

Objectives

This customer research project builds on current customer insight to start to develop the evidence base specifically for PR24 in the context of SWW's longer term investment needs.

Format	Focus groups
Households (number)	4 (n31)
Non households (number)	
Vulnerable customers	✓
Future customers	
Retailers	
Stakeholders	
South West Water	✓
Bournemouth Water	✓
Bristol Water	

Impact on our plan and ways of working

The results from this engagement helped to understand views on emerging topics such as the reduction or elimination of storm overflows and the need to protect assets from climate change.

It showed that customers want to see further improvements, but are mindful of affordability, and those that can least afford to pay need to be protected.

Date	December 2021
Supplier	ICS

Key messages – what matters most

What we did

- Four initial online focus groups were undertaken in September 2021 to explore customers' priorities for the pace, scale and profile of potential investment around six themes:
 - Connecting properties served by private supplies to the public water mains supply
 - Reducing the impact of storm overflows on rivers and the sea
 - Working in partnership with others to manage land use
 - Addressing the impacts of climate change
 - Replacing customer supply pipes
 - Reducing carbon emissions from SWW's operations
- This included activities to gauge appetite for bill changes over the 25-year time frame up to 2050.

What matters most

- Climate change and protecting the environment are viewed by customers as the most significant issues requiring transformational change
- Customers fully support investment around land management, implying that it should be feature of any SWW plan. Many customers held views that this area was not just South West Water's responsibility and that others should also be contributing to the costs (such as the government)
- Customers think that investment in addressing the impacts of climate change and storm overflows are essential
- Investment should be targeted to deal with the highest priorities first (high spills) or in the case of climate change, as the needs arise, to manage the affordability impacts and realise the greatest benefits upfront
- Reducing company contributions to climate change by achieving net zero is viewed as important, urgent and good value for money. Many customers insisted that changes should be made as soon as possible
- Bill increases to pay for improvements are acceptable as long as the needs of those who struggle to pay their bills is considered.

Are there differing views?

No significant differences.

Next steps

The research is the first step in an ongoing programme of customer engagement that will develop understanding of the acceptability of future bill pressures as the business plan is developed.