

Objectives

To gain quantitative insight across the newly combined customer base (South West, Bournemouth and Bristol Water) to understand joint priorities as well as any differences. Customer priorities form the base of business plans and shape the direction of other areas such as the development of the Green Recovery, Drainage and Wastewater Management Plan (DWMP), Water Resource Management Plan (WRMP) and WaterFit plans.

Format	Online Survey
Households (number)	1,002
Non households (number)	200
Vulnerable customers	✓
Future customers	✓
Retailers	
Stakeholders	
South West Water	✓
Bournemouth Water	✓
Bristol Water	✓

Impact on our plan and ways of working

Customers show support for investment in the environment and improving infrastructure. However there is concern over affordability – we need to communicate the reasons behind any price increase in a compelling way (e.g. with specific reference to how it will help the local environment) to increase acceptance amongst those less willing to pay.

Topics

Storm overflow	✓	Drinking water quality	✓
Water resources	✓	Net zero/ climate change	✓
Nature	✓	Affordability	✓

Key messages – what matters most

What we did

- 15-minute online survey, speaking to 1,202 customers (including a spread of age, gender and social economic groups)
- The survey included a MaxDiff exercise and a ranking task to understand importance and priority of investment areas, as well as a range of other questions to better understand customer attitudes towards future investment, including affordability.

What matters most

- Customers’ priority for investment is to ensure a clean, safe drinkable water supply is protected and maintained.
- Customers already think that water quality is very high.
- Customers welcome a step change in investment to support the local environment (e.g. preventing pollution and protecting plants /wildlife) and improving resilience (e.g. reducing leaks, failures and blockages).
- While 3 in 4 customers agree investment in the environment is required, they are conscious of the impact on affordability of their bills. However, average bill increase willingness to pay is £50, and £200 for a third of customers.
- Customers prefer a smoothed profile approach to investment in the environment, as it strikes balance between environmental improvements and affordability.

Are there differing views?

Non- household customers significantly prefer a more front-end loaded profile to investment Residential customers are motivated to pay a bill increase to help the environment directly, whereas businesses are more likely to be motivated by benefits to the local economy.

Next steps

This key quantitative research feeds into the PR24 business plan and the long-term delivery strategy directly in regard to understanding overall priorities for investment – it will be used as a key piece to triangulate against other research.