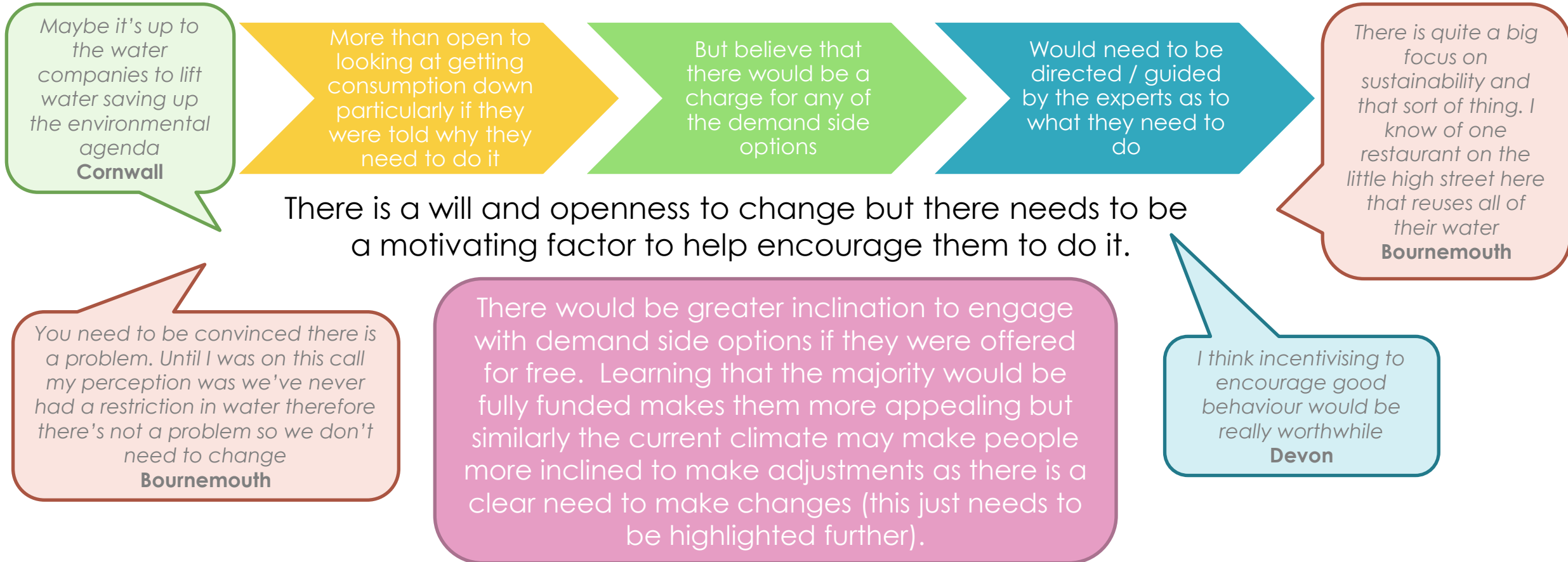
Appealing and moving more in the direction customers would like water companies to go in the future

Reactions to demand side options

There is the immediate assumption that any offering/initiative from South West Water to get demand down would come at a cost.

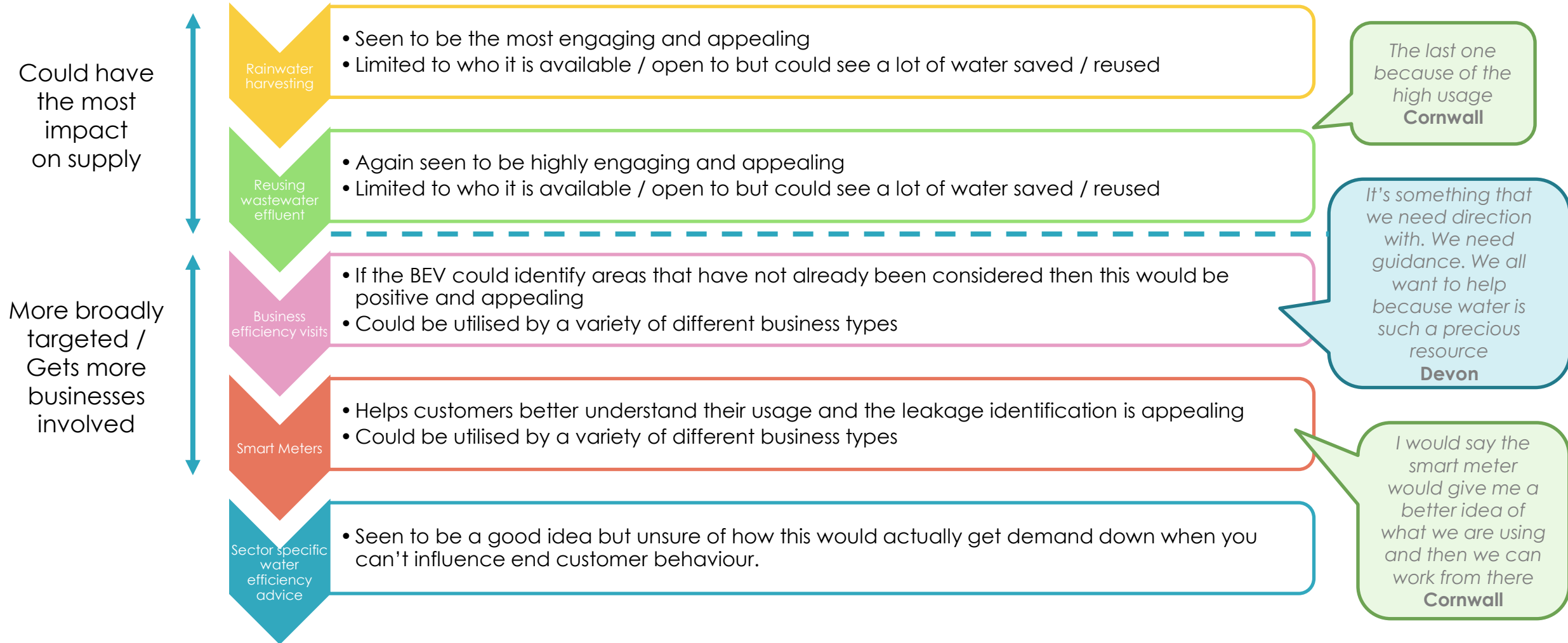


Overall non household customers were positive about the demand side options suggested and the fact that it would be South West Water offering them. The fact that South West Water / Bournemouth Water is the wholesaler was not seen to be a problem.



Reactions to demand side options

Non household customers were most positive about the demand side options where big gains could be made.





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Conclusions & Recommendations.

Conclusions & Recommendations.



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The conversation has already started about water conservation and efficiency with the news over the Summer about water levels, droughts and hosepipe bans. It is therefore important to keep the momentum going. It is more top of mind than it has ever been so is the perfect opportunity to engage with non household customers about what they could be doing. The challenge is getting them to see how they can be part of the solution.

When considering supply and demand non household customers are more inclined to lean towards increasing supply through fixing leaks as being the best option or a key area of focus rather than considering the part they play in decreasing demand. They perhaps do not fully appreciate the impact lots of people making small changes can have. Equally with many seeing significant leaks at various points they need to see or feel effort is being put in by SWW/BW to conserve water too to make them more inclined to do their bit as well (large scale visible leaks is viewed as tangible waste, customers do not understand the inner workings and financial implications instead taking the black and white view of water is being wasted). This way the challenge of supply and demand becomes a team effort rather than customers feeling they are being asked to make changes and not seeing behaviour change from above.

At a simplistic level many believe that they are already doing all they can to save water. They are mindful of what they use, are certainly not wasteful and have often taken steps to install measures, devices or change staff behaviour. More education and guidance is required to help them better see and understand what they could be doing further to help save water and why it is required.

Conclusions & Recommendations.



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The Government targets presented seem like a big ask for many when they consider how they currently use water in their business. However, there is willingness to make change and to look at ways to save more water, they just need someone to help them do it.

For the majority SWW / BW are viewed as their supplier – there is little differentiation between wholesaler and retailer so they would be happy to receive water efficiency advice and initiatives from SWW/BW (who are seen as the experts in charge of the product).

Many are time poor and cost sensitive. Easy, cheap or free fixes would be welcomed. They are much more likely to engage with something if there is no cost or if there is an incentive to do so. Compliance and engagement can be bought however, there is an increased sense of needing to be more conscious about water usage as we look to the future and this could also be capitalised on.

Smart Metering and Business Efficiency Visits were all viewed favourably and could be utilised by a variety of different businesses in a variety of different sectors.

A key positive about smart metering was about helping to identify leaks (which as we have noted is important to customers) but equally helping businesses to better understand their water usage and thus perhaps be able to see how they could make changes was also seen as a plus.

Conclusions & Recommendations.



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Business Efficiency Visits could help businesses consider things they might not have thought about previously in terms of saving water. Delivering this online or virtually would certainly be welcomed where it is appropriate.

All non household customers can very easily get behind and support reusing water and rainwater harvesting. This is an area where they want to see more focus and improvements and where they believe large savings could be made. They also see technology improvements and advancements as being important for the future with regards water supply and demand.

Developers are keen to make use of any new technology or initiatives to use in their properties so welcome SWW/BW looking at areas like this.

Mentioned by many but more commonly by those in the hospitality industry is how there needs to be a behaviour and attitude change across the board with regards water use. Pubs, bars, restaurants, hotels etc can only do so much in terms of installing water saving devices to drive demand down. What they need to support their efforts is a global attitude and behaviour change in how people think about and use water in general. The view is that people may have longer showers in a hotel because they are not paying directly for it. If this mindset could be shifted then this could have a significant impact on demand.

Conclusions & Recommendations.



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So what does this mean?

- Non household customers are open and willing to consider decreasing demand but need support to do so.
- Education and guidance is needed to help businesses reduce their water consumption but education is also required to change consumer attitudes and behaviour towards water usage in general.
- Non household customers welcome plans to increase rainwater harvesting and recycling and are pleased that SWW/BW are looking at doing more things like this. Greater communications about plans such as this and also work and plans relating to leakage will help get non household customers on board and engaged with the cause.

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30

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