

Customer motivations: water saving & smart meters

Combined report: qualitative & quantitative research

17th May 2022



To provide an in-depth understanding on two separate but linked issues: what customers want in terms of water efficiency services and smart metering.



Supporting WRMP and longer term strategy

To identify fundamental consumer barriers to water saving – and identify ways to overcome these. As well as explore the motivations and customer benefits for water efficiency.

Get\o/aterFit

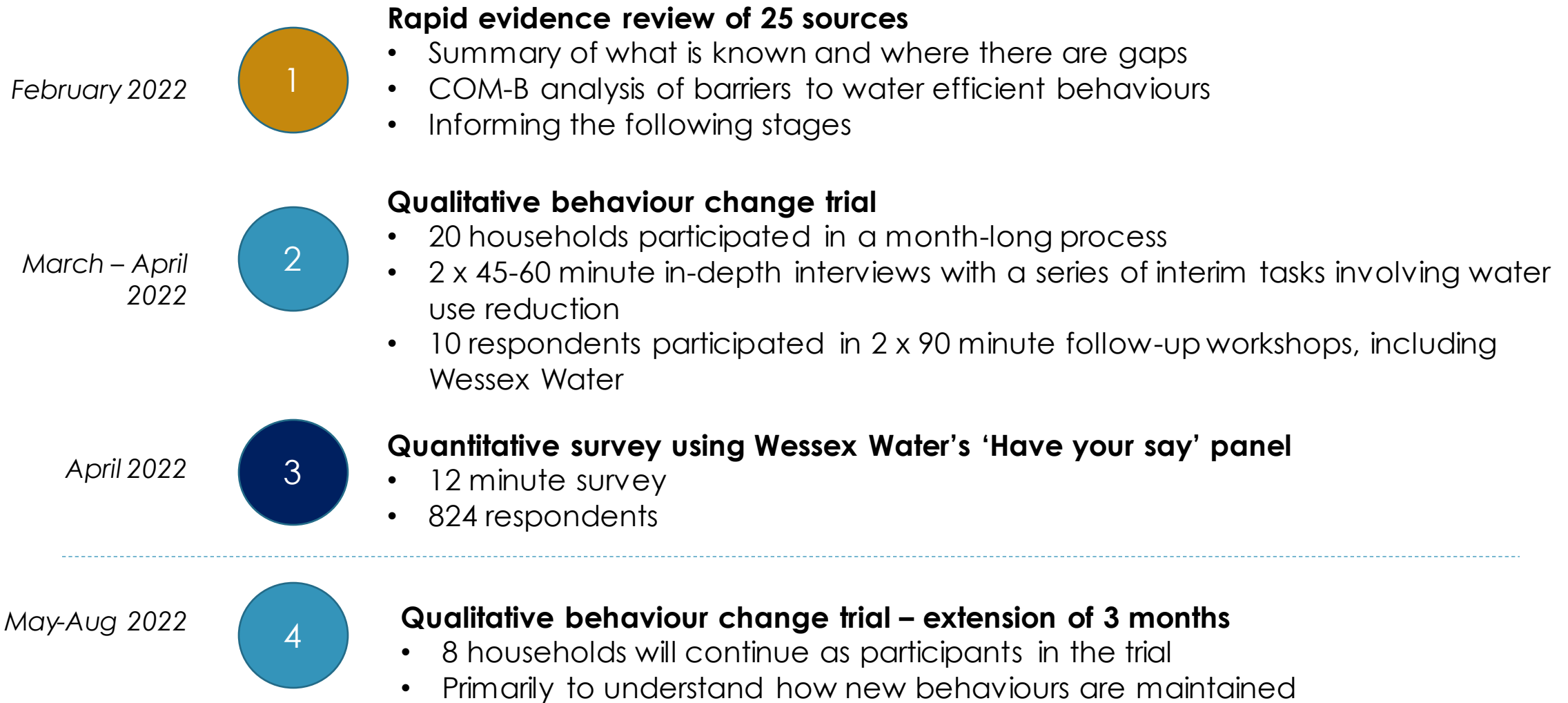
Refine current & future water efficiency programmes

To explore how services (such as Get Water Fit) are performing with customers – and where new or improved services could be developed



Inform potential smart meter roll out from 2025

To inform smart meter implementation: approaches to engaging customers; features that could drive behaviour change; and communication needs





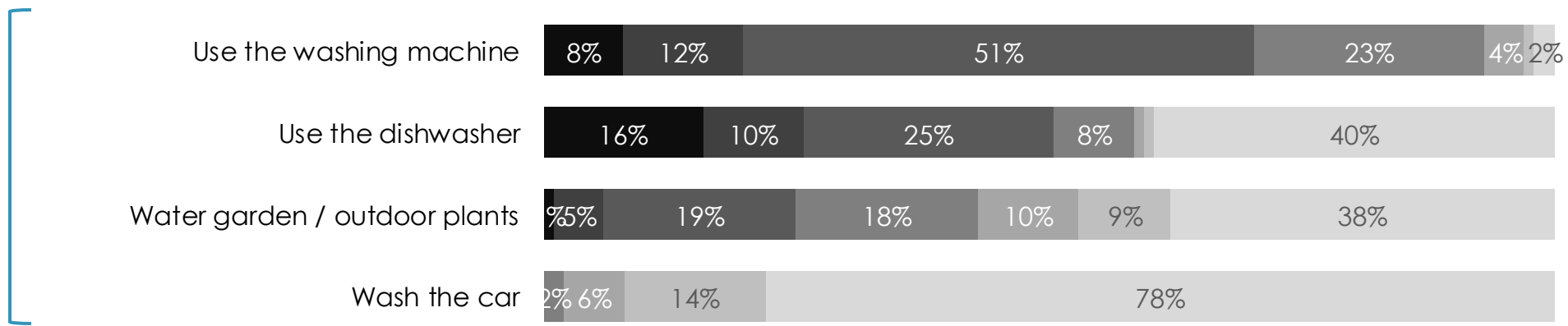
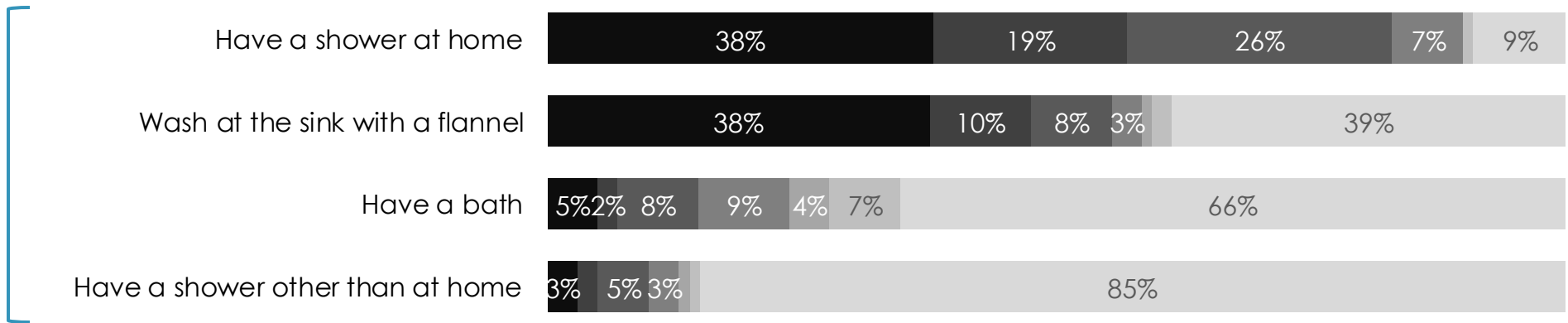
Current water use and attitudes

Frequency of water-using activities

Nearly all panel members shower at home weekly or more, with c.4 in 10 doing so every day. Washing with a flannel is also widely evident amongst our (older) panelists, but having a bath is now a rare event. Washing machines are used more widely than dishwashers, although dishwashers more frequently.

■ Once a day or more
■ Most days
■ 2-3 times a week
■ Weekly
■ Fortnightly
■ Monthly
■ Less often / never / NA

Weekly +



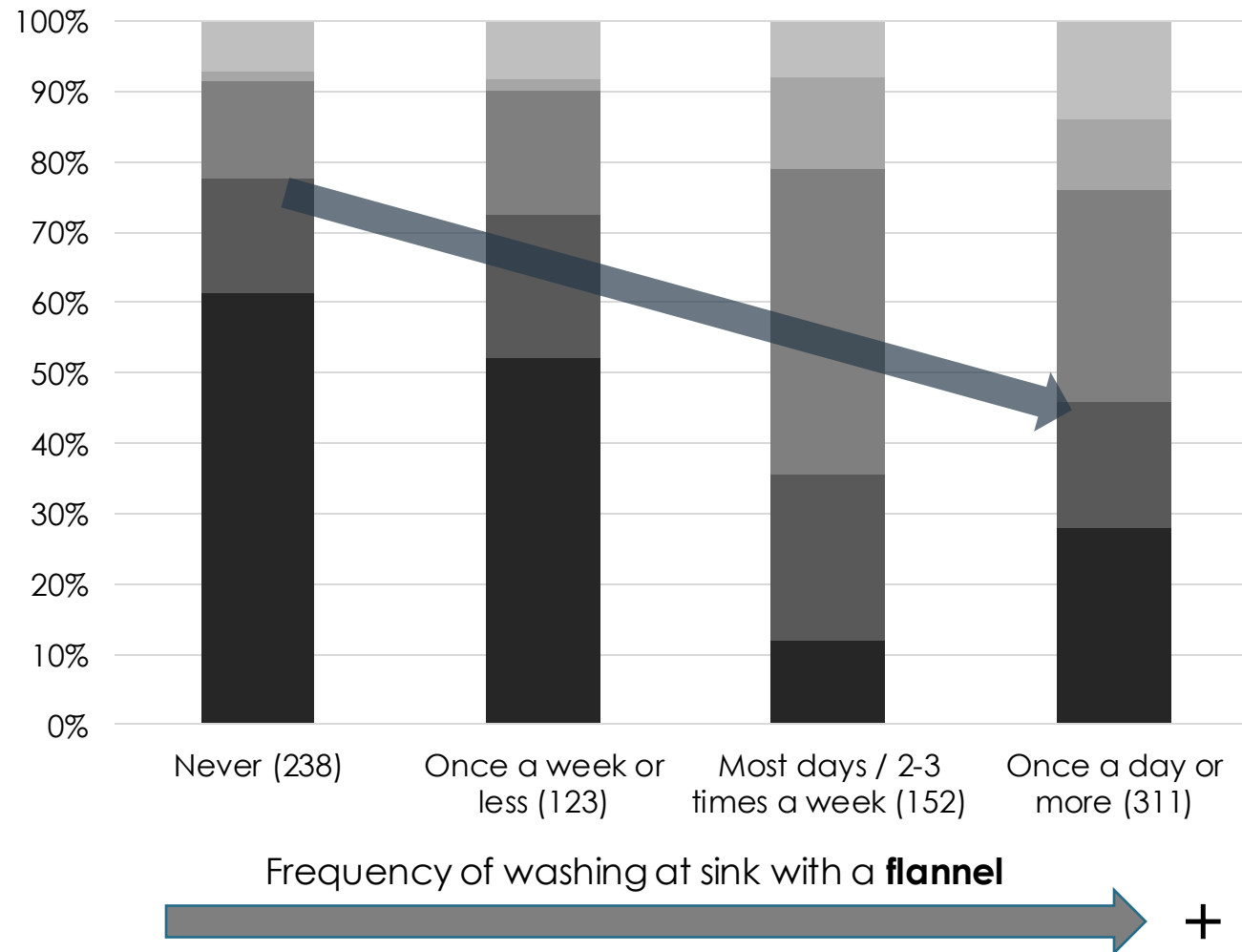
Q4a. About how often do you personally do each of the following? **Q4b.** About how often does your household (you or anyone else in your home) do the following?
 Base: All panelists (824)

Showering versus washing with a flannel

Those who wash with a flannel tend to shower less often – although regular flannel washers do use the shower periodically – at least once a week; they are not mutually exclusive modes of washing.



- Shower less than once a week/ never
- Shower once a week
- Shower 2 or 3 times a week
- Shower most days
- Shower once a day or more



Q4a. About how often do you personally do each of the following?
Base: All panelists (824)



Having daily showers is similarly common amongst most groups. Larger (busier) households are notably more likely to use water-intensive appliances more often, along with those who make less conscious effort to save water.



Daily showers at home

Who?

- *Indicatively* youngest people BUT we don't have a robust sample of 18-34s

Wash at the sink with a flannel daily

Who?

- Older i.e. >55
- Perceive water resources are limited

Have a bath weekly or more

Who?

- Indicatively*
- Female
 - Stretched and Struggling
 - No water meter

Showers out of home (work, gym) weekly or more

Who?

- Indicatively*
- AB social grade
 - Have a water meter



Washing machine used often (most days or more)

Who?

- **Larger households**
- Younger i.e. <55
- No water meter
- Those who make less effort to save water

Dishwasher used often (most days or more)

Who?

- **Larger households**
- Younger i.e. <55
- AB social grade
- No water meter
- Those who make less effort to save water
- Family Focus segment

Wash the car monthly or more

Who?

- Older i.e. >55
- AB social grade
- Those not worried about water bill
- Those who make less effort to save water
- Family Focus segment

Water garden / outdoor plants weekly or more

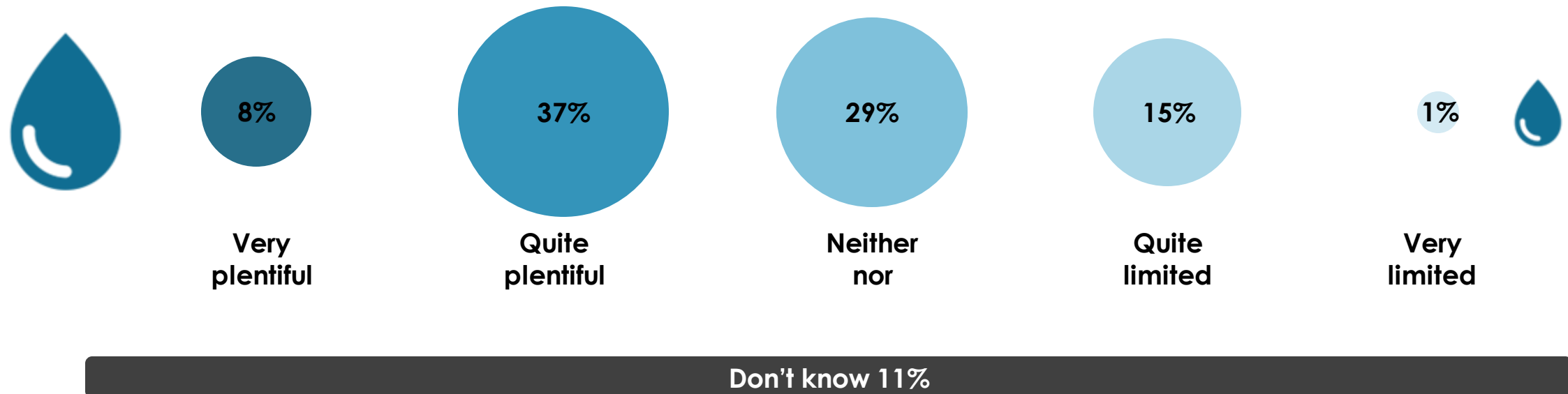
Who?

- Those with vegetable patch

Impressions of water resources in region

A large proportion of the panel (4 in 10) don't really know or have a firm view about the water resources situation in the Wessex region. Of those who give a view, the balance is towards thinking water resource is plentiful. Only c. 1 in 6 think water resource is limited. Does this general lack of concern about water resources lead to complacency in water use?

Q: The water supplied to homes and businesses comes from the rainwater in natural underground stores, reservoirs and rivers. These water sources are also essential for wildlife and the local environment. How plentiful or limited do you think these sources of water are in your region?



Similarly, qualitative respondents unaware of water resource challenges

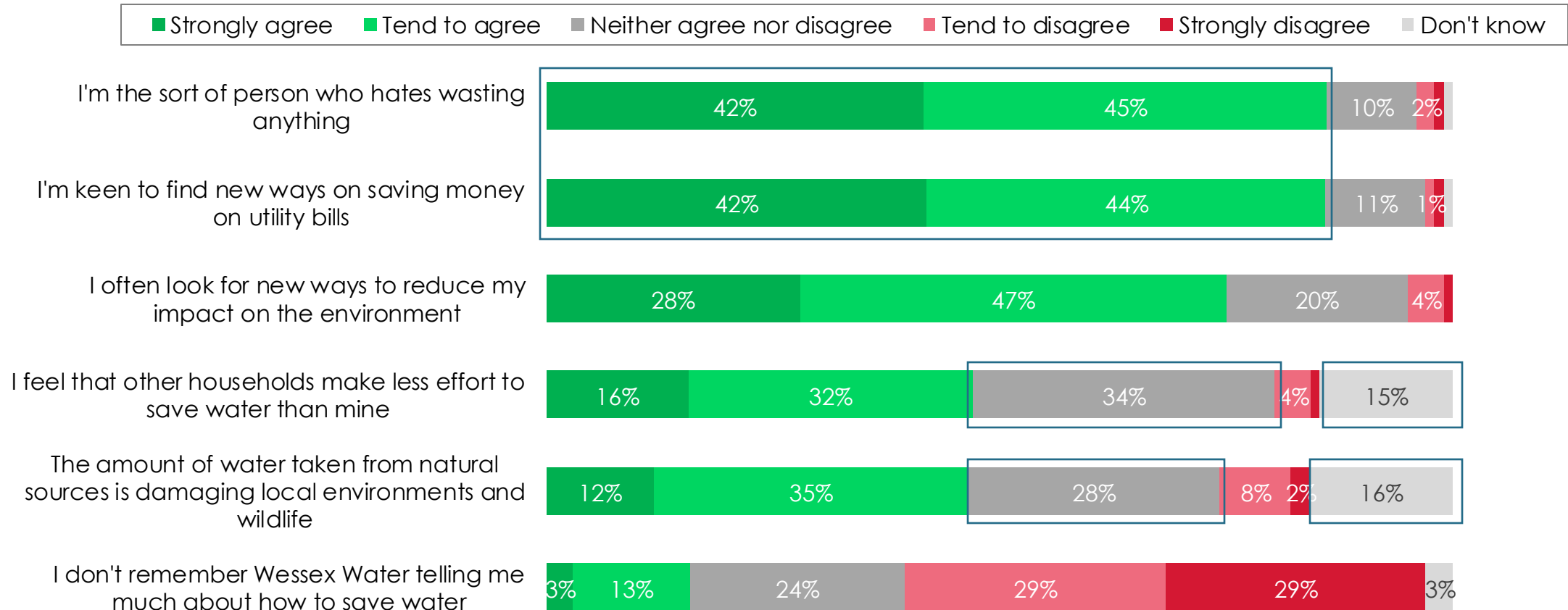
- No spontaneous reference to supply security during the trial
- General information about population growth and climate impacts shown in workshops: participants know about the general challenges but few have linked to personal water efficient behaviours

Q7. How plentiful or limited do you think these sources of water are in your region?

Base: All panelists (824)

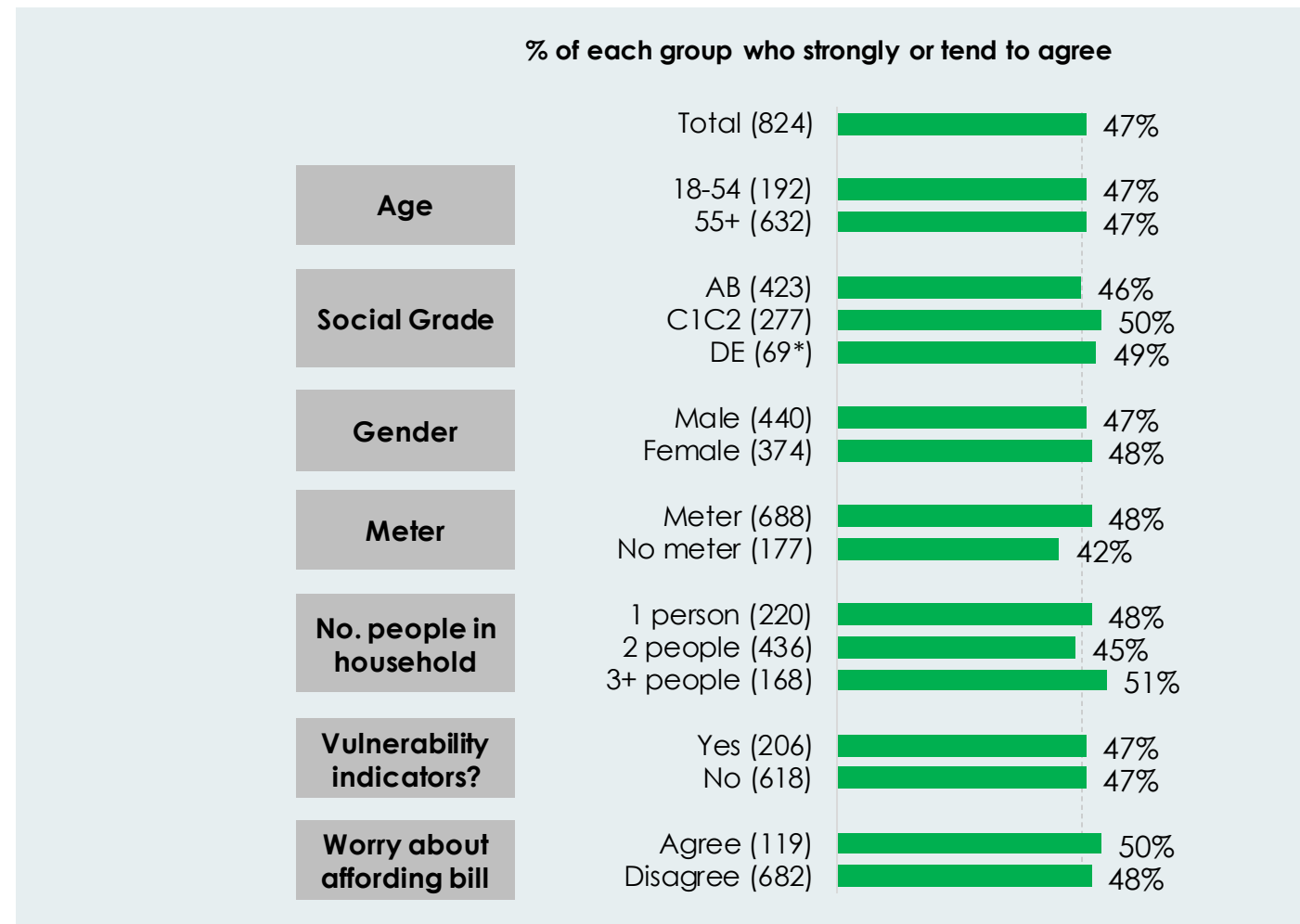
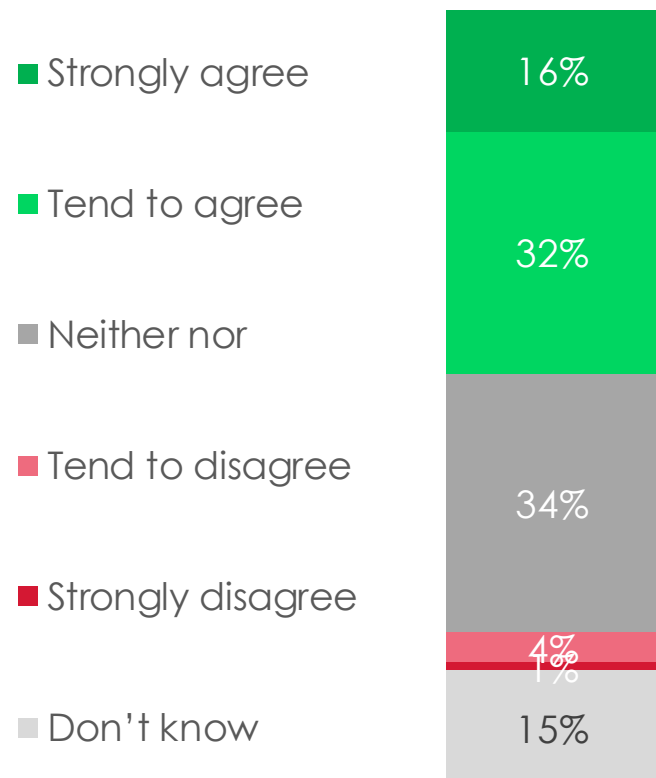
Underlying motives

A dislike of waste and a desire to save money are more strongly held motivations than actively looking for new ways to reduce environmental impact. Many don't have any strong impressions about their water use relative to other people, or the environmental damage of water abstraction.



Q8. How much would you agree or disagree with the following statements?
Base: All panelists (824)

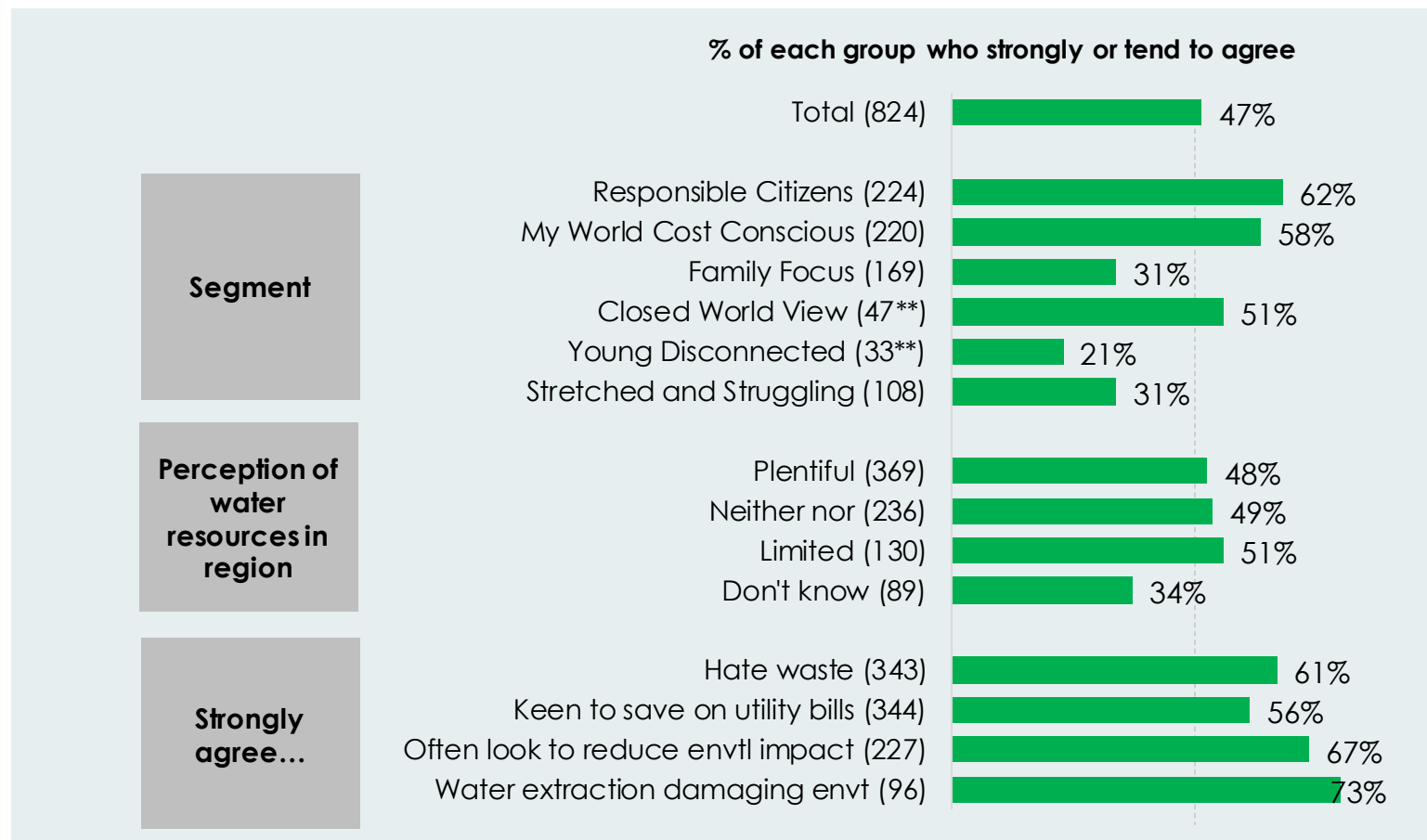
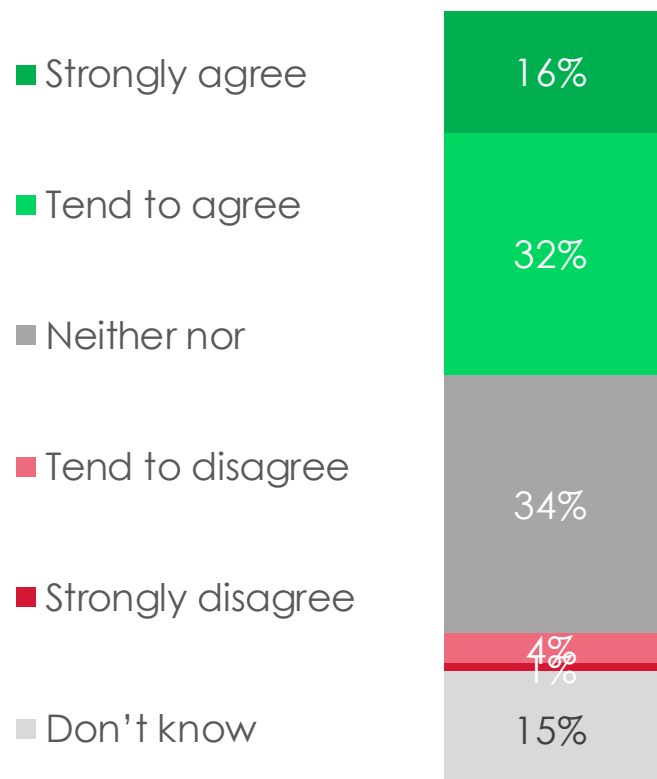
A fairly similar level of belief that 'others are more to blame' across all demographics.



Q8. I feel that other households make less effort to save water than mine.
Base: All panelists (824)

I feel other households make less effort to save water than mine

There are notable differences by segments on belief that they are 'better than others' when it comes to water use. (Although indications 'Responsible Citizens' are more likely to be watering their vegetable patches than most others!)



Q8. I feel that other households make less effort to save water than mine.
Base: All panelists (824)



Water efficiency: barriers & motivations

Consciously water efficient

Those who exhibit a number of water saving behaviours for a variety of reasons

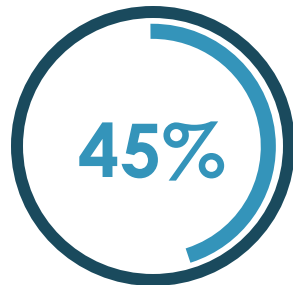
- ✓ Not keeping tap running when brushing teeth
- ✓ Not always flushing the loo
- ✓ Only filling up kettle the amount you need
- ✓ Only putting on dishwasher/washing machine if full
- ✓ Quick wash settings on dishwasher/washing machine
- ✓ Not wanting to be wasteful in general
- ✓ Encouraging others in household to adopt these behaviours
- ✓ Watering the garden with water butts
- ✓ Showering instead of having regular baths

Not consciously water efficient

Those who are often not thinking about their water usage behaviours for a variety of reasons

- Flushing the loo each time - habitual
 - Lots of washing (both clothes and dishes) due to busy households with kids
 - Swimming pool/paddling pool/hot tub refilled frequently
 - Aware others in household using lots but not thinking of personal usage
 - Washing cars/motorhomes habitually
 - Regularly watering garden with hose
- NB they don't see themselves as wasteful

Behaviour also varies within households



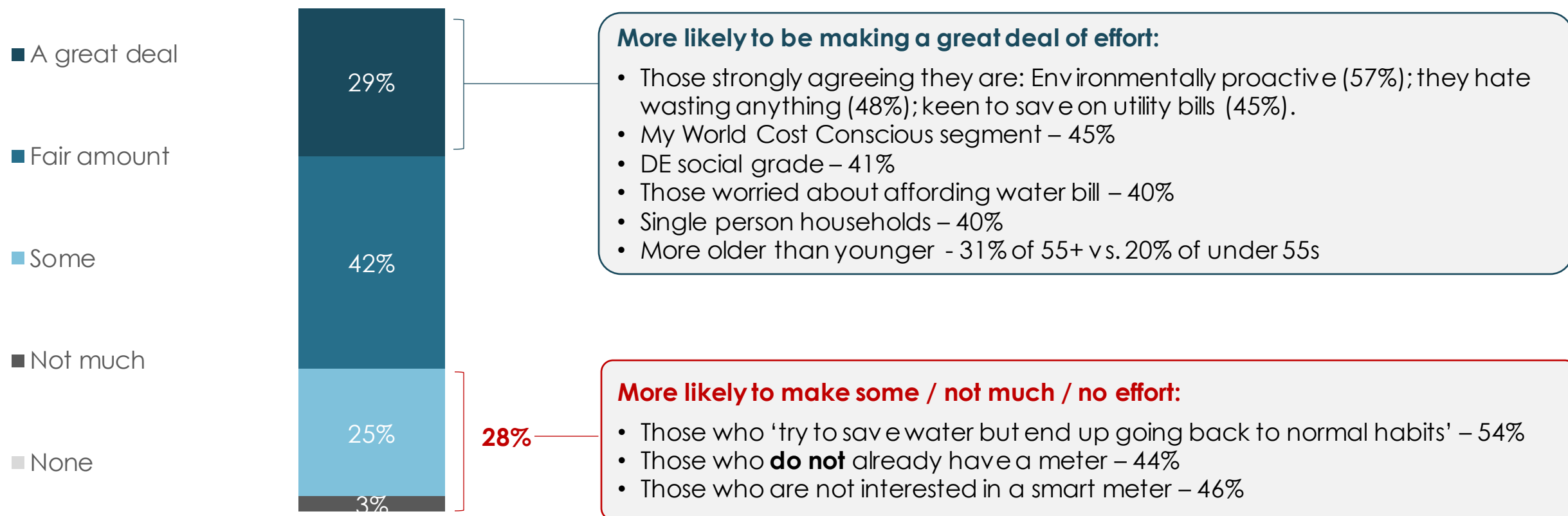
...of panelists in household of 2+ people say that others in the home either use more or less water than them personally

- Primarily they say others in the household are using more water than them (36%)
- This suggests that our panelists (bill payers) may be more conscious of saving water than partners / children who are not paying bills
- Others in the home may be even more difficult to reach and influence in terms of motivating and reminding to save water

Most panelists already think they are being 'good' with water

71% of the panel claim to make either 'a great deal' or 'a fair amount' of effort to save water (identical to the proportion in the 2021-2 tracker). This suggests most don't feel there is a pressing need to do more. Those who tell us they make less effort are often hostage to habits, and less likely to have a meter (or be interested in one).

How much effort do you personally make to save water?



Q5. How much effort do you personally make to save water
Base: All panelists (824)

Why are those who make an effort to save water doing so?

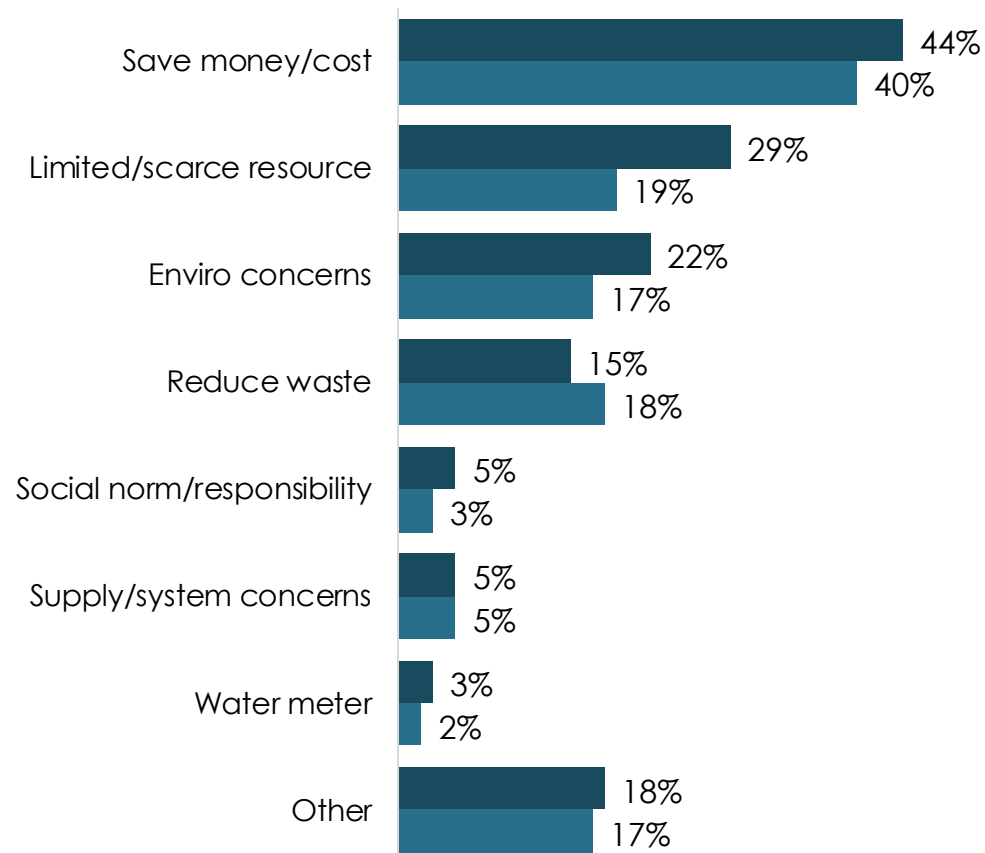
The top theme spontaneously given by members of the panel for making effort to save water is **saving money**.

After this, 'scarce resources', 'environmental concerns' and 'reducing waste' are all similarly widely mentioned.

Of the few who said they made 'not much or no effort' the dominant reason was that they don't use much water anyway.

Why do you make that amount of effort to save water? OPEN QUESTION

- Those making a 'great deal' of effort (236)
- Those making a fair amount / some effort (558)



*"Keep bills down, conserve water as it is a finite resource."
(Panelist)*

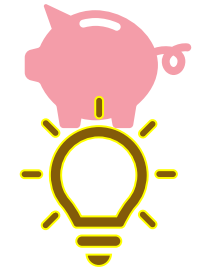
*"Mainly to save money especially as bills are all increasing."
(Panelist)*

*"Water is a precious resource, and I hate to waste it. I'm also conscious of its cost..
(Panelist)*

30 respondents said they made **'not much or no effort'** to save water, the main reason being that their water use is already low

Q6a/b/c. Why do you make <amount of> effort to save water? OPEN QUESTION. CODES ABOVE ARE NETS OF CODED ANSWERS
Base: Those making a great deal of effort (236). Those making a fair amount or some effort (558)





Many already adapting their behaviours in light of the cost of living crisis to keep costs down:

- Generally being more conscious of energy and fuel usage
 - Turning off lights when they leave the room
 - Turning off radiators in little used rooms
 - Walking (if possible) instead of driving
- Turning down thermostat, being more frugal with heating
- Wearing more layers or using hot water bottles
- Evaluating income and outgoings looking for savings

"We're not having the heating on as much as we could or should. We now have to think about what is a necessary trip in the car due to fuel costs."
(Family, older children)



However, focus of the cost of living crisis is around energy, petrol and food costs – water does not come into this



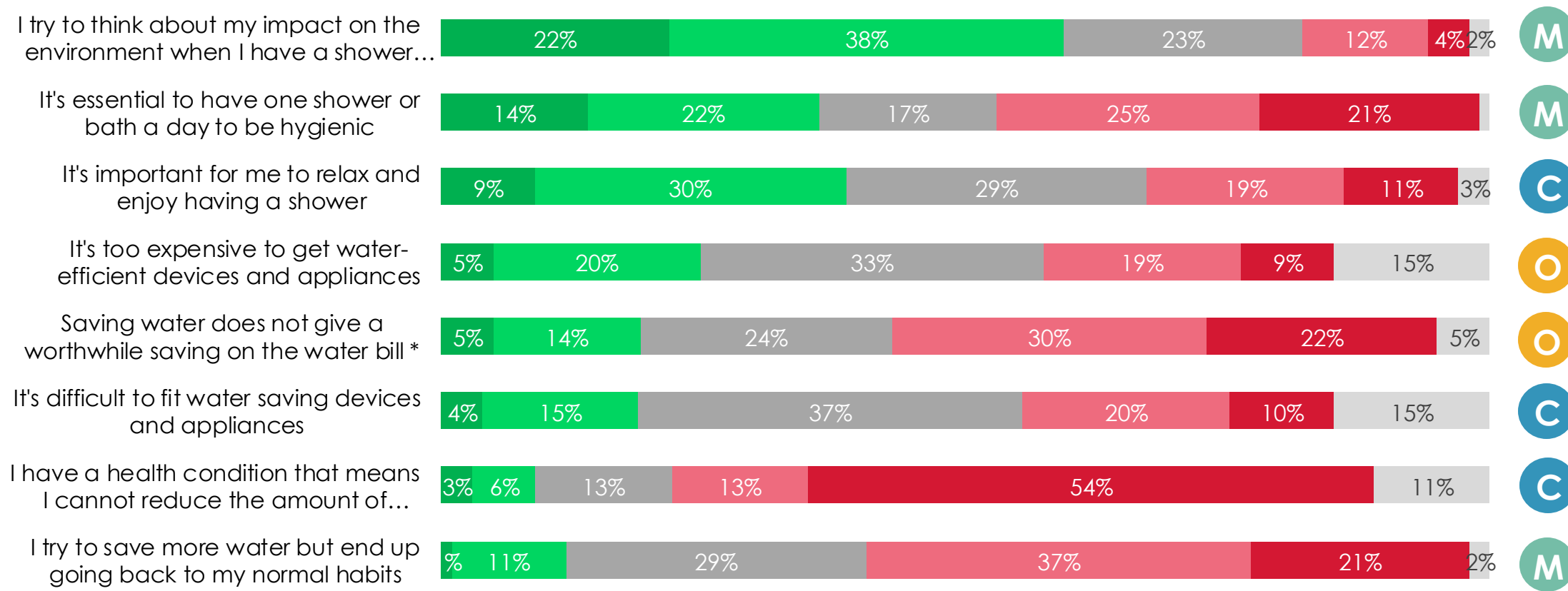
- People have a better understanding of the reason for price hikes around these costs as they're linked to immediate factors such as Brexit, the pandemic and the war in Ukraine
- There is also better knowledge of what households can do to alleviate price shocks in these areas
- Water saving does not naturally come to mind as it's not associated with an inflating expense and most aren't used to cutting down on water to save money

This data reflects the recent Ofwat report: *Cost of living: Water customers' experiences May 2022*

- 20% of bill payers are concerned about the cost of water compared to 58% concerned about electricity costs and 61% concerned about gas/heating costs.

Knowing how much you can save if you make small changes over the course of a year helps combat the underwhelming low day to day savings. This is especially true when combined with energy saving statistics, where applicable.

The biggest potential attitudinal barriers to using less water are that it is seen as essential to either shower or bathe daily to be hygienic and that it's important to relax / enjoy the shower. Encouragingly, the majority disagree that saving water doesn't give a worthwhile saving on the water bill, underpinning that financial savings are motivating.







Q12. How much would you agree or disagree with the following statements?

Base: All panelists (824) * 'Saving water does not give a worthwhile saving on the water bill' Base: those with a water meter (688)




Capability barriers

The biggest potential capability barriers to using less water is the reluctance (inability?) to go without the wellbeing benefits of relaxing in the shower - with 4 in 10 agreeing.

Capability barriers (skills, ability)	Supporting evidence from Quantitative survey	
Mental or psychological barriers: e.g. the desire to use lots of water for mental wellbeing	 <p>39%</p>	Agree: It's important for me to relax and enjoy having a shower
Too difficult for some e.g. fitting a water butt; fitting water limiting devices	 <p>19%</p>	Agree: It's difficult to fit water saving devices and appliances
'I'm doing all I can' / 'only use what I need'	 <p>9%</p>  <p>13 out of 30</p>	Agree: I have a health condition that means I cannot reduce the amount of water I use Of those who say they make not much or no effort to use water, 13 say that water use is already low.
Don't know what can do to save water	Not specifically evidenced; of those making less conscious effort, none mentioned that they 'didn't know what they could do'	

Opportunity barriers

The biggest potential opportunity barrier to using less water is the cost of installing water efficient devices. We also see that larger, busy households lack the time to put their energy into reducing water use.

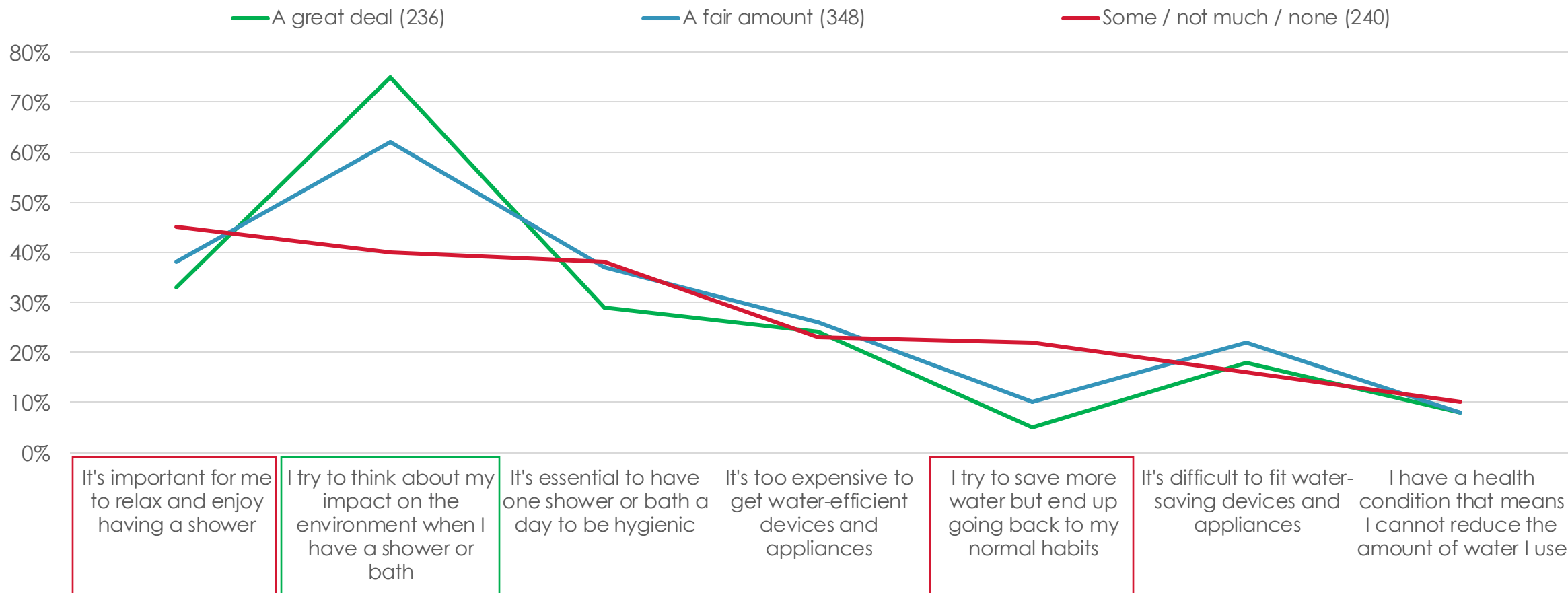
Opportunity barriers (time, money, context)	Supporting evidence from Quantitative survey	
Lack of free water efficiency aids	 <p>25%</p>	Agree: It's too expensive to get water-efficient devices and appliances
Lack of concern about water cost	 <p>19%</p>	Agree: Saving water does not give a worthwhile saving on the water bill (based on those on a meter)
Lack of practical help/ideas/tips	 <p>16%</p>	Agree: Don't remember Wessex telling me much about how to save water
Busy, erratic home life (lacking routines)	Larger households and Family Focus segment use washing machine and dishwasher more frequently; these groups are also less likely to make high conscious water saving effort	
Practical barriers to installing water saving devices e.g. space for water butts or their cost; disruption or the thought of lower pressure or less attractive fittings	<ul style="list-style-type: none"> • 7% unlikely to install water efficient washing machine • 10% unlikely to fit water butt • 18% unlikely to fit Eco showerhead with low flow • 42% unlikely to install rainwater harvesting 	

Motivation barriers dominate: while hygiene is often seen as an essential driver for water use, understanding the drivers to use less water – saving money, helping the environment, aspiring to ‘good’ or even ‘typical’ behaviours and being sparing with a finite resource are not strong drivers.

Motivation barriers (desire, obligation)	Supporting evidence from Quantitative survey	
Lack of knowledge about how much water used/whether this is typical or not; People don't know what 'normal' behaviour is	<p>49%</p>	Neutral or don't know 'I feel other households make less of an effort to save water than mine'
People don't know why it is important to save water	<p>44%</p>	Neutral / don't know 'The amount of water taken from natural sources is damaging local environments and wildlife' Neutral / don't know 'How plentiful or limited do you think these sources of water are in your region'
Lack understanding of enviro benefits	<p>41%</p>	Disagree / neutral / don't know: 'I think about my impact on the environment when I have a shower / bath'
Need for hygiene and cleanliness	<p>36%</p>	Agree 'It's essential to have daily shower/bath to be hygienic'
Lack understanding of possible £ savings	<p>29%</p>	Neutral / Don't know 'saving water does not give a worthwhile saving' (based on those on a meter)

Underlying motivations and barriers to water saving efforts.

Those who make less effort to save water are a little more likely to agree that it's important for them to relax & enjoy showers, and that they tend to fall back into normal habits of water use. Those who make greatest effort are more mindful of environmental impact, and less likely to think that daily showers/baths are a necessity to be hygienic.



Q12. How much would you agree or disagree with the following statements? % who agree
 Base: All panelists (824)



Behaviour change trial: identifying behaviours to promote

Mixed response to the idea of adopting water saving behaviours



Positives

- Opportunity to do something positive e.g. save money, save resources
- Appeal of free devices to help as many are unsure where to start
- Very positive about the idea of 'fit and forget' devices that allow them to change behaviour with minimal effort



Concerns

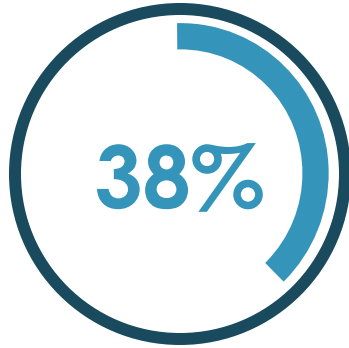
- Feel like there's nothing to save as they don't waste water
- Will the family join in?
- Don't want to make compromises for limited benefit to yourself
- Concerns about hygiene esp. fewer showers, not flushing loo
- Worry about giving confusing or contradictory instructions to their children
- Don't want to burden their children with too much info on saving – don't want to give them eco anxiety



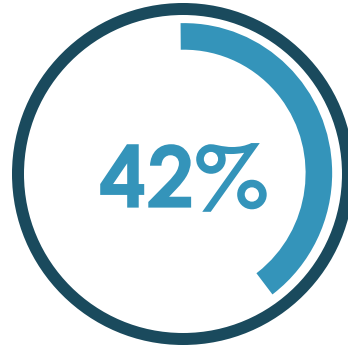
Negatives

- General dislike for the yellow mellow idea
- Having to sacrifice specific things e.g. water pressure, cleanliness/hygiene
- Having to rush through things can be stressful e.g. showers
- For those who have medical conditions it may be difficult to cut down water usage – helps with their ailment e.g. arthritis
- Some water usage behaviours contribute to wellbeing e.g. long showers or regular baths

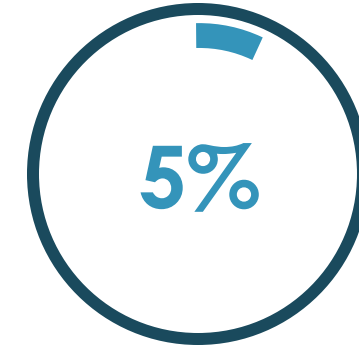
The quant revealed that the majority of the panel are not taking a daily bath or shower²⁴



**Have a shower at home
once a day or more**



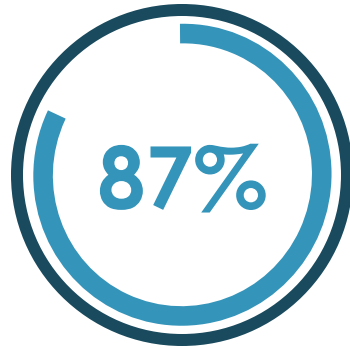
**Have a shower at home
2-3 times a week or less**



**Have a bath at home
once a day or more**

We predict that in the qualitative fieldwork people were reluctant to admit to not showering/bathing every day

Attitudes towards waste don't necessarily ring true when it comes to water behaviour



**Agree that they're the
sort of person who hates
wasting anything**



However, we heard in the qualitative fieldwork that many regularly carry out seemingly 'wasteful' water usage behaviours without thinking about how much they're wasting

Once made aware, they're often more willing to change that behaviour for the sake of being less wasteful (alongside other stronger motivations such as financial)

However, if a water saving behaviour requires a high level of effort or sacrifice the desire to be less wasteful is overruled

Initial reaction to adopting new water usage behaviours was met with trepidation:

- **Concerns that sacrifices would have to be made**
 - In terms of **hygiene** e.g. skipping showers or flushing the loo less
 - In terms of **time** e.g. collecting water to use elsewhere
 - In terms of **effort** e.g. collecting water to use elsewhere, actively thinking about water use generally
- **Change in routine can be disruptive** to the household esp. for those with children or guests
- For some, behaviours such as reducing loo flushing felt so alien that they were reluctant to even attempt them; in these scenarios, customers may need a bit more guidance and help to overcome the barriers



However, in reality most were pleasantly surprised at how easy it was to adapt to these new behaviours and incorporate them into their day to day lives

Often the anticipated 'sacrifices' didn't feel as such, and people found it's possible to get the same result as before with less water e.g. a relaxing shower being cut down from 10 minutes to 4 minutes

*"It has been a bit of an eye opener, especially how quickly our behaviour changed and how quickly we adapted."
(Couple, no kids)*

Assessment of behaviour change trial: in summary

We asked participants to...



...reduce the amount of water they use washing themselves

	Key barriers	Ways to overcome
Capability barriers	<ul style="list-style-type: none"> 'Only use what I need' The desire to use lots of water for mental wellbeing Unaware what to do to save water 	<ul style="list-style-type: none"> Need specific instructions so customers aware of how to reduce water use when washing Messaging to build awareness and 'norms'
Opportunity barriers	<ul style="list-style-type: none"> Lack of practical help/ideas/tips 	
Motivation barriers	<ul style="list-style-type: none"> Need for hygiene and cleanliness Need a rationale: cost, environment etc 	



...try and collect water that would normally get wasted and reuse it elsewhere

	Key barriers	Ways to overcome
Capability barriers	<ul style="list-style-type: none"> 'I'm doing all I can' Unaware what to do to save water 	<ul style="list-style-type: none"> Better understanding of water wasted when tap is left running Better understanding of reasons not to waste water Potential for (branded) jug or watering can as practical means for reuse Specific guidance: only so much people can do on their own
Opportunity barriers	<ul style="list-style-type: none"> Lack of concern re water cost Lack of practical help/ideas/tips Busy, erratic home life 	
Motivation barriers	<ul style="list-style-type: none"> Lack idea of possible cost savings Lack idea of how much water used/whether typical or not Need for rationale: cost, environment etc 	

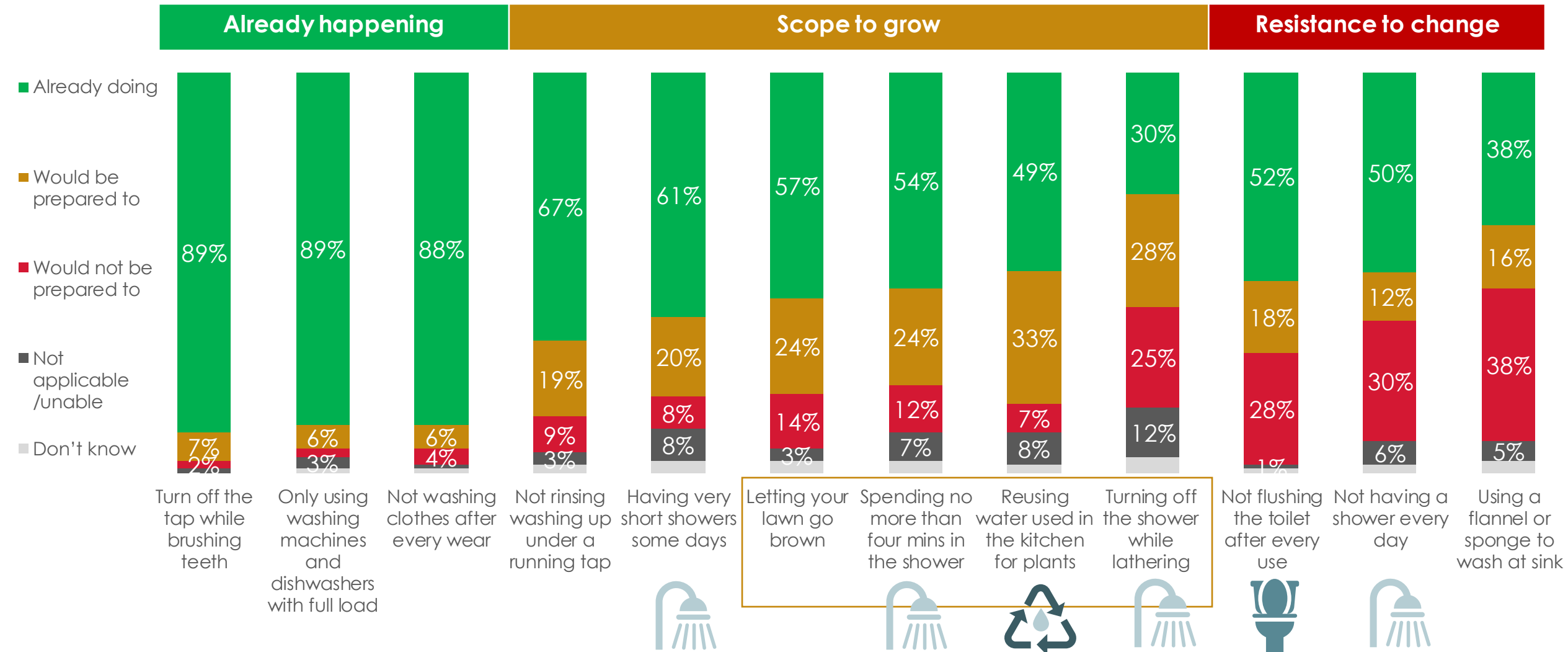


...to reduce the amount of times they flushed the toilet

	Key barriers	Ways to overcome
Capability barriers	<ul style="list-style-type: none"> 'I'm doing all I can' Unaware what to do to save water 	<ul style="list-style-type: none"> Familiarise with 'new' behaviour Better idea of how much water flushes use Explain why saving via less flushing is worth the drawbacks Cistern bag a good option for those unwilling to adopt 'mellow yellow' Educating that 'mellow yellow' is adopted by others and therefore not unhygienic or 'impolite'
Opportunity barriers	<ul style="list-style-type: none"> Lack of concern re water cost Lack of practical help/ideas/tips 	
Motivation barriers	<ul style="list-style-type: none"> Lack idea of possible cost savings Lack idea of how much water used Need for rationale: cost, environment etc 	

Water use behaviours

The widest scope to promote and convert behaviour are reusing water used in the kitchen (e.g. for plants); turning off the shower while lathering (although 1 in 4 are against this); 4 minute showers; and letting lawn go brown.



Q10 Which of these are you already doing and which others, if any, would you be prepared to do, to reduce your use of water?

Base: All panellists (824) *Base all those with a lawn (614)

Understanding volumes of water is generally very difficult

- **Some choose to compare volumes with something they can imagine** e.g. 20 litres = 20 litre bottles of water
- **Awareness of how much water is used for day to day behaviours is very limited** – most hadn't really thought about it
- Visible volumes (such as a full bath) are easier to fathom vs. flowing water (e.g. a toilet flush)
- **However, some generalisations are well-embedded:**
 - Running the tap when brushing your teeth uses 'a lot' of water
 - A bath uses a lot more water than a shower
 - Using a dishwasher can use less water than doing the washing up by hand

*"Being able to compare different activities like bath vs. a shower puts water usage into perspective. But it's still difficult to relate to how much this would cost."
(Student/shared house)*



When presented with statistics around water volumes, many were shocked by the figures

- Learning that a 10-minute shower uses 148 litres (vs. 80 litres for a full bath) was impactful in encouraging behaviour change and valuing each minute of time in the shower
- 5 litres to flush the toilet was divisive – for one flush doesn't feel like a lot but when thinking about how many flushes happen per day it adds up to a huge amount

Simple comparisons are the best way to help customers wrap their head around water volumes and be more conscious of how much water they use day to day
There is also a desire to see water volumes alongside cost

*"It doesn't sound that much when you think of the size of a bath but 80 litres is a lot for just one person. =!"
(Younger couple)*

Assessment of the behaviour change trial – Reduce personal washing time/amount

We asked participants to reduce the amount of water they use washing themselves – either by reducing time spent washing or number of washes

Effort or sacrifice required

- Showers are habitual, so this feels like a sacrifice and big change for some
 - Especially as it's related to hygiene
 - Used as a way to wake yourself up, feel fresh (or in winter, to warm up)
 - If baths are taken for physical or mental health, cutting them out feels like a sacrifice; however reducing amount of water feels doable
- Hard to know what 'shorter' is without a way to measure
- Ongoing effort – need to keep remembering to do it and easy to slip back to old ways
- In reality, many felt it would be harder/more effort than it actually was
- **Harder for:** sporty types; jobs with physical labour; long hair; shaving etc.

Gain

- Opened eyes up to flannel washing – some for selves, some for kids
- Many realising they can easily cut down shower time if they tried – most showers can be done in 4 minutes
- Less time in the shower means time in bed! Saves a bit more time in your life/morning
- Lathering, washing hair, shaved their legs with the shower off is a low effort change

Reduce personal washing time/amount

	Key barriers	Ways to overcome
Capability barriers (skills, ability)	<ul style="list-style-type: none"> • 'Only use what I need' mentality • The desire to use lots of water for mental wellbeing • Don't know what can do to save water 	<ul style="list-style-type: none"> • Need clear and specific instructions (hacks?) so customers aware of what they can do to reduce water consumption when washing • Messaging to build awareness and 'norms'
Opportunity barriers (time, money, context)	<ul style="list-style-type: none"> • Lack of practical help/ideas/tips 	
Motivation barriers (desire, obligation)	<ul style="list-style-type: none"> • Need for hygiene and cleanliness • Need for rationale: cost, environment etc 	

Specific behaviour recommendations work best here – if you're not sure exactly what to do it's much easier to ignore/avoid. More rewarding to know you've achieved a specific goal.

Assessment of the behaviour change trial – Reusing water

We asked participants to try and collect water that would normally get wasted (e.g. when waiting for tap to get hot/cold or from tumble dryer) and reuse it elsewhere

Effort or sacrifice required

- Ongoing effort – need to consciously think about doing this
- Physical element which is quite difficult to overcome; as water collection builds up it becomes heavy and difficult to move around and store, and large vessels often don't fit under tap
- A lot of people were unsure what to use it for
 - House plants don't need much water
 - Not that helpful in rainy weather
 - Need specific examples to help
- Often remember when tap is already running, by the time you've found a vessel it's too late

Gain

- Good to keep kettle topped up
 - BUT end up always boiling a full kettle
- Some found it easy to have a jug/watering can/bottle on hand to fill
- Some using tumble dryer water – felt like a lot of water coming out of this: an easy win
- Reusing cooking water from pasta or vegetables – can be nutritious/has health benefits

Reusing water

	Key barriers	Ways to overcome
Capability barriers (skills, ability)	<ul style="list-style-type: none"> • 'I'm doing all I can' mentality • Don't know what can do to save water 	<ul style="list-style-type: none"> • Better understanding of how much water can be wasted when tap is left running • Better understanding of the reasons why it's important not to waste water • Might need some sort of branded jug or watering can to help encourage this behaviour • There is only so much people can do on their own – need specific guidance
Opportunity barriers (time, money, context)	<ul style="list-style-type: none"> • Lack of concern about water cost • Lack of practical help/ideas/tips • Busy, erratic home life 	
Motivation barriers (desire, obligation)	<ul style="list-style-type: none"> • Lack of understanding of possible cost savings • Lack of understanding about how much water used/whether this is typical or not • Need for rationale: cost, environment etc 	

Assessment of the behaviour change trial – Reducing flushing

We asked participants to reduce the amount of times they flushed the toilet – “If it’s yellow let it mellow, if it’s brown flush it down”

Effort or sacrifice required

- Divisive – a few were on board with trying this, but many were reluctant
- ‘Yuck factor’ – for some this felt unpleasant/unhygienic
- Concerns about it looking unsightly and making your toilet smell
- Some faced a dilemma in that it contradicted what they were teaching their young children when it comes to toilet etiquette
- Feels socially unacceptable if you have guests coming round – don’t want them to have to use an ‘unclean’ toilet
- Worry about staining the toilet esp. those with limescale or hard water – compensating with more bleach
- Little effort for those who are already doing it – those at home a lot alone, those who have kids who can’t reach flush yet, those who don’t flush at night to avoid waking up others

Gain

- Quite a revelation for some – once they were doing it, wasn’t as bad as they thought
- Some found workarounds: doing it when they were home alone, communicating with others who would use the toilet just after or keeping the toilet lid closed
- Seeing or thinking about how much water you’re saving every day (would be useful to inform customers on how much water is used with each flush)
- Made people more strict on using small flush on dual flush toilets
- For some, gain (in terms of water saving) outweighed the effort/sacrifice required

Reducing flushing

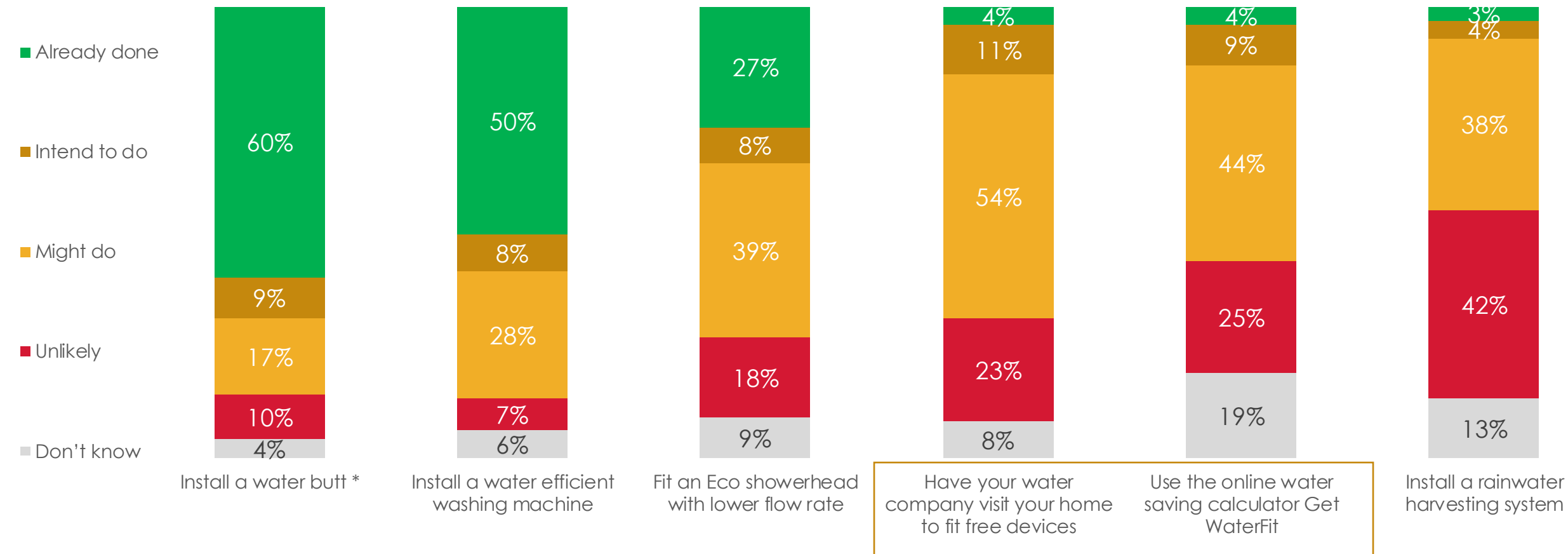
	Key barriers	Ways to overcome
Capability barriers (skills, ability)	<ul style="list-style-type: none"> • ‘I’m doing all I can’ mentality • Don’t know what can do to save water 	<ul style="list-style-type: none"> • Introduction to behaviour they hadn’t necessarily thought of before • Better understanding of how much water used when flushing
Opportunity barriers (time, money, context)	<ul style="list-style-type: none"> • Lack of concern about water cost • Lack of practical help/ideas/tips 	<ul style="list-style-type: none"> • Explain why saving water when flushing is worth the drawbacks • Cistern bag a good option for those who are unwilling to adopt ‘mellow yellow’ idea
Motivation barriers (desire, obligation)	<ul style="list-style-type: none"> • Lack of understanding of possible cost savings • Lack of understanding about how much water used • Need for rationale: cost, environment etc 	<ul style="list-style-type: none"> • Educating that this is a behaviour adopted by others and therefore not unhygienic or ‘impolite’



Water saving interventions

Water saving actions

Greatest scope for the future is with having a visit from Wessex Water to fit free devices and advise on water saving, along with using 'Get Water Fit'. These will need to be promoted to build awareness and wider interest.



Have your water company visit your home to fit free devices

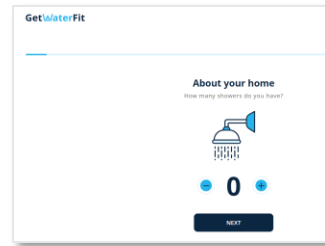
Use the online water saving calculator Get WaterFit

Q11. Which of these have you already done, and which if any are you intending to do or might do in the future?
 Base: All panellists (824). *Base: those with an outdoor space (786)

NB: no existing awareness of Get Water Fit or ability to order free water saving devices

Application process

Generally felt to be a straightforward process, but a few questions were hard to answer



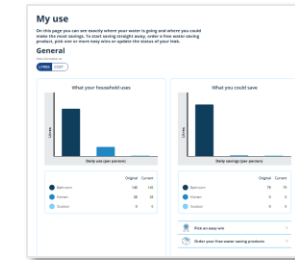
Overall, most found it easy to go through the questionnaire

However some questions were harder to answer...

- In terms of behaviours:
 - If fluctuating numbers in HH e.g. kids coming back in holidays, not sure how to answer
 - No mention of pet showers or water usage for pet
- 'About your home' section:
 - 'How many showers do you have' – confusion as to whether this meant physical showers or showers taken
 - When asked about type of shower, not sure how to answer if they have more than one shower at home
 - Shower types not obvious – not everyone aware of what 'mains pressure' shower means

Data output

Overall this was found to be difficult to interpret



Data output was not easy to interpret

- Key areas of confusion
 - Units unclear (not obvious number refers to litres)
 - Confusion as to what it's trying to tell you
 - Below and above average – very ambiguous
 - Too many charts

Implications:

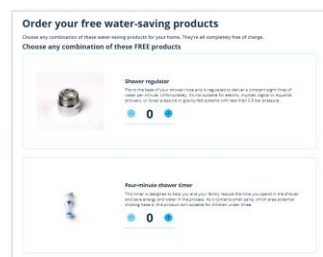
- Reassessment of question wording to ensure that questions are clear and not ambiguous
- Refresh data page to be simpler and clearer – fewer charts and more direct conclusions for what the data is showing

In terms of Get Water Fit content, most were delighted with what they received

Customers were pleased to get something for free, but were unsure who the kit was coming from

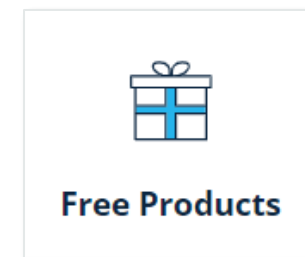
Ordering items

Easy enough to do but we noticed some inconsistencies



First impressions

Generally positive feedback on the box contents



- Unclear where to click to order kit – different parts you can click on to get to the water saving devices
 - Likely people will miss the link to get the gadgets
- Sometimes customers were not offered items that we knew they could use e.g. shower timer
- Customers wanted the ability to order extra items e.g. if they have multiple showers, they would like to order a shower head or regulator for each shower; or a cistern bag for all toilets
- Hose gun was offered to those without an outdoor tap

- Generally delighted: exciting when it arrives and customers were keen to get started
- Some items completely unfamiliar (to some) e.g. cistern bag (but instructions were clear enough)
- Some feedback that the wait time for delivery was quite long (1 week+)
- Some had items arrive at different times, but were not informed
 - E.g. shower timer coming in a box on its own, which felt a bit wasteful from a packaging perspective
- One mention of kit arriving in split jiffy bag which caused a mess

Assessment of Get Water Fit devices – shower devices



Shower head

- ✓ No complaints about look or aesthetic
- ✓ For most, reduction in pressure was minimal and still a decent showerhead
- ✓ For those with an old showerhead or a showerhead covered in limescale, this was an improvement!
- ✗ However for some, esp. those with power shower, the reduced pressure was noticeable and made it tricky to do certain things
- ✗ Not ideal for those with long/thick hair when washing
- ✗ Difficult to wash dog/pets with lower pressure



Shower regulator

- ✓ Once installed, was a great device
- ✓ Change in pressure wasn't noticeable and a good 'fit and forget' product
- ✗ Bit tricky to install for some, especially if pipework is hidden behind tiles

*"This was a bit tricky to install, had to get my wife's dad to do it (he's a plumber) but once it was in I didn't notice a difference."
(Couple, younger)*



Shower timer

- ✓ Easy to use and an easy win
- ✓ Helps people keep shower down to 4 minutes or failing that reminds people to be more conscious of the amount of time taken in the shower
- ✓ Holds you accountable for the amount of time you spend showering
- ✗ Some feedback that the timer was poor quality/cheap and didn't stick properly
- ✗ No alert for when 4 minutes was up and difficult to monitor how much you've gone over time

Assessment of Get Water Fit devices – toilet devices



Leaky loo strips

- ✓ For some, this was easy to use and install
- ✓ Ability to order multiple is good – one for each toilet in your house
- ✓ A few participants found that their toilets were leaking and were pleased that the strips enable to identify this
- ✗ Some were confused and weren't sure how they worked – need clearer instructions to explain that you're meant to leave the strip without flushing
 - ✗ A few claimed the strip disappeared



Cistern bag

- ✓ 'Fit and forget' no effort to continue use once it's installed
- ✓ For most, didn't reduce flush too much to the point where you'd need to flush twice
- ✓ Relatively easy to install
- ✗ Some have used other types of cistern bags before and felt this was a little clunkier to put in place
- ✗ For some, flush reduction was noticeable and double flushing was required which defeats the point
- ✗ Should be sent one for each toilet, similar to the leaky loo strips

NB: one person flushed needlessly to check it was working...

Assessment of Get Water Fit devices – miscellaneous



Tap insert

- ✓ Some managed to fit this relatively easily and didn't notice much difference - which was positive
- ✗ Others struggled with installation, and found it a little fiddly
- ✗ Some were unable to fit it at all as either the type of tap wasn't compatible or the scale build up on their tap prevented the device from fitting properly

Hose gun

- ✓ Many were delighted at being offered this and thought it would be a welcome improvement to just using the hose or an old attachment
- ✗ A few complained of poor quality, having difficulty fitting on hose properly
- ✗ One was sent the hose gun even though they didn't have an outdoor tap – triggered them to purchase a hosepipe to connect to kitchen sink and therefore encourage water usage!

NB: weather during fieldwork was rainy/cold so use of this device was limited



Cornflower grow kit

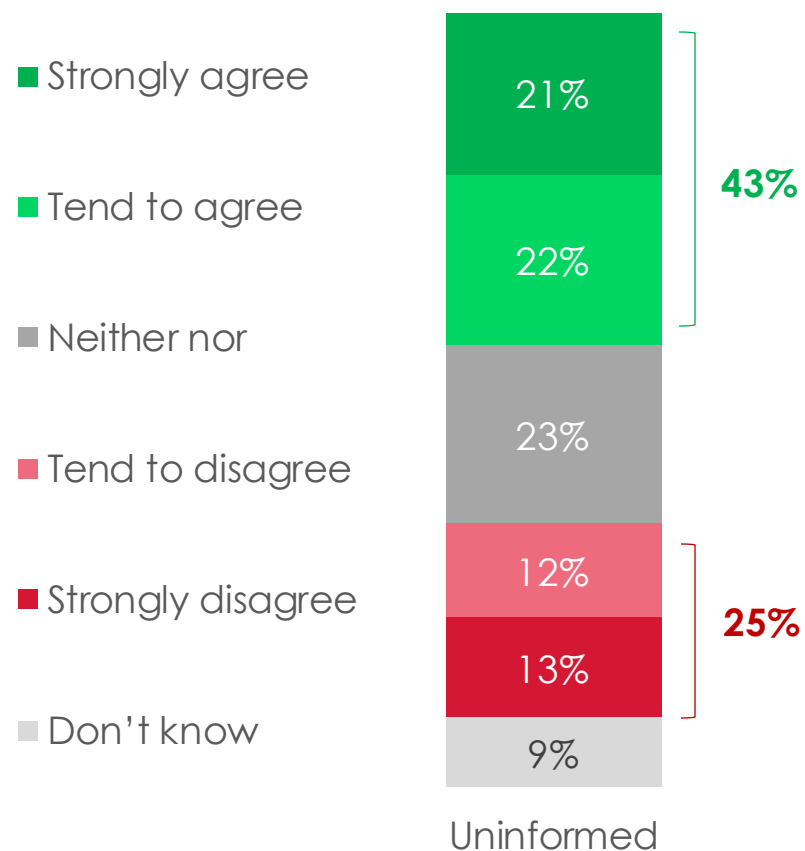
- ✓ Generally, very positive feedback on this
- ✓ Lots of feedback that grandkids enjoyed using the kit and now they were seeing the seeds sprouting
- ✓ Positive feedback on the watering head attachment for water bottles
- ✗ One HH found the soil discs difficult to use and reverted to her own pots - then found the seeds never germinated
- ✗ Slightly unclear as to why this was included in water saving kit?



Smart meters

Uninformed interest in a smart water meter

Uninformed interest in smart water meters is reasonable amongst the panel – 4 in 10 are interested. There's more enthusiasm amongst those keen to save on utility bills, the environmentally conscious, and younger customers. However, half of those who do not already have a meter are not interested in a smart meter – resistance to be overcome.



More enthusiastic about smart meters:

- Those who **look to reduce their environmental impact** – 57%
 - Those **keen to save on utility bills** – 54%
 - **18-54s** – 50%
 - Those who **already have a meter** – 47%

Not enthusiastic about smart meters

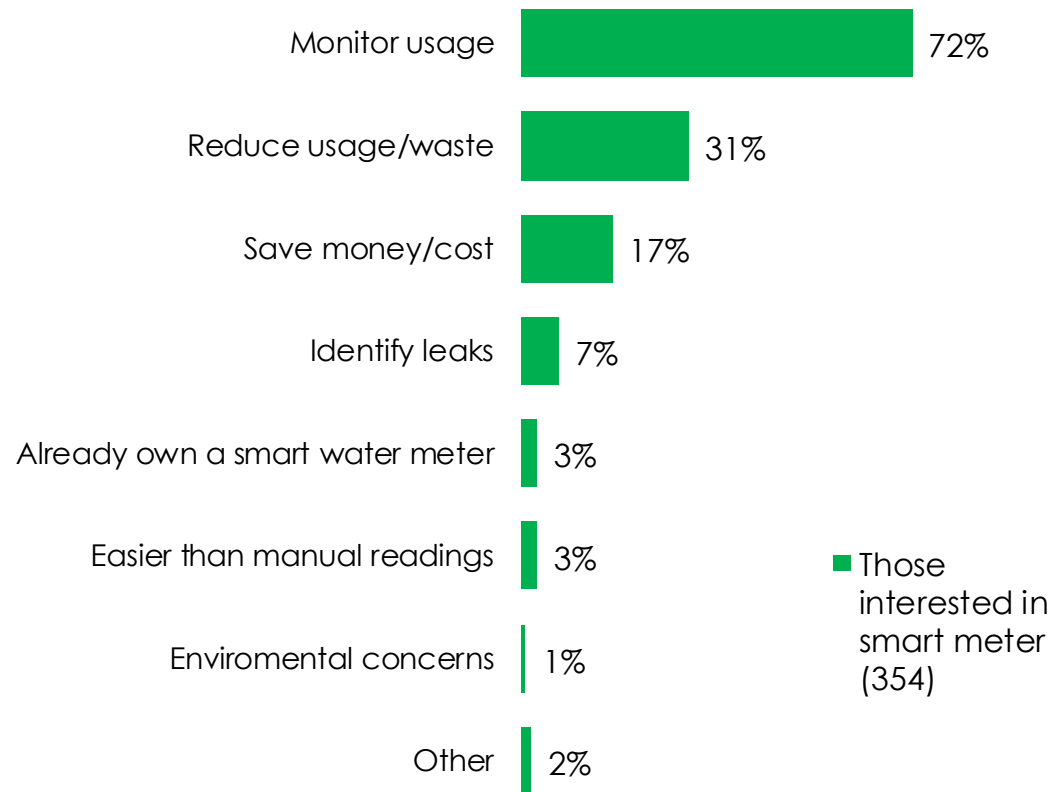
- Those who **do not** already have a meter – 50%
- Those who shower less than once a week – 40%
- Those who make less effort to save water – 39%
 - Family Focus segment – 37%

Q8. How much would you agree or disagree with the following statements? I'd be interested in having a smart water meter (a meter that lets you see your household's water use on a regular basis). Base: All panelists (824)

Why they are interested in a smart water meter - spontaneous

Of those interested in a smart water meter, aside from the functional benefit of being able to monitor water use, the main themes mentioned were to reduce use / waste, save money, and (for a smaller minority) to identify leaks.

Why agree 'I'd be interested'?



"Better insight to usage patterns - understand how much water activities use, e.g. I have no idea how much water my washing machine uses.."
(Panelist)

"Lowering usage and keeping water bill lower."
(Panelist)

"I'd certainly be interested in using a smart meter and being able to know my daily average and see what I've done differently to increase or decrease usage."
(Student/shared house)

"Interesting to see how much water is being used and when and also potentially flag up any leaks."
(Panelist)

"I could see how much water different appliances use and try to encourage my partner to save water!"
(Panelist)

"If you can see how much you're using and see it going up visually, you're more likely to be conscious and act upon that information."
(Older family)

Q9a What would the benefits be [of having a smart meter]? Base: All those interested in having a smart meter(354)

Q9b/c Why [are you not interested/neutral about having a smart meter]? Base: All those not interested (204)/ neutral (193)

Why they are not interested in a smart water meter - spontaneous

Those less interested often felt it would bring no benefit in water saving, or that they simply would not use a smart meter.

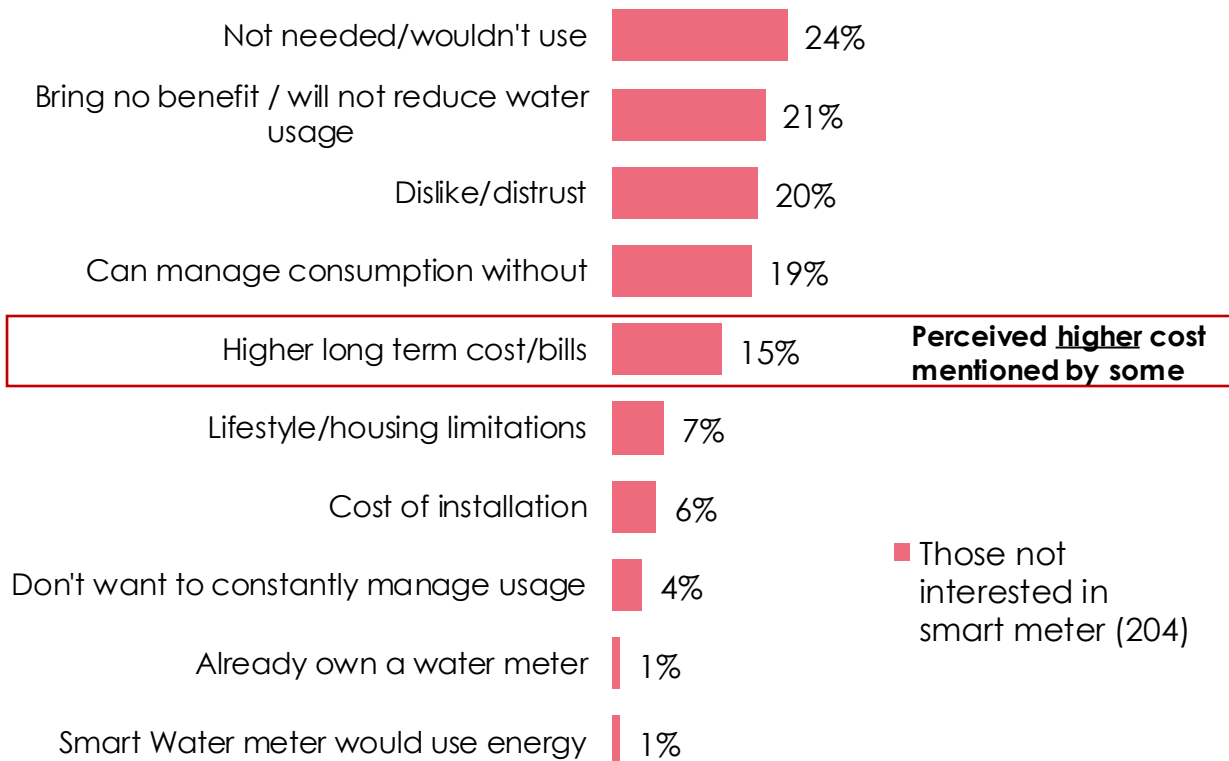
"Do you really need one? You're going to have a cup of tea or coffee if you want it anyway. Can have a detrimental effect watching it ticking up. With everything that's going on you've got to get on with life as well."
(Younger couple)

"I wouldn't take any notice of it (I don't in the case of my gas/electricity meter) as I'm confident I know which activities use most water anyway."
(Panelist)

"I use the bare minimum as it is, and feel like I couldn't save any more water if I tried. Having a smart water meter that uses electricity is just one more thing I will have to pay for. If I had a larger household and thought I wasn't saving enough water from being wasted I may feel differently..."
(Panelist)

"Call me old school, but we have an Alexa and when we're on our phones and we talk about something an ad comes up. People are listening into our private conversations... I'm not used to that."
(Older couple)

Why disagree 'I'd be interested'



Q9a What would the benefits be [of having a smart meter]? Base: All those interested in having a smart meter (354)

Q9b/c Why [are you not interested/neutral about having a smart meter]? Base: All those not interested (204)/ neutral (193)

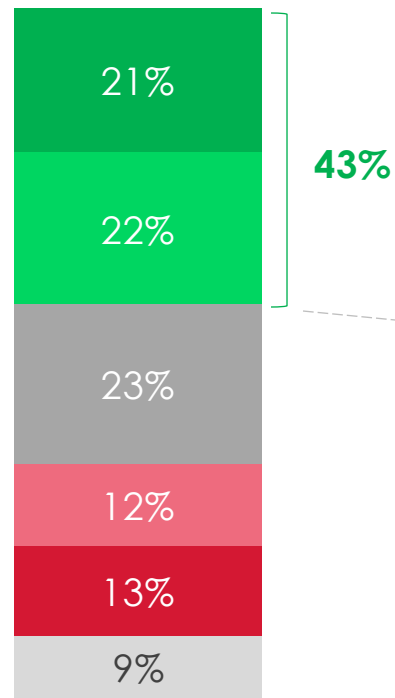
More informed interest in having a smart water meter

After being more informed about a smart water meter, the proportion of the panel interested rises slightly to just over half. 1 in 4 actively disagree they would be interested, even after seeing more info – clear resistance amongst some.

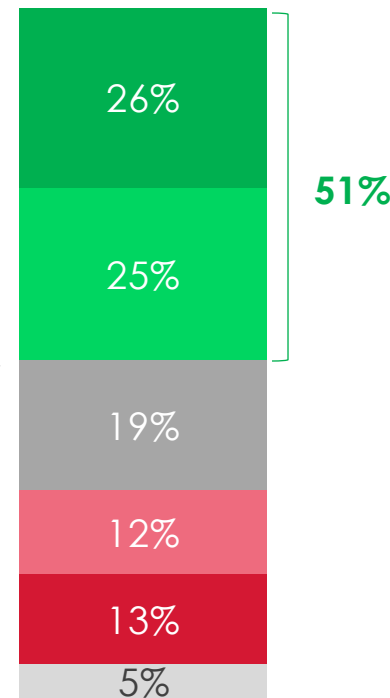
A smart water meter (a meter that lets you see your household's water use on a regular basis)

Smart water meters collect water usage information for households regularly (hourly, daily, weekly, or monthly). The information is visible to customers through an app, website or an in-home device so they can see how much water they are using and any changes in the usage. This can help to find ways to save water, manage bills more accurately and spot leaks.

- Strongly agree
- Tend to agree
- Neither nor
- Tend to disagree
- Strongly disagree
- Don't know



Uninformed

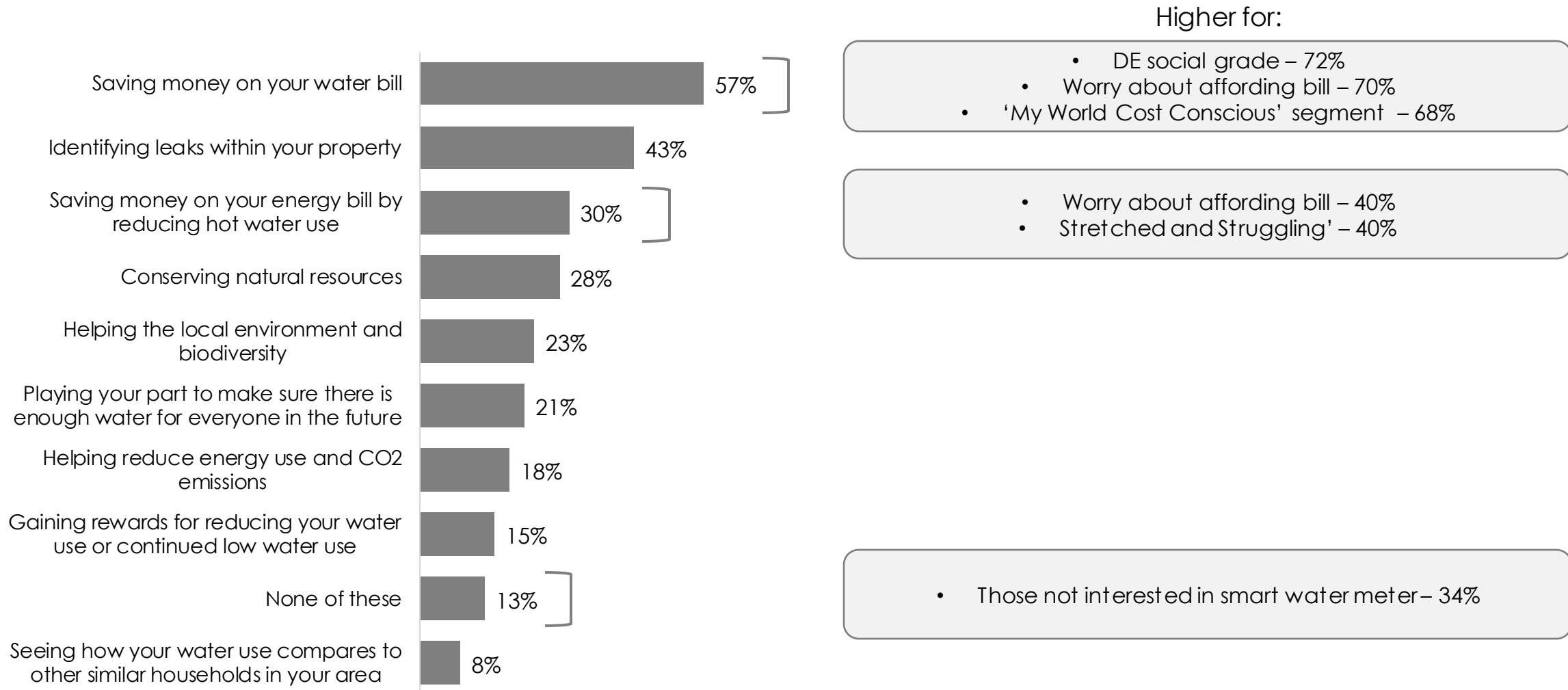


Informed (after full description)

Q8. How much would you agree or disagree I'd be interested in having a smart water meter (a meter that lets you see your household's water use on a regular basis); **Q13.** [AFTER SEEING FULL DESCRIPTION] How much would you agree or disagree with the statement 'I'd be interested in having a smart water meter'? Base: All panelists (824)

Top motivations to read a smart meter display (after being more informed)

When prompted with a list of reasons, saving money is number one for reading a smart meter. This is followed by identifying leaks - not a top-of-mind benefit, but becoming important when people learn more about them. Saving money on associated energy bills is also high on the list, above environmental benefits.



Q16 Which if any, of the above, would motivate you to read a smart meter display to help you manage your water use? Please choose up to three.
 Base: All panelists (824)

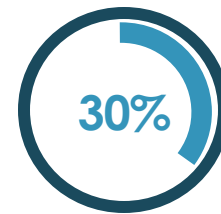
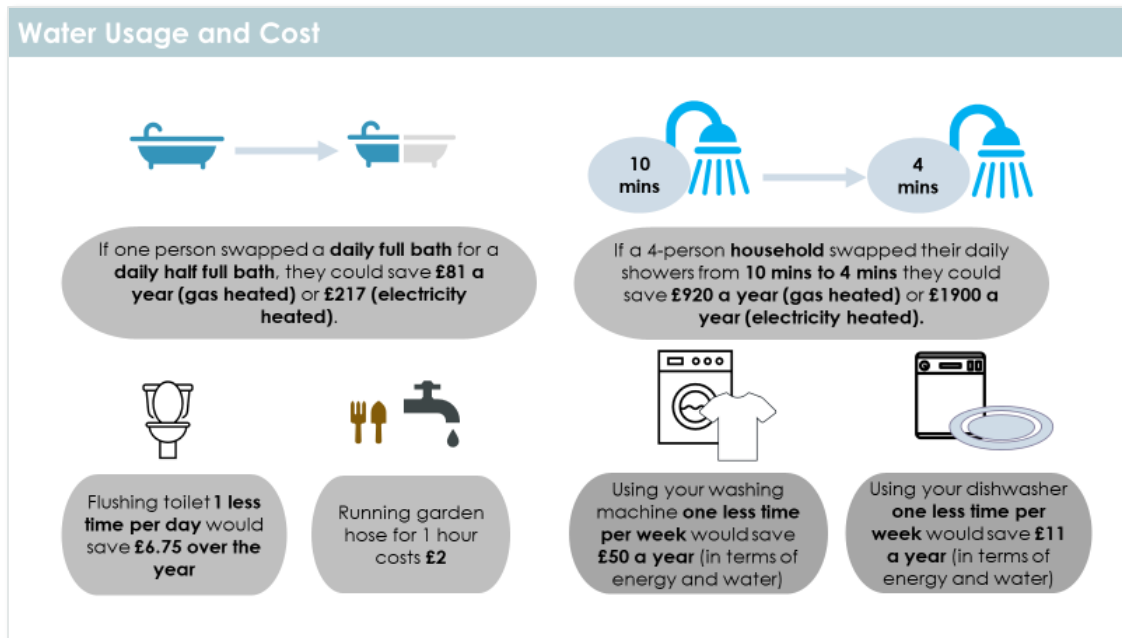
Combining possible energy savings and water savings has the potential to be highly impactful

In the qualitative workshops, we presented customers with potential savings they could make on their energy and water bills over the course of a year if they were to change their behaviours



Seeing the potential cost saving that could be made by making relatively small changes was met with surprise and shock

Statistics that highlight how quickly cost savings add up are successful in motivating and encouraging small but impactful behaviour change



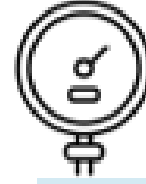
Of panellists would be motivated to read a smart meter display if it would help them to save money on their energy bill by reducing hot water use (the third strongest motivation)

Attitudes towards smart meters are generally positive



Pros

- Can save you money as you only pay for exactly what you use and readings are more accurate
- Saves you having to regularly read a meter/submit readings to your supplier
- Motivates you to save (energy/water)
- Those who are keen on saving are keen to understand where they can cut costs
- Interesting to learn more about your usage and how much you use doing certain activities; this is unfamiliar territory and even basic information is useful
- Customers don't think about how this could help with leakage without being prompted – but when understood this can be motivating



Cons

- For some, smart meters can feel a bit invasive and 'big brother'
- Others think having so much data on their usage would lead them to over-analyse and be stressed about their usage
- Concerns about safety of smart meters – microwaves/harmful/carcinogenic
- Concerns that vulnerable people may feel forced to reduce their usage e.g. keep heating off or use less water if they can see the money they're spending
 - Especially pertinent for water as it's a matter of hygiene and wellbeing

Meter data could be helpful in educating customers about their usage

Customers are very interested to know more about how much water they're using:

- It's unfamiliar territory for most; even for those who exhibited some water saving behaviours, water usage in volumes isn't well understood
- Most were unable to make an approximate guess as to how much their household uses on average each day

We presented average daily usage per household to participants, based on historic meter reads:

- Most were shocked to hear how much they used each day and said that it seemed like a lot of water
- However, customers were still unsure how their usage might compare to average usage; even though it sounds like a lot they're unsure if it's more or less than other people

We found that revealing PCC was very powerful

- Many asked what average usage was so that they could compare it to their usage... specifically comparing with similar HHs is helpful
- When we explained that average PCC was around 140-150L per day, customers calculated how that compared to their household
- **Knowing it was below average immediately provided a sense of relief, knowing it was above fuelled motivation**
- For those whose average usage went down during the fieldwork period, seeing the drop in litres was very motivating

NB: not everyone saw a reduction in their average use despite best efforts (this could be due to the method of data collection in this project)

- This has potential to demoralise customers who have worked hard but are not seeing any benefit – we will explore this further in the next wave

What do customers want from smart meters – in practice



Data frequency

- Not something customers would need to monitor regularly
- Would like to have data on daily costs and how they fluctuate to look at when they get a chance
- Useful to see a comparison with average use across the region (esp. comparing similar household setups)
- Would be interesting to see how usage changes over time too – perhaps stored on an account somewhere for you to look at when convenient



Data details

- Having detailed data on usage down to day and hour is appealing
- Ability to set caps and usage alerts appeals, specifically for those who are serious about saving (both water and cost)
- Not only is it interesting to see, but also helps customers pinpoint exactly what they were doing during spikes in usage
- 'Smart' data that shows percentage water use on specific activities sparks interest; but important for customers to know that this is vaguely accurate

*“Would want to be able to check it online and see monthly usage and when you use the most water – which days and which months etc.”
(Family, older children)*

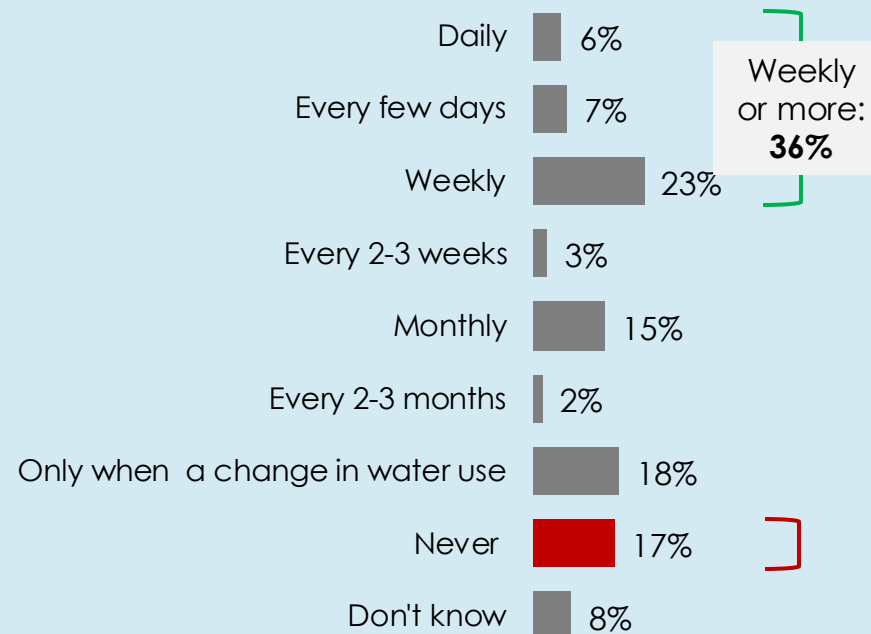
Smart meters – alerts and comms

Alerts and comms

- Thought this was really good idea that would be helpful
- Can help to alert people if their usage has gone up – may not notice or think about it
- Great if it could help detect leaks as these are difficult to find yourself
- For those who are worried about security/privacy this feels a bit too much still
- Makes sense for these alerts to come via text in case it's an emergency – need to hear about it instantly
- Phone call seems unnecessary and would likely not answer

"Interesting.. It could be something you look at when you sign up, like 'turn on smart detection for leaks' and then it asks for how you'd prefer to be contacted?"
(Student house)

- The majority would want alerts with some regularity – especially those already interested in smart meters
- Those who would 'never' want alerts are those who are less interested in smart metering; a core of c. 1 in 5 customers who will not engage with smart meter data.



- Those interested in smart meter – 61%
- Those who perceive water resources are limited – 48%
- Those who often look to reduce environmental impact – 47%

- Those not interested in smart meter – 46%
- Those who do not have a meter – 27%

Q15 With a smart water meter you could have texts or notifications on your mobile phone to prompt you to have a look at your water use information. How often would you want to be prompted? Base: All panelists (824)

The qualitative fieldwork revealed that customers would like the flexibility to adjust their preferred settings

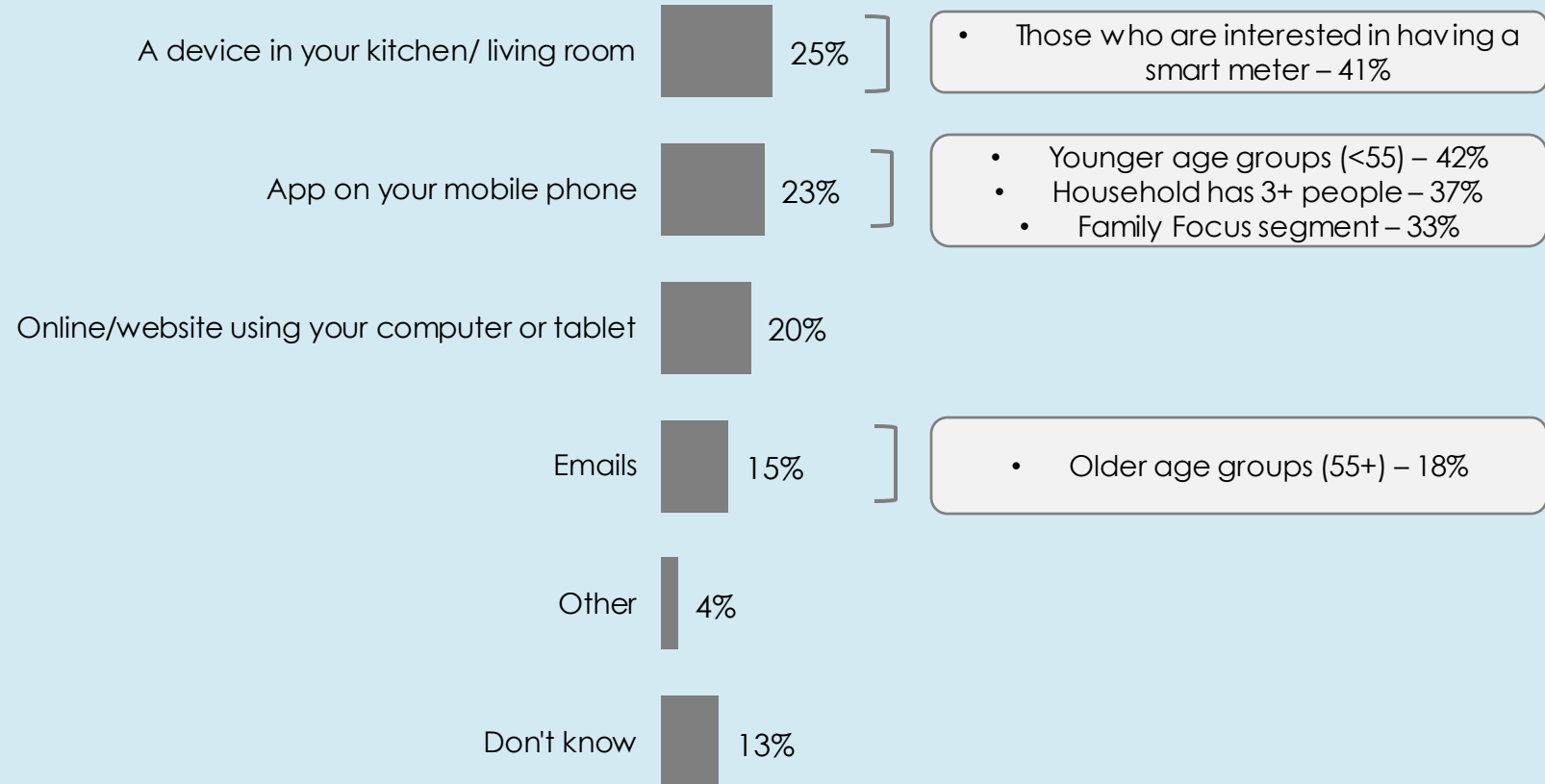


Data channel

- Makes sense to have this information stored on your online account if you have one
- A few would like to avoid a plug in device as it's just another piece of clutter in the house that will likely be ignored
- Most would be comfortable having info through an app
- BUT want to have a choice of channel – app, email, plug in, letter

*“Would be good to see your usage on a table or graph or something, like they have on the health apps.”
(Family, younger children)*

- When asked which **one** would be their preferred channel, there's a mix of answers: It depends on demographics and their interest in having a smart meter

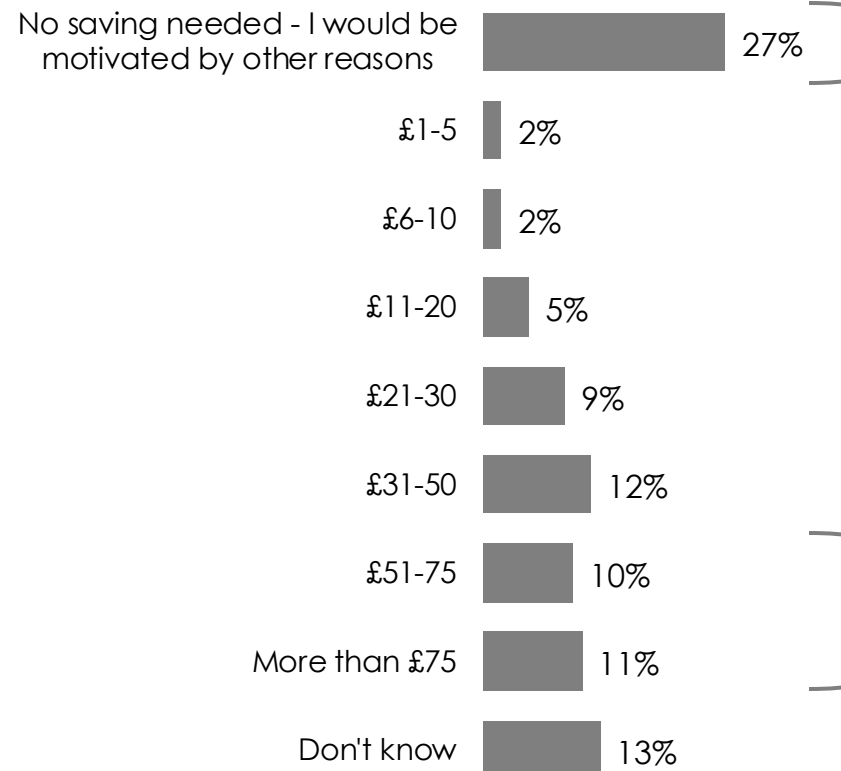


Q14 Which one of the following would be your preferred way of seeing information about your household's water use? Base: All panelists (824)

Minimum saving to make it worthwhile to read a smart water meter display

Some polarisation on how much of a saving would make reading a smart meter display worthwhile. Notably those who are worried about paying their bill are in need of a substantial saving – a small saving will not make enough difference for many.

£



Over £50:
20%

Higher for:

- Responsible Citizens – 45%
- Those who often look to reduce environmental impact – 43%
 - Those interested in a smart water meter – 40%

- Do not have a water meter – 36%
- Worry about affording bill – 31%
- Not interested in smart water meter – 31%

Q17 What is the minimum annual saving on your water bill that would make it worthwhile for you to read a smart water meter display to help manage your water use?
Base: All panelists (824)



Conclusions & recommendations

Major mindset shift will be required to trigger water use reduction



Most people think they are already making an effort to save water... or believe others are doing less than they are

Cost is a strong driver to adopt new behaviours but water costs relatively low priority

People lack the know-how to save water

People are disconnected from how much they use (and why it matters)

Use behavioural economics to develop campaigns and personal (meter) information to effect change

Use Social norms:

- Motivate customers to take water saving seriously by **providing comparisons** with neighbours, similar households etc. (e.g. *daily* showers may not be the norm)
- Help to **ease worries by opening up the conversation around good hygiene in the bathroom**; customers need reassurance that water saving behaviours are both hygienic but also socially acceptable

Develop compelling messaging around cost savings:

- To make behaviour change more worthwhile **group together energy and water costs** when showing examples of small changes in behaviour that can lead to impactful savings

Create campaigns around plugging information gaps:

- Hacks: tricks and tips (e.g. reuse ideas, use the dishwasher instead of washing up)
- Fun stuff: especially for busy, high usage households with children

Develop meaningful ways to talk about volume:

- This is a mental gap yet can have real impact. Visualising volume, especially around behaviours that involve flowing water needs simple comparisons (NB a suggested focus for the final stage)



Response to smart meters is quite muted

Smart meters are an enabler for behavioural campaigns and interventions: data will bring to life how water is used

- Promote benefits of smart meters
- Use to connect consumers with where they use water (inefficiently)
- Provide detailed data that is easy to understand and visually appealing