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Smarter Healthier Homes Research – Summary Report **DRAFT** 3rd April 2023

Full Colour Thinking from Turquoise for South West Water

April 2023

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Introduction and background.

South West Water Limited (SWW) provides reliable and efficient and high-quality drinking water and wastewater services to 1.8 million customers in Cornwall, Devon and small areas of Dorset and Somerset and the Isles of Scilly. Bournemouth Water (BW) provide water services only to 0.5 million customers in areas of Dorset, Hampshire, and Wiltshire. SWW merged with BW in 2016 and operate as a single company under one licence but with separate brands.

In June 2021, Pennon group acquired Bristol Water (BRL) who provide water only services for around 1.2 million customers in the Bristol city and surrounding area. For the upcoming price review, SWW and BRL will be submitting a joint business plan to cover investments for the combined customer base of c.3.5 million customers across the greater south west.



With the large scale of investment required for PR24 to meet strict new targets for environmental improvements and the current cost of living crisis SWW need to test that these plans are still supported by customers.

Alongside their PR24 business plans, SWW is developing its long-term delivery strategy which sets out their ambitions to 2050. Included in this are plans to extend elements of their 'Smarter, healthier homes' initiative which was launched as part of its Green Recovery plans to help the region recover from the impacts of the Covid-19 pandemic.

SWW wished to speak to domestic customers across Devon and Cornwall from both inland and coastal locations to better understand their opinions and desires with regards environmental commitments.

Turquoise Thinking Ltd were commissioned to conduct this research and the following document provides a summary report of the key findings.



Specific research objectives.



The overall objective of the research was to understand customer attitudes to, and perceptions of, South West Water, Bristol Water and Bournemouth Water identifying and fixing issues sooner, through the use of smart technology.

Additional objectives included:-





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Summary of Key Findings.

Research methodology.



A qualitative methodology was undertaken in order to meet the research objectives. Eight online focus groups were conducted (two per evening) on Monday 13th, Tuesday 14th Wednesday 15th and Thursday 16th March via Zoom, each lasting 90 minutes in duration. Four workshops were conducted with South West Water customers, two workshops with Bristol Water customers and two with Bournemouth Water customers. The topic guide utilised was designed in conjunction with South West Water. A total of **58** customers took part in the research, with the groups split as follows:

Workshop One

- Household customers
 - 46-70 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Cornwall (SWW Customers)**
Monday 13th March
7 respondents

Workshop Two

- Household customers
 - 20-45 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Devon (SWW Customers)**
Monday 13th March
8 respondents

Workshop Three

- Household customers
 - 46-70 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Devon (SWW Customers)**
Tuesday 14th March
8 respondents

Workshop Four

- Household customers
 - 20-45 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Cornwall (SWW Customers)**
Tuesday 14th March
7 respondents

Workshop Five

- Household customers
 - 46-70 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Bristol (Bristol Water Customers)**
Wednesday 15th March
6 respondents

Workshop Six

- Household customers
 - 20-45 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Bournemouth (Bournemouth Water Customers)**
Wednesday 15th March
7 respondents

Workshop Seven

- Household customers
 - 46-70 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Bournemouth (Bournemouth Water Customers)**
Thursday 16th March
8 respondents

Workshop Eight

- Household customers
 - 20-45 year olds
 - AB C1 C2 DE
- Urban/Coastal/Rural
- From **Bristol (Bristol Water Customers)**
Thursday 16th March
7 respondents

Summary of Key Findings.



When shown a summary of the Smarter Healthier Homes initiatives, many customers felt that they were things that water companies should be doing anyway – but Smarter Healthier Homes did make customers feel more positive towards their own water company. Interestingly, albeit at a low level, there was some initial surprise amongst South West Water customers that there were still lead pipes in existence. Some customers were not aware of any of these initiatives – indicating that South West Water still has work to do to communicate what they are doing more effectively to customers generally.

Before exploring them in greater detail, the most appealing elements of Smarter Healthier Homes to customers appeared to be 'water reuse and recycling' and 'water saving' – often because these were areas that customers perceived could help them to reduce their own water usage and hence their water bills. Another area that some customers felt was the most important of the Smarter Healthier Homes elements was 'repairing leaks' because this was felt to be something that is out of control of the individual but could have an effect on their water quality and water bills.

Once the various elements of the Smarter Healthier Homes initiative had been explored in greater detail in the workshops, customers felt at least as positive, if not more so, about South West Water/Bristol Water/Bournemouth Water as a result. There was also a feeling that they were now more aware of these issues than they were before, particularly about water quality, lead pipes and water recycling. Comments made in the Post-Workshop survey completed by participants reinforced these key messages - however, customers were more likely to associate Smarter Healthier Homes initiative aspects with being 'smart' rather than 'healthy'.

When asked how South West Water could better promote the Smarter Healthier Home programme, customers generally felt that they needed to be told more about it and suggested several ways that South West Water could communicate it, ranging from 'traditional' communication methods to the use of social media and well-known 'money-saving influencers'. Some customers felt that incentivising take-up of these initiatives would be an effective way of communicating their benefits and encouraging greater consideration of water use and water recycling to domestic customers and housing developers.

Summary of Key Findings.



The majority of customers expressed positivity towards smart meters generally, feeling that accurate billing, having the ability to detect leaks and generally 'putting the customer in control of their own usage' would be beneficial to both consumers and South West Water.

However, there was a more cautious reaction to the idea of smart meters amongst some customers. This appeared to be slightly more prevalent amongst some lower social grade customers, who questioned the assertion that smart meters are 'the fairest way of charging' and felt that it could create a sense of 'smart meter anxiety' whenever they needed to use water for essential purposes. At a much lower level, a couple of customers expressed concern about perceived privacy issues.

A few customers felt that South West Water may face some challenges relating to their plans for smart meter installations and replacements. The main issues raised were that the communication to the customer base would have to be swift and informative to ensure that everyone knew about it, that some people may resist having a smart meter installed, concern about the scale of the project generally and liaising with building developers.

The idea of linking smart meters to apps was liked by a good proportion of customers – this appeared to be driven by their experiences of having smart meters for other utilities and using apps for them.

Summary of Key Findings.



The issue of lead piping was something that most customers had not really given much of a thought to previously, due either to not knowing about the issue or feeling that it would have already been fully dealt with by water companies. However, although there was some initial concern expressed about the potential effects on health, this was at a relatively low level overall.

Most customers seemed to know or assume that any lead water supply pipes within a property boundary were the responsibility of the property owner. When asked initially, customers felt that it would be a good thing generally if water companies would pick up the tab for dealing with removing lead pipes, although some did express concern about the perceived high costs associated with dealing with this issue.

Overall, customers felt that they would ideally want water companies and South West Water to remove all lead pipes from the network – the key theme mentioned in support of this was simply to do with alleviating public health concerns. Some others felt that the government should support water companies in this endeavour, while a couple of others felt that committing to this would help to portray South West Water in a positive light.

However, a few customers felt that a South West Water commitment to remove all lead pipes could lead to them paying more for their water bills, with a feeling (albeit at a low level) that less affluent households would effectively be subsidising property owners to have this work conducted.

In the Post-Workshop survey completed by participants, just over half of customers (51%) overall either fully or partially supported the cost of customer lead pipe replacement being paid for by all customers regardless of whether they personally have lead pipes or not – however, only 14% of customers said they fully supported it. The highest levels of full/partial support were seen amongst older Bristol Water customers (83%), older Bournemouth Water customers (76%) and younger SWW customers in Cornwall (71%). However, no younger Bournemouth Water or younger SWW customers in Devon 'fully supported' this cost being paid for by all customers.

Summary of Key Findings.



All customers indicated that they thought water recycling was a good idea and many thought it would be likely to save them money as well as preventing water wastage. Some customers were already taking steps to reuse water, most often in the form of water butts, and several felt that South West Water had a role in educating customers about this issue and also in providing them with routes to obtaining the necessary equipment to be able to reuse and recycle water more than is currently possible.

There was a high degree of support for the various types of incentive scheme tested, in particular for those involving (regular) water butts, and there was also some support for sustainable surface water drainage systems. However, customers expressed a lukewarm attitude towards the smart water butt concept - for many, a regular water butt would be sufficient for them on a personal level compared to the perceived 'over-complicated and expensive' nature of a smart water butt. Although customers liked the incentive schemes for developers, some saw potential logistics issues in relation to larger schemes such as sustainable surface water drainage, namely that they could cause problems in already-populated areas and they would be costly to implement.

In the Post-Workshop survey completed by participants, more than four-fifths (85%) of customers indicated that they would 'fully support' incentive schemes for customers to recycle and reuse rainwater, with a further 15% saying they would 'partially support' this. The highest levels of 'full support' were seen amongst younger South West Water customers in Cornwall (100%) and Devon (88%) and older Bournemouth Water customers (88%), although in no area or age group did 'full support' dip below 70%. Meanwhile, more than four-fifths (81%) of customers indicated that they would 'fully support' incentive schemes for developers to recycle and reuse rainwater, with a further 15% saying they would 'partially support' this. The highest levels of 'full support' were seen amongst younger Bristol Water customers (100%) and younger Bournemouth Water customers (86%).

In the Post-Workshop survey completed by participants, just over half (53%) of customers indicated that they would 'fully support' lower bills being made available to customers if they add drainage onto their land so they didn't need surface water to drain to sewers. A further 42% said that they would 'partially support' this and only 5% stated that they 'do not support' it. The strongest levels of support were seen amongst younger Bristol Water and Bournemouth Water customers (71% 'strongly supporting' in each case), although in nearly all groups every customer indicated at least partial support for this initiative.

Summary of Key Findings.



Overall across all groups, 'water re-use and recycling' was rated as the most important theme/pillar of the three Smarter Healthier Homes elements by the highest number of customers, over and above 'lead pipe removal' and 'smart metering'.

Half of customers in the workshop sessions (50% - 29 out of 58 customers) ranked 'water re-use and recycling' as the most important element of the three. 'Lead pipe removal' was ranked first by 28% (16 out of 58 customers) and 'smart metering' by 22% (13 out of 58 customers). It was felt that 'water reuse and recycling' was the element which represented more of a 'quick win' for South West Water and is something that customers can 'own', whereas 'lead pipe removal' was perceived as a long term and costly plan, while 'smart metering' would also be less of a 'quick win', although it would assist customers to become more aware of their water usage and also help South West Water to improve their predictive capacity.

Some area, age and social grade related differences were noted in these importance rankings:

- South West Water customers in Devon and Bournemouth Water customers were most likely to feel that 'water re-use and recycling' was the most important pillar of the Smarter Healthier Homes initiative, over both 'smart metering' and 'lead pipe removal';
- Older customers of South West Water and Bournemouth Water were most likely to feel that 'water re-use and recycling' was the most important pillar of the Smarter Healthier Homes initiative. Older customers of Bristol Water expressed a slight preference for 'smart metering', although this was the least important pillar for most younger South West Water and Bristol Water customers;
- Customers in the ABC1 social grades felt slightly more strongly than C2DE customers that 'smart metering' was the most important pillar of the Smarter Healthier Homes initiative (a mean score of 2.0 for ABC1s, compared to 2.3 for C2DEs). However, C2DEs were more likely to prioritise 'lead pipe removal' than ABC1s (1.8 and 2.3 respectively).

Summary of Key Findings.



In the Post-Workshop survey completed by participants, when asked which of the three Smarter Healthier Homes initiatives they felt **should be a priority for South West Water**, 'water reuse and recycling' was again the initiative that was ranked as the most important priority by customers overall. This was followed by 'smart meters' and then 'removing homeowner lead pipes'.

Some area, age and social grade related differences were noted in these importance rankings:

- Younger customers in all water company areas except Bristol felt that 'water reuse and recycling' should be a priority for South West Water compared to 'smart meters' and 'removing homeowner lead pipes';
- Older customers in the Bournemouth Water and Bristol Water areas felt that 'smart meters' should be a priority for South West Water compared to the other two initiatives;
- Only younger customers in the Bristol Water area felt that 'removing homeowner lead pipes' should be prioritised over the other initiatives.

In the Post-Workshop survey completed by participants, when asked which of the three Smarter Healthier Homes initiatives they felt **would be of most benefit to customers**, 'water reuse and recycling' was again the initiative that was ranked as the most important benefit to customers overall, although the relative importance gap between 'water reuse and recycling' and 'smart meters' was smaller than that seen for which of the three initiatives should be prioritised by South West Water.

Some area, age and social grade related differences were noted in these importance rankings:

- Younger customers in all water company areas except Bournemouth Water felt that 'removing homeowner lead pipes' would have the most benefit for customers compared to 'smart meters' and 'water reuse and recycling';
- Older customers in the Bournemouth Water and Bristol Water areas, as well as younger Bournemouth Water customers, felt that 'smart meters' would be of greatest benefit to customers compared to the other two initiatives;
- Older South West Water customers in Devon and Cornwall felt that 'water reuse and recycling' would be of greatest benefit to customers.

Summary of Key Findings.



Overall across all groups, of the six priority areas tested more than four-fifths (81%) of customers felt that 'helping homes save water with water saving devices, home audits and education' should be a priority for South West Water to include in their 'PR24' Plans. More than three-fifths (61%) of customers felt that 'investing to get rid of lead pipes in older homes' should be a priority for South West Water to include in their 'PR24' Plans.

Around half (51%) of customers felt that 'helping homes recycle water by providing water butts' should be a priority for South West Water to include in their 'PR24' Plans, with just under half (49%) thinking that 'giving homes smart meters' should be a priority for South West Water to include in their 'PR24' Plans.

'Improving the taste of water' and 'improving the colour of water' were far less of a priority compared to the other priority areas tested, with only 19% and 9% respectively believing that these should be a priority for South West Water to include in their 'PR24' Plans.

Some area, age and social grade related differences were noted in how some customers prioritized the six aspects tested:

- Nearly all SWW customers asked felt that SWW should place high priority on 'helping homes recycle water by providing water butts', while nearly all SWW and Bournemouth Water customers thought that SWW should prioritise 'helping homes save water with water saving devices, home audits and education';
- Older customers of Bristol Water thought that SWW should place high priority on 'giving homes smart meters', although nearly all younger Bristol Water customers felt that this should not be a priority. Younger customers of all water companies were more likely to think that SWW should prioritise 'investing to get rid of lead pipes in older homes';
- Customers in the ABC1 social grades felt slightly more strongly than C2DE customers that 'South West Water should place high priority on 'giving homes smart meters' (54% of ABC1s, compared to 35% for C2DEs). However, C2DEs were more likely to feel that South West Water should prioritise 'investing to get rid of lead pipes' than ABC1s (71% and 51% respectively) and 'improving the waste and smell of water' (29% and 11% respectively).

Summary of Key Findings.



In the Post-Workshop survey completed by participants, when asked which of the six elements of the 'PR24' plans should be prioritised by South West Water, 'helping homes save water with water saving devices, home audits and education' received the highest priority ranking overall (a mean of 2.4 out of 6). The two other priority areas where a mean score of under 3.0 was recorded were for 'helping homes recycle water by providing water butts' and 'giving homes smart water meters'. As seen in the workshops, the areas of lowest priority were 'improving the colour of tap water' and 'improving the taste and smell of tap water'.

Some area and age grade related differences were noted in how some customers prioritized the six aspects tested:

- Older Bournemouth Water and Bristol Water customers were most likely to prioritise 'SWW giving homes smart meters' for the 'PR24' plans, while older South West Water customers in Devon and Cornwall were most likely to prioritise 'SWW helping homes recycle water by providing water butts';
- Younger South West Water customers in Cornwall, younger customers in the Bournemouth Water area and older Bristol Water customers were most likely to want to prioritise 'SWW helping homes save water with water saving devices, home audits and education' above the other elements;
- Younger Bristol Water customers were the only group to feel that 'SWW investing to get rid of lead pipes in older homes' should be the key priority for inclusion in the 'PR24' plans.



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**Customer Views on Water in 'The
Ideal Home'.**

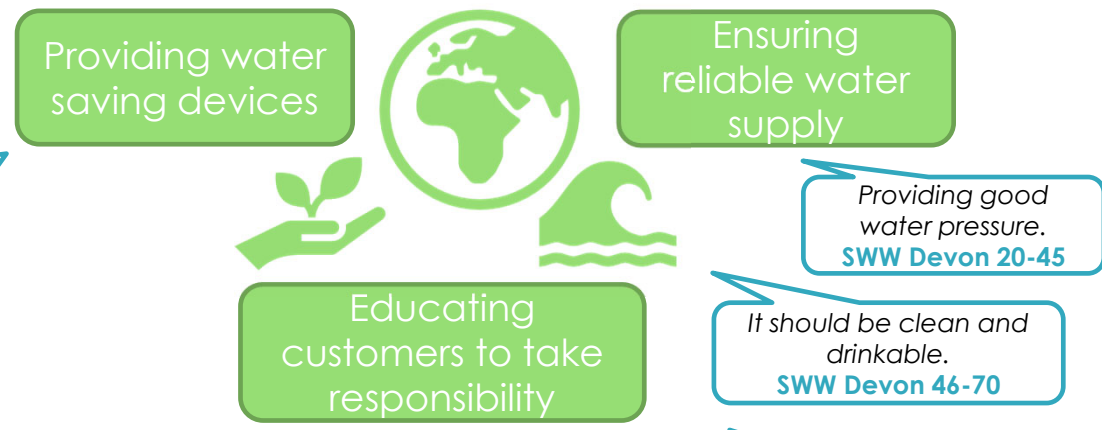


Customer Views on Water's Role in 'The Ideal Home'

Customers saw South West Water's role encompassing aspects such as providing a reliable water supply and educating customers to think about their water consumption by providing education and domestic water saving devices.



'The Role of South West Water'



I had a free water butt and one of those little things to put in the shower.
SWW Cornwall 46-70

I got all the freebies from South West Water...I've found that it has cut my water bill down significantly since I installed them, I've noticed big difference since installing the new shower head.
SWW Devon 20-45

The gadgets they can provide, the things that go on the taps to slow the amount of water coming out of the taps.
SWW Devon 46-70

Maybe some sort of incentive where if you're a good customer you get a free water butt or something?
SWW Cornwall 20-45

There is a certain amount of messaging from water companies that is about 'take responsibility' but you can't even get hippo bags for the toilets from them.
SWW Cornwall 46-70

It's educating people, just letting people know what they can do to help themselves and take a bit of responsibility.
SWW Cornwall 46-70

Ensuring reliable water supply
Providing good water pressure.
SWW Devon 20-45

It should be clean and drinkable.
SWW Devon 46-70

It's about the sustainability of water and how consciously it's collected and used.
SWW Devon 20-45

When customers were asked about what role water plays in the 'ideal home', the feeling was that both water companies and the individual have important roles to play.

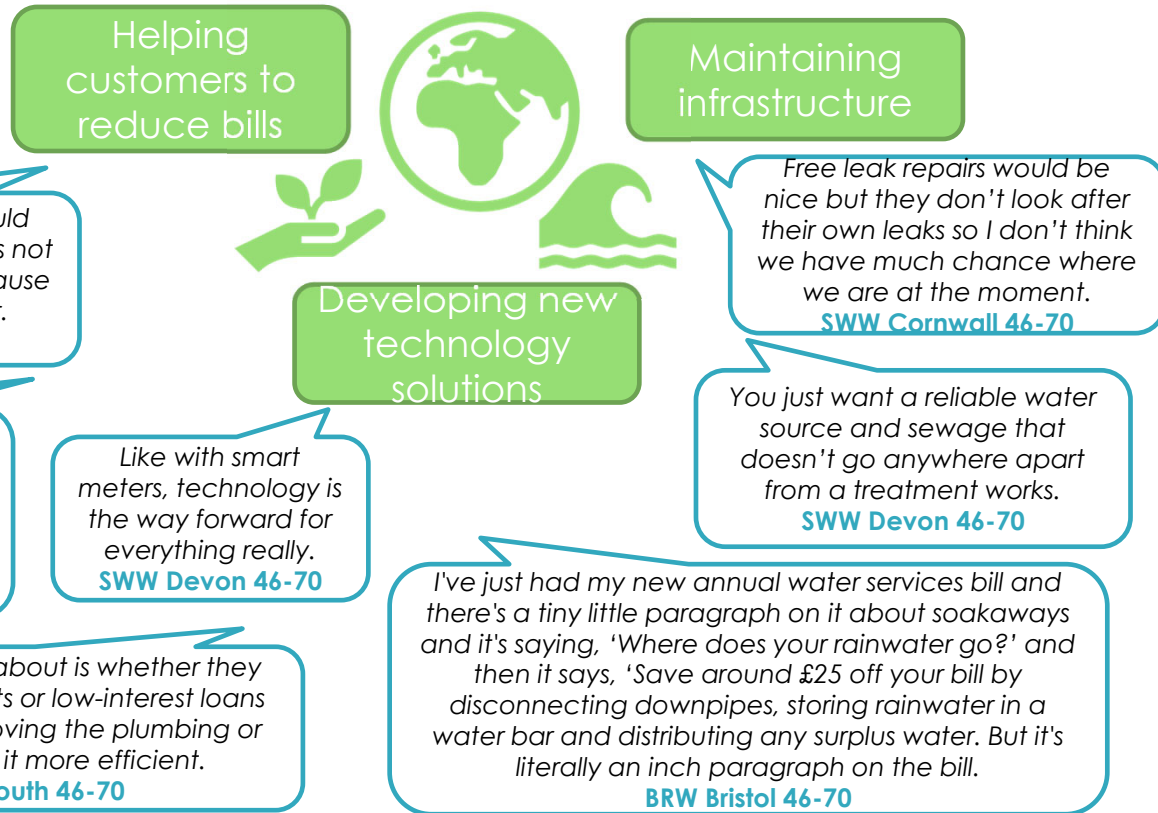
The water company was seen to be the 'enabler' – as well as ensuring a reliable and clean water supply, they were also expected to play a role in educating customers on water usage and providing household devices which can regulate water usage generally.

Customer Views on Water's Role in 'The Ideal Home'

At a lower level, some customers felt that South West Water's role also included actively helping them to reduce their water bills and to be developing up-to-date solutions to help tackle issues such as fixing leaks more efficiently.



'The Role of South West Water'



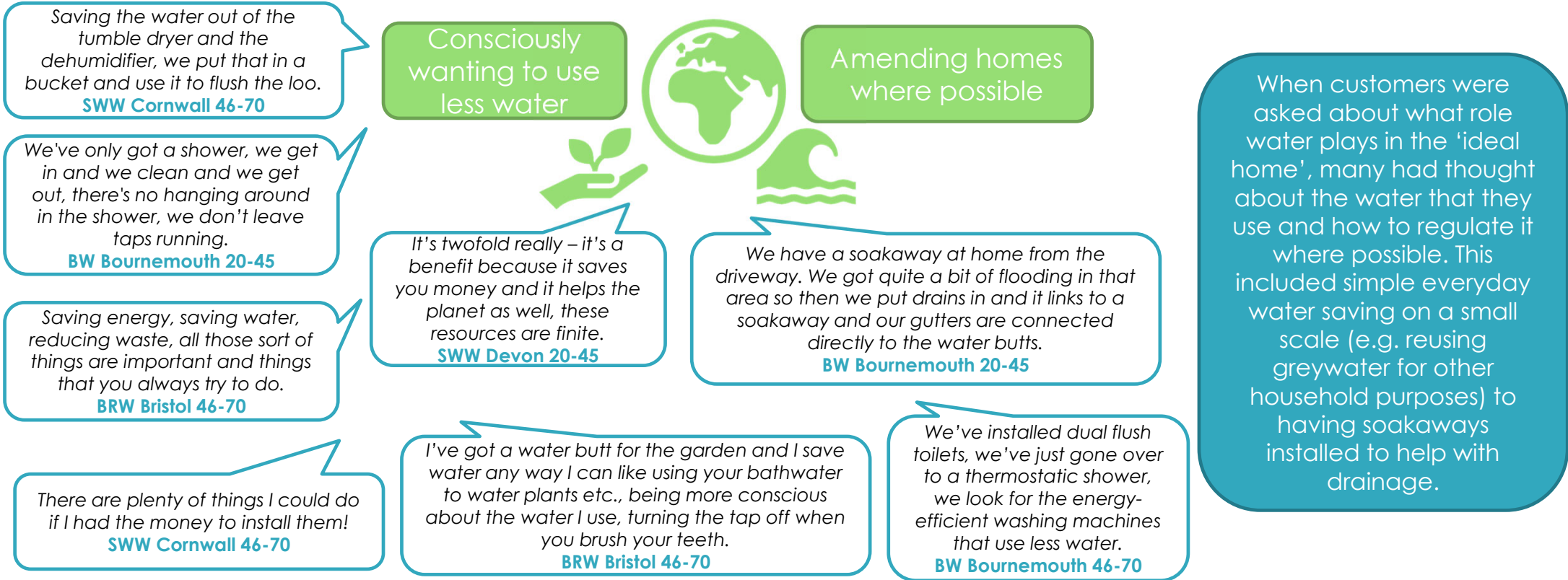
When customers were asked about what role water plays in the 'ideal home', water companies were also expected to be maintaining water infrastructure generally and to be investigating and developing technology to assist customers with their efforts to try and save water and be more conscious about their usage.

Customer Views on Water's Role in 'The Ideal Home'

Customers also felt that individuals have a key role to play in water's place in the 'ideal home', largely associated with actively trying to use less water and recycle water whenever they are able to – there was a feeling that 'everyone needs to do their bit'.



'The Role of the Individual'



The word "turquoise" is rendered in a white, dot-matrix style font. Each letter is composed of a grid of small white circles, giving it a digital or pixelated appearance. The letters are lowercase and spaced out.

**Customer Views on 'Smarter
Healthier Homes'.**

Customer Views on 'Smarter Healthier Homes'

The Smarter Healthier Homes initiatives were largely seen as things that customers would expect a water company to be doing – but customers felt positive that their water company was doing them.



What is Smarter, healthier homes? 
Initiatives currently covered by the Smarter, healthier homes programme:-

- **Smart meters** - to empower customers to manage their bills and efficient water use, and identify leaks
- **Water saving** – providing water saving devices, home audits and advice for water efficiency 
- **Water reuse and recycling** – we are providing water butts to customers in some areas that have been affected by drought and are trialing smart water butts
- **Supply pipe leakage repairs/replacement** 
- **Removing homeowner lead pipes**

Water reuse and recycling is interesting – maybe a bit more than just water butts.
SWW Cornwall 46-70

I'd say smart homes is probably more with electric and gas, like with your boiler and turning things on and off with your phone, but with water it is hard to imagine how it would work.
SWW Devon 20-45

It could make you more self-aware of the water you are using, whether it's the wastage or the savings you are making.
SWW Devon 20-45

There's all these other issues that we see on the news but then these sorts of initiatives that are happening don't seem to get as much precedence or coverage if they are meant to be as valuable as we need them to be, they just kind of get sidelined or buried.
SWW Devon 20-45

They are throwing the word 'healthy' around so that would indicate mental and wellbeing health.
SWW Cornwall 46-70

Are they already doing smart meters? That to me suggests they are.
SWW Cornwall 46-70

It should be happening anyway.
SWW Devon 20-45

I thought removing lead pipes was a thing of the past? I thought all domestic lead pipes had been removed a long time ago.
SWW Cornwall 46-70

The problem with smart homes is that it always seems to be the people that have the most money that can afford these 'smarter' homes.
SWW Devon 20-45

When shown a summary of the Smarter Healthier Homes initiatives, many customers felt that they were things that water companies should be doing anyway – however, it did make customers feel more positive towards their own water company.

Interestingly, albeit at a low level, there was some initial surprise amongst South West Water customers that there were still lead pipes in existence.



Customer Views on 'Smarter Healthier Homes'

The Smarter Healthier Homes initiatives were seen as things that customers would expect a water company to be doing – but customers felt positive that their water company was doing them.



I think it is positive that they are highlighting these things.
BRW Bristol 20-45

Could 'smarter' feel like it's more than just the water, like synchronising water and energy?
BW Bournemouth 46-70

For me and my household a smart meter would be a great thing – but from an environmental point of view it would be the practical recycling of water.
BW Bournemouth 20-45

I like the smart meter because I've got no idea where the water meter is in my home. Being able to visibly see potentially how much water I've used I think is really good.
BRW Bristol 46-70

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- **Removing homeowner lead pipes**



I think these are things that they should be doing anyway.
BW Bournemouth 46-70

I haven't heard about any of that stuff – the home audits I haven't heard about.
BW Bournemouth 20-45

I'm quite interested in the home audit, I haven't heard about that approach. I'm quite careful with water but there's other people in this household that aren't necessarily so it just focuses you on how you are using it.
BRW Bristol 46-70

When shown a summary of the Smarter Healthier Homes initiatives, many customers felt that they were things that water companies should be doing anyway – however, it did make customers feel more positive towards their own water company.

Some customers were not aware of any of these initiatives – indicating that South West Water still has work to do to communicate what they are doing more effectively to customers generally.

Customer Views on 'Smarter Healthier Homes'

The most appealing elements of 'Smarter Healthier Homes' were related to helping customers reduce bills and reduce their own water usage.



Water saving...to reduce your bills, but it does also benefit other people on another level, but it's always nice to know what you can start doing yourself.

SWW Devon 20-45

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The supply pipe leakage repairs and replacement one is a little bit misleading because from what I know having renovated my property, the water company will only repair pipes that run from your meter to your property. They won't repair pipes within your property unless you've got certain extra level of cover – so it's not actually as good as it sounds.

SWW Devon 20-45

Before exploring them in greater detail, the most appealing elements of Smarter Healthier Homes to customers appeared to be 'water reuse and recycling' and 'water saving' – often because these were areas that customers perceived could help them to reduce their own water usage and hence their water bills.

For me one of the more important points on there would be the 'water reuse and recycling', just because I think it's something that we should be more conscious of.

SWW Devon 20-45

I think the water reuse and recycling is a priority, we have had water shortages for quite a while but not all of us are collecting any water.

SWW Cornwall 20-45

I feel that removing lead pipes should be a priority given that it might have health implications, it should be a starting point before trying to make the improvements.

SWW Cornwall 20-45

I like the idea of a home audit, things that you could do personally to your home to make thing better.

SWW Cornwall 20-45

I'm not sure how much smart meters help - the reuse and recycling and possibly the water saving I would both move up the list and put the smart meters in the middle. The smart meters are good at telling you what you're doing but actually doing something about it isn't always something that you can do because a lot of it is to do with the essentials that you are doing.

SWW Devon 46-70

Smart meters would be a great one to go ahead with and identifying leaks so that you can report it yourself.

SWW Cornwall 20-45

Customer Views on 'Smarter Healthier Homes'

Other appealing elements of 'Smarter Healthier Homes' were related to increasing the ability for the both customer and South West Water to detect leaks.



Water saving devices is quite a cheap thing for them to do and they could be doing it more widespread.
BW Bournemouth 20-45

I think water reuse and recycling would be a good one. Water butts are expensive though.
BW Bournemouth 46-70

We would like someone to come round and tell us ways to save water.
BRW Bristol 20-45

I would think removing the lead pipes would be a priority for people's health.
BRW Bristol 20-45

What is Smarter, healthier homes?

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The bigger mission there is directly tackling water quality, I want that water to be clean and healthy.
BRW Bristol 20-45

I think repairing the leaks would be really good as there are a lot of them.
BW Bournemouth 46-70

Supply pipe leakage repairs/replacement comes quite low down the page – as far as I'm concerned for water companies that needs to be number one. Lots of the other things (are down to me), I can buy my own water butt and go online and do a water audit – but this is one thing that I as an individual cannot possibly do.
SWW Devon 46-70

Before exploring them in greater detail, another area that some customers felt was the most important of the Smarter Healthier Homes elements was 'repairing leaks' because this was felt to be something that is out of control of the individual but could have an effect on their water quality and water bills.

Customer Views on 'Smarter Healthier Homes'

Customers generally had positive views about the Smarter Healthier Homes programme once they had fully explored various elements in the workshops.



Anything that helps us to save water or to reuse water is going to benefit everybody isn't it? Maybe not the water company – although if they are worrying about the reservoir levels then anything that helps us to reuse what we already have is going to be beneficial.
SWW Cornwall 46-70

I think it's made me more aware of the potential problems that there are, whereas before I just took it all for granted, I just assumed that the water was all safe, I didn't know about any lead pipes, I didn't really think about leaks or what might be going in the water.
SWW Cornwall 20-45

It's about us being smarter and not them working smarter.
SWW Devon 20-45

I'm not convinced that's the right wording! Maybe 'energy efficient'?
BRW Bristol 46-70

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There will always be new ways and new innovation and thinking about it and driving the market that way.
BRW Bristol 46-70

I think it's quite good because it affects you on an individual level. These are all things that you'll see outside your home and think, 'Actually this is a really good step' and I think that encourages taking other positive steps elsewhere as well.
SWW Devon 20-45

If you get rid of lead pipes then would that be healthier? It would affect taste as well you would have thought.
SWW Devon 20-45

If this in turn reduces the risk of sewage spills because that's going to aid capacity then I think it should be done hand in hand.
SWW Cornwall 46-70

I think it's a good thing, it's about time that they caught up with the times, the energy companies have been doing it for many years, but it's positive.
BRW Bristol 46-70

Once the various elements of the Smarter Healthier Homes initiative had been explored in greater detail in the workshops, customers felt at least as positive, if not more so, about South West Water/Bristol Water/Bournemouth Water as a result. There was also a feeling that they were now more aware of these issues than they were before, particularly about water quality, lead pipes and water recycling.

Customer Views on 'Smarter Healthier Homes' – Post-Workshop Survey

'Based on everything that was discussed in the second session, what are your overall thoughts and perceptions of the Smarter, healthier homes programme?'



This is a great idea. I am all for recycling & reduction. I try my best but any additional help is greatly received.

SWW Cornwall 20-45

What is Smarter, healthier homes?

Initiatives currently covered by the Smarter, healthier homes programme:-

- **Smart meters** - to empower customers to manage their bills and efficient water use, and identify leaks
- **Water saving** – providing water saving devices, home audits and advice for water efficiency
- **Water reuse and recycling** – we are providing water butts to customers in some areas that have been affected by drought and are trialing smart water butts
- **Supply pipe leakage repairs/replacement**
- **Removing homeowner lead pipes**



I still don't get the 'healthier' bit. But totally agree with the aims of a smarter home.

SWW Cornwall 46-70

I do not agree with the term 'healthier', I don't feel what they are proposing is creating a healthier home. I do believe in a smarter home by educating the customers though.

SWW Devon 20-45

In principle I agree with it, as long as it doesn't cost the customer too much.

BRW Bristol 20-45

I'm very impressed by the options and items available to customers to support more efficient homes. I see there is incentivisation of smart meters, which is a positive step. I would reiterate the need for more regular, engaging communication with customers, to highlight the opportunities available.

BRW Bristol 46-70

I think smarter homes is a natural progression. As a consumer I like the idea of having a better understanding of where my water is being used, what its costs and making more informed decisions about how we use water in our home.

BW Bournemouth 20-45

Smarter, healthier homes is a positive initiative in my view. We should use technology to help everyone - the water company to locate those leaks and customers to try and conserve their water as much as possible.

BW Bournemouth 46-70

It's a nice ambition but the energy smart meter I have has made very little difference to my usage. I think leaks in my home are rare enough to not worry too much about them. So overall I'm worried it's diverting resources away from the pursuit of renewables and other efficiency initiatives.

SWW Devon 46-70

Comments made in the Post-Workshop survey completed by participants reinforced the key messages from the workshops about Smarter Healthier Homes making people feel more positive towards their water company.

However, customers were more likely to associate the aspects of the Smarter Healthier Homes initiative with being 'smart' rather than 'healthy'.

Customer Views on 'Smarter Healthier Homes'

In terms of what SWW can do to better promote the Smarter Healthier Homes programme, the theme of more effective communication to customers about the various issues was common across all customer groups.



For 'smarter', why waste resources on advertising when you could just send out or email it to offer them to customers... rather than paying out for adverts? I can't say that I've ever seen a single South West Water advert.

SWW Devon 20-45

I think they should put something through the post because that will reach all customers, the aged population aren't as electronically-savvy...and some generations still get paper bills.

SWW Devon 20-45

Just focus on getting these messages out, a lot of us haven't heard about any work that they are doing at the moment. Perhaps some work on social media – I've seen some bus adverts and a couple of us have had letters in the post but not much else.

SWW Cornwall 20-45

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You should get Martin Lewis onto it because it's a money-saving thing...they could put things on there.

BW Bournemouth 20-45

Education, especially the young ones, to make them more aware of what's going on...it takes time, it doesn't happen overnight.

SWW Devon 46-70

As a student nobody talks to us about anything so maybe advertise it at universities, it would be helpful to educate our generation...and give some of the freebies out at Freshers Week.

BW Bournemouth 20-45

When asked how South West Water could better promote the Smarter Healthier Home programme, customers generally felt that they needed to be told more about it and suggested several ways that South West Water could communicate it, ranging from 'traditional' communication methods to the use of social media and well-known 'money-saving influencers'.

Customer Views on 'Smarter Healthier Homes'

A theme that was more evident amongst South West Water customers was that of linking Smarter Healthier Homes initiatives with financial incentives, in the form of discounts on customer bills and providing incentives for customers, communities and developers to think more about incorporate this initiative into their daily thinking.



A discount off the bill so that you can save some money. It's hard to get the message out to people sometimes, if we have paper bills we don't always read the other stuff that's inside them.
SWW Cornwall 46-70

It would be good if there could be a means of supporting things like having a means of reusing your greywater...there could be some subsidies to help people to do that?
SWW Cornwall 46-70

I think it would be really interesting to do it as a community exercise so the communities get incentivised as a group because then you've got peer-to-peer talking to other people. The trouble is when this big corporate talks to people, you just get 'paper blindness' with so much information coming at you – but if you are just chatting to your neighbour about a water butt and 'if everyone got one then we would get so much off our water bills', I think that's a really nice way of doing it.
SWW Cornwall 46-70

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Working more closely with developers – I know that is only applying to new builds. I know there is a local developer who at one point were looking at building in Westward Ho! and they were very much above the bigger housebuilders and were quite for doing greywater tanks.
SWW Devon 20-45

Bitesize snappy marketing and incentivisation, I think that's really important, incentivising people like Octopus do with the electric. We're in one now actually, the 'Supersave Save Energy' sessions. So incentivising people to use less at various points maybe would be much more productive and effective.
BRW Bristol 46-70

When asked how South West Water could better promote the Smarter Healthier Home programme, some customers felt that incentivising take-up of these initiatives would be an effective way of communicating their benefits and encouraging greater consideration of water use and water recycling to domestic customers and housing developers.

Customer Views on 'Smarter Healthier Homes'

Key Learnings



- When shown a summary of the Smarter Healthier Homes initiatives, many customers felt that they were things that water companies should be doing anyway – but Smarter Healthier Homes did make customers feel more positive towards their own water company. Interestingly, albeit at a low level, there was some initial surprise amongst South West Water customers that there were still lead pipes in existence. Some customers were not aware of any of these initiatives – indicating that South West Water still has work to do to communicate what they are doing more effectively to customers generally.
- Before exploring them in greater detail, the most appealing elements of Smarter Healthier Homes to customers appeared to be 'water reuse and recycling' and 'water saving' – often because these were areas that customers perceived could help them to reduce their own water usage and hence their water bills. Another area that some customers felt was the most important of the Smarter Healthier Homes elements was 'repairing leaks' because this was felt to be something that is out of control of the individual but could have an effect on their water quality and water bills.
- Once the various elements of the Smarter Healthier Homes initiative had been explored in greater detail in the workshops, customers felt at least as positive, if not more so, about South West Water/Bristol Water/Bournemouth Water as a result. There was also a feeling that they were now more aware of these issues than they were before, particularly about water quality, lead pipes and water recycling. Comments made in the Post-Workshop survey completed by participants reinforced these key messages - however, customers were more likely to associate Smarter Healthier Homes initiative aspects with being 'smart' rather than 'healthy'.
- When asked how South West Water could better promote the Smarter Healthier Home programme, customers generally felt that they needed to be told more about it and suggested several ways that South West Water could communicate it, ranging from 'traditional' communication methods to the use of social media and well-known 'money-saving influencers'. Some customers felt that incentivising take-up of these initiatives would be an effective way of communicating their benefits and encouraging greater consideration of water use and water recycling to domestic customers and housing developers.

The word "turquoise" is rendered in a white, dot-matrix style font. Each letter is composed of a grid of small white circles, giving it a digital or pixelated appearance. The letters are lowercase and spaced out.

Customer Views on Smart Metering.

Customer Views on Smart Metering

The majority of customers were positive towards smart meters in general – water saving, cost control and the potential to spot leaks were all mentioned as positives to both the customer and to South West Water.



I guess it's fair because they are putting you in control a little bit more.
SWW Cornwall 46-70

I genuinely don't understand why people wouldn't want a smart meter. I've got young kids and the more tools I can give them to show them what consumerism does and what it means to be a consumer of energy of water, I think that's a great way to do it, it would make me more mindful.
SWW Cornwall 46-70

The water companies can take a reading automatically without you having to submit a reading and your bill will be accurate.
SWW Devon 46-70

I think if you give people access to this type of information, they will naturally try harder to make the number lower. In a weird way, it's like a game isn't it? You are looking at something and thinking, 'How can I use less today than I did the day before?' or, 'How can I reduce my bill this quarter compared to last quarter?'.
SWW Devon 20-45

Smart metering

Key benefits:

- **Greater control over bills**
Seen to be the fairest way of charging.
- **Faster identification of leaks**
One third of leakage is on customer property. A leaky toilet can cost hundreds of pounds a year.
- **More timely leak repairs**
Additionally lead pipes can be removed during repairs, leading to better quality water



Bill accuracy is the obvious one (benefit) and not having to kneel down (to read it)!
SWW Devon 20-45

I think there will be a direct impact very quickly.
BRW Bristol 46-70

It gives people the opportunity to see how much they're spending, and they will reduce their consumption.
BW Bournemouth 46-70

The majority of customers expressed positivity towards smart meters generally, feeling that accurate billing, having the ability to detect leaks and generally 'putting the customer in control of their own usage' would be beneficial to both consumers and South West Water.

There have been times when friends have had leaks and they didn't know until the bill has come through and it's a hefty bill and they thought, 'How is this even possible?'
SWW Devon 20-45

If you're aware of how much you're using, then you will be more careful about what you're using – I certainly am with gas and electricity.
BW Bournemouth 46-70

Identifying leaks – leaks could cost them (South West Water) a lot of money.
SWW Cornwall 20-45

Identifying leaks in the home is going to be of benefit to them (the water company).
SWW Devon 46-70

Customer Views on Smart Metering

However, there were some customers who had reservations about smart meters, mainly relating to fairness of charging and 'smart meter cost anxiety'.



Where it says 'the fairest way of charging' I'm a bit sceptical about that. If I have a meter fitted I could be paying more than I'm on.
SWW Cornwall 20-45

I'd like to know what they mean by 'the fairest way of charging'.
SWW Cornwall 46-70

I would worry about the negative impact, like with hot water bottles, I wouldn't want it to make me think twice about being comfortable and having a hot water bottle if I was cold, you'd have a visual of Pound signs rolling up just because you're filling up your hot water bottle.
SWW Cornwall 20-45

I would like a smart meter but I would personally rather buy a third party one because I've seen horror stories of when companies, if you run up too much of a bill, they'll just move you on to prepaid meters and you've got to go to the shop every 20 minutes to put a fiver on or whatever. Our money comes in quite sporadically so we pay off chunks and miss a month and whatever, it's just a bit of a risky one for self-employed people.
BW Bournemouth 20-45

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It feels very invasive to me. It's a device in your home that operates on Wi-Fi and it's also about knowing that information, it's up to me, it's an invasion of my privacy.
SWW Cornwall 46-70

I would have a smart meter if you could opt in or out of having it connected to the internet.
BRW Bristol 20-45

I don't think it should be compulsory, I think people should get the choice, especially vulnerable groups. If someone is in their seventies or eighties I don't see what difference having a water meter will make to them, except for maybe increasing their anxiety if they see it going up and making them worry about using water.
SWW Devon 46-70

I think they are great but you can get fixated on them the way things are at the moment. You can get worried about how much the meter is telling you that you've spent.
BW Bournemouth 46-70

I'm a bit of a luddite about 'smart' things, the more moving parts there are the higher the chances it is going to break.
SWW Cornwall 46-70

However, there was a more cautious reaction to the idea of smart meters amongst some customers.

This appeared to be slightly more prevalent amongst some lower social grade customers, who questioned the assertion that smart meters are 'the fairest way of charging' and felt that it could create a sense of 'smart meter anxiety' whenever they needed to use water for essential purposes. At a much lower level, a couple of customers expressed concern about perceived privacy issues.

Customer Views on Smart Metering

Perceived challenges that customers felt South West Water might face when implementing smart water technology for customers included the perceived scale of the project and gaining access to people's homes.



Accessing people's homes that don't want them.
SWW Cornwall 46-70

You can't say that this is going to be compulsory (if I don't want one), are you going to shut my water off?
BRW Bristol 20-45

There would be concerns from some people that their bills are going to go exponentially higher when they can't afford it.
BW Bournemouth 46-70

Although I don't want a smart meter in my own home, I can see the benefits of this as a scheme. Down here in southwest Cornwall we have an awful lot of second homes and you have folks who are here for four weeks. But when they are here, they fill up the swimming pool and so on and so forth. I think if South West Water are going to be rolling out and it looks like it's compulsory, which I do have misgivings about as well, if it is a mandatory requirement what they ought to be doing is focusing that mandatory requirement on folks who are excessive users of the utility.
SWW Cornwall 46-70

Smart metering – plans for installations & replacements

- Smart meters will be rolled out as a part of a large programme.
- There are a lot of meters to give to 25 million homes so it will take several years to do this, as it did with energy.
- The meter rollout can be expected to be geographical as that makes it more efficient. There are some water-stressed areas where metering will become compulsory in the future due to insufficient water, such as the Bournemouth region. As such the rollout will start here.
- There is very high meter penetration in the South West (circa 85%) so we will be mostly moving people to smart meters in this region.



I think it makes sense to attack it that way and by putting out there how much there is to do it does kind of help manage expectations a bit in terms of when you can expect to get one. You'd rather know that than be told, 'Oh it is our plan one day'.
SWW Devon 20-45

It's not something I've heard about before this discussion so if they're going to be doing that then I think they need to let people know.
BW Bournemouth 46-70

I think Bournemouth is one of the largest-growing conurbations in the south west so I can imagine that water companies have a hard time trying to work with building companies to get the water systems in place.
BRW Bristol 20-45

It's going to be a big job, will their tech be up to standard and will there be teething problems to get over?
SWW Devon 20-45

If planning requirements include smart meters being fitted into a new build of any description, then they don't have to retrofit from that point...it's the same with the greywater and the rainwater and water butts and so on and so forth.
SWW Cornwall 46-70

A few customers felt that South West Water may face some challenges relating to their plans for smart meter installations and replacements.

The main issues raised were that the communication to the customer base would have to be swift and informative to ensure that everyone knew about it, that some people may resist having a smart meter installed, concern about the scale of the project generally and liaising with building developers.



Customer Views on Smart Metering

The idea of an app linked to a smart meters was generally liked by customers, who are becoming more tech-savvy and liked the idea of being alerted when their water usage was about to go beyond its normal levels.



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An app would make sense because everyone else is doing it, the other utilities.
SWW Cornwall 46-70

A smart meter on a digital screen would be lovely or something that flicked up automatically to the app.
SWW Devon 20-45

100% - we are a very smart 'techy' home, we've got Hive, we've got the boiler app.
SWW Devon 20-45

If you had an app on your phone it would be interesting to know that if you had a shower then you could see on your phone and say, 'It has cost me this much'. An accurate live time app would be quite useful really. It can help identify issues like a leaky tap.
BRW Bristol 20-45

With an alert, it would be useful to see if you are 'above average' for that month, just to make you aware that you are using more than usual.
SWW Devon 20-45

When you know your own usage within a tolerance then maybe you can set your own limits?
SWW Cornwall 20-45

I would use an alert as an alarm in case there was a water leak I didn't know about.
SWW Cornwall 46-70

I know not everyone is tech-savvy, especially the older generation, but to have it all on an app linked to your account - would it be another way that could make it more cost-effective to roll out quicker?
BW Bournemouth 20-45

The idea of linking smart meters to apps was liked by a good proportion of customers – this appeared to be driven by their experiences of having smart meters for other utilities and using apps for them.

Customer Views on Smart Metering

Key Learnings



- The majority of customers expressed positivity towards smart meters generally, feeling that accurate billing, having the ability to detect leaks and generally 'putting the customer in control of their own usage' would be beneficial to both consumers and South West Water.
- However, there was a more cautious reaction to the idea of smart meters amongst some customers. This appeared to be slightly more prevalent amongst some lower social grade customers, who questioned the assertion that smart meters are 'the fairest way of charging' and felt that it could create a sense of 'smart meter anxiety' whenever they needed to use water for essential purposes. At a much lower level, a couple of customers expressed concern about perceived privacy issues.
- A few customers felt that South West Water may face some challenges relating to their plans for smart meter installations and replacements. The main issues raised were that the communication to the customer base would have to be swift and informative to ensure that everyone knew about it, that some people may resist having a smart meter installed, concern about the scale of the project generally and liaising with building developers.
- The idea of linking smart meters to apps was liked by a good proportion of customers – this appeared to be driven by their experiences of having smart meters for other utilities and using apps for them.

turquoise

Customer Views on Lead.

Customer Views on Lead

There was some surprise amongst customers initially that there were so many lead pipes still in use, although initially there appeared to be a relatively low level of concern overall amongst customers about the health implications.



I thought it had all been replaced.
SWW Cornwall 46-70

I'm surprised they've not been bang on that and getting that sorted. I mean, 1969 is a long time, I'm surprised it's not been fully phased out to be honest.
BW Bournemouth 20-45

I think my husband has mentioned it but it's not something that I probably think a lot about.
BW Bournemouth 46-70

I didn't know it still existed in homes, I thought that with legislation it might have already been removed.
SWW Devon 20-45

It doesn't surprise me, most houses these days probably has swapped unless your house hasn't been modernised for a long time.
SWW Devon 46-70

I'm sure we've all had lead pipes at some point.
BRW Bristol 46-70

I know of it, it's just that I wouldn't know if it is in my house.
SWW Devon 20-45

How lead gets into the water

- The use of lead service pipes was phased out during the 1960's and officially became illegal in 1969 due to the impact lead exposure can have on your health.
- Over time, lead service pipes have been removed from the mains water network (modern service pipes are made of blue plastic) but there may still be some lead pipes and fittings in older properties (which would have been installed by the developer). Communication pipes and supply pipes can be made of lead too but communication pipes are replaced by South West Water whenever they are found in the network during other works.
- When water leaves the treatment works, there's no lead in the water, however if you have lead pipework or fittings in your home, small amounts may be found in your supply.
- Chemicals (phosphate) is added to the treated water leaving the treatment works to help reduce exposure to lead. The dosing helps build up a protective layer inside lead pipes, both in the distribution network and on the customers' side within the property.



I wasn't aware until now. I don't know what the consequences of having lead pipes are but is it not more of a priority to identify where lead pipes are and get them changed, rather than just 'as and when'?
SWW Cornwall 20-45

The sooner it is out of the system the better.
BRW Bristol 20-45

I would get them changed (if they were in my house) because they are dangerous to your health.
SWW Cornwall 46-70

Phosphates worry me a bit, they are the things I try and avoid all the time so it's a bit strange that phosphates are being put in.
SWW Cornwall 46-70

I thought there was some link between lead piping and potentially Alzheimer's – but I could be wrong.
SWW Devon 46-70

If it was me, I've got this far in life so I must have had some exposure at some stage so I would be fine – but if it was my kids you would want to get it sorted because you don't know what the long term effects to them would be.
SWW Devon 20-45

The issue of lead piping was something that most customers had not really given much of a thought to previously, due either to not knowing about the issue or feeling that it would have already been fully dealt with by water companies.

However, although there was some initial concern expressed about the potential effects on health, this was at a relatively low level overall.

Customer Views on Lead

Most customers assumed that the homeowner would be responsible for water supply pipe repairs if they were inside their property boundary, especially if the pipes were inside their house – but that it would be a good thing generally if water companies were to pick up at least some of the lead pipe replacement costs



After it leaves the road and comes onto your property, I thought it was your responsibility.
BW Bournemouth 46-70

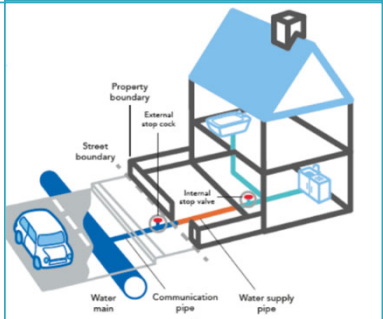
I feel like I should be responsible for replacing that orange bit if it's lead. But if that blue bit's lead, then they should be replacing it.
BW Bournemouth 20-45

If it's inside the property then it's surely the responsibility of the landlady?
SWW Cornwall 20-45

It's a good thing, it seem like they're taking responsibility for making improvements and at the end of the day they are supplying a product that you can't use unless all of the equipment is working properly.
SWW Devon 20-45

Surely that's a good thing, surely if they sorted it out then they wouldn't need to add phosphates to the water, which would save them money in the long run.
BRW Bristol 20-45

What are your thoughts on water companies picking up the tab for sorting lead pipes out even if they didn't cause it?



We had ours removed at our last house, it cost us a day's labour for a tradesman so it was a good couple of hundred Pounds to do, which is obviously not viable for everyone to do themselves.
BRW Bristol 20-45

It's hard to answer this without hard boring numbers – how much would it cost? If it's the entire Devon and Cornwall together then that would be some serious cost.
SWW Devon 46-70

I think it should be a combination of both (the government and homeowners) really.
SWW Devon 20-45

Maybe meet halfway? If the water companies met the householder halfway, it's not in the house and it's not on the street!
SWW Devon 20-45

I think I would struggle to support it in all cases. Ultimately when you buy a home it's your responsibility to maintain that home. It's like with mundic isn't it - unfortunately people bought houses that had mundic in it and they had to replace it. If my bill is going to go up because they're busy replacing then that's quite a hard thing to swallow.
SWW Cornwall 46-70

Most customers seemed to know or assume that any lead water supply pipes within a property boundary were the responsibility of the property owner.

When asked initially, customers felt that it would be a good thing generally if water companies would pick up the tab for dealing with removing lead pipes, although some did express concern about the perceived high costs associated with dealing with this issue.



Customer Views on Lead

Customers in the workshops generally felt that they would like water companies and South West Water to remove all lead pipes, despite the costs involved.

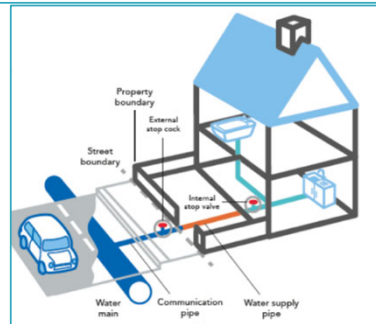


It's fair, I wouldn't expect any different really.
SWW Cornwall 46-70

Across the UK, but less so in the South West, there are lots of lead pipes and it will cost billions of pounds to remove them all. Do you want water companies & South West Water to do this?

But at the same time, if the water companies were going to replace them, surely there should be some sort of government scheme to support water companies encourage them to replace them?
SWW Devon 20-45

I think in general it should be a priority when it comes down to health, specifically in the case of South West Water and their mission statement about being 'safe and secure'. It's in everyone's mutual benefit to get everything sorted.
SWW Cornwall 20-45



Can't there be grants for stuff like that?
SWW Devon 20-45

Yes I would, if it's a health hazard then it's the first thing you would look at.
BRW Bristol 46-70

I think it's a good spin for the water company, it paints them in a good light doesn't it.
BW Bournemouth 46-70

It's like the removal of asbestos, it is something that is contaminating and affecting our health and I think it needs to be done really.
BW Bournemouth 46-70

What they could do is offer as part of the audit to run tablets through the water supply to pick up any untoward lead in pipes and then tell the homeowner that 'we put phosphate in the water to stop this being a health issue but you do have lead piping under your house and if that's something you want to fix then we'll support you in that, not financially but by doing this audit'. And then everyone gets the audit, everyone gets the information and then what you do with the information is up to you. I feel that's quite fair.
SWW Cornwall 46-70

It's hard for me to say what's more important – I would put trust in them to make the decision about what takes priority and if that is removing lead pipes then fine.
BW Bournemouth 20-45

Overall, customers felt that they would want water companies and South West Water to remove all lead pipes from the network – the key theme mentioned in support of this was simply to do with alleviating public health concerns.

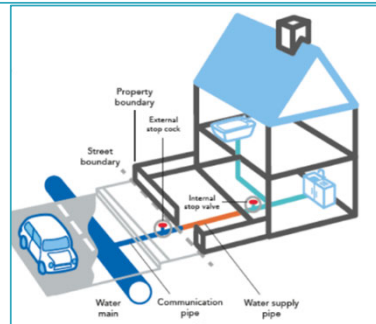
Some others felt that the government should support water companies in this endeavour, while a couple of others felt that committing to this would help to portray South West Water in a positive light.

Customer Views on Lead

However, some customers felt that the costs of removing all lead pipes could end up being passed on to customers in the form of higher water bills.



Across the UK, but less so in the South West, there are lots of lead pipes and it will cost billions of pounds to remove them all. Do you want water companies & South West Water to do this?



If they want us to be healthier, there should be some sort of financial aid to have the pipework in your home replaced with modern equivalents.
SWW Devon 20-45

That would cost us wouldn't it?
SWW Devon 20-45

In an ideal world yes but there's going to be a cost to the consumer, they're not going to do it for free, they're going to increase bills.
SWW Devon 46-70

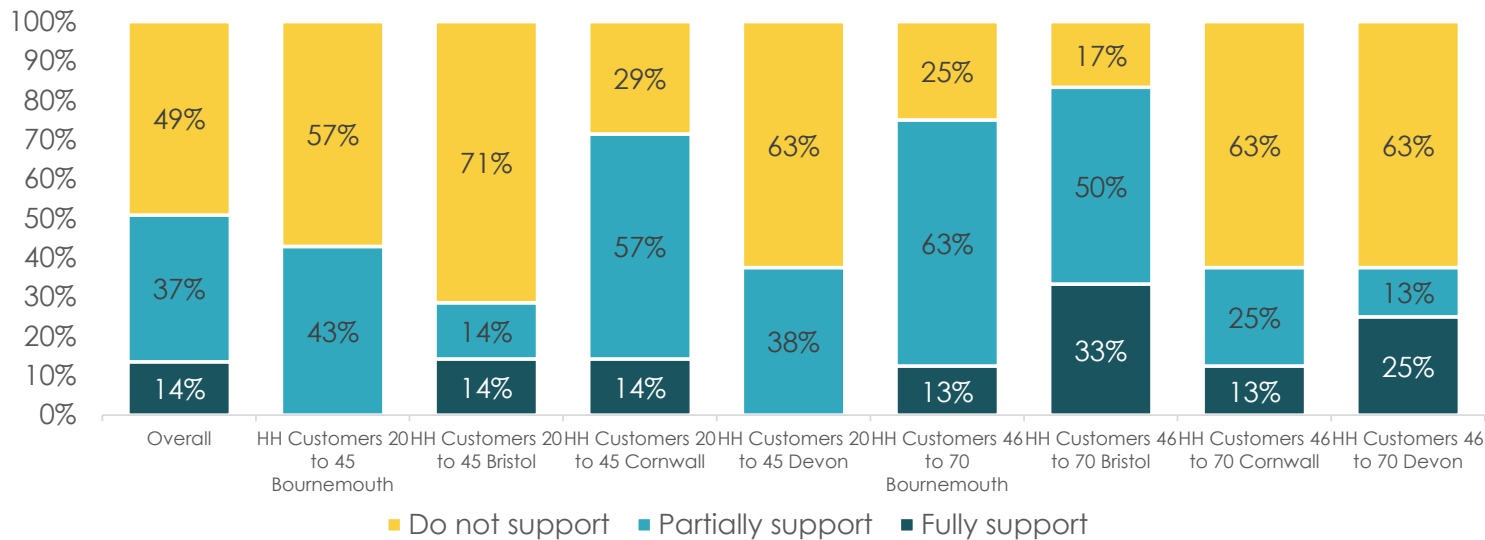
I don't want to pay for it and I don't think it's a priority for me, I've been drinking tap water for 40 years and I'm alright on it, I'm not worried.
BW Bournemouth 20-45

It seems to me that the private rental and social housing sectors and anybody who isn't a property owner are contributing towards somebody else's domestic problem. That's not just or fair.
SWW Cornwall 46-70

However, a few customers felt that a South West Water commitment to remove all lead pipes could lead to them paying more for their water bills, with a feeling (albeit at a low level) that less affluent households would effectively be subsidising property owners to have this work conducted.

Customer Views on Lead – Post-Workshop Survey

‘Do you support the cost of customer lead pipe replacement being paid for by all customers regardless of whether they personally have lead pipes or not?’



In the Post-Workshop survey completed by participants, just over half of customers (51%) overall either fully or partially supported the cost of customer lead pipe replacement being paid for by all customers regardless of whether they personally have lead pipes or not – however, only 14% of customers said they fully supported it.

The highest levels of full/partial support were seen amongst older Bristol Water customers (83%), older Bournemouth Water customers (76%) and younger SWW customers in Cornwall (71%). However, no younger Bournemouth Water or younger SWW customers in Devon ‘fully supported’ this cost being paid for by all customers.

Customer Views on Lead

Key Learnings



- The issue of lead piping was something that most customers had not really given much of a thought to previously, due either to not knowing about the issue or feeling that it would have already been fully dealt with by water companies. However, although there was some initial concern expressed about the potential effects on health, this was at a relatively low level overall.
- Most customers seemed to know or assume that any lead water supply pipes within a property boundary were the responsibility of the property owner. When asked initially, customers felt that it would be a good thing generally if water companies would pick up the tab for dealing with removing lead pipes, although some did express concern about the perceived high costs associated with dealing with this issue.
- Overall, customers felt that they would ideally want water companies and South West Water to remove all lead pipes from the network – the key theme mentioned in support of this was simply to do with alleviating public health concerns. Some others felt that the government should support water companies in this endeavour, while a couple of others felt that committing to this would help to portray South West Water in a positive light.
- However, a few customers felt that a South West Water commitment to remove all lead pipes could lead to them paying more for their water bills, with a feeling (albeit at a low level) that less affluent households would effectively be subsidising property owners to have this work conducted.
- In the Post-Workshop survey completed by participants, just over half of customers (51%) overall either fully or partially supported the cost of customer lead pipe replacement being paid for by all customers regardless of whether they personally have lead pipes or not – however, only 14% of customers said they fully supported it. The highest levels of full/partial support were seen amongst older Bristol Water customers (83%), older Bournemouth Water customers (76%) and younger SWW customers in Cornwall (71%). However, no younger Bournemouth Water or younger SWW customers in Devon 'fully supported' this cost being paid for by all customers.

The word "turquoise" is rendered in a white, dot-matrix style font. Each letter is composed of a grid of small white circles, giving it a digital or pixelated appearance. The letters are lowercase and spaced out.

Customer Views on Recycling Water.

Customer Views on Recycling Water

Most customers felt that water recycling was a good idea and some already had water butts



I don't know much about it but I can't see any downsides to it.
SWW Cornwall 20-45

It's good for the planet and it's good for my pocket.
BRW Bournemouth 20-45

It would be good for the bills, good for the pocket.
SWW Devon 46-70

I have a water butt that I had to buy but I would quite like another one for free!
SWW Cornwall 46-70



To be fair to South West Water, they came to our local Morrison's, they put a big thing on Facebook saying they would be at Morrison's with free water butts and they were begging people to take them away and people were refusing them!
SWW Cornwall 46-70

Yes it is a good idea, especially if you think about how much you use in the shower that could be used to flush a toilet at the same time.
SWW Devon 20-45

It's about not using tap water to water plants, to use a natural water resource that's out there.
BRW Bristol 46-70

It would be reasonable to provide water butts at a discount or free.
SWW Devon 46-70

I think it would be really useful, it would probably take a bit of re-education for people and a bit of infrastructure to put in but once it is and it becomes the 'norm' I think that will be really beneficial.
SWW Cornwall 20-45

All customers indicated that they thought water recycling was a good idea and many thought it would be likely to save them money as well as preventing water wastage.

Some customers were already taking steps to reuse water, most often in the form of water butts, and several felt that South West Water had a role in educating customers about this issue and also in providing them with routes to obtaining the necessary equipment to be able to reuse and recycle water more than is currently possible.

Customer Views on Recycling Water – Smart Water Butts

Most customers had not heard of smart water butts but reactions to this idea were mixed and there was fairly low interest in having a smart water butt due to the expense and the perceived 'over-complication' compared to a regular water butt.




If we can hold back some of that tidal flow that would help us in the long run because then it won't cost us so much for repair and damage and muddy water for three days after a flood or a storm and all that sort of stuff.

SWW Devon 20-45

Smart water butts

- Smart water butts are controlled by a computer which receives weather forecast data.
- The system predicts how much rain will fall and automatically adjusts the tank level to the correct capacity for the approaching storm by opening and closing a valve.
- Whilst it rains the tanks hold back the water running off the properties' roofs, thereby reducing the volume of water entering the combined wastewater network
- But they are quite expensive



For me as a consumer it doesn't help me any more than my plain bog-standard barrel.

SWW Devon 46-70

I think it's a bit gimmicky compared to a standard water butt. It's hard to predict how much water is coming from a storm off just one house.

SWW Cornwall 20-45

What about the maintenance, who would be in charge of fixing it?

SWW Devon 20-45

Give every house two water butts, it will be twice as efficient and it will cost less than the electric one.

SWW Cornwall 46-70

Why would it need to open and close and make itself smaller or bigger? Surely it should just be a standard-sized water butt?

SWW Devon 20-45

Would we have to pay for it?

SWW Devon 46-70

I'm not sure I understand how it works but if it is expensive and you could just get a big plastic bucket to collect the water I think I would definitely go for the simpler option.

SWW Cornwall 20-45

What happens when your smart water butt is full because you live in Devon and it rains a lot?

SWW Devon 20-45

If it's quite expensive then I'd rather just get another water butt.

BW Bournemouth 20-45

It sounds a bit pointless to be honest with you.

BRW Bristol 46-70

It seems to me that it's been over-engineered.

SWW Cornwall 46-70

I've got several water butts and I'm quite happy with those.

BW Bournemouth 46-70

Most customers expressed a lukewarm attitude towards the smart water butt concept when exploring it. For many, a regular water butt would be preferable to them on a personal level and a smart water butt would 'only be a 'nice to have' because of the perceived over-complicated nature of it and also the information that it was likely to be 'expensive'.

Customer Views on Recycling Water – Incentives to Recycle/Reuse

There was a high level of support for these incentive schemes overall – some customers already had water butts and soakaways in place.




I'm all for it. I think that the more water saving devices that we have at our disposal is good. Last year I got one big water butt but we didn't have any rain for month so now I've got an extra water butt which is my garden compost wheely bin, I've used that with a pipe coming out...it doesn't have to be orthodox.
SWW Cornwall 46-70

If someone has roof space then something like that can be used to store the rainwater coming off your roof and gutters, you can have incorporated tanks for greywater and brownwater and flushing loos.
SWW Devon 20-45

I've got soakaways for my rainwater and a water butt so it doesn't go into the sewer system.
SWW Cornwall 46-70


It just reduces the sort of things that we were complaining about last week and I think it feels a bit like something that we could all be doing to talk about this, like the issue over overflows when there are storms. Ultimately there's got to be a bit of give and take and I think also these grants schemes do really work, we saw the solar panel thing and loads of people took it up.
SWW Devon 20-45

Incentives to recycle or use rainwater in the house
 Incentivising customers to harvest rainwater through free water butts and smart water butts.



Developer incentive schemes, discounts for:-

- Fitting A-Rated bathroom fittings
- Fitting greywater recycling systems
- Fitting rainwater harvesting systems
- Sustainable surface water drainage (limiting or having no surface water going into the sewers)



Grant schemes to retrofit recycling / reuse systems and sustainable surface water drainage in homes.

You are already trying to think about doing your bits. I know these guys are already doing a lot themselves, but it just makes more sense to be more environmentally friendly and the less that we're having to clean wastewater means there's less energy spent on those. It's a whole big bigger picture isn't it?
SWW Devon 20-45

You could have money off the bill and also advertising it and making it really clear what happens and the sort of timeframes involved.
SWW Devon 20-45

There shouldn't be an incentive – they should make them do it.
SWW Devon 46-60

We've got a river that runs right next to our property so I think it all just drains into there. Right. The reason why we paved over it was because the bit of the garden that we paved over was just getting flooded all the time.
SWW Devon 20-45

It looks like 'controlled flooding', that would be good for wildlife, if you've got a family you could take them down to it and they would find that interesting. It would be cool to have a controlled water feature in your communal space.
SWW Devon 20-45

It's good to put some of the flak on developers with the amount of new developments going up in Bristol.
BW Bournemouth 20-45

I'd really like to see greywater recycling systems put into place, or discounts for it.
BW Bournemouth 20-45

With the developer incentives, there are quite a lot of new developments going up in Cornwall so that can only be a good thing to make those homes a bit more efficient.
SWW Cornwall 20-45

There was a high degree of support amongst customers for the various types of incentive scheme tested, in particular for those involving (regular) water butts.

There was also some support for sustainable surface water drainage systems.

Customer Views on Recycling Water – Incentives to Recycle/Reuse

However, a few customers felt that the sustainable surface water drainage scheme would not be practical where they lived, particularly in built-up areas.



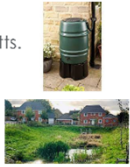
I think they're like a great idea but I know I won't be able to do that where I am now – the location, there's no space to hold rainwater. The only place that holds rainwater is the bottom of my garden.
SWW Devon 20-45

You could potentially end up with damp going into your house and walls if it's not draining away properly.
BW Bournemouth 46-70

It's a good idea but it would all depend on the landscape i.e. is it a pond, does it run downhill, what quantities of water, where is it going to run? That will take a lot of time to develop and check and I guess a lot of rainwater can be quite dirty by the time it passes through the drainage so that will have to be cleaned.
SWW Cornwall 20-45

You would have to think about the location, like where you have got houses packed closely together. Is you doing that going to affect your neighbours, where your water is running?
SWW Cornwall 20-45

Incentives to recycle or use rainwater in the house
Incentivising customers to harvest rainwater through free water butts and smart water butts.



- Developer incentive schemes, discounts for:-
- Fitting A-Rated bathroom fittings
- Fitting greywater recycling systems
- Fitting rainwater harvesting systems
- Sustainable surface water drainage (limiting or having no surface water going into the sewers)

Grant schemes to retrofit recycling / reuse systems and sustainable surface water drainage in homes.

If you disconnect complete and then developers come and build a load of houses, which completely messes up your ability to drain your water because fields aren't there anymore, don't you have to be aware of stuff like that?
SWW Cornwall 46-70

It is all very well incentivizing people but are they going to save in the long run? Is there going to be a cost? You are discounting something but it's still costing something.
SWW Devon 46-60

I'm all for this...the grant schemes to retrofit recycling systems are good in theory but my gut instinct is that it's going to be horrendously expensive.
SWW Devon 46-60

The pros are that people will do it but the cons are ultimately that it will be the people that will pay for it through higher costs.
SWW Cornwall 20-45

I'd definitely support the grants but a lot of the time the grants are met by people with certain criteria so they can only reach a limited number of people.
SWW Cornwall 20-45

I think they should be doing these things anyway, they should be part of the building regulations and should be expected to be doing these thing as a matter of course.
BW Bournemouth 46-70

Although customers liked the incentive schemes for developers, some saw potential logistics issues in relation to larger schemes such as sustainable surface water drainage, namely that they could cause problems in already-populated areas and they would be costly to implement.

Customer Views on Recycling Water – Incentives to Recycle/Reuse

However, a few customers felt that the sustainable surface water drainage scheme would not be practical where they lived, particularly in built-up areas.



Would you ever consider disconnecting your surface water supply from the sewers to save money and boost the environment (the amount of water that goes into the drains drives the number of spills so less water means less spills)?

I like the fact that this (the run-off) gives you options, opportunities and choices that otherwise you don't have. The water runs off and it goes and I don't see it, I don't worry about it. A reduction in the bill would be nice wouldn't it?

BRW Bristol 46-70

We do actually do that already. We planted a whole bunch of shrubs around the outside of our property, we bought a device that you can link to the hose fitting on the tap and we then tell the water company how many units we've used that haven't actually gone down the drain. They then add it to our account and keep a track of it and then reduce the bill.

BW Bournemouth 20-45

I live in a flat so it makes no difference to me unfortunately.

BRW Bristol 46-70

I think it needs to be simplified a little bit. It sounds very, very confusing.

BW Bournemouth 20-45

I don't know if that's such a big scheme in the cities, I've heard of it in more countryside areas though.

BRW Bristol 20-45

It depends on the size of the houses you've got to disconnect.

BW Bournemouth 46-70

How about if a whole street or village got together to disconnect their surface water from the mains, including the use of smart water butts, is this a good idea?

Friends of ours in London all got together and put solar panels on the roofs of a whole street, they did a massive crowdfunding exercise, so anything that brings communities together to do anything like that is a great idea.

SWW Cornwall 46-70

There would be less waste going through the system I suppose and less carbon to treat it all.

BW Bournemouth 20-45

The problem is that most of us live in urban areas and it's not really feasible to start flooding our gardens with all the additional water. And there's also that additional problem of releasing ground and having that sort of water around the foundations of your property, that can be quite detrimental, so it's not quite as straightforward as people are making out. There would be some serious repercussions for roads, walls, and buildings.

BRW Bristol 46-70

Although customers liked the incentive schemes for developers, some saw potential logistics issues in relation to larger schemes such as sustainable surface water drainage, namely that they could cause problems in already-populated areas and they would be costly to implement.

Outside our house is quite a flood zone anyway, if we did that we would be likely to be flooded if the whole street did that.

BRW Bristol 20-45

Customer Views on Recycling Water – Post-Workshop Survey

'How much do you support incentive schemes for customers to recycle and reuse rainwater?'

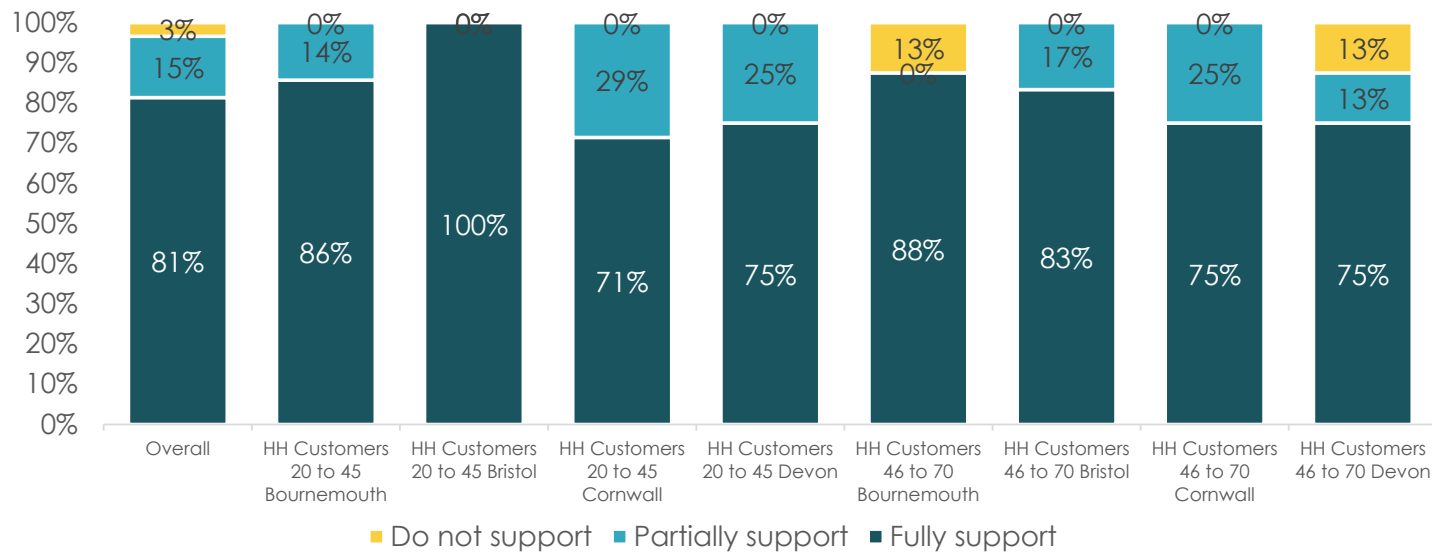


In the Post-Workshop survey completed by participants, more than four-fifths (85%) of customers indicated that they would 'fully support' incentive schemes for customers to recycle and reuse rainwater, with a further 15% saying they would 'partially support' this and nobody indicated that they 'do not support' it.

The highest levels of 'full support' were seen amongst younger South West Water customers in Cornwall (100%) and Devon (88%) and older Bournemouth Water customers (88%), although in no area or age group did 'full support' dip below 70%.

Customer Views on Recycling Water – Post-Workshop Survey

'How much do you support incentive schemes for developers to install systems to recycle and reuse rainwater?'

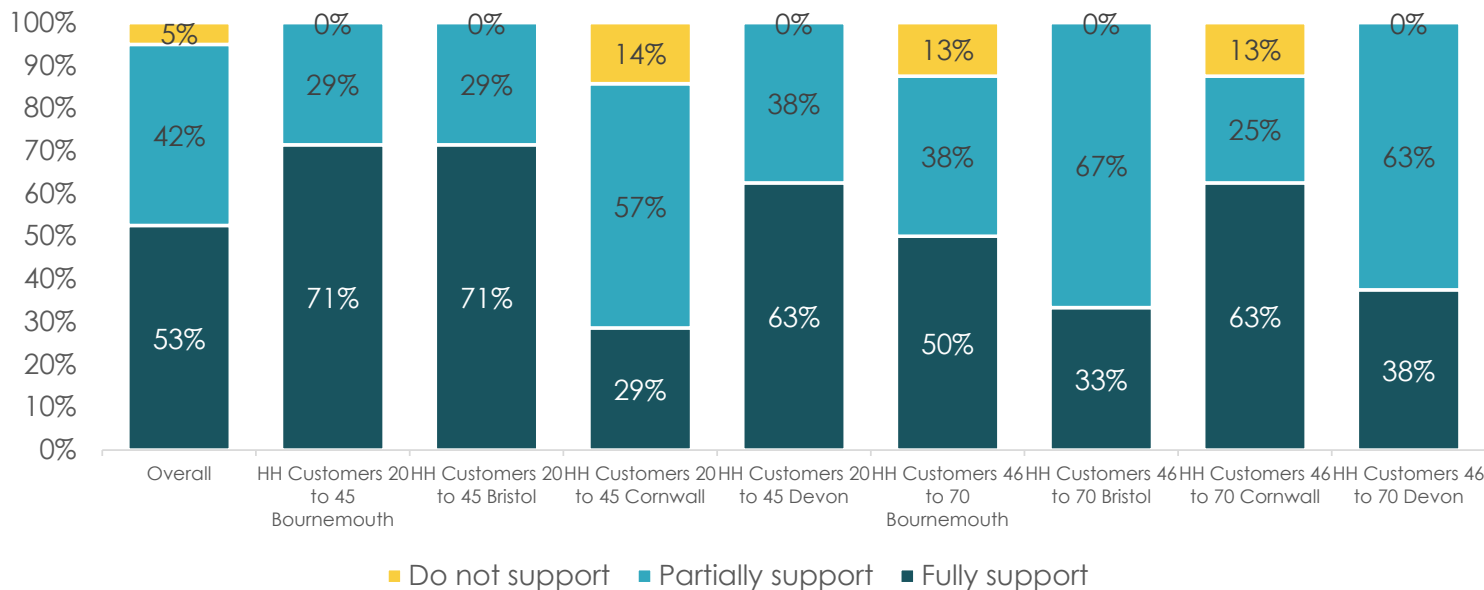


In the Post-Workshop survey completed by participants, more than four-fifths (81%) of customers indicated that they would 'fully support' incentive schemes for developers to recycle and reuse rainwater, with a further 15% saying they would 'partially support' this and only 3% stated that they 'do not support' it.

The highest levels of 'full support' were seen amongst younger Bristol Water customers (100%) and younger Bournemouth Water customers (86%). The only customers who said they 'do not support' this were in the older Bournemouth Water and older South West Water group in Devon (13% - 1 respondent) in each case.

Customer Views on Recycling Water – Post-Workshop Survey

'How much do you support lower bills being available to customers if they add drainage onto their land so they didn't need surface water to drain to sewers (e.g. replace driveway with grass)?'



In the Post-Workshop survey completed by participants, just over half (53%) of customers indicated that they would 'fully support' lower bills being made available to customers if they add drainage onto their land so they didn't need surface water to drain to sewers. A further 42% said that they would 'partially support' this and only 5% stated that they 'do not support' it.

The strongest levels of support were seen amongst younger Bristol Water and Bournemouth Water customers (71% 'strongly supporting' in each case), although in nearly all groups every customer indicated at least partial support for this initiative.

Customer Views on Recycling Water

Key Learnings



- All customers indicated that they thought water recycling was a good idea and many thought it would be likely to save them money as well as preventing water wastage. Some customers were already taking steps to reuse water, most often in the form of water butts, and several felt that South West Water had a role in educating customers about this issue and also in providing them with routes to obtaining the necessary equipment to be able to reuse and recycle water more than is currently possible.
- There was a high degree of support for the various types of incentive scheme tested, in particular for those involving (regular) water butts, and there was also some support for sustainable surface water drainage systems. However, customers expressed a lukewarm attitude towards the smart water butt concept - for many, a regular water butt would be sufficient for them on a personal level compared to the perceived 'over-complicated and expensive' nature of a smart water butt. Although customers liked the incentive schemes for developers, some saw potential logistics issues in relation to larger schemes such as sustainable surface water drainage, namely that they could cause problems in already-populated areas and they would be costly to implement.
- In the Post-Workshop survey completed by participants, more than four-fifths (85%) of customers indicated that they would 'fully support' incentive schemes for customers to recycle and reuse rainwater, with a further 15% saying they would 'partially support' this. The highest levels of 'full support' were seen amongst younger South West Water customers in Cornwall (100%) and Devon (88%) and older Bournemouth Water customers (88%), although in no area or age group did 'full support' dip below 70%. Meanwhile, more than four-fifths (81%) of customers indicated that they would 'fully support' incentive schemes for developers to recycle and reuse rainwater, with a further 15% saying they would 'partially support' this. The highest levels of 'full support' were seen amongst younger Bristol Water customers (100%) and younger Bournemouth Water customers (86%).
- In the Post-Workshop survey completed by participants, just over half (53%) of customers indicated that they would 'fully support' lower bills being made available to customers if they add drainage onto their land so they didn't need surface water to drain to sewers. A further 42% said that they would 'partially support' this and only 5% stated that they 'do not support' it. The strongest levels of support were seen amongst younger Bristol Water and Bournemouth Water customers (71% 'strongly supporting' in each case), although in nearly all groups every customer indicated at least partial support for this initiative.

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Summary of Importance Ranking of Smarter Healthier Homes Elements.

Summary of Importance Ranking of Smarter Healthier Homes Elements

Overall customer rankings of the different elements of Smarter Healthier Homes confirmed which were the most important to them.

Aggregated importance rankings across all 8 groups	Ranked 1 st	Ranked 2 nd	Ranked 3 rd
Ranking of Importance of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	13	19	26
Ranking of Importance of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	16	13	29
Ranking of Importance of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	29	26	3

Overall across all groups, 'water re-use and recycling' was rated as the most important theme/pillar of the three Smarter Healthier Homes elements by the highest number of customers, over and above 'lead pipe removal' and 'smart metering'.

Half of customers in the workshop sessions (50% - 29 out of 58 customers) ranked 'water re-use and recycling' as the most important element of the three. 'Lead pipe removal' was ranked first by 28% (16 out of 58 customers) and 'smart metering' by 22% (13 out of 58 customers).

Summary of Importance Ranking of Smarter Healthier Homes Elements

Average rankings by group.



Some **area related differences** were noted: SWW customers in Devon and Bournemouth Water customers were most likely to feel that 'water re-use and recycling' was the most important pillar of the Smarter Healthier Homes initiative, over both 'smart metering' and 'lead pipe removal'.

Some **age related differences** were noted: Older customers of South West Water and Bournemouth Water were most likely to feel that 'water re-use and recycling' was the most important pillar of the Smarter Healthier Homes initiative. Older customers of Bristol Water expressed a slight preference for 'smart metering', although this was the least important pillar for most younger South West Water and Bristol Water customers.

Some **social grade differences** were noted: Customers in the ABC1 social grades felt slightly more strongly than C2DE customers that 'smart metering' was the most important pillar of the Smarter Healthier Homes initiative (a mean score of 2.0 for ABC1s, compared to 2.3 for C2DEs). However, C2DEs were more likely to prioritise 'lead pipe removal' than ABC1s (1.8 and 2.3 respectively).



Average Group Rankings	SWW Cornwall 46-70s	SWW Devon 20-45s	SWW Devon 46-70s	SWW Cornwall 20-45s	BRW Bristol 46-70s	BW B'mouth 20-45s	BW B'mouth 46-70s	BRW Bristol 20-45s	Overall Average Ranking	Overall Ranked Order
Ranking of Importance of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	2.0	2.4	2.5	2.4	1.7	1.9	1.9	2.7	2.2	2 nd =
Ranking of Importance of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	3.0	1.9	2.4	1.1	2.3	2.6	2.8	1.6	2.2	2 nd =
Ranking of Importance of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	1.0	1.8	1.1	1.8	2.0	1.6	1.4	1.7	1.6	1 st

Summary of Importance Ranking of Smarter Healthier Homes Elements

Overall, half of customers felt that 'water reuse and recycling' was the area that South West Water should focus on. It was felt that this element was more of a 'quick win' for South West Water and is something that customers can 'own'.



It would lower the pressure on the actual water treatment places and then hopefully everything would be cleaner from there and in the ocean.

SWW Cornwall 20-45

We're just running out of time with the planet in general.

BW Bournemouth 20-45

You can do the water reuse stuff first, there would be less of a barrier than for the smart metering, although I do think the two are quite equally important.

SWW Cornwall 46-70

The lead pipe is down to the homeowner.

SWW Cornwall 46-70

The water reuse and recycling would be top...I just think the smart metering will take ages.

SWW Devon 20-45

What Should South West Water Focus On?

Please rank (in order of importance) the areas that you think South West Water should focus on...

- Smart metering?
- Lead pipe removal?
- Water re-use and recycling?

I don't like waste.

BW Bournemouth 20-45

With recycling, people can do it instantly.

BW Bournemouth 20-45

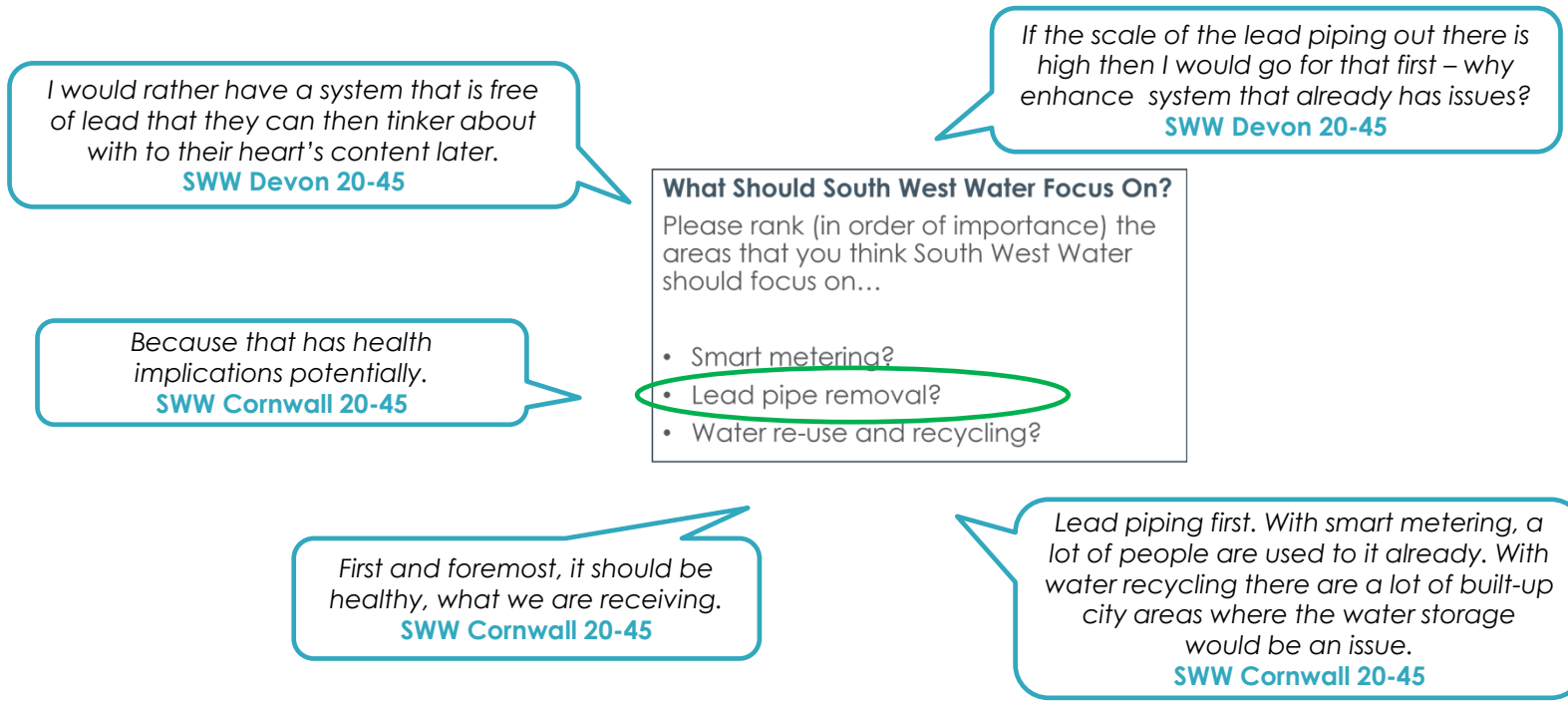
It's good to start doing recycling and reuse of water, like washing-up water on the garden and little things like not wasting water with the taps running.

BW Bournemouth 46-70

A selection of customer opinions from the workshop sessions relating to why they thought that 'water reuse and recycling' should be the main priority for South West Water are shown on the left.

Summary of Importance Ranking of Smarter Healthier Homes Elements

Approaching three in every ten customers felt that 'lead pipe removal' was the area that South West Water should focus on above the others. It was felt that, despite the problem now being widely reported, it was something that could potentially have health effect on people, although it was perceived to be a long-term and costly plan.



A selection of customer opinions from the workshop sessions relating to why they thought that 'lead pipe removal' should be the main priority for South West Water are shown on the left.

Summary of Importance Ranking of Smarter Healthier Homes Elements



Meanwhile, just over a fifth of customers thought that 'smart metering' was the area that South West Water should focus on above the others. It was felt that water meters would assist customers to become more aware of their water usage and that it would also help South West Water to improve their predictive capacity.

For me it would be smart metering to know what I can do just to change things for my habits and stuff, I know I could do more.
SWW Devon 20-45

Look at the impact the energy smart meters have had.
BRW Bristol 46-70

It is more of a 'quick win', it's got to be a much quicker job than anything else.
BRW Bristol 20-45

I'd say smart meeting first because although counteractive to that I think water reuse and recycling is the most important thing, I think smart metering is going to be the best way to go about getting people to realise that.
SWW Devon 20-45

What Should South West Water Focus On?
 Please rank (in order of importance) the areas that you think South West Water should focus on...

- Smart metering?
- Lead pipe removal?
- Water re-use and recycling?

I think it will give the water company and customers more information about their water use and if there was a problem it would hopefully be highlighted sooner.
BW Bournemouth 46-70

A selection of customer opinions from the workshop sessions relating to why they thought that 'smart metering' should be the main priority for South West Water are shown on the left.

Smart metering would be a priority to give myself awareness really (of what I am using).
BW Bournemouth 20-45

I'm going with smart metering because I think that will have the most dramatic impact quickly and easily. Lead pipe removal is a long-term goal and it isn't something that can have a massive impact quickly and there are other things that can reduce the impact.
BRW Bristol 46-70

From a personal point of view it would make me more aware of how much you're using and would potentially stop me using as much or find alternative ways of using water.
BW Bournemouth 20-45

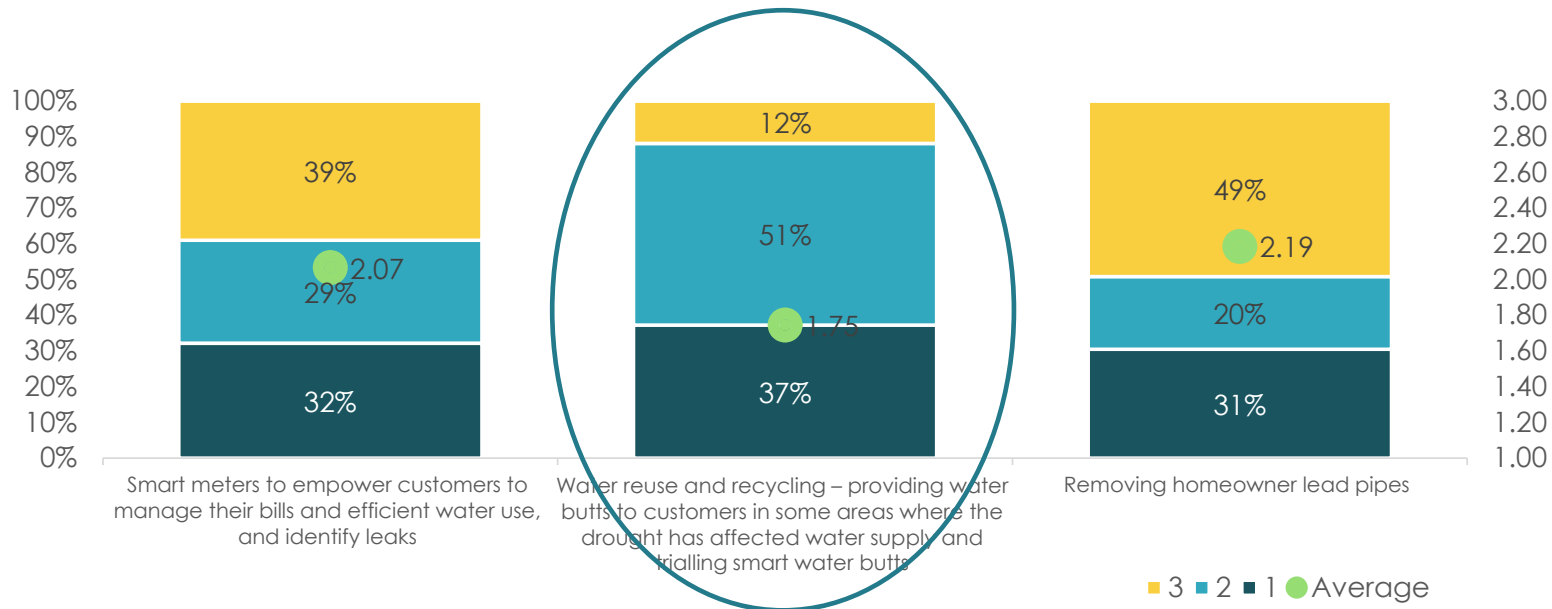
The less fresh water you use the better.
BW Bournemouth 46-70

We can see and then react, both in terms of the water company and the consumer.
BW Bournemouth 46-70

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of which should be a priority for SWW (where 1 = the most benefit, 2 = the second most benefit etc.)'



In the Post-Workshop survey completed by participants, when asked which of the three Smarter Healthier Homes initiatives they felt should be a priority for South West Water, 'water reuse and recycling' was again the initiative that was ranked as the most important priority by customers overall. This was followed by 'smart meters' and then 'removing homeowner lead pipes'.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of which should be a priority for SWW (where 1 = the most benefit, 2 = the second most benefit etc.)'

Average ranking (1=most important priority)	Smart meters to empower customers to manage their bills and efficient water use, and identify leaks	Water reuse and recycling – providing water butts to customers in some areas where the drought has affected water supply and trialling smart water butts	Removing homeowner lead pipes
HH Customers 20 to 45 Bournemouth	1.71	1.71	2.57
HH Customers 20 to 45 Bristol	2.57	2.14	1.29
HH Customers 20 to 45 Cornwall	2.29	1.71	2
HH Customers 20 to 45 Devon	2.38	1.75	1.88
HH Customers 46 to 70 Bournemouth	1.63	1.88	2.5
HH Customers 46 to 70 Bristol	1.67	2	2.33
HH Customers 46 to 70 Cornwall	1.75	1.50	2.75
HH Customers 46 to 70 Devon	2.50	1.38	2.13

In the Post-Workshop survey completed by participants, younger customers in all water company areas except Bristol felt that 'water reuse and recycling' should be a priority for South West Water compared to 'smart meters' and 'removing homeowner lead pipes'.

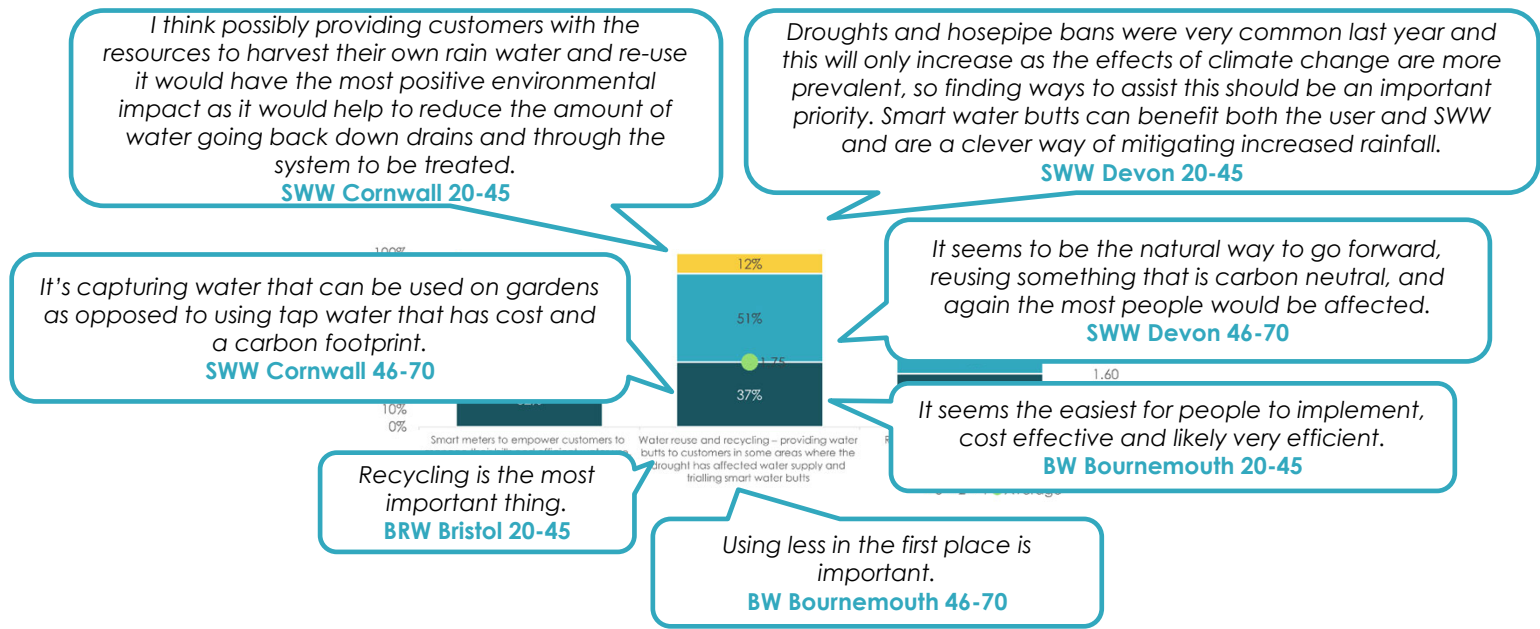
Older customers in the Bournemouth Water and Bristol Water areas felt that 'smart meters' should be a priority for South West Water compared to the other two initiatives.

Only younger customers in the Bristol Water area felt that 'removing homeowner lead pipes' should be prioritised over the other initiatives.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of which should be a priority for SWW (where 1 = the most benefit, 2 = the second most benefit etc.)' "Water reuse and recycling"



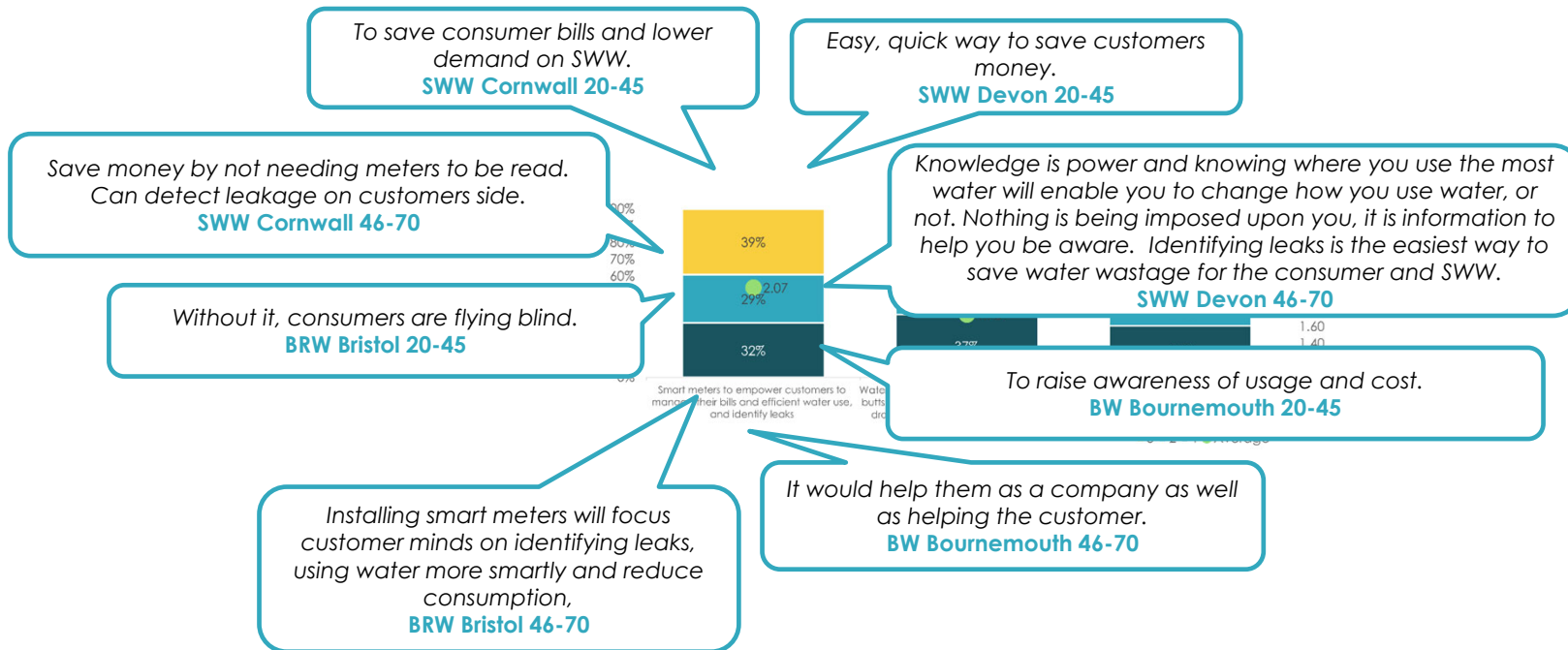
A selection of customer opinions from the Post-Workshop Survey saying that 'water reuse and recycling' should be the main priority for South West Water are shown on the left.

* NB: No-one in the BRW Bristol 46-70 group ranked 'water reuse and recycling' in position 1.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



‘How would you rank each of the initiatives in terms of which should be a priority for SWW (where 1 = the most benefit, 2 = the second most benefit etc.?)’ “Smart meters”

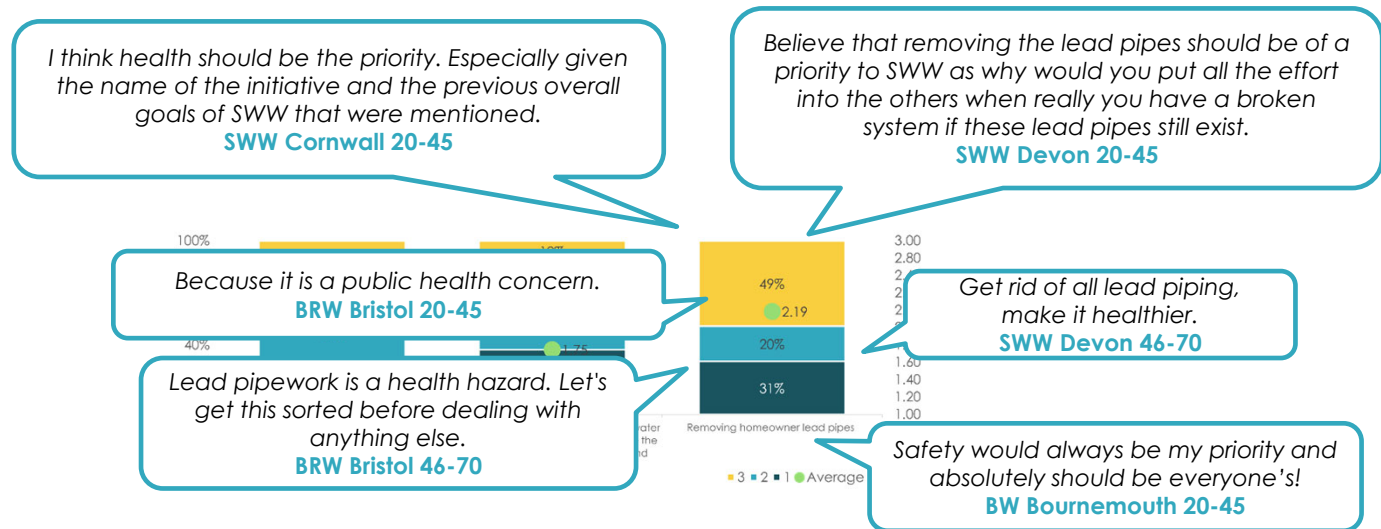


A selection of customer opinions from the Post-Workshop Survey saying that ‘smart meters’ should be the main priority for South West Water are shown on the left.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of which should be a priority for SWW (where 1 = the most benefit, 2 = the second most benefit etc.?)' **"Removing homeowner lead pipes"**



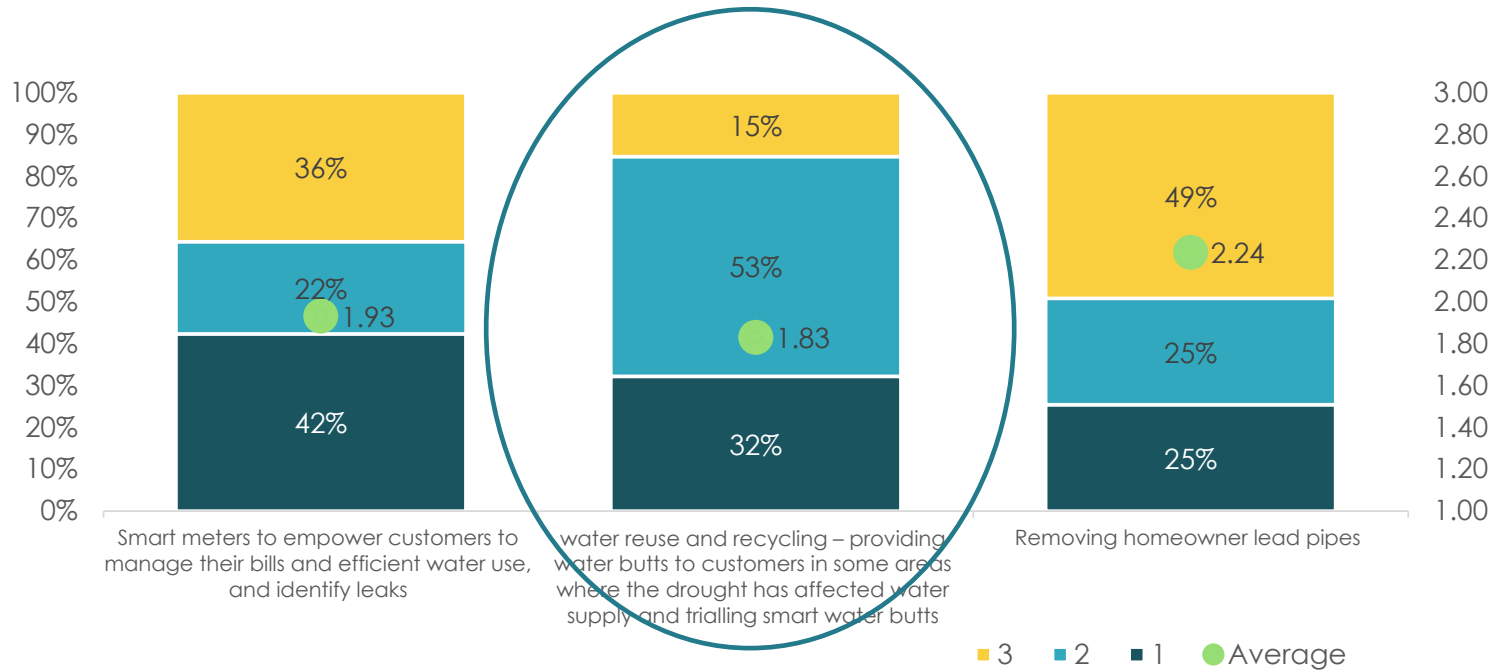
A selection of customer opinions from the Post-Workshop Survey saying that 'removing homeowner lead pipes' should be the main priority for South West Water are shown on the left.

* NB: No-one in the **SWW Cornwall 46-70** group or the **BW Bournemouth 46-70** group ranked 'removing homeowner lead pipes' in position 1.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of most benefit to customers (where 1 = the most benefit, 2 = the second most benefit etc.)'



In the Post-Workshop survey completed by participants, when asked which of the three Smarter Healthier Homes initiatives they felt would be of most benefit to customers, 'water reuse and recycling' was again the initiative that was ranked as the most important benefit to customers overall, although the relative importance gap between 'water reuse and recycling' and 'smart meters' was smaller than that seen for which of the three initiatives should be prioritised by South West Water.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of most benefit to customers (where 1 = the most benefit, 2 = the second most benefit etc.)?'

Average ranking – (1=most benefit)	Smart meters to empower customers to manage their bills and efficient water use, and identify leaks	Water reuse and recycling – providing water butts to customers in some areas where the drought has affected water supply and trialling smart water butts	Removing homeowner lead pipes
HH Customers 20 to 45 Bournemouth	1.71	1.86	2.43
HH Customers 20 to 45 Bristol	2.29	2.29	1.43
HH Customers 20 to 45 Cornwall	2.29	2	1.71
HH Customers 20 to 45 Devon	2.13	2	1.88
HH Customers 46 to 70 Bournemouth	1.50	1.88	2.63
HH Customers 46 to 70 Bristol	1.67	2	2.33
HH Customers 46 to 70 Cornwall	1.88	1.25	2.88
HH Customers 46 to 70 Devon	2.00	1.50	2.5

In the Post-Workshop survey completed by participants, younger customers in all water company areas except Bournemouth Water felt that 'removing homeowner lead pipes' would have the most benefit for customers compared to 'smart meters' and 'water reuse and recycling'.

Older customers in the Bournemouth Water and Bristol Water areas, as well as younger Bournemouth Water customers, felt that 'smart meters' would be of greatest benefit to customers compared to the other two initiatives.

Meanwhile, older South West Water customers in Devon and Cornwall felt that 'water reuse and recycling' would be of greatest benefit to customers.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of most benefit to customers (where 1 = the most benefit, 2 = the second most benefit etc.)?' "Smart meters"

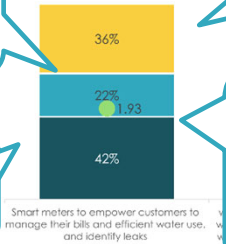
I have no idea how much water we use as a household personally. I think empowering customers to take some control over this would have the greatest benefit to customers out of the 3 incentives.
SWW Cornwall 20-45

Easy, quick way to save customers money.
SWW Devon 20-45

I have no clue how much water I use and how that relates to my bills, if I had more knowledge I'd feel more in control. I can only assume that the same could be said of others.
SWW Cornwall 46-70

Knowledge is power and if you can see where your use of water is greatest you can choose to change how you use water, or not. Also, identifying leaks is the easiest way to save wasting water. This benefits the consumer and SWW.
SWW Devon 46-70

Without it, consumers are flying blind.
BRW Bristol 20-45



It is an immediate and short-term way for consumers to monitor usage and reduce daily consumption as they desire. It also allows The Water Company and customer to spot water leakages ASAP, saving money and reducing water waste.
BW Bournemouth 46-70

The energy smart meters have had a significant impact and I would hope that this would be similar with regard to saving water and therefore money (if you are on a meter, which I am).
BRW Bristol 46-70

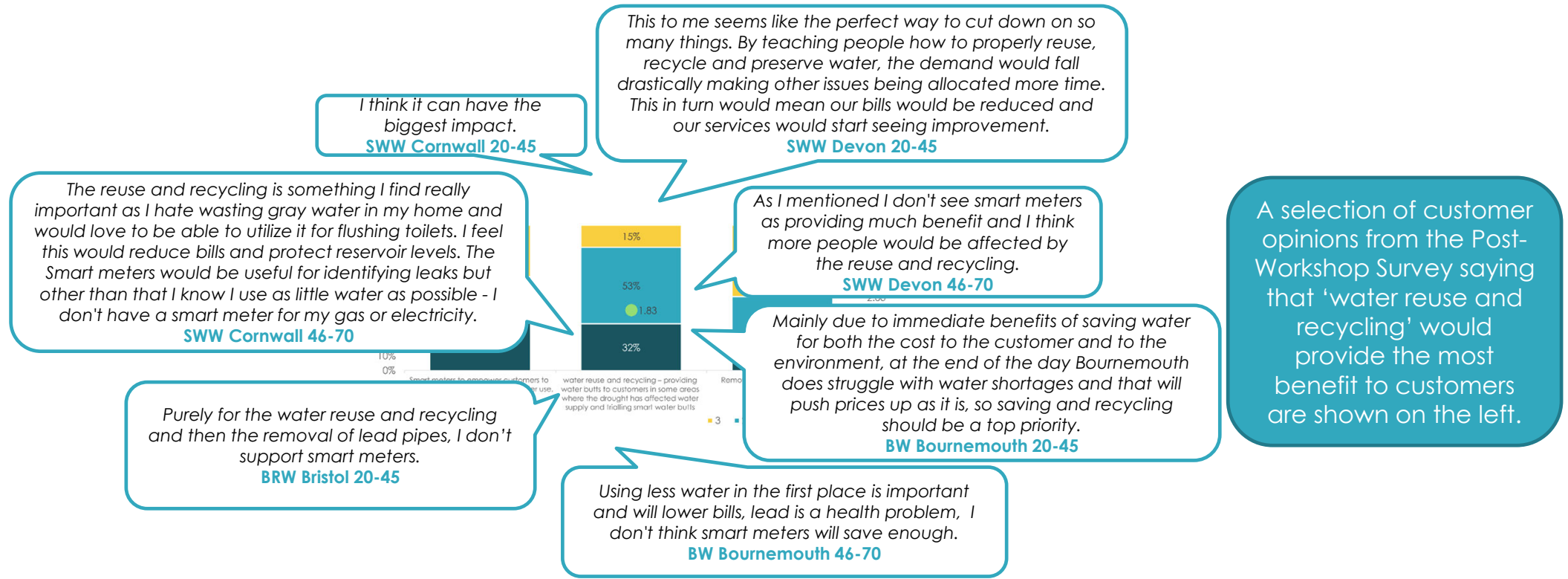
To raise awareness of usage would benefit me the most on a day to day.
BW Bournemouth 20-45

A selection of customer opinions from the Post-Workshop Survey saying that 'smart meters' would provide the most benefit to customers are shown on the left.

Summary of Importance Ranking of Smarter Healthier Homes Elements – Post-Workshop Survey



'How would you rank each of the initiatives in terms of most benefit to customers (where 1 = the most benefit, 2 = the second most benefit etc.)?' "Water reuse and recycling"

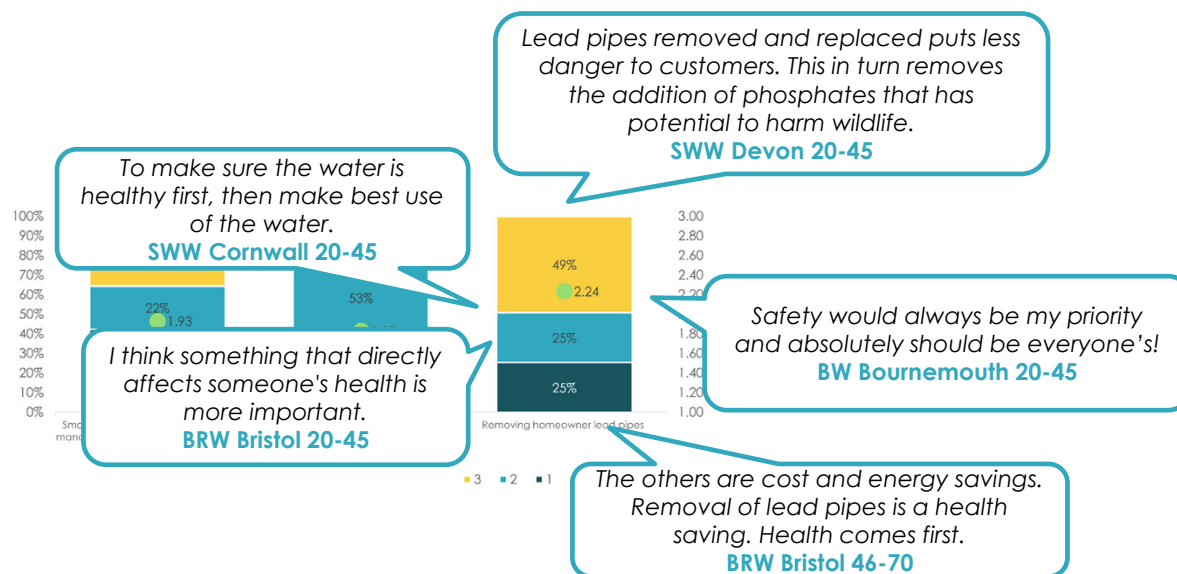


* NB: No-one in the BRW Bristol 46-70 group ranked 'water reuse and recycling' in position 1.

Summary of Importance Ranking of Smarter Healthier Homes Elements - Post-Workshop Survey



'How would you rank each of the initiatives in terms of most benefit to customers (where 1 = the most benefit, 2 = the second most benefit etc.)?' "Removing homeowner lead pipes"



A selection of customer opinions from the Post-Workshop Survey saying that 'removing homeowner lead pipes' would provide the most benefit to customers are shown on the left.

* NB: No-one in the **BW Bournemouth 46-70**, **Cornwall 46-70** or **Devon 46-70** group ranked 'removing homeowner lead pipes' in position 1.

Summary of Importance Ranking of Smarter Healthier Homes Elements

Key Learnings (1)



- Overall across all groups, 'water re-use and recycling' was rated as the most important theme/pillar of the three Smarter Healthier Homes elements by the highest number of customers, over and above 'lead pipe removal' and 'smart metering'.
- Half of customers in the workshop sessions (50% - 29 out of 58 customers) ranked 'water re-use and recycling' as the most important element of the three. 'Lead pipe removal' was ranked first by 28% (16 out of 58 customers) and 'smart metering' by 22% (13 out of 58 customers). It was felt that 'water reuse and recycling' was the element which represented more of a 'quick win' for South West Water and is something that customers can 'own', whereas 'lead pipe removal' was perceived as a long term and costly plan, while 'smart metering' would also be less of a 'quick win', although it would assist customers to become more aware of their water usage and also help South West Water to improve their predictive capacity.
- Some area, age and social grade related differences were noted in these importance rankings:
 - South West Water customers in Devon and Bournemouth Water customers were most likely to feel that 'water re-use and recycling' was the most important pillar of the Smarter Healthier Homes initiative, over both 'smart metering' and 'lead pipe removal';
 - Older customers of South West Water and Bournemouth Water were most likely to feel that 'water re-use and recycling' was the most important pillar of the Smarter Healthier Homes initiative. Older customers of Bristol Water expressed a slight preference for 'smart metering', although this was the least important pillar for most younger South West Water and Bristol Water customers;
 - Customers in the ABC1 social grades felt slightly more strongly than C2DE customers that 'smart metering' was the most important pillar of the Smarter Healthier Homes initiative (a mean score of 2.0 for ABC1s, compared to 2.3 for C2DEs). However, C2DEs were more likely to prioritise 'lead pipe removal' than ABC1s (1.8 and 2.3 respectively).

Summary of Importance Ranking of Smarter Healthier Homes Elements

Key Learnings (2)



- In the Post-Workshop survey completed by participants, when asked which of the three Smarter Healthier Homes initiatives they felt **should be a priority for South West Water**, 'water reuse and recycling' was again the initiative that was ranked as the most important priority by customers overall. This was followed by 'smart meters' and then 'removing homeowner lead pipes'.
- Some area, age and social grade related differences were noted in these importance rankings:
 - Younger customers in all water company areas except Bristol felt that 'water reuse and recycling' should be a priority for South West Water compared to 'smart meters' and 'removing homeowner lead pipes';
 - Older customers in the Bournemouth Water and Bristol Water areas felt that 'smart meters' should be a priority for South West Water compared to the other two initiatives;
 - Only younger customers in the Bristol Water area felt that 'removing homeowner lead pipes' should be prioritised over the other initiatives.
- In the Post-Workshop survey completed by participants, when asked which of the three Smarter Healthier Homes initiatives they felt **would be of most benefit to customers**, 'water reuse and recycling' was again the initiative that was ranked as the most important benefit to customers overall, although the relative importance gap between 'water reuse and recycling' and 'smart meters' was smaller than that seen for which of the three initiatives should be prioritised by South West Water.
- Some area, age and social grade related differences were noted in these importance rankings:
 - Younger customers in all water company areas except Bournemouth Water felt that 'removing homeowner lead pipes' would have the most benefit for customers compared to 'smart meters' and 'water reuse and recycling';
 - Older customers in the Bournemouth Water and Bristol Water areas, as well as younger Bournemouth Water customers, felt that 'smart meters' would be of greatest benefit to customers compared to the other two initiatives;
 - Older South West Water customers in Devon and Cornwall felt that 'water reuse and recycling' would be of greatest benefit to customers.



turquoise

**Summary of Priorities for South West
Water – PR24 Plans.**

Summary of Priorities for South West Water – PR24 Plans

Overall customer priorities for South West Water are to help homes save water with water saving devices, home audits and education and, to a lesser degree, to invest to get rid of lead pipes in older homes.

Aggregated responses across all 8 groups	Yes (a priority for South West Water)	No (not a priority for South West Water)
Future Priorities/Inclusion in 'PR24' Plans:		
- Is it a priority for South West Water to...		
- Improve the taste and smell of water?	19% (8 out of 43)	81% (35 out of 43)
- Improve the colour of water?	9% (4 out of 43)	91% (39 out of 43)
- Invest to get rid of lead pipes in older homes?	61% (26 out of 43)	39% (17 out of 43)
- Help homes recycle water by providing water butts?	51% (22 out of 43)	49% (21 out of 43)
- Give homes smart meters?	49% (21 out of 43)	51% (22 out of 43)
- Help homes save water with water saving devices, home audit and education?	81% (35 out of 43)	19% (8 out of 43)

Overall across all groups, of the six priority areas tested more than four-fifths (81%) of customers felt that 'helping homes save water with water saving devices, home audits and education' should be a priority for South West Water to include in their 'PR24' Plans.

Overall across all groups, more than three-fifths (61%) of customers felt that 'investing to get rid of lead pipes in older homes' should be a priority for South West Water to include in their 'PR24' Plans.

*NB: These questions were not asked in Groups 1 & 2 as they were not introduced until Group 3 onwards.

Summary of Priorities for South West Water – PR24 Plans

Average rankings by group.



Individual Group Priorities – Proportions Saying ‘Yes’ to Each Question	SWW Cornwall 46-70s	SWW Devon 20-45s	SWW Devon 46-70s	SWW Cornwall 20-45s	BRW Bristol 46-70s	BW B'mouth 20-45s	BW B'mouth 46-70s	BRW Bristol 20-45s	Overall Proportions Saying ‘Yes’
Future Priorities/Inclusion in ‘PR24’ Plans:									
- Is it a priority for South West Water to...									
- Improve the taste and smell of water?	-	-	13% (1 out of 8)	0% (0 out of 7)	0% (0 out of 6)	14% (1 out of 7)	25% (2 out of 8)	57% (4 out of 7)	19% (8 out of 43)
- Improve the colour of water?	-	-	0% (0 out of 8)	14% (1 out of 7)	17% (1 out of 6)	14% (1 out of 7)	0% (0 out of 8)	14% (1 out of 7)	9% (4 out of 43)
- Invest to get rid of lead pipes in older homes?	-	-	50% (4 out of 8)	86% (6 out of 7)	50% (3 out of 6)	57% (4 out of 7)	25% (2 out of 8)	100% (7 out of 7)	61% (26 out of 43)
- Help homes recycle water by providing water butts?	-	-	100% (8 out of 8)	86% (6 out of 7)	33% (2 out of 6)	43% (3 out of 7)	38% (3 out of 8)	0% (0 out of 7)	51% (22 out of 43)
- Give homes smart meters?	-	-	13% (1 out of 8)	29% (2 out of 7)	100% (6 out of 6)	86% (6 out of 7)	63% (5 out of 8)	14% (1 out of 7)	49% (21 out of 43)
- Help homes save water with water saving devices, home audit and education?	-	-	75% (6 out of 8)	100% (7 out of 7)	100% (6 out of 6)	86% (6 out of 7)	100% (8 out of 8)	29% (2 out of 7)	81% (35 out of 43)

Some **area related differences** were noted: Nearly all SWW customers asked felt that SWW should place high priority on ‘helping homes recycle water by providing water butts’, while nearly all SWW and Bournemouth Water customers thought that SWW should prioritise ‘helping homes save water with water saving devices, home audits and education’.

Some **age related differences** were noted: Older customers of Bristol Water thought that SWW should place high priority on ‘giving homes smart meters’, although nearly all younger Bristol Water customers felt that this should not be a priority. Younger customers of all water companies were more likely to think that SWW should prioritise ‘investing to get rid of lead pipes in older homes’.

* NB: These questions were not asked in Groups 1 & 2 as they were not introduced until Group 3 onwards.

Summary of Priorities for South West Water – PR24 Plans

Average rankings by group.



Individual Group Priorities – Proportions Saying ‘Yes’ to Each Question	SWW Cornwall 46-70s	SWW Devon 20-45s	SWW Devon 46-70s	SWW Cornwall 20-45s	BRW Bristol 46-70s	BW B'mouth 20-45s	BW B'mouth 46-70s	BRW Bristol 20-45s	Overall Proportions Saying ‘Yes’
Future Priorities/Inclusion in ‘PR24’ Plans:									
- Is it a priority for South West Water to...									
- Improve the taste and smell of water?	-	-	13% (1 out of 8)	0% (0 out of 7)	0% (0 out of 6)	14% (1 out of 7)	25% (2 out of 8)	57% (4 out of 7)	19% (8 out of 43)
- Improve the colour of water?	-	-	0% (0 out of 8)	14% (1 out of 7)	17% (1 out of 6)	14% (1 out of 7)	0% (0 out of 8)	14% (1 out of 7)	9% (4 out of 43)
- Invest to get rid of lead pipes in older homes?	-	-	50% (4 out of 8)	86% (6 out of 7)	50% (3 out of 6)	57% (4 out of 7)	25% (2 out of 8)	100% (7 out of 7)	61% (26 out of 43)
- Help homes recycle water by providing water butts?	-	-	100% (8 out of 8)	86% (6 out of 7)	33% (2 out of 6)	43% (3 out of 7)	38% (3 out of 8)	0% (0 out of 7)	51% (22 out of 43)
- Give homes smart meters?	-	-	13% (1 out of 8)	29% (2 out of 7)	100% (6 out of 6)	86% (6 out of 7)	63% (5 out of 8)	14% (1 out of 7)	49% (21 out of 43)
- Help homes save water with water saving devices, home audit and education?	-	-	75% (6 out of 8)	100% (7 out of 7)	100% (6 out of 6)	86% (6 out of 7)	100% (8 out of 8)	29% (2 out of 7)	81% (35 out of 43)

Some **social grade related differences** were noted: Customers in the ABC1 social grades felt slightly more strongly than C2DE customers that ‘South West Water should place high priority on ‘giving homes smart meters’ (54% of ABC1s, compared to 35% for C2DEs). However, C2DEs were more likely to feel that South West Water should prioritise ‘investing to get rid of lead pipes’ than ABC1s (71% and 51% respectively) and ‘improving the waste and smell of water’ (29% and 11% respectively).

* NB: These questions were not asked in Groups 1 & 2 as they were not introduced until Group 3 onwards.

Summary of Priorities for South West Water – PR24 Plans

Summary of Comments Relating to Priority Choices

'Is it a priority for SWW to improve the taste and smell of water?'

'Is it a priority for SWW to improve the colour of water?'



I think it should be just because of plastic waste and plastic bottles.
BW Bournemouth 20-45

'Is it a priority for SWW to improve the taste and smell of water?'

I think the water down here is fine to be honest.
BW Bournemouth 20-45

I think we have a particularly high quality of water in this country anyway.
BRW Bristol 46-70

If you've got dirty water then it's really going to put you off using it so you have to have water that is a sensible colour.
BRW Bristol 46-70

'Is it a priority for SWW to improve the colour of water?'

There are probably quite a lot of homes where it's not a great colour.
BRW Bristol 46-70

Customers generally rated 'improvements in the taste/smell and colour of water' as a relatively low priority for South West Water compared to the other priority areas tested – the perceived high quality of drinking water currently was the key reason for this.

Summary of Priorities for South West Water – PR24 Plans

Summary of Comments Relating to Priority Choices

'Is it a priority for SWW to invest to get rid of lead pipes in older homes?'



If there is something that is potentially causing a health problem and there is something we can do to prevent it then I would want to do it.
BW Bournemouth 20-45

If you get rid of all the lead pipe then you wouldn't have to put all the chemicals in.
BW Bournemouth 46-70

People's safety should come first I think.
BW Bournemouth 20-45

'Is it a priority for SWW to invest to get rid of lead pipes in older homes?'

Half of us didn't even know we had them so it can't be much of an issue.
BW Bournemouth 20-45

Because they've already got something in place which mitigates that, putting the phosphates in there which are lining them, so it's not an immediate health issue.
BW Bournemouth 46-70

It's important but it just seems like such a huge job, the cost of it is probably prohibitive.
BRW Bristol 46-70

Customers generally rated 'investing to get rid of lead pipes in older homes' as a relatively high priority for South West Water compared to most of the other priority areas tested. The key reasons were because of the perceived health risk to customers and to prevent the need to use phosphates in old lead piping. However, for others their lack of previous awareness about the issue made them feel that it wasn't too much of a danger due to the action that is already being taken in this area.

Summary of Priorities for South West Water – PR24 Plans

Summary of Comments Relating to Priority Choices

'Is it a priority for SWW to help homes recycle water by providing water butts?'



Customers generally rated 'helping homes to recycle water by providing water butts' as a middling priority for South West Water compared to some of the other priority areas tested. The key reasons were because of the perceived minimal impact of water saving of water butts, the relatively cheap cost for a customer to buy their own water butt and the practicalities of providing every single home with a water butt.

Summary of Priorities for South West Water – PR24 Plans

Summary of Comments Relating to Priority Choices

'Is it a priority for SWW to give homes smart meters?'



It works for us all and it works for the water company.
BW Bournemouth 20-45

I would prefer the water company to be doing things for me that I can't do for myself, like the smart meters and lead pipe (removal).
BW Bournemouth 20-45

'Is it a priority for SWW to give homes smart meters?'

It's just not that big a bill I don't think so it's not a priority for me.
BW Bournemouth 20-45

If you are starting to reuse and recycle water you're saving money anyway so a smart meter to me isn't as important.
BW Bournemouth 46-70

Customers generally rated 'giving homes smart meters' as a middling priority for South West Water compared to some of the other priority areas tested. The key positive reasons mentioned were that it would help both the consumer and South West Water and that smart meters would help customers to be more aware of their water usage, although some felt that their water bill wasn't as large a utilities bill as electricity or gas so a smart meter wouldn't be a pressing priority for them to have installed.

Summary of Priorities for South West Water – PR24 Plans

Summary of Comments Relating to Priority Choices

'Is it a priority for SWW to help homes save water with water saving devices, home audits and education?'



The more that they can do the better.

BRW Bristol 46-70

If your house wasn't efficient in how it's using water people may not even be aware of flow restrictors to reduce the amount of water you are using.

BW Bournemouth 20-45

'Is it a priority for SWW to help homes save water with water saving devices, home audit and education?'

If they made them (water saving devices) readily available for people to buy then I wouldn't have a problem with that.

BW Bournemouth 20-45

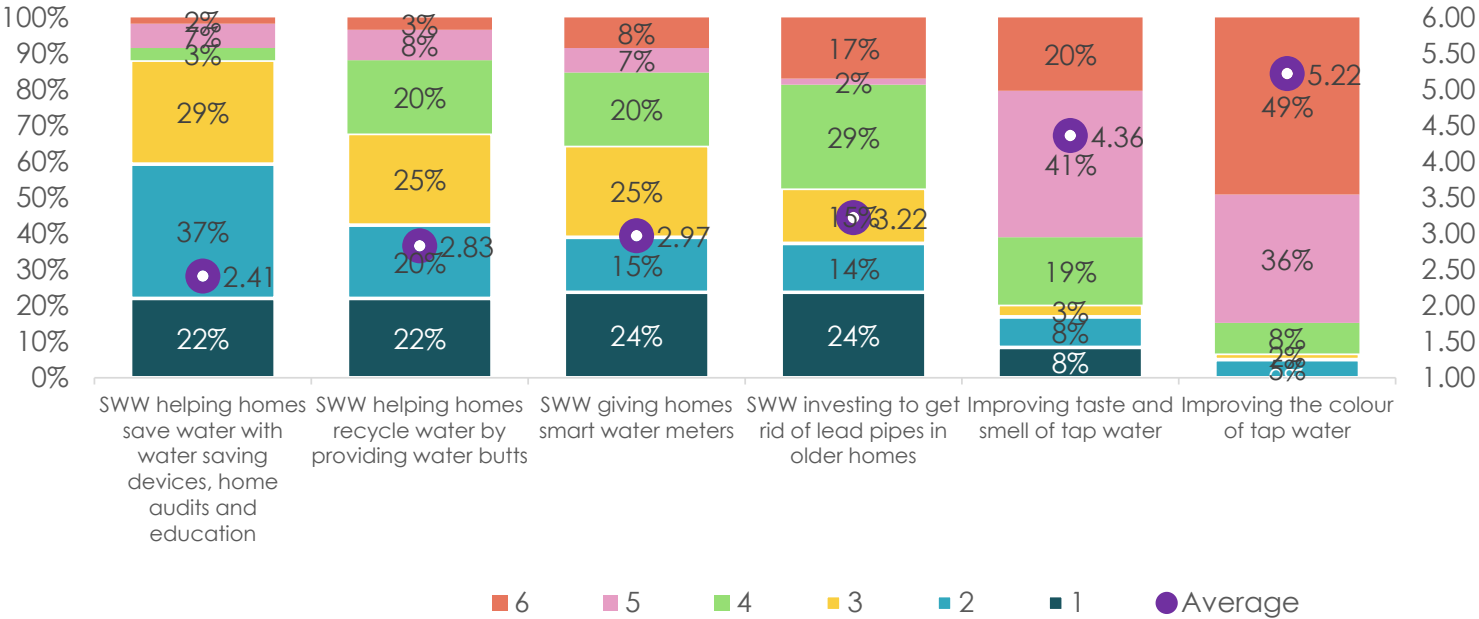
It all links back in to being greener and more eco-friendly.

BW Bournemouth 20-45

Customers generally rated 'helping homes save water with water saving devices, home audits and education' as a high priority for South West Water compared to many of the other priority areas tested. The key reason mentioned was that it would increase customer knowledge and awareness of easy ways in which they could save or recycle water.

Summary of Priorities for South West Water – Post-Workshop Survey

'What is the order of priority in terms of including these elements in the PR24 plans? Please rank them in terms of where 1 = the most important priority for the future, 2 = the second most important priority etc.'



In the Post-Workshop survey completed by participants, when asked which of the six elements of the 'PR24' plans should be prioritised by South West Water, 'helping homes save water with water saving devices, home audits and education' received the highest priority ranking overall (a mean of 2.4 out of 6). The two other priority areas where a mean score of under 3.0 was recorded were for 'helping homes recycle water by providing water butts' and 'giving homes smart water meters'.

As seen in the workshops, the areas of lowest priority were 'improving the colour of tap water' and 'improving the taste and smell of tap water'.



Summary of Priorities for South West Water – Post-Workshop Survey

'What is the order of priority in terms of including these elements in the PR24 plans? Please rank them in terms of where 1 = the most important priority for the future, 2 = the second most important priority etc.'



Average ranking – 1=most important priority	SWW helping homes save water with water saving devices, home audit and education	SWW helping homes recycle water by providing water butts	SWW giving homes smart water meters	SWW investing to get rid of lead pipes in older homes	Improving taste and smell of tap water	Improving the colour of tap water
HH Customers 20 to 45 Bournemouth	2.14	3.43	2.43	4	4.14	4.86
HH Customers 20 to 45 Bristol	3.14	3.86	3.86	1.43	2.86	5.86
HH Customers 20 to 45 Cornwall	1.71	2.43	3.57	2.57	5.29	5.43
HH Customers 20 to 45 Devon	2.63	2.38	3.13	3	4.75	5.13
HH Customers 46 to 70 Bournemouth	2.38	3	2.25	3.75	4.25	5.38
HH Customers 46 to 70 Bristol	2.17	4.5	2.17	2.83	4.67	4.67
HH Customers 46 to 70 Cornwall	2.63	1.88	2.50	4.25	4.63	5.13
HH Customers 46 to 70 Devon	2.38	1.75	3.75	3.63	4.25	5.25

In the Post-Workshop survey, older Bournemouth Water and Bristol Water customers were most likely to prioritise 'SWW giving homes smart meters' for the 'PR24' plans, while older South West Water customers in Devon and Cornwall were most likely to prioritise 'SWW helping homes recycle water by providing water butts'.

Younger South West Water customers in Cornwall, younger customers in the Bournemouth Water area and older Bristol Water customers were most likely to want to prioritise 'SWW helping homes save water with water saving devices, home audits and education' above the other elements.

Meanwhile, younger Bristol Water customers were the only group to feel that 'SWW investing to get rid of lead pipes in older homes' should be the key priority for inclusion in the 'PR24' plans.

Summary of Priorities for South West Water – PR24 Plans

Key Learnings (1)



- Overall across all groups, of the six priority areas tested more than four-fifths (81%) of customers felt that 'helping homes save water with water saving devices, home audits and education' should be a priority for South West Water to include in their 'PR24' Plans. More than three-fifths (61%) of customers felt that 'investing to get rid of lead pipes in older homes' should be a priority for South West Water to include in their 'PR24' Plans.
- Around half (51%) of customers felt that 'helping homes recycle water by providing water butts' should be a priority for South West Water to include in their 'PR24' Plans, with just under half (49%) thinking that 'giving homes smart meters' should be a priority for South West Water to include in their 'PR24' Plans.
- 'Improving the taste of water' and 'improving the colour of water' were far less of a priority compared to the other priority areas tested, with only 19% and 9% respectively believing that these should be a priority for South West Water to include in their 'PR24' Plans.
- Some area, age and social grade related differences were noted in how some customers prioritized the six aspects tested:
 - Nearly all SWW customers asked felt that SWW should place high priority on 'helping homes recycle water by providing water butts', while nearly all SWW and Bournemouth Water customers thought that SWW should prioritise 'helping homes save water with water saving devices, home audits and education';
 - Older customers of Bristol Water thought that SWW should place high priority on 'giving homes smart meters', although nearly all younger Bristol Water customers felt that this should not be a priority. Younger customers of all water companies were more likely to think that SWW should prioritise 'investing to get rid of lead pipes in older homes';
 - Customers in the ABC1 social grades felt slightly more strongly than C2DE customers that 'South West Water should place high priority on 'giving homes smart meters' (54% of ABC1s, compared to 35% for C2DEs). However, C2DEs were more likely to feel that South West Water should prioritise 'investing to get rid of lead pipes' than ABC1s (71% and 51% respectively) and 'improving the waste and smell of water' (29% and 11% respectively).

Summary of Priorities for South West Water – PR24 Plans

Key Learnings (2)



- In the Post-Workshop survey completed by participants, when asked which of the six elements of the 'PR24' plans should be prioritised by South West Water, 'helping homes save water with water saving devices, home audits and education' received the highest priority ranking overall (a mean of 2.4 out of 6). The two other priority areas where a mean score of under 3.0 was recorded were for 'helping homes recycle water by providing water butts' and 'giving homes smart water meters'. As seen in the workshops, the areas of lowest priority were 'improving the colour of tap water' and 'improving the taste and smell of tap water'.
- Some area and age grade related differences were noted in how some customers prioritized the six aspects tested:
 - Older Bournemouth Water and Bristol Water customers were most likely to prioritise 'SWW giving homes smart meters' for the 'PR24' plans, while older South West Water customers in Devon and Cornwall were most likely to prioritise 'SWW helping homes recycle water by providing water butts';
 - Younger South West Water customers in Cornwall, younger customers in the Bournemouth Water area and older Bristol Water customers were most likely to want to prioritise 'SWW helping homes save water with water saving devices, home audits and education' above the other elements;
 - Younger Bristol Water customers were the only group to feel that 'SWW investing to get rid of lead pipes in older homes' should be the key priority for inclusion in the 'PR24' plans.

turquoise

Conclusions & Recommendations.

Conclusions & Recommendations

Conclusions



turquoise

The general consensus was that, based on the information presented to them, customers think that the Smarter Healthier Homes initiative is a positive thing for South West Water to be undertaking. However, some customers said that they would like to see more information and context behind some of the aspects covered in the Smarter Healthier Homes initiative in order to help them make more informed decisions about them – in particular, this related to smart metering and surface water drainage systems.

Customers ranked 'water re-use and recycling' as the most important theme/pillar of the three Smarter Healthier Homes elements tested. The highest number/proportion of customers (29 out of 58 customers – 50%) thought that 'water reuse and recycling' was the most important issue, over and above 'lead pipe removal' (16 customers – 28%) and 'smart metering' (13 customers – 22%).

Conclusions & Recommendations

Conclusions

A large turquoise logo consisting of the word "turquoise" in a dotted, pixelated font, centered within a white circle. The circle is set against a background of overlapping colored circles in shades of teal, yellow, green, pink, and orange.

turquoise

In terms of the six priority areas that customers think South West Water should include in their 'PR24' Plans, the top priority identified in the workshops overall was 'helping homes save water with water saving devices, home audits and education', followed by 'investing to get rid of lead pipes in older homes'. Areas of middling priority were 'helping homes recycle water by providing water butts' and 'giving homes smart meters'. Meanwhile, the lowest priorities were identified as 'improving the taste of water' and 'improving the colour of water', mainly because customers felt that the standards in this area were already acceptable.

In the Post-Workshop survey completed by participants, when asked which of the six elements of the 'PR24' plans should be prioritised by South West Water, 'helping homes save water with water saving devices, home audits and education' received the highest priority ranking overall, followed by 'helping homes recycle water by providing water butts' and 'giving homes smart water meters'. As seen in the workshops, the areas of lowest priority were identified as being 'improving the colour of tap water' and 'improving the taste and smell of tap water'.

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Appendices.

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 1 (South West Water, Cornwall, 46-70)



GROUP 1 (SOUTH WEST WATER) CORNWALL, AGED 46-70	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	2	2	2	2	2	2	-	2	2.0	2 nd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	3	3	3	3	3	3	-	3	3.0	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	1	1	1	1	1	1	-	1	1.0	1 st
Future Priorities/Inclusion in 'PR24' Plans: - Is it a priority for South West Water to...										
- Improve the taste and smell of water?	-	-	-	-	-	-	-	-	-	-
- Improve the colour of water?	-	-	-	-	-	-	-	-	-	-
- Invest to get rid of lead pipes in older homes?	-	-	-	-	-	-	-	-	-	-
- Help homes recycle water by providing water butts?	-	-	-	-	-	-	-	-	-	-
- Give homes smart meters?	-	-	-	-	-	-	-	-	-	-
- Help homes save water with water saving devices, home audit and education?	-	-	-	-	-	-	-	-	-	-

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 2 (South West Water, Devon, 20-45)



GROUP 2 (SOUTH WEST WATER) DEVON, AGED 20-45	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	3	1	3	1	2	3	3	3	2.4	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	1	3	1	3	3	1	2	1	1.9	2 nd
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	2	2	2	2	1	2	1	2	1.8	1 st
Future Priorities/Inclusion in 'PR24' Plans:										
- Is it a priority for South West Water to...										
- Improve the taste and smell of water?	-	-	-	-	-	-	-	-	-	-
- Improve the colour of water?	-	-	-	-	-	-	-	-	-	-
- Invest to get rid of lead pipes in older homes?	-	-	-	-	-	-	-	-	-	-
- Help homes recycle water by providing water butts?	-	-	-	-	-	-	-	-	-	-
- Give homes smart meters?	-	-	-	-	-	-	-	-	-	-
- Help homes save water with water saving devices, home audit and education?	-	-	-	-	-	-	-	-	-	-

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 3 (South West Water, Devon, 46-70)



GROUP 3 (SOUTH WEST WATER) DEVON, AGED 46-70	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	3	2	3	2	2	3	2	3	2.5	2 nd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	1	3	2	3	3	2	3	2	2.4	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	2	1	1	1	1	1	1	1	1.1	1 st
Future Priorities/Inclusion in 'PR24' Plans: - Is it a priority for South West Water to...									<i>Number of respondents prioritising:</i>	
- Improve the taste and smell of water?	Yes								1	4 th =
- Improve the colour of water?									0	6 th
- Invest to get rid of lead pipes in older homes?	Yes			Yes		Yes		Yes	4	3 rd
- Help homes recycle water by providing water butts?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	8	1 st
- Give homes smart meters?				Yes					1	4 th =
- Help homes save water with water saving devices, home audit and education?			Yes	Yes	Yes	Yes	Yes	Yes	6	2 nd

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 4 (South West Water, Cornwall, 20-45)



GROUP 4 (SOUTH WEST WATER) CORNWALL, AGED 20-45	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	3	3	3	-	2	3	2	3	2.4	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	1	1	1	-	1	1	3	1	1.1	1 st
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	2	2	2	-	3	2	1	2	1.8	2 nd
Future Priorities/Inclusion in 'PR24' Plans: - Is it a priority for South West Water to...									<i>Number of respondents prioritising:</i>	
- Improve the taste and smell of water?				-					0	6 th
- Improve the colour of water?				-				Yes	1	5 th
- Invest to get rid of lead pipes in older homes?	Yes	Yes	Yes	-	Yes	Yes		Yes	6	2 nd =
- Help homes recycle water by providing water butts?	Yes	Yes		-	Yes	Yes	Yes	Yes	6	2 nd =
- Give homes smart meters?				-	Yes	Yes			2	4 th
- Help homes save water with water saving devices, home audit and education?	Yes	Yes	Yes	-	Yes	Yes	Yes	Yes	7	1 st

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 5 (Bristol Water, Bristol, 46-70)



GROUP 5 (BRISTOL WATER) BRISTOL, AGED 46-70	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	1	-	1	3	-	3	1	1	1.7	1 st
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	3	-	3	1	-	1	3	3	2.3	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	2	-	2	2	-	2	2	2	2.0	2 nd
Future Priorities/Inclusion in 'PR24' Plans: - Is it a priority for South West Water to...									Number of respondents prioritising:	
- Improve the taste and smell of water?		-			-				0	6 th
- Improve the colour of water?		-	Yes		-				1	5 th
- Invest to get rid of lead pipes in older homes?	Yes	-		Yes	-	Yes			3	3 rd
- Help homes recycle water by providing water butts?		-		Yes	-	Yes			2	4 th
- Give homes smart meters?	Yes	-	Yes	Yes	-	Yes	Yes	Yes	6	1 st =
- Help homes save water with water saving devices, home audit and education?	Yes	-	Yes	Yes	-	Yes	Yes	Yes	6	1 st =

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 6 (Bournemouth Water, Bournemouth, 20-45)



GROUP 6 (BOURNEMOUTH WATER)	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
BOURNEMOUTH, AGED 20-45										
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	2	1	1	3	1	3	2	-	1.9	2 nd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	3	3	3	2	2	2	3	-	2.6	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	1	2	2	1	3	1	1	-	1.6	1 st
Future Priorities/Inclusion in 'PR24' Plans:										
- Is it a priority for South West Water to...									<i>Number of respondents prioritising:</i>	
- Improve the taste and smell of water?	Yes							-	1	5 th =
- Improve the colour of water?	Yes							-	1	5 th =
- Invest to get rid of lead pipes in older homes?		Yes		Yes	Yes	Yes		-	4	3 rd
- Help homes recycle water by providing water butts?			Yes		Yes		Yes	-	3	4 th
- Give homes smart meters?		Yes	Yes	Yes	Yes	Yes	Yes	-	6	1 st =
- Help homes save water with water saving devices, home audit and education?	Yes	Yes	Yes		Yes	Yes	Yes	-	6	1 st =

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 7 (Bournemouth Water, Bournemouth, 46-70)



GROUP 7 (BOURNEMOUTH WATER)	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
BOURNEMOUTH, AGED 46-70										
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	2	1	2	3	1	3	1	2	1.9	2 nd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	3	3	3	2	3	2	3	3	2.8	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	1	2	1	1	2	1	2	1	1.4	1 st
Future Priorities/Inclusion in 'PR24' Plans: - Is it a priority for South West Water to...									Number of respondents prioritising:	
- Improve the taste and smell of water?				Yes	Yes				2	4 th =
- Improve the colour of water?									0	6 th
- Invest to get rid of lead pipes in older homes?	Yes			Yes					2	4 th =
- Help homes recycle water by providing water butts?	Yes					Yes	Yes		3	3 rd
- Give homes smart meters?	Yes	Yes			Yes		Yes	Yes	5	2 nd
- Help homes save water with water saving devices, home audit and education?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	8	1 st

Summary of Priorities for 'Smarter Healthier Homes' Elements & PR24.

Group 8 (Bristol Water, Bristol, 20-45)



GROUP 8 (BRISTOL WATER)	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5	Respondent 6	Respondent 7	Respondent 8	Average Ranking	Order/ Overall Sentiment
BRISTOL, AGED 20-45										
Ranking of Smarter Healthier Homes Elements – Key Area One: 'Smart metering'	3	3	3	3	3	-	3	1	2.7	3 rd
Ranking of Smarter Healthier Homes Elements – Key Area Two: 'Lead pipe removal'	1	1	1	2	2	-	2	2	1.6	1 st
Ranking of Smarter Healthier Homes Elements – Key Area Three: 'Water re-use and recycling'	2	2	2	1	1	-	1	3	1.7	2 nd
Future Priorities/Inclusion in 'PR24' Plans: - Is it a priority for South West Water to...									Number of respondents prioritising:	
- Improve the taste and smell of water?	Yes	Yes	Yes			-		Yes	4	2 nd
- Improve the colour of water?				Yes		-			1	4 th =
- Invest to get rid of lead pipes in older homes?	Yes	Yes	Yes	Yes	Yes	-	Yes	Yes	7	1 st
- Help homes recycle water by providing water butts?						-			0	6 th
- Give homes smart meters?						-		Yes	1	4 th =
- Help homes save water with water saving devices, home audit and education?		Yes			Yes	-			2	3 rd