

## MTP Water Products Recommendations – for stakeholders

29 November 2006

### 1. Background

On behalf of the Market Transformation Programme (MTP), a water efficiency consortium engaged stakeholders through an event to seek feedback on three key products: baths, showers and WCs.

The consortium consists of representatives from WRc plc, Waterwise, ICF International, Exeter University, The Social Marketing Practice and Futerra.

This document is a summary of a stakeholder event on these three water products held on 6 October 2006. It sets out what the consortium intends to do with the information we gathered at the event.

It contains:

- > Key challenges for the water sector
- > Stakeholder recommendations from the event
- > An attendee list for the event (see appendix A)
- > A write-up of the flipcharts created during the event (see appendices B-D)

### 2. Event outline

The event brought together a good cross-section of the stakeholders involved in bathroom products which use water: baths, showers and WCs. Attendees included manufacturers, retailers, water companies, water saving groups, government organisations and academics.

During the event, stakeholders discussed and debated the critical issues in this field: for example, the challenges and opportunities for water efficiency in relation to market trends and consumer behaviour.

The morning session of the event featured:

- > An introduction to MTP and the issues facing the water sector
- > Identification of the challenges for baths, showers and WCs (see table in section 3)
- > A brainstorm of all possible solutions to the challenges

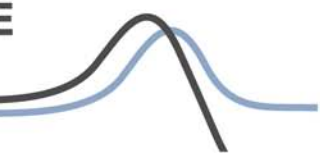
In the afternoon, delegates chose to attend two workshops from the four options (see below), and identified opportunities to transform the market, and the people best placed to take those actions.

Delegates identified the most important issues facing the water sector and chose four workshops through a vote. Stakeholders had a choice of two workshops out of the following:

1. Mass market retrofit
2. Communications
3. Plumbers and installers
4. Legislation

At the end of the day, stakeholders were invited to give their specific recommendations to the MTP.

This document gives an overview of the issues raised by stakeholders, and the recommendations that will be made to the MTP based on the event. The write-up of the flipcharts from the event can be found in appendices B-D.



### 3. Key challenges

The stakeholders identified the key challenges facing water efficient products; these are listed in the table below.

Baths and Showers	WCs
Lack of information on how/who/when baths and showers are used. Differences in users, e.g. age and lifestyle may affect the use of water efficient products	Lack of information on how WCs are used and how this affects their performance e.g. use for general waste disposal
Lack of consumer demand for water efficient products – consumers want the feel or image of more water, not less	Lack of consumer demand for low flush WCs
Not all water efficient products are compatible with household water systems (the type of water or the type of boiler)	There may be technical issues preventing retrofit of water efficient WCs and affecting their performance
Consumers can't readily identify the amount of water they use around the home	Lack of regulation for water efficient WCs and enforcement of existing regulation
Consumers often perceive baths as a luxury for relaxation	Consumer acceptance of domestic urinals
Plumbers may have a 'comfort level' for recommending products that does not extend to water efficient products	
There are few technical changes that can be made for baths. Is it worth attempting to transform the market?	

### 4. Stakeholder recommendations

The feedback from stakeholders has been extremely valuable in shaping our recommendations for the future of the MTP Water Products area.

The plans for the MTP Water Products area are outlined in three Policy Briefs (one each for showers, baths and WCs) which can be found on the MTP website:

<http://www.mtprog.com/SelectProductStrategy.aspx?intSelection=0&intSector=6>

Some recommendations made by the stakeholders are already happening, or are already part of the Policy Briefs. We have indicated at the end of this section where stakeholder recommendations fall into one of these categories.

## Key recommendations

Following the stakeholder event, we have three key recommendations to the MTP:

- > Initiate rolling workshops with experts for each Policy Brief. These workshops will tackle the technical issues underlying the Policy Briefs, and help to inform MTP's evidence base.
- > Act as a portal for publicly available research from the water sector. Stakeholders made many recommendations for further research – some of which is already being undertaken by various organisations – and MTP could provide enormous help in collating the results of this research.
- > Propose to Defra that the Policy Brief information is repackaged to make it accessible and attractive for different audiences. This could take the form of an online game, a communications campaign for plumbers, or another appropriate medium.

## Updating Policy Briefs

The Policy Briefs outline the main issues and opportunities for the water products market. There were a number of recommendations relating to updating of the Policy Briefs for baths, showers and WCs.

The Policy Briefs are reviewed on a monthly basis and, following the event, the items below will be reviewed by the MTP Water Products team to determine what further actions are required. Please note that not all of these activities can be led by the MTP. Many of them will need to be undertaken in partnership with other organisations, and some are best addressed outside the MTP.

- > Raise awareness of water efficiency among plumbers/installers, as they are highly influential in consumer purchasing decisions
- > Ensure that support for training on water efficient products – for retail staff and water company representatives is included
- > Encourage social landlords to retrofit with sustainable products
- > Ensure that the Policy Briefs are consistent with the Code for Sustainable Homes
- > Liaise with BRE to include water efficiency in the EcoHomes standard
- > Explore the options for developing economic incentives for water efficient products
- > Work with Defra on improving requirements for water efficiency in the Water Supply Regulations
- > Help Government procurement agencies to help them specify water efficient products
- > Examine the potential for water efficiency to feature in home sellers' packs
- > Rewrite Policy Briefs for non-technical audiences (manufacturers, retailers, water companies, plumbers/merchants, consumer groups)
- > Reconvene this stakeholder group (plus consumers/consumer groups) to let them know what has changed and seek further input
- > Work with the supply chain to ensure that consumers know how to use water products to save water

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We will also add the following item to the Critical Issues section of the briefs:

- > Investigate 'perverse' legal loopholes in water products, e.g. it may be legal to buy WCs with high water use, but illegal to install them
- > Assess the impact on behaviour of making visible the amount of water consumers are using – for example, by metering or live feedback mechanisms

## Current activities

Some stakeholder recommendations are already underway, whether through the MTP or through other organisations. Below are the ones of which the consortium is aware:

- > Standard benchmarking of products. The Market Transformation Programme uses a benchmarking tool to compare the water efficiency of different products. The benchmarks for showers, baths and WCs is currently being updated by MTP to reflect the latest modelling data. Visit the MTP website for details: <http://www.mtprog.com/PSIB/PSbyProduct.aspx>
- > Raise awareness among plumbers/installers. The IPHE (Institute of Plumbing and Heating Engineering) Resource Efficiency Group is looking into raising awareness of water efficiency among plumbers.
- > Undertake an independent evaluation of products on the market, to show which products are suitable for which plumbing systems (e.g. direct/indirect/gravity-fed). Waterwise is doing research into this issue, and hopes to publish the details in accessible form.
- > Training on water efficient products – for retail staff and water company representatives. Waterwise supports water companies in recommending water efficient products, and is working on an initiative with retailers.
- > Increase the desirability of water efficient products. The Consumer Council for Water and Waterwise both have programmes looking at the consumer attitudes towards water efficient products.

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## APPENDIX A: Delegate list

6 October 2006

ANDREWARTHA	Tom	Essex and Suffolk Water
BALLINGER	Stuart	Envirowise
BERKSHIRE	Linda	Anglian Water Services Ltd
BINNIE	Chris	CIWEM (Chartered Institution of Water and Environmental Management)
BRANN	Peter	Peterton Ltd
BRINDLEY	Dave	Thames Water
BUTLER	David	University of Exeter
CHAPMAN	Helen	Thames Water
CHURCHMAN-DAVIES	Jonathan	ICF International
CLARKE	Doug	Severn Trent
COLE	Victoria	CIRIA
EVERY	Louise	IPPR
FEWKES	Alan	Nottingham Trent University
FOORD	Liz	Consumer Council for Water
FOSTER	Nigel	Bournemouth & West Hampshire Water plc
GILLESPIE	Ed	Futerra
HADI	Mindy	Building Research Establishment
HOOPER	Brian	Waterwise
JIGGINS	Peter	Water Supply and Regulations, Defra
JOHNSON	Mike	DCLG
KEATING	Terry	Southern Water
MARSHALLSAY	Dene	WRc plc
MCATHY	Ian	Folkestone & Dover Water Services Ltd
MCCORMACK	Les	Mira Showers
MEDD	Will	Lancaster University
OGDEN	Christine	DCLG
ORGILL	Yvonne	Bathroom Manufacturers Association
OXLEY	Nathan	Futerra
PERRY	Sarah	Futerra
PLAYER BISHOP	Jilly	Polypipe
PRATLEY	Keith	Dwr Cymru/Welsh Water
RICE	Ben	Aqualogic
RICHARDS	Jo	Hillreed Homes Ltd
RIGG	Jennifer	Veolia Water Partnership
RYMILL	Mike	Bathroom Manufacturers Association
SANSBY	Paul	Portsmouth Water Ltd
SHEA	Lucy	Futerra
SHEPHERD	Jan	Aqualisa Products Ltd
SHOULER	Martin	Arup
SONDEN	Lester	Sutton & East Surrey Water plc
TAYLOR-HAMLIN	Christian	Mira Showers
TOMPKINS	Jacob	Waterwise
TUCKWELL	Steve	Water Regulations Advisory Scheme
TURNER	Joanne	Water Supply and Regulations, Defra
WARBURTON	Simon	WRc NSF
WAYLEN	Carmen	WRc plc
WESTCOTT	Rob	Environment Agency
WHITE	Paul	The Social Marketing Practice
WHITE	Janet	Aqualisa Products Ltd
WRIGHT	Philip	AEA Technology

## APPENDIX B: Challenges

### Morning Session

Below is a transcript of the flipcharts that were created during the 'Challenges' session on 6 October.

#### Baths

##### Manufacturers

- > Think consumers don't care
- > In the past, lots of sticks and few carrots
- > Reduce overflow
- > Cost of change to start trend – moulds expensive
- > Can we change the shape?

##### Market

- > In decline
- > Replaced – to fit in a space

##### Consumers

- > Movement towards showers over baths – need data. Some developers now building without baths
- > People don't want a smaller bath – fashion.
- > Some people need a bath – safety – children, elderly, larger.
- > Incentive to buy efficient bath
- > Consumer experience important: luxury/relaxation; you can see how much water
- > Why do people have baths?
- > Jacuzzis – more water efficient?
- > Fashion – Ken Livingstone.
- > A bath has a set volume – building regulations requirements. Overflow? Need data.
- > Is it worth changing?

#### Showers

- > Added value to house (bathroom) – small part of sale; don't want to disturb buying pattern – they rarely change existing stock
- > "Not on radar" – hard to select – point of sale info can't be definitive – not enough for personal installation
- > Hard water – limescale
- > Perception of environmental showers not clean? (but most popular shower is energy efficient).
  - simplistic: showers are good
  - carbon emissions and water recycle
  - lack of understanding of purchasing decisions – aesthetics/waste in usage passé?
  - Most consumers look for more water
- > Flow vs. behaviour bathing patterns
  - Products – time in shower

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- > Lack of compulsory meeting – no financial incentive; don't appreciate environmental issues. Can't switch supplier.
- > Other products developed e.g. increased combi boiler/pumps – incompatibility, imported products (environmental levels)
  - Gravity-fed aerated showers and spray taps don't work – people get put off. Noise.
- > Prescribed fittings agreement (condition of metering)
- > Complexity of shower make-up e.g. replace showerhead – hotels: how to adjust flow? (mechanical vs. thermostat)
- > NPD e.g. wet rooms. Competitive market share vs. NPD
- > Installers plumbers awareness (conservative – comfort value) – incentivise people not to request flow rate
  - Design
  - Plumbing inefficiencies
  - Amount of water outlets

## WCs

- > Biggest opportunity
- > Existing properties (refurb). Sydney 350k – missed opportunity?
- > No customer demand – lack of customer concern re water conservation; no incentive without metering. Lack of manufacturer interest in new product. Linked to:
  - > Cost – additional; water too cheap
  - > Pros and cons of dual flush
    - Behavioural use (satisfactory flushing experience?)
    - User friendly? Education! Wrong messages – using water, not wasting water
    - Installed performance. Effectiveness of retrofit – flush mechanism only.
    - Poor design, unattractive
- > Lack of government intervention
  - Regulation – practical/realistic tested (e.g. integral overflow, fail-safe systems)
  - Water Act – advice on water efficiency
  - Code for sustainable homes - % of market?!
  - No incentive without metering
  - Point of sale control and responsibility (despite willingness of customers – smaller, efficient)
  - Lack of level playing field?
- > Technical – design flaws (lack valves, limescale etc). Current design boundaries re performance. Dyson toilet!
- > Intrusive! Consumers pressured.
- > Existing drainage infrastructure, regulating minimum flow – is this really an issue? Evidence?
- > Who's using the WC? Domestic urinals. What for? (waste disposal)
- > Why change
- > Hippos! – affect flush performance
- > Distraction of greywater and rainwater harvesting.

## APPENDIX C: Solutions

### Morning Session

Below is a transcript of the flipcharts that were created during the 'Solutions' session on 6 October.

### Bathing/showering

#### Products

- > Peanut-shaped baths
- > Personalised settings
- > Aerated showers – same experience, less water; 1/3 showers in UK potential

#### Consumer (Habits)

- > “dry” cleaning
- > Promote other ways to relax
- > Educate re: their products
- > Don't need to wash so often – change idea of what makes you clean
- > Showering/bathing outside the home – trial new tech
- > Flannels
- > Research and identity triggers
- > Home makeover shows to promote – soap
- > Make visible how much water you're using – caveats on water efficiency messages/on water bills

#### Point of sale information

- > Amount of water
- > What system
- > Plumbers
- > And through whole spectrum
- > A long way in advance

#### Recycling rather than saving

- > Recycling showers
- > Use water for something else
- > Drain baths direct into garden
- > Community recycling – showering at sports centre

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## Incentives

- > Specify products for govt procurement
- > Discount for efficient products
- > Cut VAT for refurb

## Educate plumbers

- > Promote water efficient products
- > Green certificate

## Water meters

- > Collect more water in the first place – rainwater harvesting
- > Reinvest money in water efficiency

## Legislate

- > Size of bath
- > Length of shower
- > Flow

## Code for sustainable homes – make mandatory

### Bathing/showering

- > Point of sale – control in store (foreign markets)
  - Better info at point of sale – A-G labelling
  - Retailer contracts water efficient – training of point of sale staff
  - Timer for everyone who buys shower
  - Demonstrate efficient showers
- > Enforcement of legislation/regulations
- > Development, Distribution, Sales and uptake
- > Market 60% showers, 95% baths.
- > Same shower can give different results
- > IPHE: work with them for education. PAY THE PLUMBERS. 80% plumbers influence sales 50% of the time. Approved plumbers' scheme.
- > More research – innovative communications
  - Surface hidden costs e.g. on bills

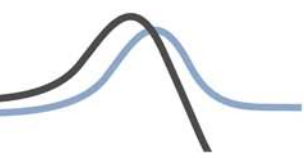
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- Identify consumer desires – “what do you want”
- Design and marketing around consumer desires – Ken Livingstone
- Consumer education and motivation e.g. length of time in shower – promote wash and go. Cost of energy, cost of heating.
- Target households without showers (40%)
- Visualise volume of water
- Water rating scheme (unsafe)

## WCs

- > Legislation
  - Point of sale legislation – needs enforcement and action – choice editing!
  - Compulsory metering. Rising incremental tariff – monthly billing
- > Different grades of toilet paper impacts – Shower toilets; air or vacuum toilets; composting toilets; paper into bins; “Blue” flush
- > Planning authorities – national standards (not individual LDFs etc)
- > Ease of service/access – not an EST equivalent!
- > Installation specification education – plumbers, developers
- > Unconscious change!
- > Effective promotion of EXISTING TECHNOLOGY! – get rid of the stuff that doesn’t work!
- > Use non-potable water
- > Customer education
  - Design and performance
  - “Ken” Factor – behaviour change: smart metering? Align with energy? Caution re conservation vs. efficiency
  - Media effects
- > Discontinue dual flush. Enforce: set maximum flush volume at 4 litres (dilution requirements). Performance requirements.
- > Night soil cart (!)
- > £ Mass Retrofit (incentives). Scale, urgency – 6L?
  - Housing associations
  - Public sector procurement
  - Consumer – council tax, VAT reduction etc. Can’t sell house near 9L+ flush!



## APPENDIX D: What needs to happen?

### Afternoon Session

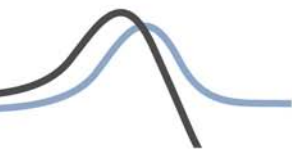
Below is a transcript of the flipcharts that were created during the 'What needs to happen?' session on 6 October.

### Workshop 1: Mass Market Refurbishment

What needs to happen?	Who/how/when?
Government to publish guidance on Water Act	Defra – NOW
Encourage social landlords to retrofit with water efficient products	Social landlords/trade organisation
Government procurement departments recommend retrofit products	Government departments/DCLG
Plumbers to recommend water efficient products	Plumbers/associations
Encourage water meters	Ofwat/government/water companies
Raise awareness among homeowners	Water companies/media/government/NGOs/LAs
Piggyback on energy efficiency schemes (or base on that framework)	Government/NGOs – Sustainable Business Partnership for commercial
Point-of-sale communication (including product endorsement)	Retailers/water companies/Waterwise
Benchmarking	Independent body
Grants for retrofit of efficient products	Govt
Find further opportunities to meet customers	Water companies Manufacturers/trade associations/retailers/ plumbers
Independent evaluation of products to find out which are suitable for different systems – info in digestible form – public service package to install retrofit products (with water meters?). Marketing water efficient products as more desirable	WRAs/WRC/scheme e.g. Corgi – soon Water companies/service providers/manufacturers – after above HAs, LAs, CAB

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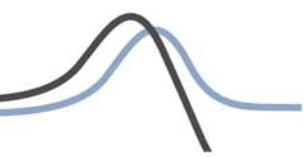
## Workshop 2: Communications

What needs to happen?	Who/how/when?
Consumer understanding of their water system (consultation with retailer/plumber)	Plumbers/retailers Water Companies Merchants, Retailers – BMA information Government, water industry MTP labelling? – needs outreach education – push innovation on long term timescale, bring practical edge to blue sky ideas. Water company Manufacturers
Point of sale workshops – practicalities	
Matching products to needs	
Consistent information re baths vs. showers > Protocol > Standard benchmarking/standards	
Suppliers need to stock water efficient WCs	
Incentives/promotions (e.g. £50 discount) – who pays?	
Better market/customer segmentation – regional, level of income/expenditure	
Distinct aesthetics (suite) and performance (WC/shower). Choice editing – modular approach.	
Instructions on use of equipment (post sales)	
Stalking horse of “water apathy”	
Imaginative linking water use and energy use – careful placing	Imaginative linking water use and energy use – careful placing Existing communications channels
Target consumer: schools etc	Water companies/government
Water metering promotion	Water companies/government
Build water efficiency into NVQ2s for plumbers*	DCLG: 1) understand plumbers and merchants – what’s in it for them e.g. trusted source; 2) When/how people purchase bathrooms
Others: market / PR campaign in sectoral press* re e.g. environmental benefits	Existing
Incentivise: £ - reduce risk of comeback / try before you buy* e.g. trade fairs* / vary in training room e.g. pressure*	Manufacturers, Government, Water Companies
Train others for consumer awareness e.g. debt recovery	Water Companies
Bring in BRE research on plumbers	Waterwise

\*MTP to design evidence base around these requirements

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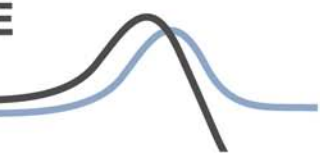
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What needs to happen? (continued)	Who/how/when? (continued)
Merchant point of sale – plumbers, packaging information	Retailers/manufacturers
Industry wide e.g. FSC for water	
Localisation e.g. communications funds	

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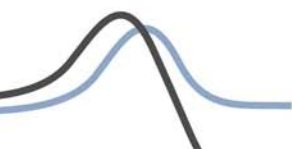


## Workshop 3: Plumbers and installers

What needs to happen?	Who/how/when?
Register all plumbers (similar to electrical) – “competent person”	DCLG/Defra (Building regulations)
Define plumber (research) e.g. gas board, Corgi registered plumber	
HBF specification	HBF etc.
Training and planners	DCLG/LAs
Water companies notification: engage with developers	
Tightening up definition of “power” shower – low/medium/high. Linked with cost: 1) include energy; 2) translate and repackage MTP information; 3) work with Treasury so decrease VAT on energy/water efficient products	Water companies
Targeted campaign to lifestyle communications e.g. TV, magazines, find champions e.g. Sarah Beeny	
Communications and branding around celebrating water and valuing	
Cross-promotions e.g. surveyors “water efficiency rating”, estate agent, sustainable nectar card - VAT reduction, water companies fit showers so are experts?	Estate Agents (DCLG)

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## Workshop 4: Legislation

What needs to happen?	Who/how/when?
CSH part of legislation – integrate	DCLG. Imminent public consultation on water efficiency – this year
Review existing standards for manufacturers. EN1111	Defra, European Standards
Understand where the conflicts are Building regulations change and tie in to consumer education	
Legislation needs to impact on point of sale cover, not just installation loophole – some exceptions. Needs primary legislation.	Act of Parliament – needs an evidence base to show that some toilets on sale don't comply. Close the loophole in the law which allows inefficient water appliances (e.g. toilets) to be sold, but not fitted. Sort out this discrepancy – label as “unfit for purpose”?
Make selling non-complying toilets illegal	
Improve requirements for water efficiency in water supply regulations.	This must be policed and enforced.
Compulsory metering (?)	
CSH – publication	DCLG.
Eco Homes adjusted for water efficiency	BRE – could be put in as a condition of planning approval.
LAs should have more powers to make CSH statutory water efficiency mandatory. Specify level – act on property developers e.g. in water stressed areas	
Change legislation on “undue consumption”. Water fittings regulation. Integrate with building regulations.	
Water Act guidance: publish	Defra: as soon as possible. Government should publish the Water Act guidance & qualify and quantify what it wants water companies & public bodies to do
BRE look at CSH for water	
All homes should be graded against CSH at the point of sale, not just new ones.	
Water Act guidance qualify and quantify what it wants water companies and public bodies to do.	