

Customer Research to inform the Best Value Water Resource Plan for the South West

Objectives

To support the West Country Water Resource Group (WCWRG) in formulating the best value regional plan for the South West. The aim was to develop the evidence base on customer and stakeholder preferences for the various outcomes associated with the planning objectives.

Format	Focus Groups and Online Survey
Households (number)	1,570
Non households (number)	312
Vulnerable customers	
Future customers	✓
Retailers	
Stakeholders	
South West Water	✓
Bournemouth Water	✓
Bristol Water	✓

Impact on our plan and ways of working

This research provided key insight into customer water use, and expectations and preferences for investment, which was used in support of the regional Water Resource Management Plan and individual company Water Resource Management Plans.

Topics

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

Key messages – what matters most

What we did

- The study used a combination of qualitative (deliberative groups) and quantitative research (online survey) methods - carried out between June 2021 and March 2022.
- Customers were from areas supplied by Bristol Water, Bournemouth Water, South West Water and also Wessex Water
- Areas of focus were: supply resilience, best value planning, supply and demand options, sharing water, and policy issues and constraints

What matters most

- Participants recognised water resources are limited but perceived severe water restrictions as difficult to cope with. Majority of customers supported higher frequency of less severe restrictions if this would contribute to keeping more water in the environment and protecting sensitive habitats.
- There is a strong preference for the plan to go beyond the minimum requirements for environmental protection.
- Customers favoured earlier investment in supply options, even if this was associated with greater risk of going wrong.
- There's overall support for reduction in severe restrictions' level of risk, but no clear preference for the extent of risk reduction
- Supply resilience was ranked highest priority out of the factors for best value planning, with benefitting and affordable for society ranking the lowest
- No supply or demand options were considered unacceptable for customers, with the strongest support being for reducing leakage, closely followed by reservoirs. In general, supply options were favoured over demand options
- Sharing water was generally supported, with it being strongly supported to protect the environment
- Participants were in agreement that affordability should be considered, however views were mixed as to how this should be achieved – external support via government, means tested bills, national pricing etc.

Are there differing views?

Over half of NHH participants stated their business would struggle to use less water, compared to the majority of HH customers considering they could use less.

Next steps

This research feeds into work being conducted by the Environment team for the WRMP, as well as being important for the long-term delivery strategy.