

# Appendix 1.1.B - Strategic direction

Wessex Water

September 2018

Business plan section	Supporting document
Board vision and executive summary	
1 Engaging customers	<b>1.1 Summary of research findings</b>
	1.2 Communications strategy
	1.3 Customer participation and behavioural engagement strategy
2 Addressing affordability and vulnerability	
3 Delivering outcomes for customers	
4 Securing long term resilience	
5 Markets & innovation: wholesale	
6 Markets & innovation: open systems & DPC	
7 Markets & innovation: retail	
8 Securing cost efficiency	
9 Aligning risk and return	
10 Financeability	
11 Accounting for past delivery	
12 Securing trust, confidence and assurance	
13 Data tables and supporting commentaries	

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# PR19 Foundation Stage Revisiting the SDS

Water – the way  
ahead 2015-2040

Wessex Water's  
long-term strategy



Summary for Partnership Meeting  
6<sup>th</sup> October 2016

**your say**  **your future**

## Objectives

- To understand the economic confidence and current expectations of service providers
- To check and challenge Wessex Water's long term vision, *The Way Ahead 2015-40*

### QUALITATIVE Fieldwork: March to April 2016



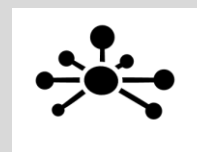
**Domestic customers:**  
3 x Community deliberative events



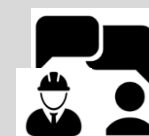
**Customers of tomorrow:**  
4 x group discussions



**Non Household customers:**  
4 groups, 10 depth interviews



**Stakeholders:**  
Partnership, Catchment Management Panel and 8 x telephone depths  
**Vulnerability 'partners'**



**Staff**  
5 workshops

### QUANTITATIVE Fieldwork: Jan to Sept 2016



**SDS Survey 2016**  
600 telephone interviews with customers



**Tracking Survey Jan 2016**  
1,000 telephone interviews



**Tracking Survey Q1 April-June Q2 July-Sept 2016**  
500 telephone interviews



**Staff survey**  
737 online interviews



**Snapshot survey: postal**  
1,350 responses



**Snapshot survey: online**  
1,092 responses



**Online Panel**  
**May:** 894 fully completed  
**July:** 768 fully completed



## Economic confidence in 2016

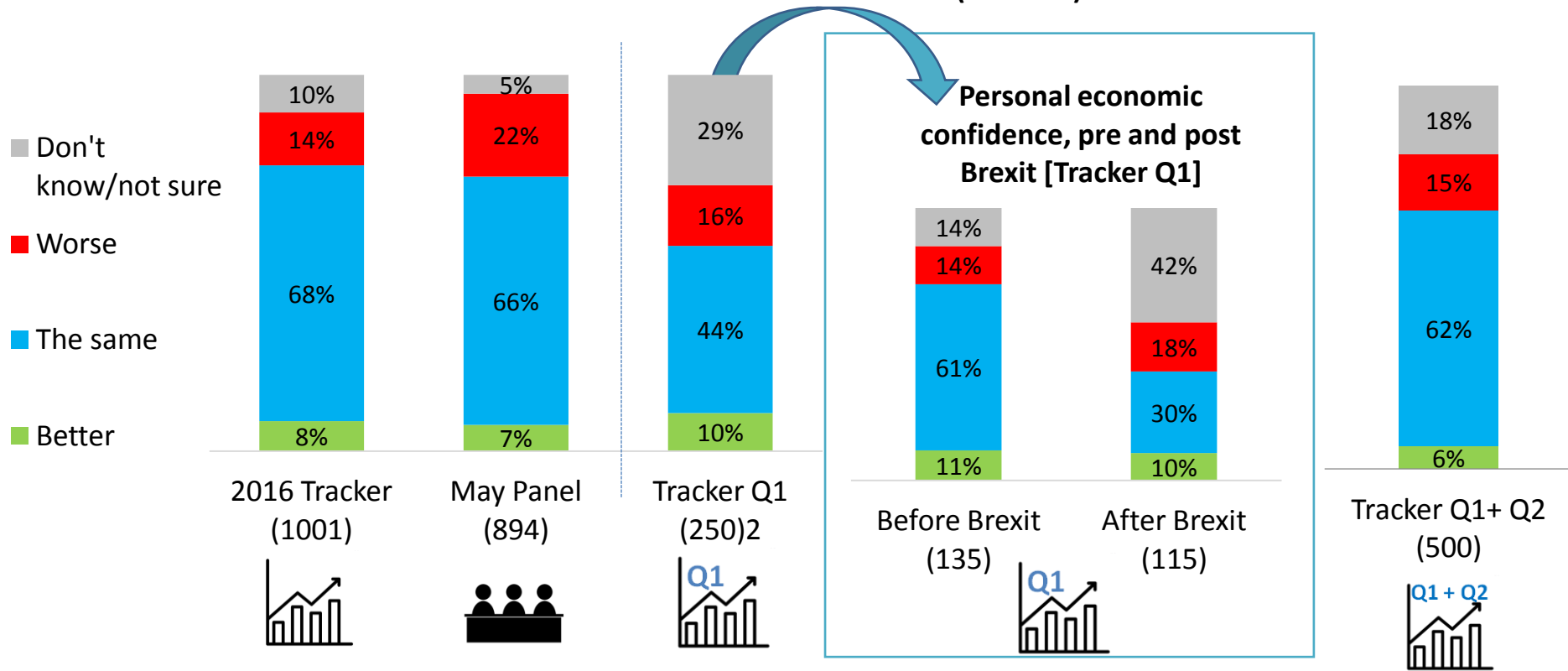
**What is the consumer context in which Wessex Water is developing its long term plans?**

- Water bill affordability remains a real issue for approximately 1 in 10 customers
- Affordability attitudes are at similar levels to PR14 research
- Brexit appears to be increasing uncertainty in household confidence
- Customers continue to support overwhelmingly the 'same bill for same service' option

**your say**  **your future**

- Q1 Tracker survey shows an increase in uncertainty (29%). In addition more of these customers are feeling negative (16%) than positive (10%).
- Much higher uncertainty amongst customers interviewed just after June 23<sup>rd</sup> referendum
- Uncertainty remains above 2016 Tracker but has settled down post the Referendum

**Q. Thinking about the current economic climate, do you expect your household to be better off, worse off or about the same in the next 12 months? (Base: all)**

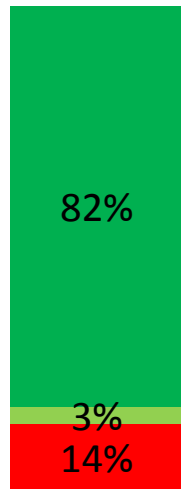
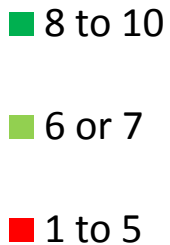


- The majority of customers do not think about their water bill and do not worry about being able to afford their water bill.
- Around one in ten worry about being able to afford their water bill; 7% say they already can't afford their water bill.
- Those under 34 (12%) and females (12%) are most likely to say they can't afford their bill.

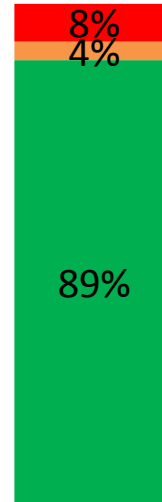
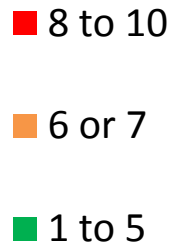


To what extent do you agree or disagree with the following statements?  
(1 = strongly disagree, 10 = strongly agree)

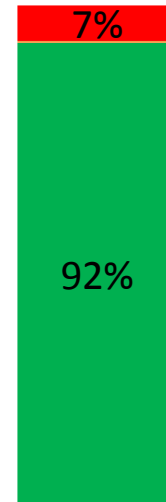
Base: all



I don't really think about my water bill, it's just something that I have to pay



I worry about being able to afford my water bill



I already can't afford my water bill



- **Key drivers for vulnerability: mental health; old age; financial stress**
- Universal credit and welfare reform creating large case load and appeals
  - Rent arrears; Bedroom tax; Change from JSA to Employment & Support Allowance; DLA to PIP/new PIP criteria
- Increasing levels of referrals from rent teams in social and council housing
- Increasingly doing 'crisis' work rather than ongoing support/education

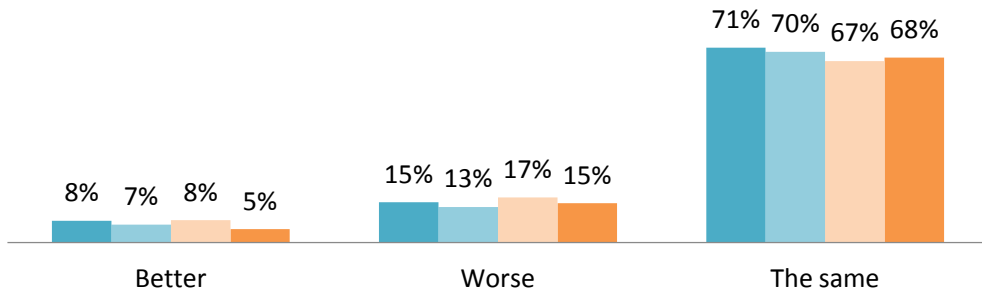
- Water a 'quick win' if eligible for Assist tariff – can be a hook at events
- But very low awareness amongst customers
- CAB and Wessex Water praised

*Wessex Water are very well intentioned*  
Mental health charity

*Wessex Water: incredibly helpful*  
Government funded community programme for elderly

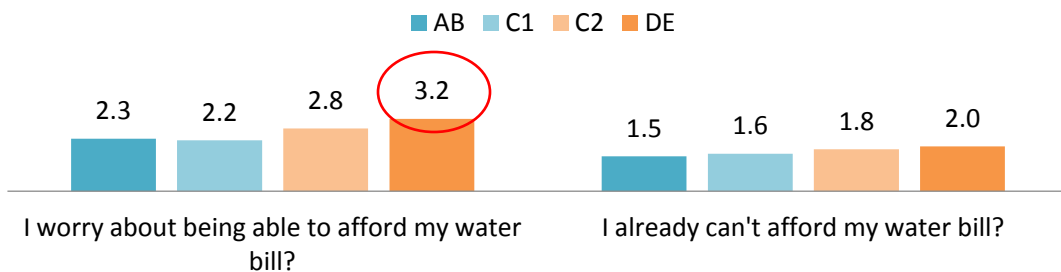
*Of all the companies we deal with Wessex Water are definitely one of, if not the best. Very supportive of what we do*  
Debt advice charity

**Q11. Thinking about the current economic climate, do you expect your household to be better off, worse off or about the same in the next 12 months? 2016 TRACKER**



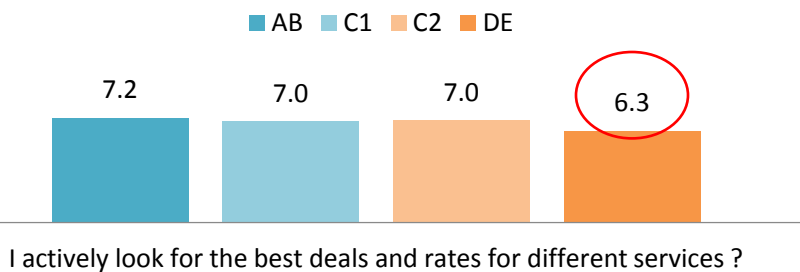
No significant differences in financial outlook

**Q19. How strongly do you agree or disagree with... (Scale 1-10 – 10 strong agreement) 2016 TRACKER**



However, lower income groups have greater concerns about bill affordability

**Q19. How strongly do you agree or disagree with... (Scale 1-10 - 10 strong agreement) 2016 TRACKER**

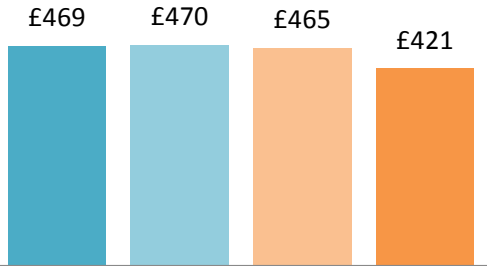


DE less likely to be actively seeking deals

○ Denotes significance

## £ 2016 TRACKER

■ AB ■ C1 ■ C2 ■ DE

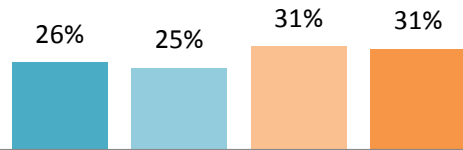


How much do you think you currently pay?

DE's think they pay an average of £44 less than other social grades

## % Don't know what pay 2016 TRACKER

■ AB ■ C1 ■ C2 ■ DE

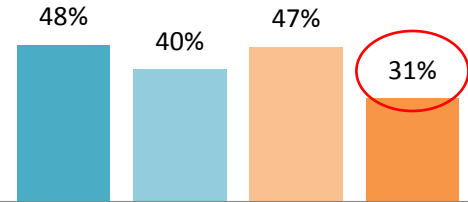


How much do you think you currently pay?

Though a greater proportion of DEs say they don't know what they pay.

## % with meter 2016 TRACKER

■ AB ■ C1 ■ C2 ■ DE

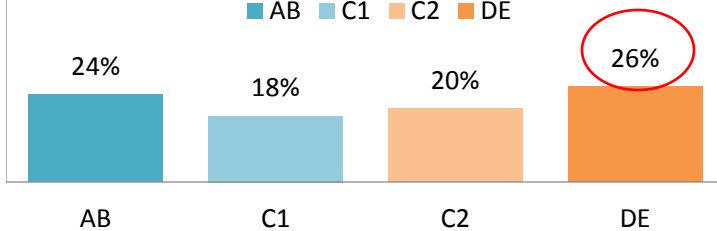


% with a water meter

Fewer DEs have a water meter.

Q22. How would you rate the drinking water supplies and the sewage service you receive in your area in terms of value for money? ('Very good')

■ AB ■ C1 ■ C2 ■ DE

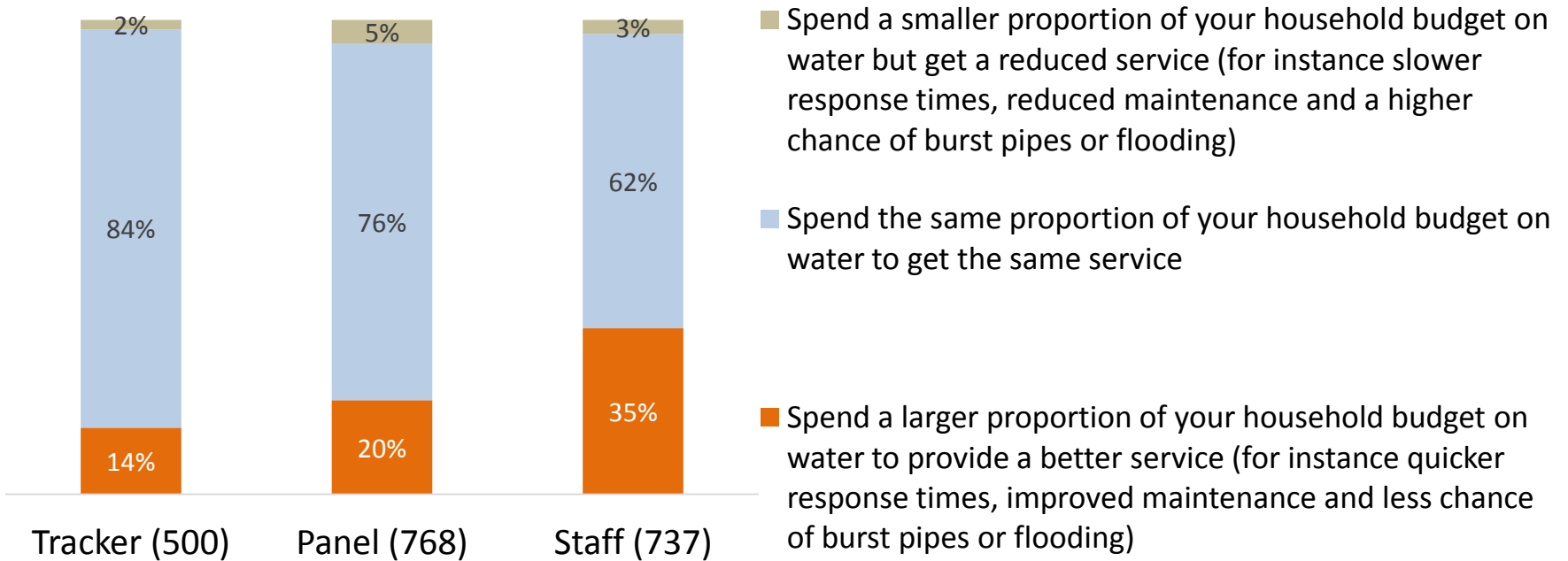


**Low income groups give higher vfm scores than C1C2, however:**

- More likely to think they pay less than others
- More likely not to know what they pay than ABC1s
- Less likely to have meter

- The majority of customers, Panellists and staff think that Wessex Water should continue to spend the same proportion of customers' household budget for the same service
- Staff are more likely (35%) to think that Wessex should spend a larger proportion of customers' household budget for an improved service

## If it was down to you, which of the following options do you think Wessex Water should adopt?





## Current context: perceptions of Wessex Water

### How is Wessex Water perceived?

- Overall service satisfaction is very high
- Perceptions of Wessex Water are very positive in relation to its customer care but unclear for its corporate behaviour re. profits
- The most informed samples are more positive about Wessex Water: familiarity breeds favourability

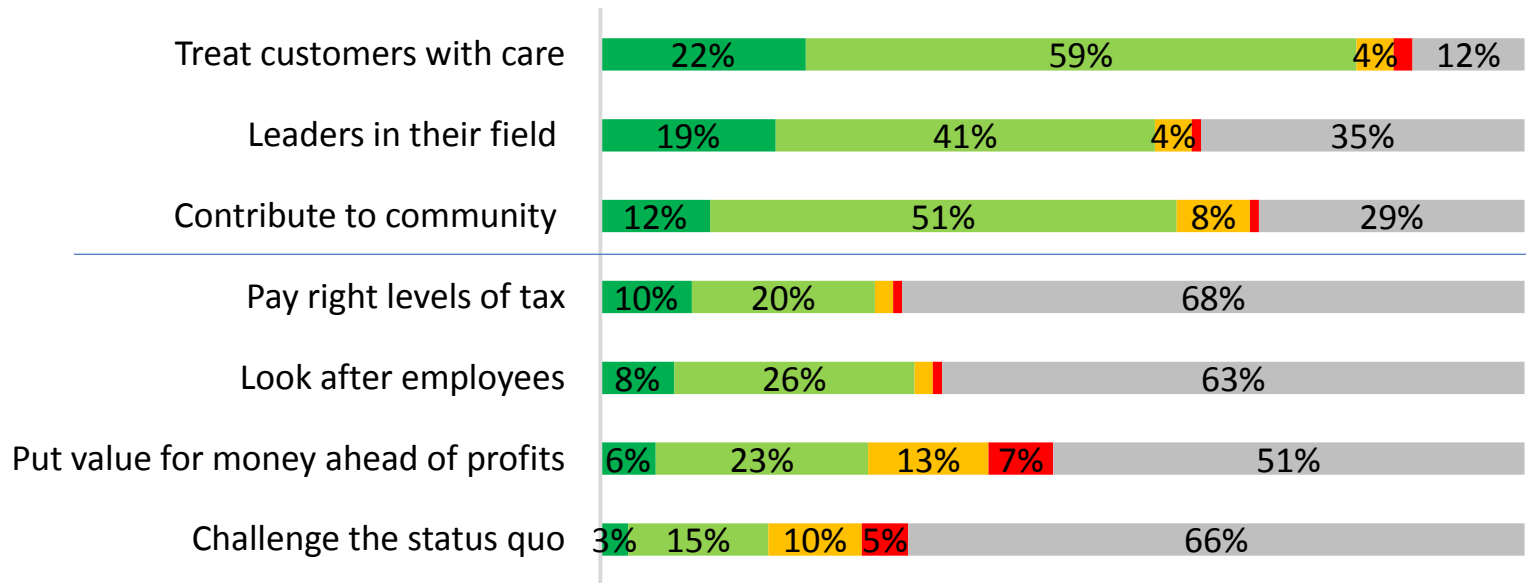
**your say**  **your future**

- Wessex Water is seen as good at *treating customers with care*, and *leaders in their field*
- However, high levels of uncertainty around whether Wessex Water *pays the right levels of tax*, *looks after its employees*, *challenges the status quo* and *puts value for money ahead of profits* (one of the areas considered to be most important for utility companies).



**I would like you to rate Wessex Water in terms of these statements: from what you know, how accurately or inaccurately does each describe Wessex Water? Trust factors (Base: all)**

■ Very accurate  
 ■ Fairly accurate  
 ■ Not very accurate  
 ■ Very inaccurate  
 ■ Don't know



- Staff think Wessex Water is more *customer focussed* than its customers do
- Staff and magazine readers completing snapshot survey (informed & engaged samples) more likely to feel Wessex Water *plays a key role in protecting the environment* and has *expertise* and plays an *active role in the community*.

**Thinking about your overall image of Wessex Water, how much would you agree or disagree with the following statements?  
(% strongly & slightly agree)**

*Uninformed*

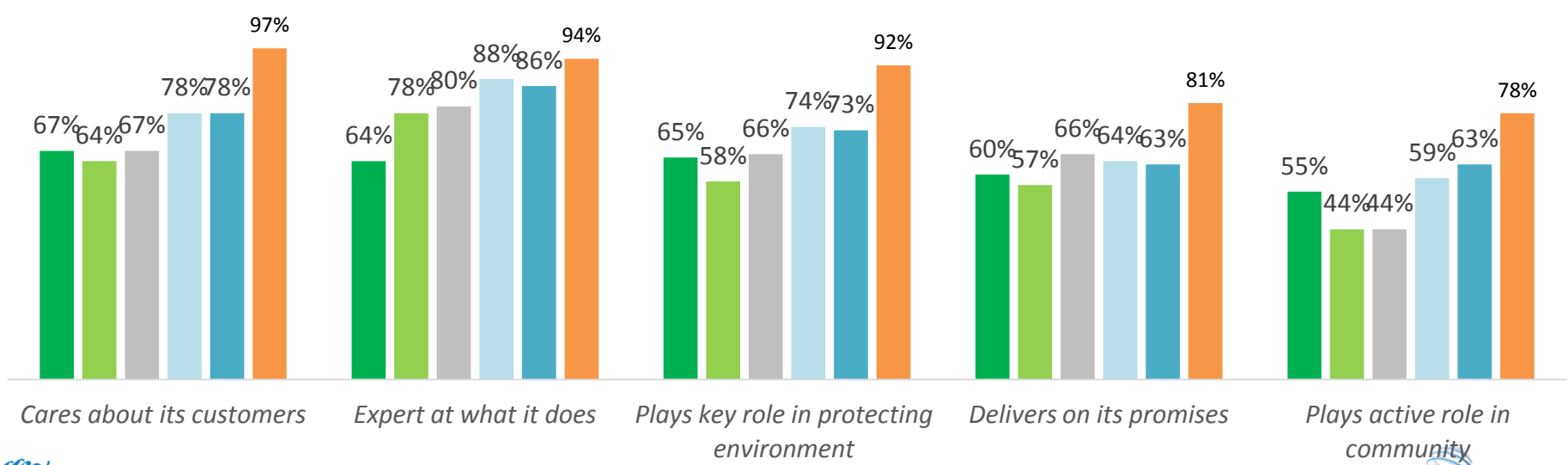
■ SDS survey (600) ■ Tracker 2016 (500)

*Engaged*

■ Panel July (768) ■ Snapshot postal (1340) ■ Snapshot online (1092)

*Informed*

■ Staff (1372)





**Strategic Direction Statement:** what are (UNINFORMED) customer priorities?

**What are customers' priorities for investment/improvement?**

- Choosing priority areas is difficult for customers – because everything is important
- Most are satisfied with the level of service: some areas perceived slightly more likely to need improvement than others

**your say  your future**



- Customers can think of many different issues they expect to see included in the long term strategy.
- Aspects relating to most but not all of the 9 goals are mentioned spontaneously.

			
Customer service		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Save water & money		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prevent sewer flooding		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leakage		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Improving river habitats		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Drinking water quality		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reliability		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Carbon footprint		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bathing water quality		<input type="checkbox"/>	<input type="checkbox"/>

• Rivers and bathing waters are least likely to be raised spontaneously



## CUSTOMER COMMUNICATIONS

- The company: ownership, future plans and investments
- Water quality information (tap vs. bottle, fluoridisation)
- Education including children/schools
- Inform about environmental impact of activities



## PROMOTE WATER SAVING

- Customer water efficiency advice
- Smart metering, personalised billing, leak alerts
- Subsidised water butts, and devices
- Promote use of grey water/more technology



## INFLUENCING ROLE

- Involvement with flood prevention
- Role in regulations for new homes
- Work with manufacturers to develop water efficient products
- Work with other utilities to prevent disruption



## REWARD CUSTOMERS

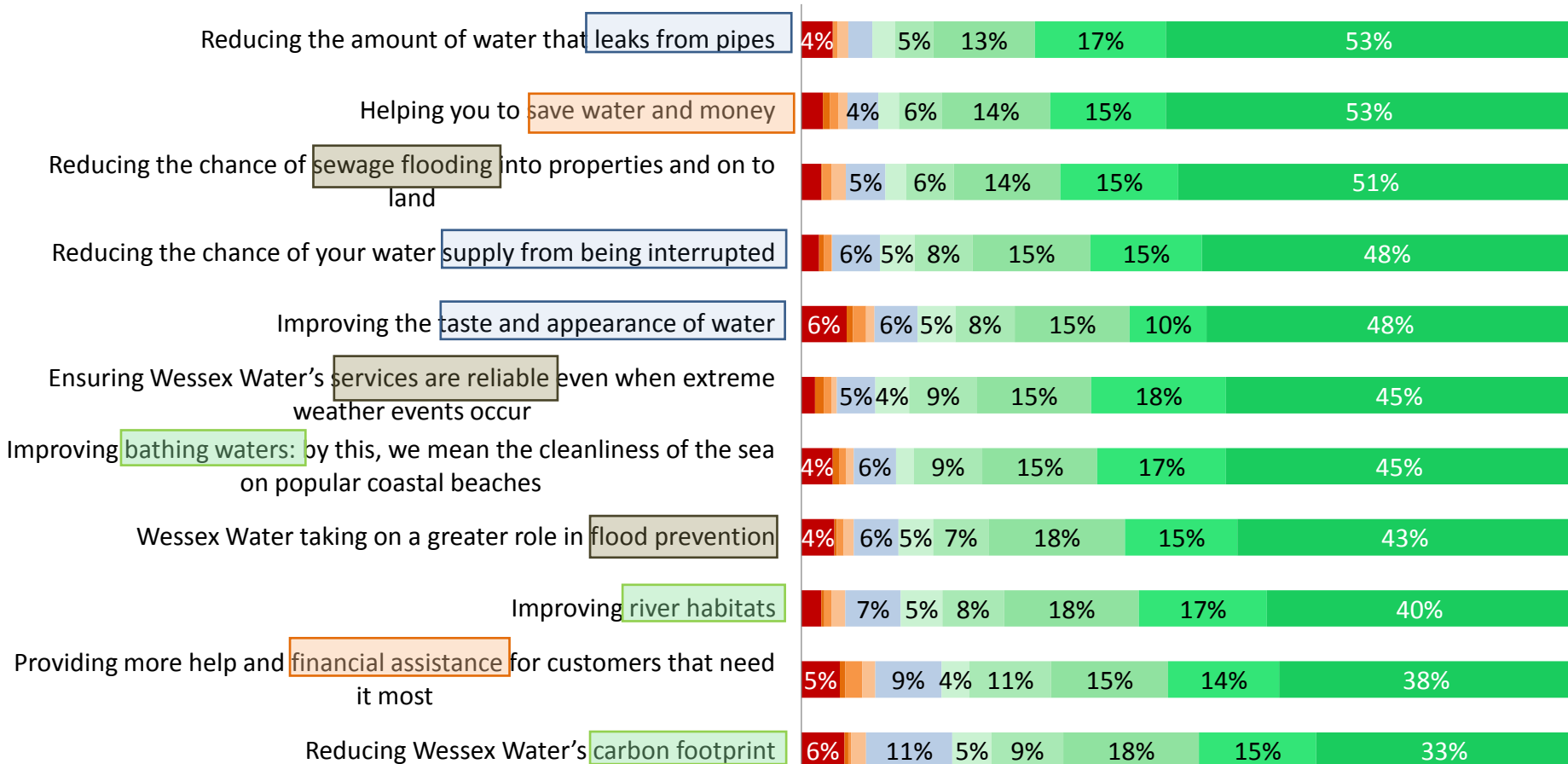
- Rewards for being loyal
- Rewards for being water efficient/reducing usage

- Qualitatively, customers found it very hard to prioritise goals. This is borne out in the quantitative data



## How important are the following? Total (600)

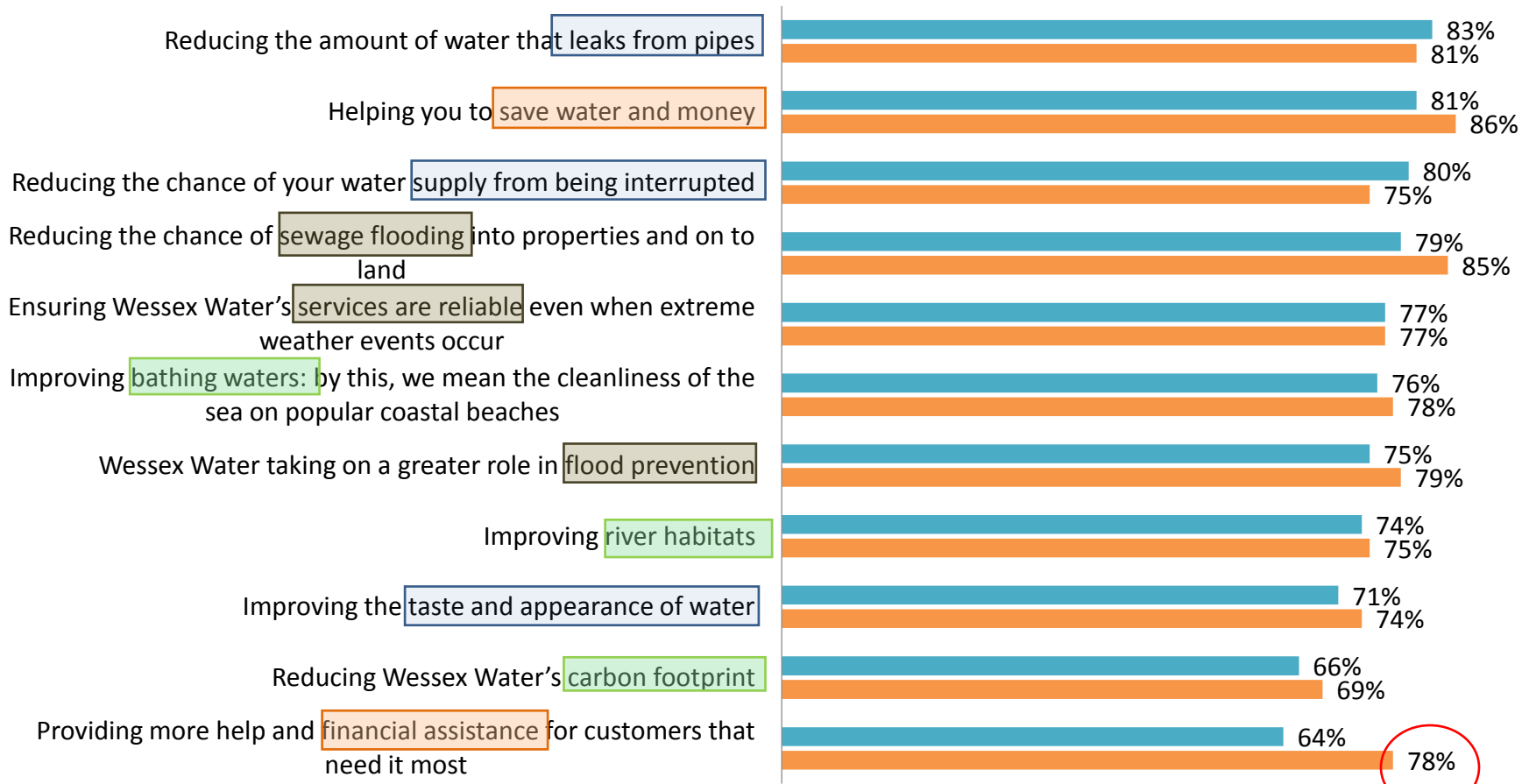
■ 1. Not at all important ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10. Very important



DE customers reflect broadly similar priorities. However DEs more likely to prioritise *‘providing more help and financial assistance’*.

## How important is...10 is the most important? SDS Survey

■ ABC1C2Score 8/9/10 (Base 402) ■ DE Score 8/9/10 (Base: 114)

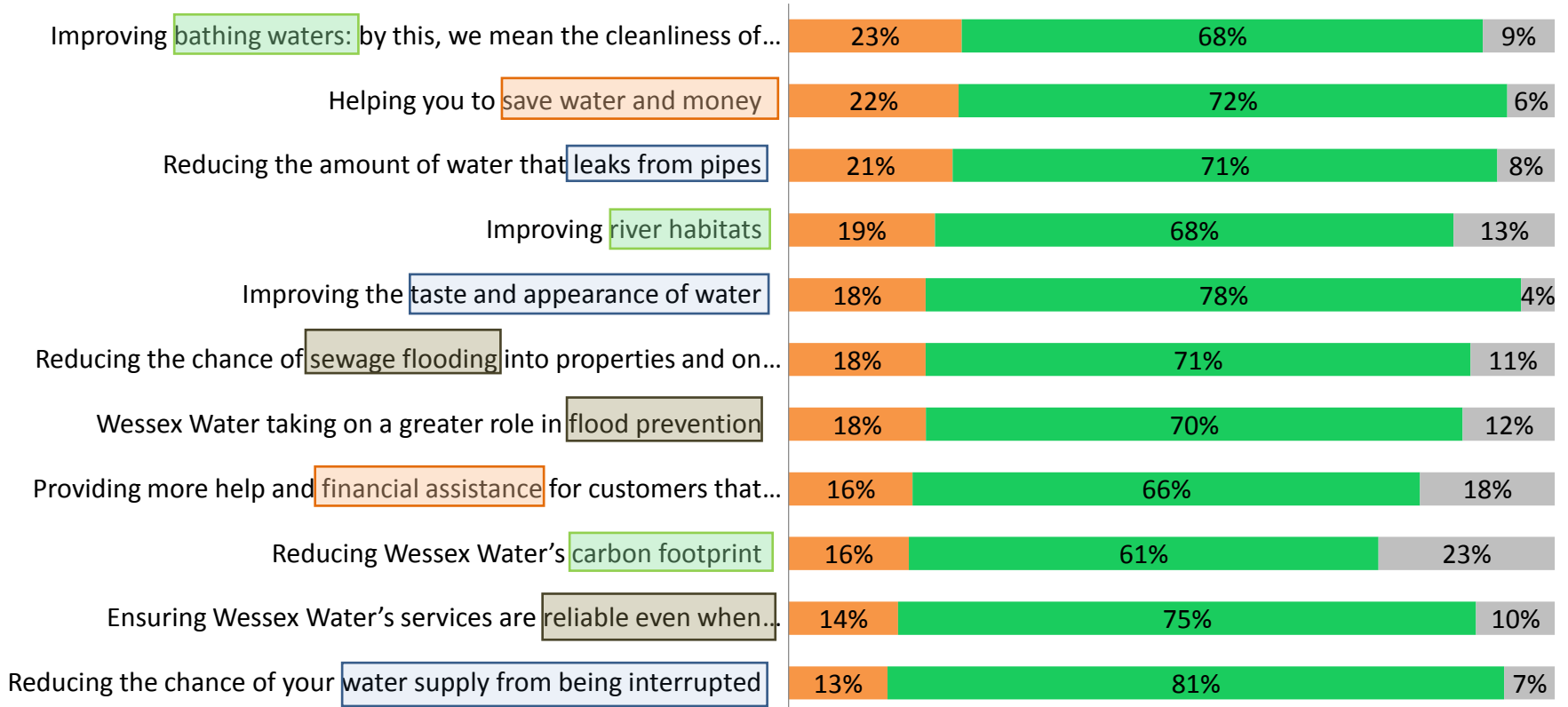


- Levels of satisfaction with current services are very high, particularly for *reliability of supply* and *water taste/appearance*
- Areas most considered in need of improvement are: *bathing waters, saving water and money; leakage.*

## And would you say that (xxx) is satisfactory or should it be improved? (Base: all)



■ Should be improved    
 ■ Satisfactory    
 ■ Don't know





Highest levels of performance satisfaction (top 3)



Highest potential for performance improvement (top 3)



Higher proportions unable to say whether needs improvement (top 3)

Following immersion exercises: *What 3 things should Wessex Water prioritise?*

*Most consistent themes arising:*

Protect the environment and sustainability

Affordable water

Evolving with technology

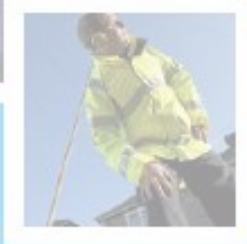
Deliver high quality water

Future planning focus on prevention

- Water seen as a 'human right' that everyone needs
- Delivering quality water a top priority
- Affordable water especially relevant for this generation (expecting to leave University in debt)
- Protecting the environment is expected
- Prevention measures to tackle e.g. flooding

NB: Young People's Panel also put greater emphasis on the importance of evolving with new technology





**Is there support for the Strategic Direction Statement when deliberated/informed?**

**Is the SDS endorsed by customers?**

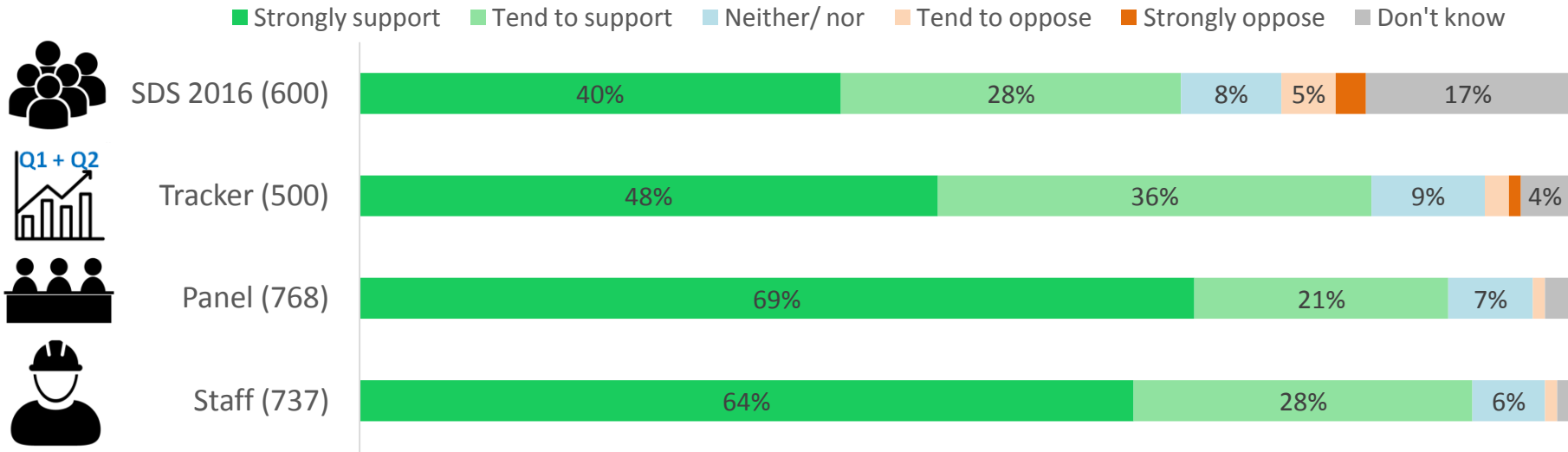
- Yes – customers agree with the underlying principles and specific improvements
- Yes – stakeholders trust Wessex to do the right thing
- Yes – staff support the SDS...but see the challenges

**your say**  **your future**









- The majority of customers are supportive of Wessex Water trying less proven, less expensive approaches instead of the more 'tried and tested' ones.
- Especially the more informed samples (Staff and the Panel)

**Using solutions which might be less proven but are less expensive and use less energy than the more tried and tested approaches. E.g. incentivising farmers to reduce pollutants getting into streams and rivers rather than spending more time processing**



- Similarly, customers and staff are broadly supportive of Wessex Water helping customers to save water rather than focus on intensive building projects.

Sample	Overall acceptance of SDS	Any contentious aspects	Desire for greater emphasis
		 <ul data-bbox="562 361 1093 686" style="list-style-type: none"> <li>• Strong rejection of compulsory metering</li> <li>• Best in class, not best in the land</li> <li>• Reject taking a bigger role (but lack info)</li> </ul> 	<ul data-bbox="1151 418 1870 632" style="list-style-type: none"> <li>• Communications generally</li> <li>• Water saving information and initiatives over and above metering</li> <li>• Water efficiency innovation</li> </ul>
		 <ul data-bbox="562 775 1103 875" style="list-style-type: none"> <li>• Leaks are less contentious for younger people</li> </ul>	<ul data-bbox="1151 718 1841 932" style="list-style-type: none"> <li>• Higher expectations for online services, Apps etc.</li> <li>• Reduction of carbon footprint and green credentials</li> </ul>
		 <ul data-bbox="562 1046 1103 1203" style="list-style-type: none"> <li>• Larger businesses aware of impending competition: what are the plans?</li> </ul>	<ul data-bbox="1151 961 1879 1289" style="list-style-type: none"> <li>• Looking for high service levels (online, accurate bills etc.) – but not at a premium price</li> <li>• More on smart metering, monitoring, leak prevention/alerts on their premises</li> </ul>

Panel members (i.e. those who attended the Catchment Management Panel or WW Partnership meeting) reviewed the options posed in the customer deliberative events

## Option 1

## Option 2

 *Catchment Management*  
 *WW Partnership*



Avoid additional water treatment



Additional treatment processes



Smart meter in every household



Gradual increase of metering



Invest in physical assets

Combination of measures



Widespread pipe replacement

Targeting and quicker response



Be the best water co



Compete with best brands



Build more assets

Combination of measures



Introduce more cleaning processes

More prevention and collaborations



Build more assets e.g. storm storage

Incentivise farmers to pollute less



**High degree of consistency for options from all panel member stakeholders**

- Overall the more 'innovative' and/or environmental option is favoured
- Partnership have stronger support for voluntary metering and increasing service levels
- Also strong views for 'best of both' options



**Stakeholders trust Wessex to do the right thing**



**Some question emphasis /missing areas**

- Water efficiency and education emphasis
- How Wessex Water will reduce, recycle, reuse?
- More to help low income customers?
- Implications of an open market?



**Staff give their support to SDS, but they are not emphatic...they understand the complexity that lies behind the goals**



- Some question how achievable some goals are
- Nothing here for staff to feel proud about
- Reoccurring theme relates to customer education: tell customers they get a premium service



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Water – the way  
ahead 2015-2040

Wessex Water's  
long-term strategy



# PR19 Foundation Stage

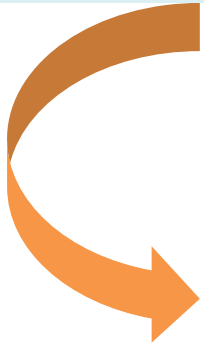
Revisiting the SDS

12<sup>th</sup> May 2016



**your say**  **your future**

- The water industry has truly begun to put customers at the heart of its business planning process. Many lessons were learned about engaging with customers during the PR14 cycle, not least that canvassing views from customers and stakeholders should be an ongoing conversation and not just limited to the various regulatory staging posts
- Wessex Water is designing the various components of its customer engagement activity which will encompass both continuous and ad hoc elements all of which will be triangulated.



## **Overall objective was to canvas the views of domestic and non-domestic customers, staff and stakeholders at the outset of business planning cycle**

- To take a temperature check of both economic confidence and current expectations of service providers
- To check and challenge Wessex Water's long term vision, as set out in its strategic direction statement, *The Way Ahead 2015-40*



## **Domestic customers: 3 x Community deliberative events**

3 hour events with cross section of customers by age, gender and SEG. Wessex Water staff present

- Bath, 28 customers
- Poole, 28 respondents
- Taunton, 26 respondents



## **Customers of tomorrow: 4 x 1½ hour group discussions**

In Bridgewater and Chippenham with customers aged 20-29 years who are not currently paying water bills. (Range of educational qualifications and ages).



## **Non Domestic customers: 4 x 2 hour group discussions and 10 depth interviews**

Including a range of: sectors (private & public sector); business size; nature and level of water usage.



**Stakeholders:** meetings with Wessex Water Partnership and Catchment Management Panel and 8 x 45 minute telephone depths



**Staff workshops:** 5 group discussions with range of staff in Claverton Down, Nailsea and Yeovil

**Fieldwork: 21<sup>st</sup> March to 28<sup>th</sup> April 2016**

N.B. Stage 2 Quantitative research to follow





**Temperature  
check:** what is the  
mood of the  
moment?

**your say**  **your future**

**Newspaper headlines: Steel tariffs, and warm weather**

**Steel crisis: UK willing to take 25% stake in rescue deal**

**The economy and Brexit – a tangled tale**

**Reality Check: Would Brexit be good for the UK economy?**

**Donald Trump 'would drop the atom bomb' says supporter**

**European Parliament: Counter-terrorism**

**US election 2016: Donald Trump sweeps five US states**

**House prices rise in UK's big cities, says Hometrack**

**The UK economy grew by 0.4% on the first quarter of the year**

**Hinkley Point: French government 'completely committed' to plant**

**Big 6 energy companies drop their gas prices**

## In 2012 recession set tone of customer mind-set – this is no longer the case!

- Personal circumstances rather than macro issues, driving customer mind-set
- Emphasis can vary according to life stage and socio-demographic status



### Feeling positive/optimistic about:

**Family & friends:** weddings, social life, children all happy, becoming a grandparent

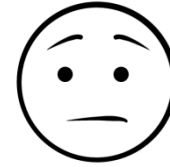
**Health & wellbeing:** happy, I'm healthy, family healthy, new house, good social life, feeling contented, getting married

**Work life & finances:** promotion, new job, enjoy job, not worrying about bills

**Leisure time:** holidays, travelling, Euro 2016, gardening, walking

**Where I live:** beautiful area, good community

**Time of year:** summer coming, Easter coming, sunshine



### Feeling negative/worried about:

**Health & wellbeing:** personal & family health, lack of time, work/life balance, growing old

**Personal finances:** bills, mortgage costs, debt, planning for retirement

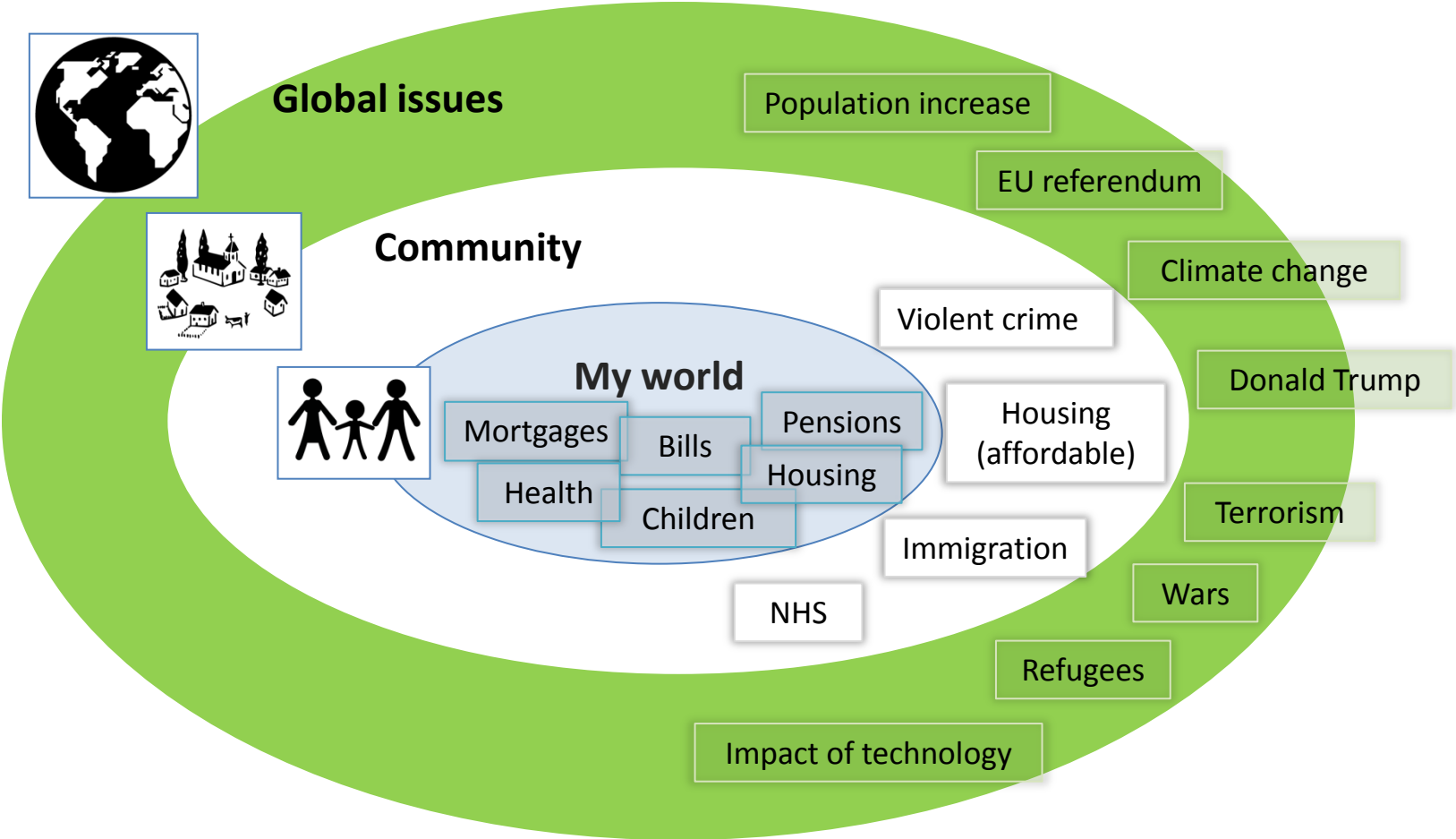
**Work life:** redundancy, job insecurity, self-employment, work-life balance, lack of time

**EU:** uncertainty re. referendum (but unwilling to discuss further)














**State of the World:** Trump, terrorist threats, Syria, refugees

## Worries in 2016 more focussed on global issues than community or 'my world' issues

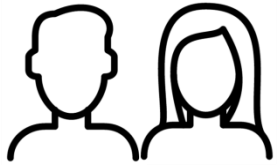
• in 2012, customers saw direct connection between global economic situation and their world



Younger customers more likely to worry about 'my world' issues, especially housing and cost of living. Older generation worries are more outward-looking/global.

Top 6 headlines in 2007	Perspective in 2012 (compared to 2007)	Perspective in 2016 (compared to 2012)
<b>Immigration</b>	Lower profile 	<b>Higher prominence: EU referendum and global conflict</b> 
<b>Economic downturn</b>	NUMBER 1 ISSUE IN 2012 	<b>Less prominent: personal circumstances</b> 
<b>Social Issues (ASBOs, nanny state, workshy)</b>	Mentioned but overshadowed by economic issues 	<b>Focus on: NHS and difficulty getting on housing ladder</b> 
<b>Crime</b>	Not a major issue 	<b>Not a major issue</b> 
<b>Corporate dominance</b>	Emphasis on banking industry: greed & corruption 	<b>Less prominent issue, but underlying cynicism</b> 
<b>Environment</b>	More immediate relevance: resource scarcity linked to household costs 	<b>More focus on climate change</b> 
		<b>Global uncertainty: terrorism, war, US elections</b> 

## Personal issues dominate



- ✓ Family / friends / relationships
- ✓ Work
- ✓ Good health
- ✓ Personal achievements



- ✗ Finances / lack of money /cost of living
- ✗ Employment prospects
- ✗ Lack of affordable housing
- ✗ **Life feels harder than for previous generations, esp. employment, housing**



*If you've got a degree then you've got to have the skills and to get the skills you got to have the job and to get the job you've got to have the skills. Half the time we can't get the skills because we can't get that job opportunity.*  
Customer of tomorrow, 26-30 years, Chippenham

## Wider issues reflect customer sample

- Social: economic inequality, population growth and immigration
- Environmental issues, including flooding (Chippenham)
- Political issues: EU membership
- Global: terrorism threat
- **Added to which, there is an underlying feeling of cynicism about life, which impacts on customer perceptions and attitudes**

*I feel like I'm **finally** getting somewhere with my career.*  
Customer of tomorrow, 26-30  
Bridgewater

*I can't think of anything positive about my life!* Customer of tomorrow, 26-30, Chippenham

## Lots of reasons to feel uncertain



- ✓ New contracts/  
growing demand
- ✓ Economy improving
- ✓ Low interest rates
- ✓ Good colleagues



- ✗ Economy & rising costs
- ✗ Keeping up with customers expectations (more for less)
- ✗ Uncertainties: new management, new policies, job insecurity, merging sites
- ✗ **EU creating uncertainty**
- ✗ Public sector insecurity
- ✗ Climate change / environmental impacts and opportunities
- ✗ Social issues impacting business/policy decisions e.g. growing /aging population

*It's much more short term and it's short term because we have to be much more reactive to the pressures of economics which can change so quickly in what is increasingly a globalised marketplace.*

*There is lots of uncertainty and so I feel I can't control what will happen over the next 10 years.*

- Non-domestic customers more negative/concerned than domestic sample
- Compared to 2012, costs remain a concern: post recession cost sensitivity is the new normal
- **NB: Small businesses feel unfairly penalised by new legislation:** e.g. minimum wage, recycling, pensions, maternity



**Admired brands:**  
applying learning  
to utility sectors

**your say**  **your future**





Waitrose

Sainsbury's

BBC

NHS

Virgin

The co-operative

YOUR M&S



Google

dyson

Levi's



ovc energy



Thompsons Holidays

Seafresh  
Delivering Fresh & Direct

LUSH  
FRESH HANDMADE COSMETICS

Clarks



**CONSISTENCY & SERVICE**

- ✓ Exceeding expectations
- ✓ Product quality & confidence
- ✓ Guarantees
- ✓ Response to problems

**RESPONSIBILITY & CORPORATE ETHICS**

- ✓ To staff
- ✓ To community
- ✓ To the environment
- ✓ To suppliers (fairtrade)

Increasingly important

**VALUE**

- ✓ Incentives, offers
- ✓ Low/competitive prices
- ✓ Reward loyalty

Less prominent than 2012

**TRANSPARENCY**

- ✓ Honest rates & deals
- ✓ Ownership & supply chain
- ✓ Tax issues

Increasingly important

**CHALLENGER/SPECIALISM**

- ✓ Product passion
- ✓ Expertise, knowledge
- ✓ Taking a stance, being brave
- ✓ Challenging the competition

**IDENTITY/PERSONALITY**

- ✓ Established/heritage
- ✓ A face/figurehead
- ✓ Britishness/local

Customer focussed rather than money focussed. Younger Poole

Not just about profit, it's more about the greater good. Older, Poole

Admired brands need to be at least one of the above (most position their brands single-mindedly around one of these dimensions)

Greatest positivity is reserved for smaller, local and independent companies/suppliers.



- Good customer service
  - Reliable, no quibbles, resolves problems quickly, trained staff, online access, UK call centre
  - Experts in their field – knowledgeable, understand my business
- Personal relationship and easy to deal with
  - Less corporate and more personal relationship – an account manager or one point of call
- Fair pricing
  - Clear and concise billing
- Quality products – built to last, kite marks



JOHN DEERE



Compared to domestic customers, when things go wrong there's greater urgency to get an immediate and effective resolution



## Building trust:

- Requires a customer to feel they have a *relationship* with the brand / company
- Need to feel like a *valued* customer
- Often built through direct (personal) contact and being *treated with empathy*
- Trust often built *via a person* (i.e. employees) not company as a whole
- Requires customer to believe the company/staff are *experts*



- **Customers of Tomorrow** less able to give examples of trusted brands
- Part of general cynicism re corporations
- Behaviour is to 'date' brands, not seek long term relationships

**Although very rarely mentioned as admired or trusted (OVO is the exception) strong negativity towards utilities seen in 2012 has weakened and is less vociferous**

- utility prices not as big a news story in 2016; and less domination of 'big 6'
- other sectors in the spotlight for poor practices (Amazon, Starbucks, Co-op)
- (we have considered the 'observer effect' of Wessex personnel present at the deliberative events but think other factors having a much more significant effect on attitudes)

## CONSISTENCY & SERVICE

- Improvements not about quality of product (*it's all the same*), but **quality of service**: UK call centres; real person not IVR; attitude of staff; speed of getting through

## VALUE

- **Fair pricing**, bills should go down as quickly as they go up, pass savings onto customers
- Incentives for loyal customers, deals, reward for using less

## TRANSPARENCY

- Easier to **make comparisons and shop around**
- Clearer bills

## CORPORATE ETHICS

- Improve **honesty & transparency of bills**: return overpayments from estimated bills quickly or pay customer interest (OVO as good example)

## CHALLENGER/SPECIALISM

- Not explicit customer priority for utilities (but many 'admired brands' have this dimension)

## IDENTITY/PERSONALITY

- Few utilities have strong brand identity ("*They are all as bad as each other*") hence not explicit customer priority

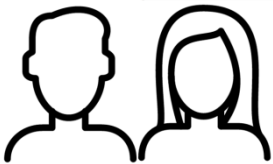


*The worst thing they (Wessex Water) could be is just another energy company. Middle age group, Bath*

## Starting point for most customers:

- High levels of satisfaction with the product
  - Low levels of contact with Wessex Water
- ↓
- Has better reputation than electricity and gas companies
  - Good customer experience examples e.g.
    - Proactive contact to alert customer of increased use and potential leak - resulted in £350 refund
    - Good experience surrounding supply interruptions and associated communications

But some question why Wessex Water care about customer opinion in the monopoly context



- **Customers of Tomorrow** have no perceptions of Wessex Water (positive or negative)
- Lack of knowledge and understanding
  - Unsure of relative cost to other utilities
- (Engagement waned as discussion focused on WW's specific goals)

*It's included in my rent so it's something I don't have to think about.*  
Customer of tomorrow,  
26-30 years,  
Chippenham

Water companies (and Wessex specifically) perceived more positively than other utilities.



- Unlike other utilities, seen as less ruthless, mercenary: instead more about working with customers
- Better service, react more quickly to problems and will come out and resolve them
- For water critical businesses Wessex Water more visible vs. other utility companies who you never see (e.g. account managers, or meter readers)
- Larger businesses (account managed) have particularly good relationship with Wessex Water, valuing a single point of contact / consistency of personnel for many years



*I'd sooner have somebody there that's accountable for whatever your problem... make somebody accountable for it.*  
SME

Businesses want to be treated as businesses i.e. for some, personal account management while for others (smaller/SMEs) this is about a dedicated service (contact centre etc.)



**Wessex Water's  
long term plans:  
what do customers  
think should be  
included?**

**your say  your future**





## Step 1

Wessex Water staff/Blue Marble gave an initial short presentation about the company providing an overview of the organisation, its: size, role, remit and partners.

This was intended to inform customers and give them a starting point to think about what they would like to see included in the long term strategy.

Following the presentation customers carried out a brainstorming activity to think about all the different issues they would expect to see included in Wessex Water's long term strategy.



*“Improve customer call centre”, “Clear, accurate, transparent bills” (business)*



*“Keep costs down”, Offer water saving devices”, “Help those with difficulties paying”, “Compulsory meters”*



*“Flood prevention”, “Stop wipes being flushed”*



*“Leakage repair”, “Mend leaks quicker”*



*“Make sure rivers are clean” (but few other mentions)*



*“Maintain water quality”, “Safe water to drink”*



*“Plan for climate change”, “Plan for population change”, “Better water storage in winter to plan for droughts”*



*“Aim to be carbon negative”, “More poo vehicles”, “More green energy”*





## CUSTOMER COMMUNICATIONS

- The company: ownership, future plans and investments
- Water quality information (tap vs. bottle, fluoridisation)
- Education including children/schools
- Inform about environmental impact of activities
- Advice to tenants



## PROMOTE WATER SAVING

- Customer water efficiency advice
- Smart metering, personalised billing, leak alerts
- Subsidised water butts, and devices
- Promote use of grey water/more technology



## INFLUENCE OTHERS

- Involvement with flood prevention
- Role in building new homes, regulations for new homes
- Work with manufacturers to develop water efficient products e.g. washing machines, use of grey water
- Work with other utilities to prevent disruption



## REWARD CUSTOMERS

- Rewards for being loyal
- Rewards for being water efficient/reducing usage



## COMMUNITY /CSR

- Give back to the local community
- Promote existing activities
- Help other countries, link with Water Aid

*They have a captive audience so they should be putting back, funding community projects. Middle age group, Bath*



## LOCAL ENVIRO ISSUES

- Sewerage smells
- Visual impact of infrastructure on the environment
- Soften water



## TECHNOLOGY

- Keep up to date e.g. filtering out latest pollutants
- To ensure using most efficient systems and practices



## OTHER ISSUES

- Protect against potential terrorist attacks on water supply
- Penalise non-compliant industries
- Invest in desalination
- Consider impact of new industries/infrastructure e.g. Hinkley Point
- Exporting/trading water
- Team up with other utilities to offer joint services – similar to dual fuel offers



## Maintain

- Quality of water
- Reliable supply
- Good customer service

## Invest & improve

- Infrastructure to reduce leaks
- Technology to be more efficient
- Environmental issues (including educating customers)

## Prepare for future

- Increasing demand due to population increase
- Climate change
- Competition and the open market

**Larger non domestic customers** (who aware of competition) expect Wessex to be preparing for consequences of competition. They want reassurances that their needs will be met at the same standards (if not improved!).

Spontaneous discussions of the long term strategy generally support the current SDS

However indications that customers expect to see greater emphasis on:

- Promoting water saving - both internally by Wessex and customers
- Use of technology and innovation
- Communications with customers

- Wide range of spontaneous ideas for the long term strategy developed by customers after relatively brief 'informing process' demonstrates level of engagement with Wessex
- Customers have an appetite for more information and communications from Wessex:
  - 'familiarity breeds favourability'
  - greater transparency will build greater trust
  - impact of behaviour change campaigns depend on initial levels of understanding of the issues
  - evidence of urban myths and common misconceptions (e.g. can't drink from bathroom tap/softened water, oral contraceptives & antibiotics in tap water)

*They should communicate more with customers, generally. Middle age group, Bath*

*They should inform us a bit more on the things that are happening. Customer of tomorrow, older, Chippenham*

*They need to be good enough to make you want to stay if this becomes an option.  
Middle age group, Bath*



**Wessex Water's  
long term plans:  
customer views  
after deliberation**

**your say  your future**

## Considerations between now and 2040

9 goals identified in long term strategy - 2040

- Provide excellent customer service
- Help customers save money & water
- Prevent sewage flooding
- Reduce leakage
- Help safe-guard quality of bathing waters
- Protect rivers, and lakes
- Provide high quality drinking water
- Improve reliability of the water supply
- Reduce our carbon footprint

## Step 2

Wessex Water staff gave a brief presentation introducing the business planning process and the Wessex Water Business Plan PR14 video.

Customers completed a prioritisation exercise on the 9 goals followed by a brief discussion.

### Reduce leakage

#### The Situation Now

Customers tell us leaks should be a top priority

Currently, 20% of water processed for drinking, is lost because of leaks

£12m a year is spent on reducing leaks, renewing pipework and fixing 12,000 leaks

Wessex Water has halved leakage since 1995

Currently at the point where reducing leakage further would cost more than the value of water which has leaked

OFWAT  
Beaten regulator targets every year since introduced in 1997

#### Reduce leakage

#### Our Goals

As a Wessex Water Customer I can say:  
"They keep the amount of water leaked at the practical minimum"  
"If I report a leak it will be fixed within a day"

**Option 1:** to implement a widespread pipe replacement programme to reduce leakage

**Option 2:** to proactively target weak spots using leak detecting technology - and react more quickly to leaks when they occur

## Step 3

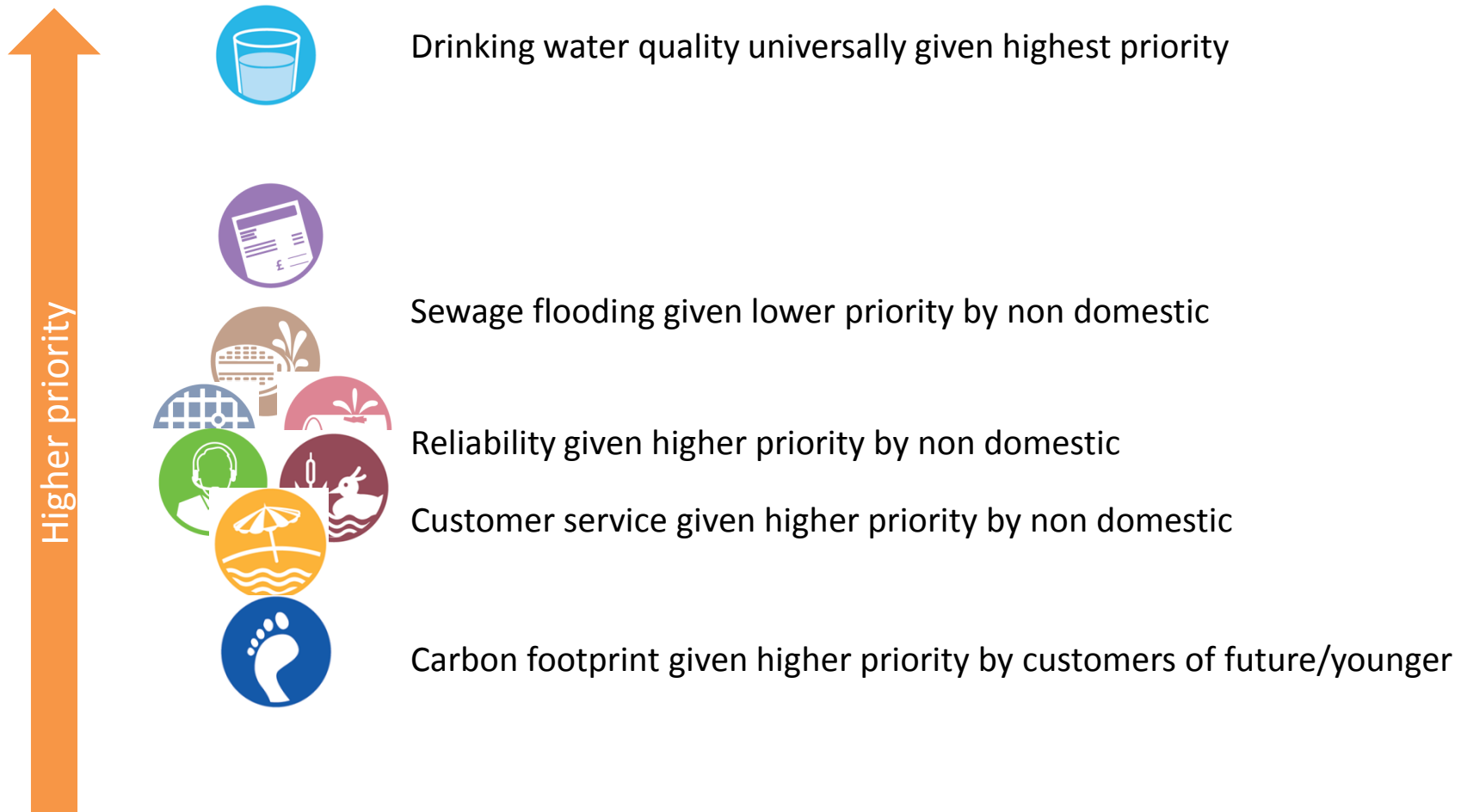
Focussing on individual goals customers were provided extra information (outlining current performance and key facts) and were presented with two alternative options for how the goal could be achieved.

Small groups deliberated the two options which was followed by a vote.



**General support for the 9 Goals:** *'Covers everything, comprehensive', 'A good overview of what a water company should be doing', 'What I would expect'*

Customers found it very difficult to prioritise or rank order the 9 goals – they are all perceived to be important. (N.B. Quantitative research to follow will explore this further)





## Consistently rated as the most important goal

*“My water is safe and healthy to drink”*

*“My water tastes and looks good”*

- Viewed as an expectation → a **hygiene factor** for a water company
- This should already be achieved – should be reality now, not an aspiration
- Not just about how it looks and being healthy, but also want high quality (including hardness)
- Want it to be best in country/better than bottled water

*First and foremost what they supply to your home has to be safe.  
Middle age group, Bath*



### Option 1: avoid additional water treatment

- Long term solution, may take longer
- Less certain, can't always rely on others
- Better to be proactive and prevent problems
- Important to work with farmers
- More natural, environmentally friendly

### Option 2: additional treatment processes

- Greater certainty & guarantees (can't trust farmers to act)
- Opposition to water softening (too many chemicals, worse for health)
- Too expensive *“waste of money adding chemicals”*

**Vast majority vote for Option 1**



- Express very similar views
- Water softening more polarising issue for some non-domestic



## Consistently rated as one the most important goals

*“Whatever my income I can afford to pay for the water I need”*

*“I am able to control my water bill and to use water wisely”*

- General perception that currently affordable - but should this include payment plans for lower income households?
- Supportive of idea of being able to control bill (but some scepticism/lack of knowledge about how this is achieved)

N.B. Metering is emotive issue, not all customers convinced metering will reduce usage. Expect/would like to see greater range of water saving measures to reach this goal.

### Option 1: smart meter in every household

- Don't like element of compulsion
- Question if customers will save water if they are forced to be metered
- Some unclear about benefit of smart meters
- Expensive – don't expect to pay for smart meters (ref. energy sector)
- Is there choice to have meter removed?



### Option 2: gradual increase of metering

- Instinctively favour this option
- What does 'encouraging' mean (different tariffs?)
- Will this include water saving devices?
- Want protection/options for large families

**Vast majority vote for Option 2**



*“Whatever my income I can afford to pay for the water I need”  
“I am able to control my water bill and to use water wisely”*



## **Non Domestic:**

- Having control over bill especially important – want Wessex Water to help/support them do this. Want audits, smart meters, monitoring and more innovative ‘revolutionary’ ways to help save
- ‘Affordability’ is not relevant – more about reasonable and fair pricing
- Expect Wessex Water to improve own internal efficiencies to help reduce costs



## **Customers of tomorrow:**

- Have no context for cost of water bill, but expect less than gas or electricity
  - Unsure how Wessex will ensure affordability for all
  - Like idea of control – unsure what this means App?
- This goal is weakened by linking saving both water and money:
    - Customers expect to see greater emphasis on water saving by other means, not just metering (e.g. use of technology, grey water)
    - Customers want money saving ideas not reliant on being metered
  - In customer minds water and money saving not automatically linked (esp. if not metered)



## Consistently rated as one the more important goals (although less so after deliberation)

*“The number of properties – in my region – affected by sewage flooding is the lowest in the UK”*

*“The risk of my home being affected by sewage flooding has not increased despite climate change”*

- None had experienced sewer flooding which set context for discussion
- Approve of promise to be best in the UK – suitably ambitious
- Uncertain how climate change impacts sewer flooding – need explanation, not intuitive
- Would like goal to include what actions Wessex will take

### Option 1: invest in physical assets

- Demonstrates Wessex Water taking responsibility
- Preventative = a good thing
- Don't anticipate significant disruption
- Expensive

### Option 2: combination of measures

- More environmentally friendly option
- Education and prevention = a good thing
- Lack of guarantees – worrying, long term solution only
- Putting responsibility onto customers

**No clear option chosen – many want combination of two options  
Customers and Wessex Water need to work together**

N.B. Discussion of how customer behaviour causes blockages sways customers to vote for more education and therefore Option 2



*“The number of properties – in my region – affected by sewage flooding is the lowest in the UK”*

*“The risk of my home being affected by sewage flooding has not increased despite climate change”*



## Non Domestic:

- Some acceptance that can't eradicate the problems, therefore want promises about how will deal with sewage flooding (response times)
- Want Wessex Water to lobby companies to ensure that all wipes are flushable – put pressure on manufacturers

**Want combination – Option 1 in short term followed by Option 2 i.e. education**



## Customers of tomorrow:

- Question whether regional comparisons are fair – due to different geography, and infrastructure
- Concerned that climate change being ‘blamed’ for other problems/issues causing sewage flooding



## Greater variability in the priority given to this goal (lower priority amongst younger customers)

*“They keep the amount of water leaked at the practical minimum”*

*“If I report a leak it will be fixed within a day”*

- How will they achieve this – is it reducing pressure (disliked)
- What does ‘practical minimum’ mean?
- Not just an economic issue, but also ethical/environmental issue
- Unrealistic to fix leaks in a day – won’t meet this target

### Option 1: widespread pipe replacement

- Will need to do this eventually, system is outdated
- This is long term, future focussed option, suitable for 25 year plan
- Expensive – should put profits into this
- Prevents the need for Option 2 in future

### Option 2: targeting and quicker response

- Short term – priority for now/the next 5 years
- Will this be sufficient alone - is it just ‘*patching up*’?
- Do this whilst plan/save up for Option 1
- Only less expensive in short term?

**No clear option chosen – many want combination of two options**

N.B. Statement about water leaking back into the ground makes leaks a lower priority goal for many



*“They keep the amount of water leaked at the practical minimum”  
“If I report a leak it will be fixed within a day”*



## **Non Domestic:**

- Greater cynicism about ‘practical minimum’ – sounds vague
- Greater scepticism about whether realistic to fix in a day
- Want targets around leak prevention – better monitoring, including consumption figures

**Want combination of two options**



## **Customers of tomorrow:**

- Supportive of overall aims – perceived as reducing wastage
- Want to see targets in terms of volume of water in meaningful measurements (e.g. bath tubs, swimming pools)





## Rated in the middle of the priority ranking

*“There will never be a hosepipe ban here”*

*“I can trust their services to keep going even when unexpected events happen (such as floods and droughts)”*

- Impressive, ambitious
- Hosepipe ban not feel relevant to many (rich person’s promise, drinking water more important)
- Few have experienced interruptions to supply – not an issue they ever think about
- Expect more problems due to climate change

### Option 1: investment in assets

- Reservoirs feel like logical solution (necessary if other regions in drought and to plan for population increase)
- Positive as not reliant on others (and could sell to others)
- Uncertain where will build reservoirs
- Will this encourage greater water use (analogy to new motorways)

### Option 2: mix of alternative approaches

- Like idea of encouraging reduced usage – education is a good thing but takes time
- Feels too long term (Option 1 quicker)
- Too uncertain, insufficient guarantees
- Water trading not helpful if a national problem
- How will this address flooding problem?

**Difficult decision, no clear consensus  
Want a mixture of Option 1 and Option 2**



*“There will never be a hosepipe ban here”  
“I can trust their services to keep going even when unexpected events happen (such as floods and droughts)”*



## Non Domestic:

- Hosepipe bans polarise: ambitious goal vs. they can be necessary and responsible environmental measure in extremis (assume businesses exempt)
- Concerned about reputational damage making promises for ‘unexpected’ events

**More sceptical about challenge of getting customers to change behaviour – therefore need balance of 2 options**



## Customers of tomorrow:

- More positive about hosepipe ban promise - feels like a tangible goal
- Concerned that too ambitious – it may be necessary/helpful in the future to have hosepipe ban (assume it won’t affect them and there won’t be other restrictions)



## Greater variability in the priority given to this goal (higher priority amongst younger customers)

*"I get good value for money"*

*"If I were able to choose my supplier  
I would choose Wessex Water"*

- Currently happy with service levels
- Statements about choice (and recommendation) confusing – *"How can you recommend if you can't compare"*
- Difficult to rate VFM if no comparison
- Assume from this means competition will happen soon

### Option 1: be best water company for service

- Majority happy with service (especially as few need to contact water company), supported by evidence of 95% satisfaction levels
- Impressed that Wessex Water is ranked first in industry - want to retain this!
- Happy now with real person answering the phone
- Expect this Option will meet all current (and increasing) service needs and keep Wessex top of industry table

### Majority vote for Option 1

**Do not want to vote for bill rises unless they know exactly what the customer benefit will be**

### Option 2: match best brands in country

- Most unwilling to pay more for improved service over and above being the industry leader – no perceived need
- When asked explicitly, most do not think appropriate to compare Wessex to other brands i.e. Amazon
- Those who vote for Option 2:
  - think always need to improve, customers will expect more
  - need to keep up to date with technology
- Most unwilling to vote for higher bills without understanding customer benefits (some call for text alerts, faster call outs, specific appointment times)



*“I get good value for money”  
“If I were able to choose my supplier I would choose Wessex Water”*



## Non Domestic:

- Greater desire for improvement on billing: greater transparency, use of accurate not estimated figures, online monitoring/tracking
- Some evidence of desire for improved service in terms of dedicated business contacts, use of technology e.g. web chat - but no evidence that happy to pay for it, expected as normal for modern company



## Customers of tomorrow:

- Unable to comment on whether customer service needs improving as no experience
- Indication that would like to choose level of service and use digital channels

*I know one thing that Ovo do. You can save a bit of money by promising to never call their Call Centre. I never call Call Centres because I know what a nightmare they are so I always, always email. By emailing and doing it through the App I get money off, I get like £2.50 off a month.*  
Customers of tomorrow, 26-30 years,  
Chippenham

- Votes for Option 1 assume Wessex Water will continue to be top of water industry league table.
- N.B. Customers claim direct comparisons to other brands are not relevant, however customers do have increasing service expectations (e.g. shorter appointment times, online tracking) which are being set by the likes of Amazon etc.
- Positioning service levels beyond the water industry is difficult for customers to understand. Possibly better considered as an internal ambition and expressed externally as: *we will remain the best in the water industry by adopting the practices of the best in the world...*



## Rated in the middle to lower end of the priority ranking

*“Rivers in my region have improved and now meet tighter EU standards”*

*“Wessex Water is the leading water company for environmental performance”*

- Expect Wessex to meet EU standards, not ambitious
- Issues not previously considered, unsure how serious the problems are currently
- Like idea of ‘leading for environmental performance’- although could be vague

### Option 1: more cleaning processes

- Quicker fix and guaranteed
- More expensive
- Not sustainable, not solving the problem
- More chemicals not seen as a solution
- (Farmers might vote for this)

### Option 2: prevention via collaboration/ technology

- Preventative = always a good thing
- Cost effective, cheaper
- Light touch – feels appropriate
- Better for the environment
- Encouraging customers to take ownership = positive
- But, unintended consequences (e.g. will farmers play the system or will it affect productivity?)



Less important than for domestic



Like idea of tighter standards – want to see improvements

**Unanimous vote for Option 2**



## Rated lower in priority ranking

“If bathing waters fail EU standards it won’t be due to my water company”

- Language not always clear – what are *bathing waters*?
- Dislike way goal written – sounds defensive, blaming others (*it’s not our fault*)
- Understand quality affected by external issues (but unclear exactly what), but want to hear what Wessex is doing to help
- Some recognise improvement occurred in last 10 years

### Option 1: invest in assets and cleaning processes

- Long term plan
- Guaranteed outcome
- Investing now so not leaving children/next generation with the problem
- One off cost which will remedy problem (in contrast to ongoing cost of Option 2)

### Option 2: incentivise landowners /farmers

- Preventative – appropriate to stop problem happening at source
- Will this be sufficiently effective – will Option 1 be required in the future anyway?
- Can we trust farmers to act?
- For some who think issue is less important chose this option as cheaper



More likely to think greater scope for businesses to work in partnership and take greater shared responsibility

**Difficult to come to conclusion**  
**Majority vote for Option 2, but desire for both approaches**



*“My water company is carbon neutral”*

## Consistently rated as lower priority (But still considered important)

Carbon footprint raised spontaneously as goal for long term plan:

- Be more environmentally friendly
- Invest in green energy, use solar panels
- More ‘poo’ buses
- Be more energy efficient

Often polarising, reasons for lower priority rating:

- Other goals on list more important/relevant - not core (rather than not wanted or important)
- Too ambitious
- Expected of large corporate organisations (especially non domestic)
- Is this jumping on the ‘green bandwagon’

Support for inclusion of reduction in carbon footprint also demonstrated throughout discussions and deliberations of other goals



- Place higher priority – think should be aspiration of all companies
- Some claim prepared to pay more for this

*"I trust Wessex Water to help solve wider issues in the local water environment"*

No spontaneous mention of e.g. flood prevention, private water supplies (problem not perceived by customers)

New information (not referenced in the briefing presentations): require fuller picture of the costs and benefits to evaluate this proposal

## Option 1: continue as we are

- Should continue to work in collaboration as do now
- Stick to specialism, don't over stretch
- Assume will be cheaper/not affect bills

Majority vote for Option 1

## Option 2: take greater responsibility

- Wessex Water are capable – but will it affect our bills?
- Unclear about advantages/benefits and whose idea (government?)
- Presents reputational risk:
  - Other agencies involved, complex
  - EA can decide to flood a village but can Wessex Water when villagers are its customers?
  - Will get blamed when things go wrong
- Government delighted, but would shareholders be happy?
- Will it be the end of EA?
- Would require all water companies to take on responsibilities – otherwise unfair (Wessex customers paying twice via tax and bills)





Stakeholders

**your say**  **your future**



**STAKEHOLDERS:**  
2 meetings and 8  
depth interviews

Stakeholder profile	
Wessex Water Partnership	<b>7 participants</b> <b>April 5<sup>th</sup></b>
Catchment Management Panel	<b>9+ participants</b> <b>April 12<sup>th</sup></b>
Wider stakeholder voices • Pre-task exercise • Read key sections of <i>The Way Ahead 2015-40</i>	<b>8 x 45 minute</b> <b>telephone</b> <b>interviews</b>

## Objectives

- To review relevance of the Strategic Direction Statement with stakeholders
- To identify themes and issues that stakeholders wish Wessex Water to accommodate in its planning



**Catchment Management Panel**

**Wessex Water Partnership**

## Environmental

Protecting the environment

Climate change

Flood prevention

Increasing pollution

Pressure on the countryside: housing, large building projects

Innovation in relation to sustainability

Consumers unaware of their impact

## Customer

Demographic trends: aging & growing population

Welfare reform (increasing debt)

Health trends: mental and physical

Customers becoming more demanding/saavy

Digital inclusion and exclusion

Need to influence customer behaviour

## Political/economic

Global economy

Global security

Intergenerational fairness

Impact of Brexit on legislation

Greater collaboration (with public sector)

Political 'indifference' to environment

Pressure to build more houses

## Environmental

- Joint public / private sector initiatives
- Innovation: energy and resource efficiency, grey water, SUDs
- Collaborations to improve pollution

## Customer

- Smart technology
- Engaging customers e.g. householders and businesses on environmental impacts
- Embed messages via large employers
- Canvass youth for their outlook
- Assess willingness to pay for a premium service
- Improve customer service via technology (overcome legacy issues)
- Ensure competency of staff

## Political/economic

- Supporting local (supply chain)
- Extend influence to local planning and new build laws (to improve water usage)
- Pressure to act may come from online petitions rather than government

**Depth stakeholders (i.e. those not already working with Wessex Water as part of a specialist panel) are only able to give a high level assessment of the SDS**



## **Acceptability of SDS based on different factors for different stakeholders**

- Trust Wessex to do the right thing
- Review from 'citizen' rather than specialist viewpoint: looks sensible
- See the need to balance bills with service: hope the balance is fair
- Nothing disappointing or perceived as unfair
- Consider reputational risk to Wessex Water of setting goals too high
- Wider influence around flood prevention (but not at risk of weakening core operation)





## **Some questions over emphasis or missing areas**









- Lacks emphasis on need for water efficiency and education for consumers on how to use less
- How is Wessex Water itself going to reduce, recycle, reuse?
- Can it do more to help low income customers post welfare reform e.g. pay as you go options?
- Implications of an open market e.g. will sustainability be undermined?

Panel members (i.e. those who attended the Catchment Management Panel or WW Partnership meeting) reviewed the options posed in the customer deliberative events

## Option 1

## Option 2

 *Catchment Management*  
 *WW Partnership*

	Avoid additional water treatment	Additional treatment processes
	Smart meter in every household	Gradual increase of metering
	Invest in physical assets	Combination of measures
	Widespread pipe replacement	Targeting and quicker response
	Be the best water co	Compete with best brands
	Build more assets	Combination of measures
	Introduce more cleaning processes	More prevention and collaborations
	Build more assets e.g. storm storage	Incentivise farmers to pollute less



**High degree of consistency for options from all panel member stakeholders**

- Overall the more 'innovative' and/or environmental option is favoured
- Partnership have stronger support for voluntary metering and increasing service levels
- Also strong views for 'best of both' options



*Prince*

Key account manager



*Ruth*

Environment manager

## Staff views

**your say**  **your future**





5 x STAFF  
workshops  
1½ hours  
4<sup>th</sup>-11<sup>th</sup> April

## Staff sample profile

Retail •CSU; ROC, R&M Supply	<b>Claverton Down 1 group</b>
Wholesale •Operations staff : supply and waste	<b>Yeovil 2 groups</b>
Retail •Billing services • Account Managers (W2B)	<b>Nailsea 2 groups</b>

## Objectives

- To understand the staff perspective on the Strategic Direction Statement
- To engage a broad representation of staff qualitatively before issuing an inclusive staff survey

None are aware of the SDS, but many aware of AMP cycles and some awareness of broader strategic intentions

## Several themes relating to what imagine/expect to be in a long term plan

### Competition preparation

- Moving to being a retailer vs. wholesaler
- Adapting internally: BWBSL arms length with operations
- Operations will be able to do less for customers
- Prepare for domestic competition too

*It'll be very different in future. We'll be mercenary, we won't have allegiance, we will be our customers' champion because we'll be after the customers.*

### Strategic plans to become a service brand

- To be judged against consumer facing brands, not just water companies
- Become better known/higher profile
- To remain number 1 in the industry
- Self service, Apps etc.

*We know that Colin wants to be the Amazon of transactions and the John Lewis of the service*

### Resilience of infrastructure

- Taking more innovative environmental approach
- Being more proactive than reactive in preventing problems
- Climate change adaptation
- Asset replacement
- IT improvements

*We need to start updating some of our assets: sewers, pumping stations, waterworks.*

## Staff believe that customers simply do not know that they receive a premium service

- GEM is increasing customer expectations (not necessarily making them more satisfied)
- Major sums spent on meeting the needs of users (non domestic) when supply disrupted
- Increasing 'unwanted contact' when dealing with customer side leaks etc.
- Anticipate problems if and when the market opens (business and domestic) as customers have not appreciated they pay for a premium service

*We go above and beyond , like working with communities, we don't have to do it - we do it because we are a good water company.*


*[Customers] have taken the [high levels of] service for granted and not realised the cost – because we haven't told them*


*We don't do enough about telling people what we do from an environmental point of view.*


*[About building a lay-by for 8 cars] where does it stop? Whose money are we spending?*


*We have smaller timescales than is expected of us, we give shorter timescales than we are legally obliged to do.*


# Response to the 9 goals


 **Provide excellent customer service**  
High levels of satisfaction by consistently meeting or exceeding customers' expectations; being viewed as a trusted, reliable and preferred service provider


 **Reduce leakage**  
Continue to drive leakage down and fix leaks reported by customers within 24 hours


 **Provide high quality drinking water**  
Safe, wholesome and pleasant drinking water, which complies with mandatory standards and supports well-being of our customers and communities


 **Help customers save money & water**  
Affordable bills for our customers; and wiser and more efficient use of water and sewage services

 **Help safe-guard quality of bathing waters**  
Contributing to bathing water quality being in good or excellent condition

 **Improve reliability of the water supply**  
Assets and working practises that continue to deliver high quality reliable services, even in the face of unusual events

 **Prevent sewage flooding**  
The risk of sewage flooding kept to a minimum, benefitting the well-being of our customers, communities and environment

 **Protect rivers, and lakes**  
Watercourses in good ecological and chemical condition, with abstraction, effluent and land runoff fit to be sustainably accommodated by the environment

 **Reduce our carbon footprint**  
Achieving carbon neutrality in our combined activities and generating our own renewable energy

- Nine goals largely seen to reflect what WW does already: not challenging at first glance
- But reluctant to agree to higher targets... equates to more pressures for staff
- All important, central to what Wessex Water does, some obligatory
- Generic: no different to other water companies
- Some re-group as:
  - **Core:** customer service, leakage, sewage flooding, quality water and resilience
  - **Environment and shared responsibility:** bathing water, rivers, carbon footprint
  - **Innovative:** saving money and water

## Missing goals?

- no mention of staff/investing in people
- investment in technology/innovation
- a more ambitious/prominent green commitment

## Meeting customer needs?

- Staff perceive goals will meet customers needs (see customers as having basic expectations: clean water, low bills and no leaks...)



## Provide excellent customer service

- High service (SIM) is a reason to feel proud
- HOWEVER: risk of service deterioration in a competitive world
- WW chose to offer and charge for a premium service, but customers do not know they get this... and may choose a cheaper option



## Prevent sewage flooding

- Important ambition but staff see it not entirely in WW control
- *Lowest in UK* admirable: but know WW can not eliminate the risk entirely
- Customer behaviour key (education strategy)
- Hard to factor the impact of climate change (is goal too ambitious?)



## Reduce leakage

- 'Practical minimum' odd language...or '*a cop out?*'
- Customer service staff embrace the goal... (knowing how this matters to customers)
- Operations think impossible to achieve: many impediments to fixing within a day
- More calls for compensation payments



## Provide high quality drinking water

- Acknowledge that while goal does not look ambitious, in reality it is ambitious
- See as already achieved '*we do this now*'
- Need for customer education about cloudy water
- Provenance of water: *People want to know where food comes from...they should know where water comes from too*



Improve  
reliability of the  
water supply

- Goal relating to hosepipe bans sounds 'old hat'; '1970s' – prefer 'no restrictions'
- *But also see as very ambitious for a 25 year plan*
- Reliability also about pipe work, leak management



Help  
safe-guard  
quality of  
bathing waters

- Difficult to make promises about aspects can't fully control '*we get bad press when it's from farms*'; also reference SWW, Welsh and Thames bordering region
- Some call for WW to be better at communicating '*We're doing our bit*': and about working with stakeholders
- Customer service staff have no reference points for this goal



Protect  
rivers, and  
lakes

- Many feel distant from this area of business
- Want to be 'leading' in this area – but not a tangible goal
- Operations see complexity of issue: water management in dry periods etc.
- Some see as a good public message to promote



Help  
customers  
save money &  
water

- Already supporting lowest incomes
- Need to communicate value for money and how to save water
- Widespread support for compulsory metering and/or education
- Industry seen as behind re Smart meters
- Encouraging customers to take social responsibility for water use more effective?



**Staff do give their support the SDS, but they are not emphatic...they understand the complexity that lies behind the goals**



**Most staff tend to be quite conservative in terms of how ambitious the goals should be:**

- Too ambitious could lead to more stressful working practices
- Service promises/SLAs could be used against them

**Not sure how achievable some goals are**

- Particularly relevant where Wessex Water are not in control of the outcome

**Nothing here for staff to really get behind or feel proud about**

- Plan feels generic, standard, like other water company plans would be

**Reoccurring theme relates to customer education:**

- They want Wessex Water to tell customers that they get a high quality service

*Customer service is bang on. The others are good but not sure how achievable they are as there are a lot of implications involved*

*Hard for customers to judge value for money if don't know what paying. We need to create a greater awareness of what they are getting*














## Summary and conclusions

**your say**  **your future**



# SDS evaluation in a page

Sample	Overall acceptance of SDS	Any contentious aspects	Desire for greater emphasis
	✓	 <ul style="list-style-type: none"> <li>• Strong rejection of compulsory metering</li> <li>• Reject taking a bigger role (but lack info)</li> <li>• Best in class, not best in the land</li> </ul> 	<ul style="list-style-type: none"> <li>• Communications generally</li> <li>• Water saving information and initiatives over and above metering</li> <li>• Water saving innovation</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Leaks are less contentious for younger people</li> </ul>	<ul style="list-style-type: none"> <li>• Higher expectations for online services, Apps etc.</li> <li>• Reduction of carbon footprint and green credentials</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Larger businesses aware of impending competition: what are the plans?</li> </ul>	<ul style="list-style-type: none"> <li>• Looking for high service levels (online, accurate bills etc.) – but not at a premium price</li> <li>• More on smart metering, monitoring, leak prevention/alerts on their premises</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Strong support for compulsory metering</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage water efficiency behaviours in customers</li> <li>• Other areas reflect organisational agendas</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Same day leak commitments impossible to achieve</li> </ul>	<ul style="list-style-type: none"> <li>• Inform customers that Wessex offers a premium service (manage customer expectations, create sense of value)</li> <li>• Encourage responsible behaviours in customers</li> </ul>

Although cost of living not dominating in 2016, post recessionary cost consciousness is the 'new normal'

## Implications for the SDS/business plan

- Customers support ‘innovative’ approaches to achieve the goals, but when provided with more information and deliberated they want this in combination with ‘traditional’ approaches
- Recommend separating cost efficiency and water efficiency (and give greater emphasis to water saving initiatives)
- Re-think ‘taking a bigger role’ to include specific collaborations and influencing others

### Balance benefits of innovation...

- ✓ Preventative      ✓ Environment
- ✓ Collaborative    ✓ Cost effective

... with the certainty of the ‘traditional’

### Language to reconsider:

- ✗ Hosepipe ban (taken literally – rarely applies)
- ✗ Bathing waters (bath water?)
- ✗ Practical minimum (not understood)

## Implications for communications

- *Customer communications*: inform on water efficiency, how to save money, ‘love your loo’, responsible citizenship
- *‘Brand communications’*: building greater trust and develop a positioning (e.g. premium service, environmental leader, community)
- *Internal communications*: address staff anxiety about managing customer expectations



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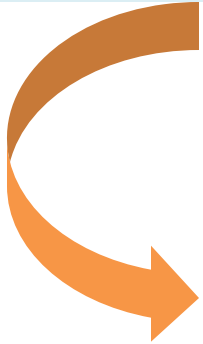
# PR19 Foundation Stage: revisiting the SDS

Final report: 2<sup>nd</sup> August 2016



**your say**  **your future**

- The water industry has truly begun to put customers at the heart of its business planning process. Many lessons were learned about engaging with customers during the PR14 cycle, not least that canvassing views from customers and stakeholders should be an ongoing conversation and not just limited to the various regulatory staging posts.
- Wessex Water is designing the various components of its customer engagement activity to encompass both continuous and ad hoc elements.



## **Overall objective: to canvas the views of domestic and non-domestic customers, staff and stakeholders at the outset of business planning cycle**

- To take a temperature check of both economic confidence and current expectations of service providers
- To check and challenge Wessex Water's long term vision, as set out in its strategic direction statement, *The Way Ahead 2015-40*

# Samples, data sources and audience profiles





## **Domestic customers: 3 x Community deliberative events**

3 hour events with cross section of customers by age, gender and SEG. Wessex Water staff present

- Bath, 28 customers
- Poole, 28 customers
- Taunton, 26 customers



## **Customers of tomorrow: 4 x 1½ hour group discussions**

In Bridgewater and Chippenham with customers aged 20-29 years who are not currently paying water bills. (Range of educational qualifications and ages).



## **Non Domestic customers: 4 x 2 hour group discussions and 10 depth interviews**

Including a range of: sectors (private & public sector); business size; nature and level of water usage.



**Stakeholders:** meetings with Wessex Water Partnership and Catchment Management Panel and 8 x 45 minute telephone depths



**Staff workshops:** 5 group discussions with range of staff in Claverton Down, Nailsea and Yeovil

**Fieldwork: 21<sup>st</sup> March to 28<sup>th</sup> April 2016**

In total: 5,691 completed surveys



## SDS Survey 2016 (and 2012)

- Representative sample
- Uninformed
- 600 telephone interviews



## Snapshot survey: postal

- Self-selecting
- Uninformed
- 1,350 responses (almost all household customers)



## Wessex Water Tracking Survey Q1 April-June 2016

- Representative sample
- Uninformed
- 250 telephone interviews



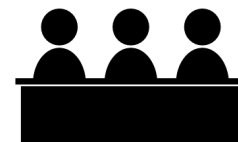
## Snapshot survey: online

- Self-selecting
- Uninformed
- 1,092 responses (almost all household customers)



## Staff survey

- Informed
- 737 online interviews



## Wessex Water Online Panel

- Panellists
- Informed
- Online methodology
- **May:** 894 fully completed
- **July:** 768 fully completed

Fieldwork dates:

**Customer:** w/c 23<sup>rd</sup> May – w/c 27<sup>th</sup> June

**Staff:** W/c 27<sup>th</sup> June – w/c 11<sup>th</sup> July



- New industry good practice developed post PR14 promotes ongoing research and consultation via different methods to capture the widest range of views and embed engagement as BAU (i.e. not a regulatory tick box exercise)
- In doing so, Wessex Water can draw an analysis from several data sources drawn together to corroborate evidence (triangulation)
- Inevitably, some differences appear between data sources which are usually explained by: level of engagement (e.g. the panellists are more engaged), survey context (e.g. magazine readers) or methodology/question structure
- Some sources should be considered as more robust/representative than others (see hierarchy)



	SDS	Tracker	Postal	Online	Panel	Staff
<b>Representative</b>	✓✓	✓				
<b>Uninformed</b>	✓	✓				
<b>Immediate touch point</b>			✓	✓		
<b>Informed</b>					✓	✓
<b>Self-selecting</b>			✓	✓	✓	✓

Hierarchy

**Representative**

**Uninformed**

**Immediate touch point**

**Informed**

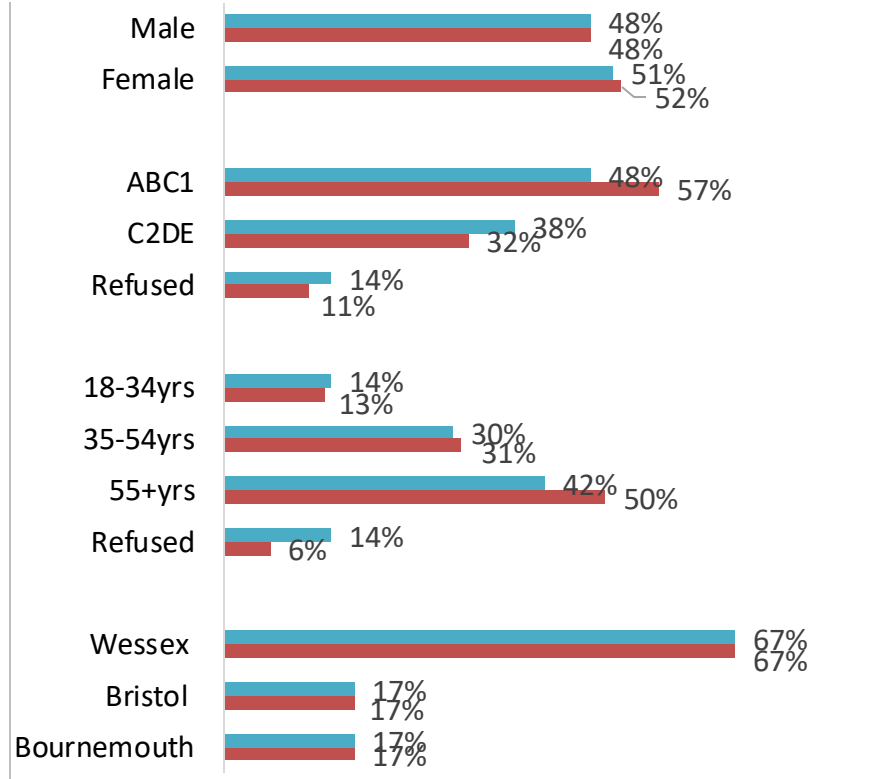
**Self-selecting**

# SDS and Tracker profiles



## SDS sample profile

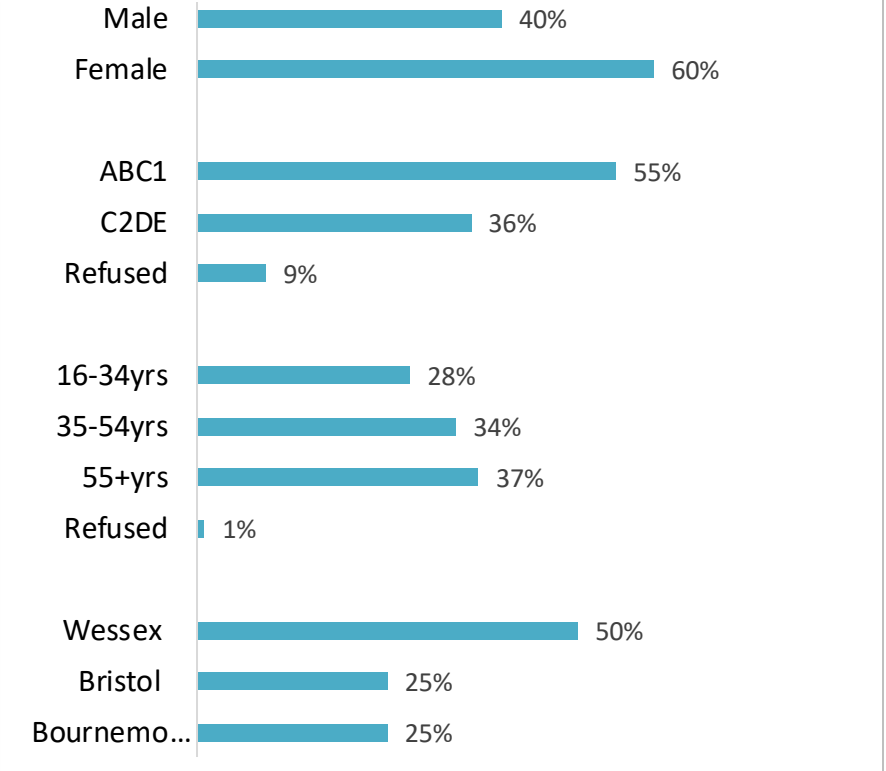
2016 (600) 2012 (600)



*N.B. New age and SEG quotas with weighting applied to reflect 2011 census data and CCWater's evidence about age of bill payers. But profiles broadly comparable.*

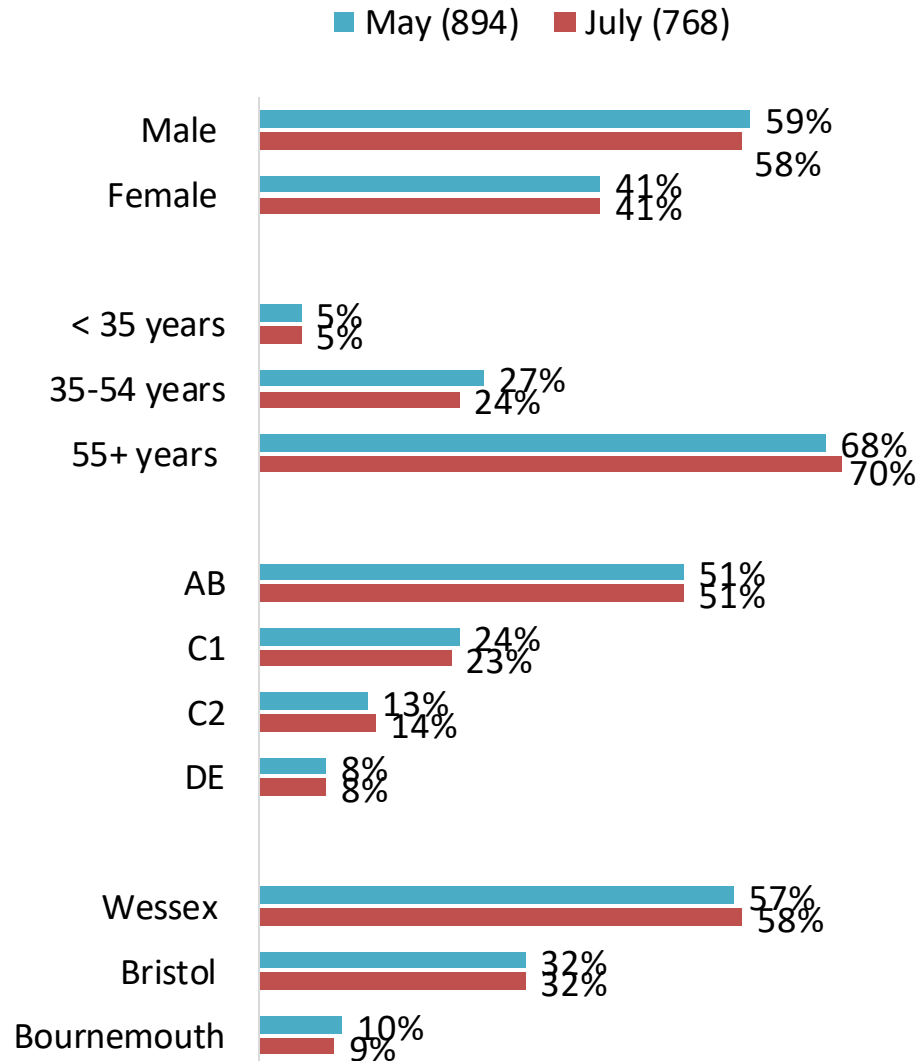
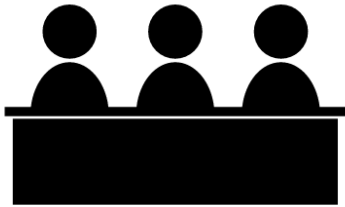


## Tracker profile



*N.B. Quotas and weighting retained over time to ensure comparability with previous years. However, caution when making comparisons with SDS survey due to different sample profile (more women, younger and more Bristol and Bournemouth customers)*

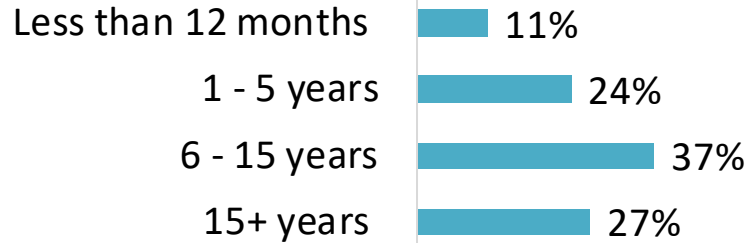
- The self-selecting Panel surveys are skewed towards men, older customers (over two-thirds are 55+ years) and the higher socio-economic grades (half are AB SEG).



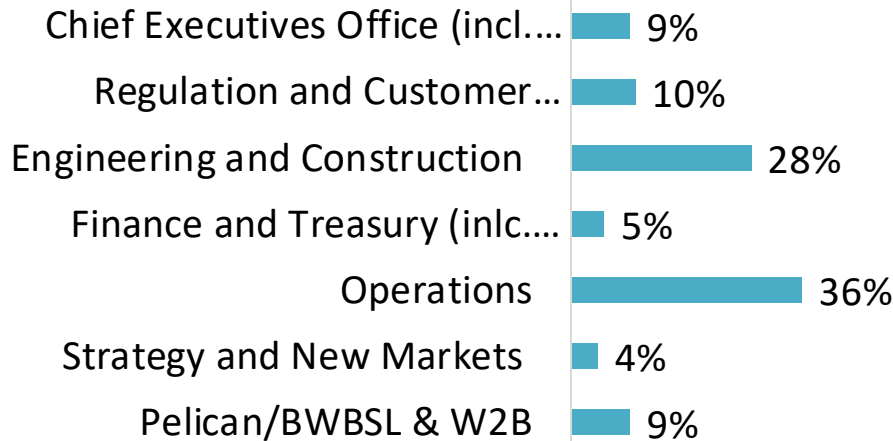


## Staff profile

### Length worked for Wessex Water



### Directorate



### Wessex Water customer





Temperature Check  
Mood of the moment

**your say**  **your future**

Steel crisis: UK willing to take 25% stake in rescue deal

The economy and Brexit – a tangled tale

Donald Trump 'would drop the atom bomb'

Reality Check: Would Brexit be good for the UK economy?

US election 2016: Donald Trump sweeps five US states

European Parliament: Counter-terrorism

House prices rise in UK's big cities, says Hometrack

The UK economy grew by 0.4% on the first quarter of the year

Hinkley Point: French government 'completely committed' to plant

Big 6 energy companies drop their gas prices

## In 2012 recession set tone of customer mind-set: this is no longer the case

- Personal circumstances rather than macro issues, driving customer mind-set
- Emphasis can vary according to life stage and socio-demographic status



### Feeling positive/optimistic about:

**Family & friends:** weddings, social life, children all happy, becoming a grandparent

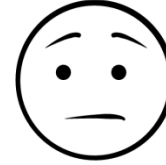
**Health & wellbeing:** happy, I'm healthy, family healthy, new house, good social life, feeling contented, getting married

**Work life & finances:** promotion, new job, enjoy job, not worrying about bills

**Leisure time:** holidays, travelling, Euro 2016, gardening, walking

**Where I live:** beautiful area, good community

**Time of year:** summer coming, Easter coming, sunshine



### Feeling negative/worried about:

**Health & wellbeing:** personal & family health, lack of time, work/life balance, growing old

**Personal finances:** bills, mortgage costs, debt, planning for retirement

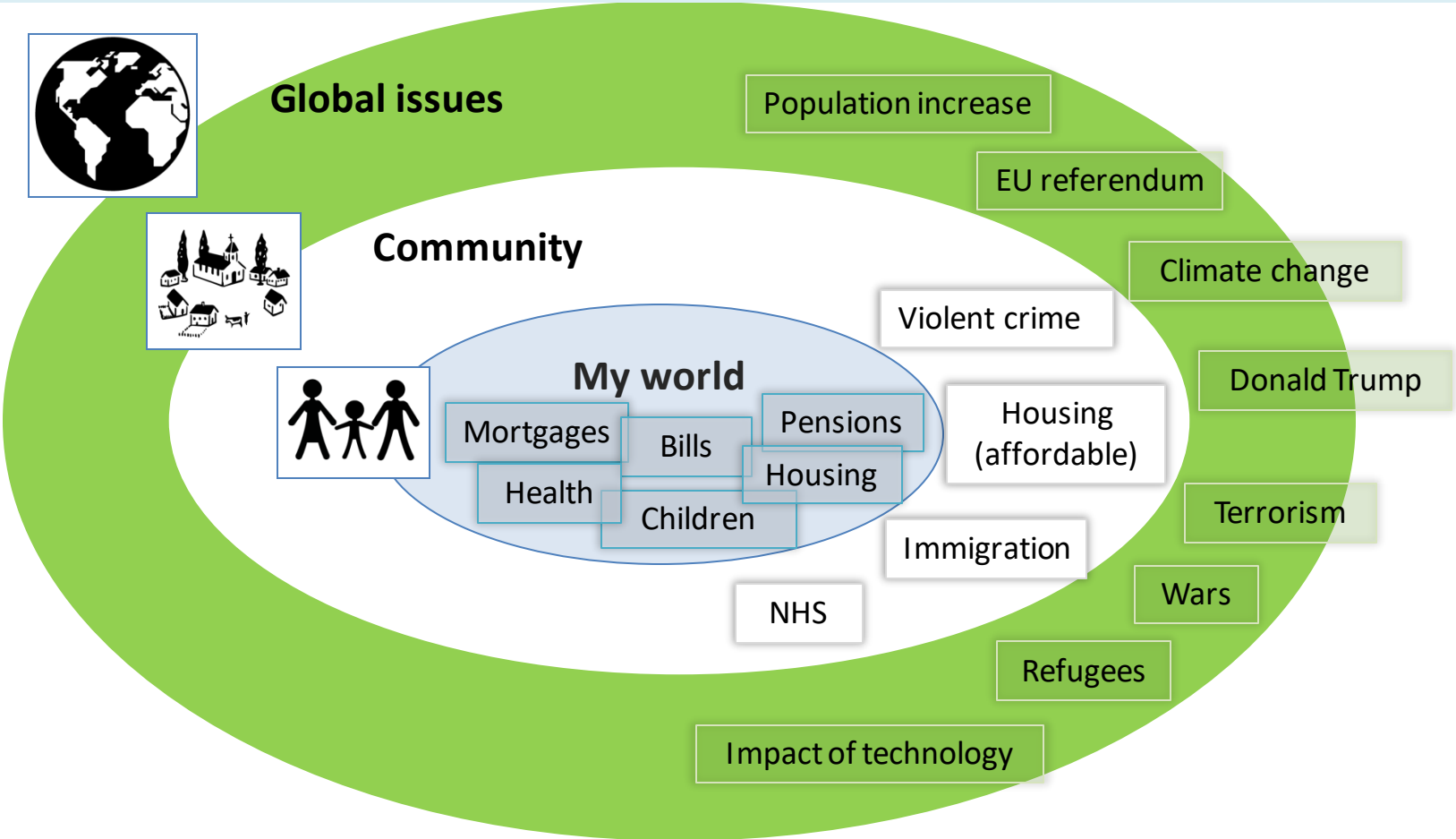
**Work life:** redundancy, job insecurity, self-employment, work-life balance, lack of time

**EU:** uncertainty re. referendum (but unwilling to discuss further)

**State of the World:** Trump, terrorist threats, Syria, refugees

## Worries in 2016 more focussed on global issues than community or 'my world' issues

• By contrast, in 2012 customers saw a direct connection between global economic situation and their world



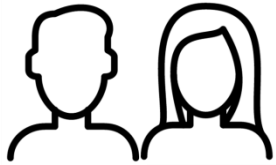
Younger customers more likely to worry about 'my world' issues, especially housing and cost of living. Older generation worries are more outward-looking/global.





Top 6 headlines in 2007	Perspective in 2012 (compared to 2007)	Perspective in 2016 (compared to 2012)
<b>Immigration</b>	Lower profile	<b>Higher prominence: EU referendum and global conflict</b>
<b>Economic downturn</b>	NUMBER 1 ISSUE IN 2012	<b>Less prominent: personal circumstances</b>
<b>Social Issues (ASBOs, nanny state, workshy)</b>	Mentioned but overshadowed by economic issues	<b>Focus on: NHS and difficulty getting on housing ladder</b>
<b>Crime</b>	Not a major issue	<b>Not a major issue</b>
<b>Corporate dominance</b>	Emphasis on banking industry: greed & corruption	<b>Less prominent issue, but underlying cynicism</b>
<b>Environment</b>	More immediate relevance: resource scarcity linked to household costs	<b>More focus on climate change</b>
		<b>Global uncertainty: terrorism, war, US elections</b>

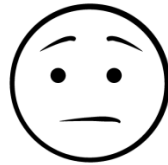
## Personal issues dominate



- ✓ Family / friends / relationships
- ✓ Work
- ✓ Good health
- ✓ Personal achievements



- ✗ Finances / lack of money /cost of living
- ✗ Employment prospects
- ✗ Lack of affordable housing
- ✗ **Life feels harder than for previous generations, esp. employment, housing**



*If you've got a degree then you've got to have the skills and to get the skills you got to have the job and to get the job you've got to have the skills. Half the time we can't get the skills because we can't get that job opportunity.*  
Customer of tomorrow, 26-30 years, Chippenham

## Wider issues reflect customer sample

- Social: economic inequality, population growth and immigration
- Environmental issues, including flooding (Chippenham)
- Political issues: EU membership
- Global: terrorism threat
- **Added to which, there is an underlying feeling of cynicism about life, which impacts on customer perceptions and attitudes**

*I feel like I'm **finally** getting somewhere with my career.*  
Customer of tomorrow, 26-30  
Bridgewater

*I can't think of anything positive about my life!* Customer of tomorrow, 26-30, Chippenham

## Lots of reasons to feel uncertain



- ✓ New contracts/  
growing demand
- ✓ Economy improving
- ✓ Low interest rates
- ✓ Good colleagues



- ✗ Economy & rising costs
- ✗ Keeping up with customers expectations (more for less)
- ✗ Uncertainties: new management, new policies, job insecurity, merging sites
- ✗ **EU creating uncertainty**
- ✗ Public sector insecurity
- ✗ Climate change / environmental impacts and opportunities
- ✗ Social issues impacting business/policy decisions e.g. growing /aging population

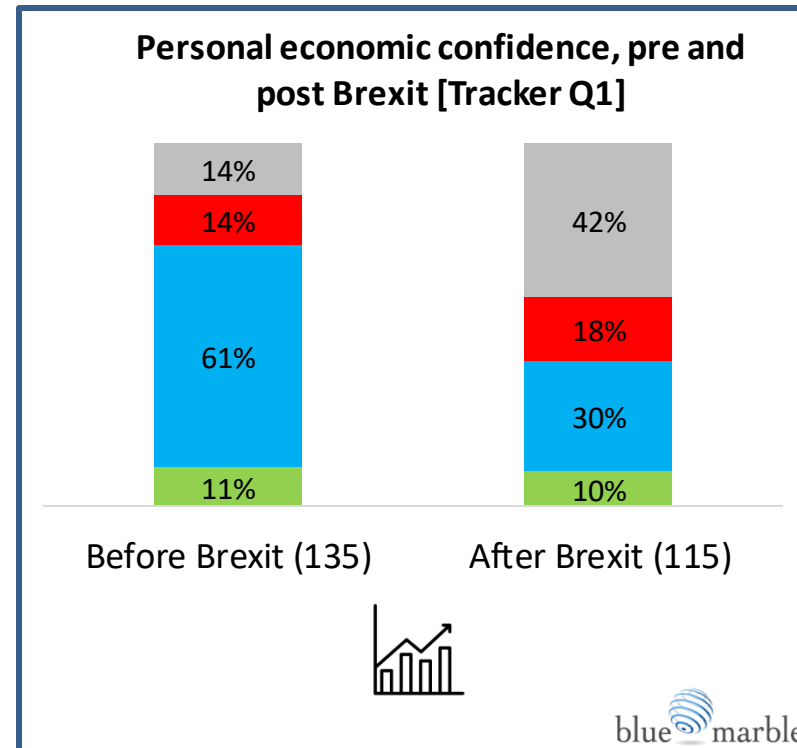
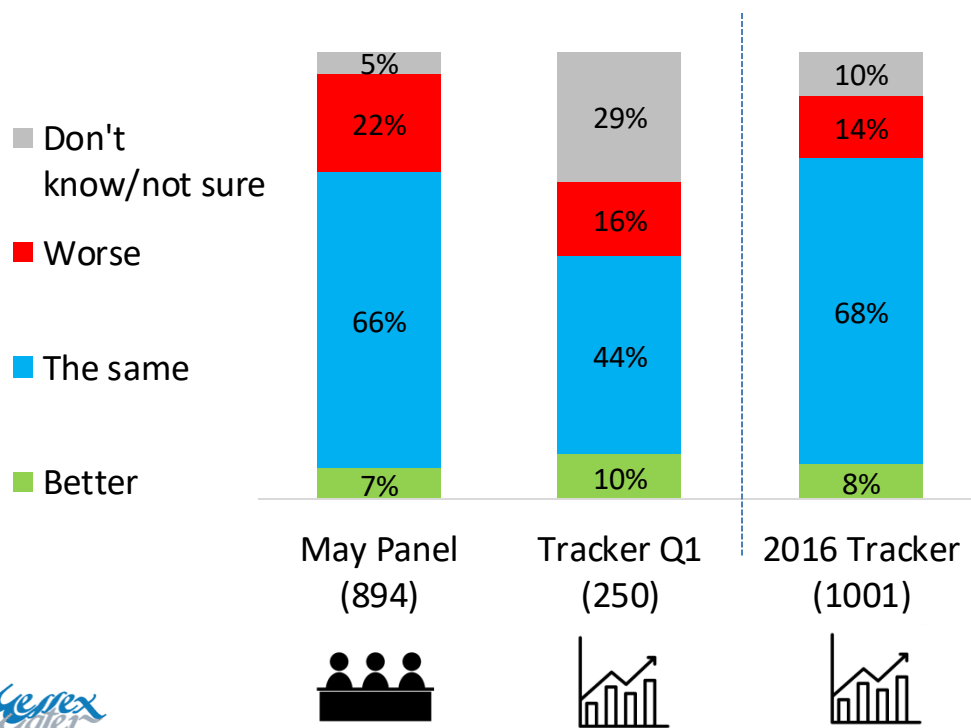
*It's much more short term and it's short term because we have to be much more reactive to the pressures of economics which can change so quickly in what is increasingly a globalised marketplace.*

*There is lots of uncertainty and so I feel I can't control what will happen over the next 10 years.*

- Non-domestic customers more negative/concerned than domestic sample
- Compared to 2012, costs remain a concern: post recession cost sensitivity is the new normal
- **NB: Small businesses feel unfairly penalised by new legislation:** e.g. minimum wage, recycling, pensions, maternity

- The May Panel, in line with the 2016 Tracker, are feeling fairly certain about their household finances
- However Panellists are more likely to expect to be worse off in the next year (22%). Panellists in the middle age bands (30% of 35-54 year olds) and in lower socio-economic grades (34% of DEs) are more likely to be pessimistic about their personal finances.
- However, the Q1 Tracker survey shows an increase in uncertainty (29%) - this reflects the qualitative findings where the impending EU referendum was causing uncertainty. In addition more of these customers are feeling negative (16%) than positive (10%).
- Much higher uncertainty amongst customers interviewed after June 23<sup>rd</sup> (referendum day)

**Q. Thinking about the current economic climate, do you expect your household to be better off, worse off or about the same in the next 12 months? (Base: all)**



- The majority of customers (82%) do not think about their water bill and 89% do not worry about being able to afford their water bill. There has been no significant changes in the proportion of customers who worry about affordability over this AMP.
- Around one in ten (12%) worry about being able to afford their water bill and 7% say they already can't afford their water bill (scoring 6-10). Those aged under 34 (12%) and females (12%) are most likely to say they can't afford their bill.

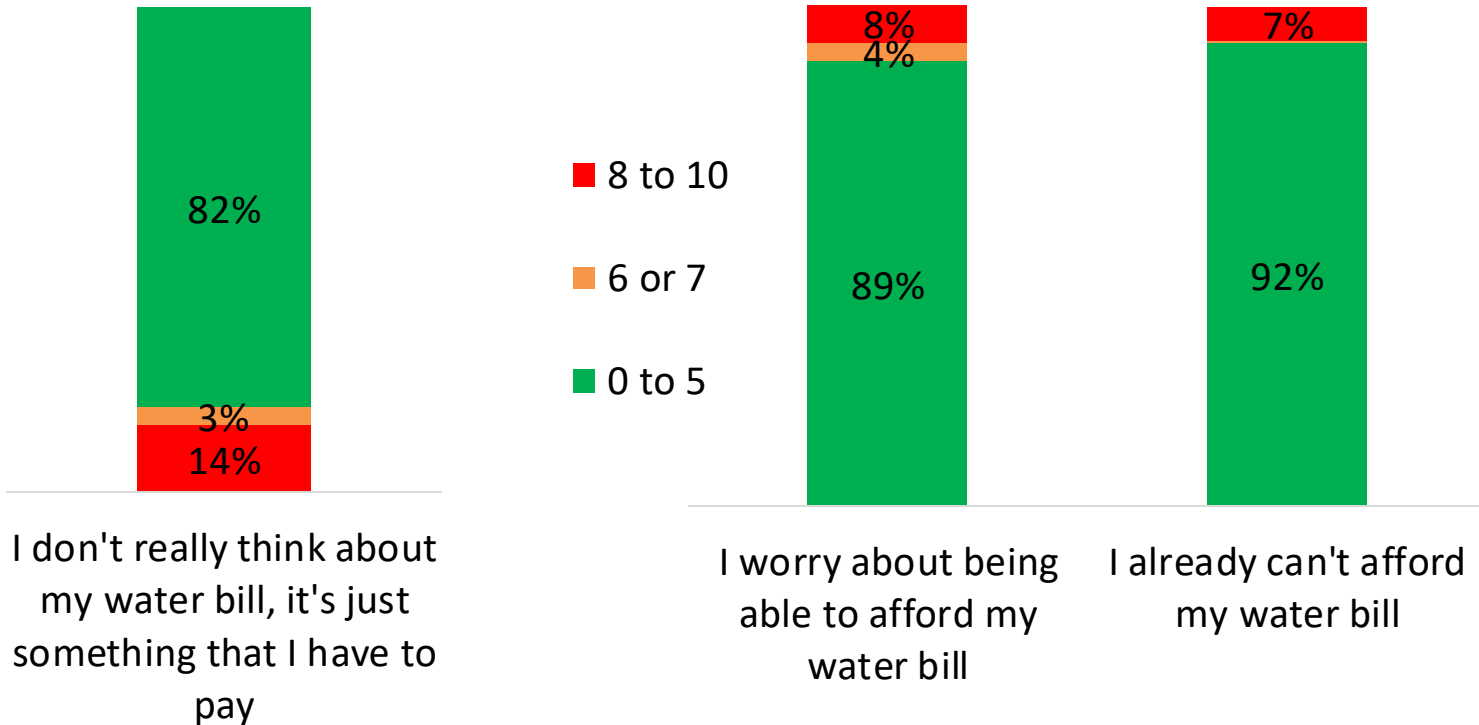


**To what extent do you agree or disagree with the following statements?  
(1 = strongly disagree, 10 = strongly agree)**

Base: all

- 8 to 10
- 6 or 7
- 0 to 5

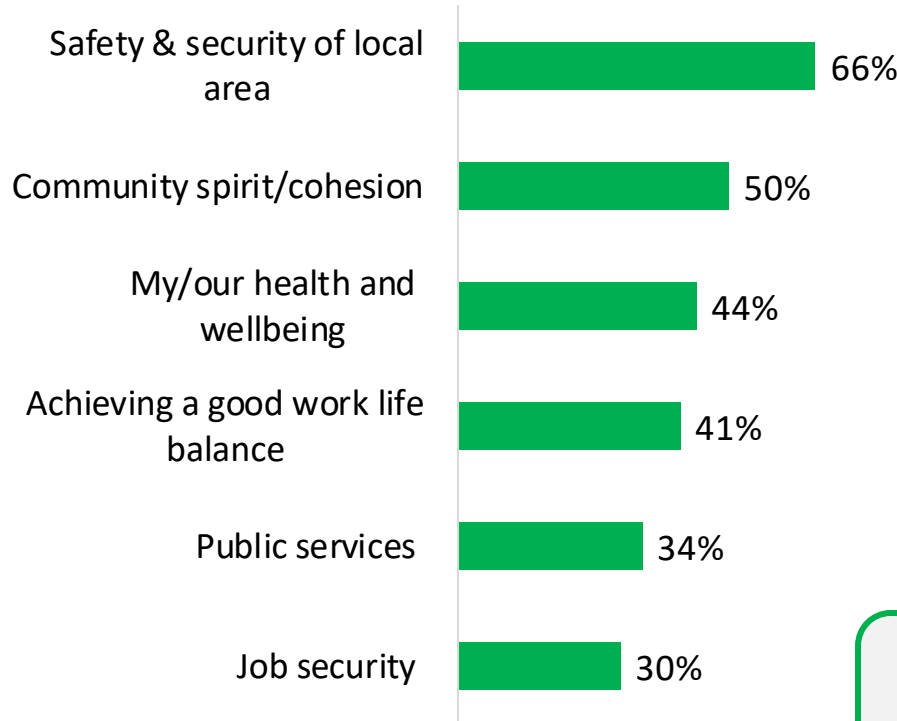
- 8 to 10
- 6 or 7
- 0 to 5



- The issues which Panel members are feeling most positive and optimistic about are more personal/local: themselves or their household (e.g. health and wellbeing, work/life balance) and their community (e.g. safety and security and community cohesion).
- This reflects the findings from the qualitative research, particularly for the older and more affluent customers (which the Panel members are more likely to be).



## Most optimistic (Base: 894)



Excellent local schools

Very content with where we live.

I love being retired!

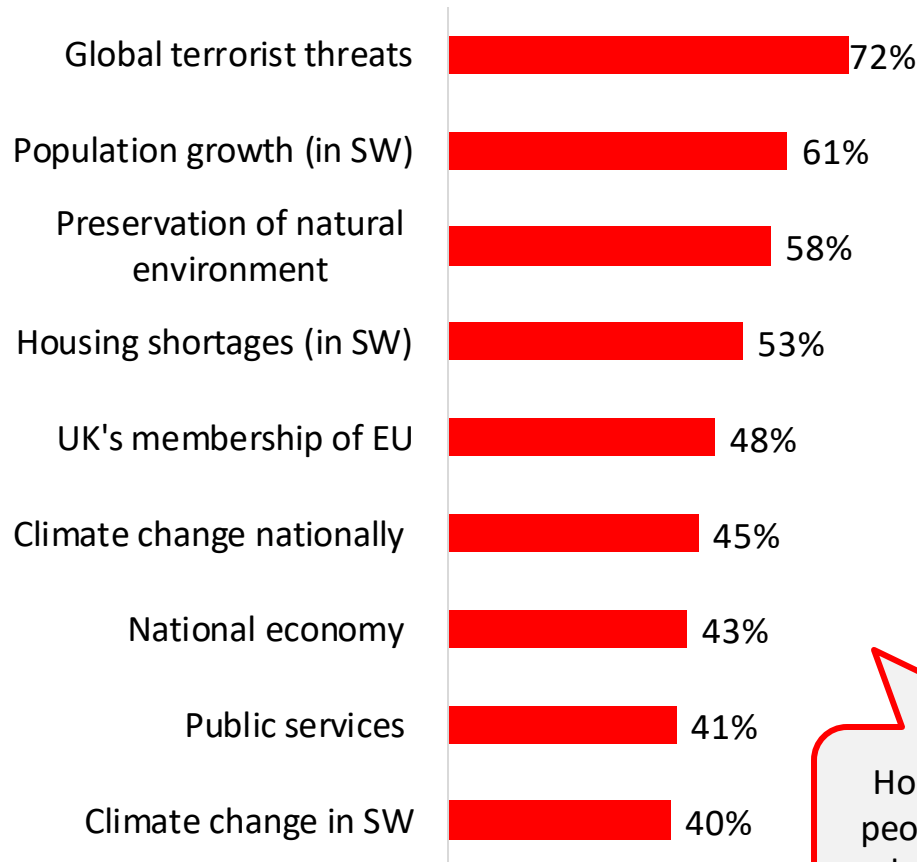
Work being done to improve the local Dorset environment.

Community cohesion on a regional and national scale

- By contrast, Panel members are more pessimistic about macro/global issues (e.g. terrorism, EU membership, climate change) and national/regional issues (e.g. population growth) .



## Most pessimistic (Base: 894)



EU and influx of other countries citizens on our infrastructure

I feel negative about the NHS - I worry that it's being dismantled and that's a terrible legacy for our children. I also feel pessimistic about this government's policies on education.

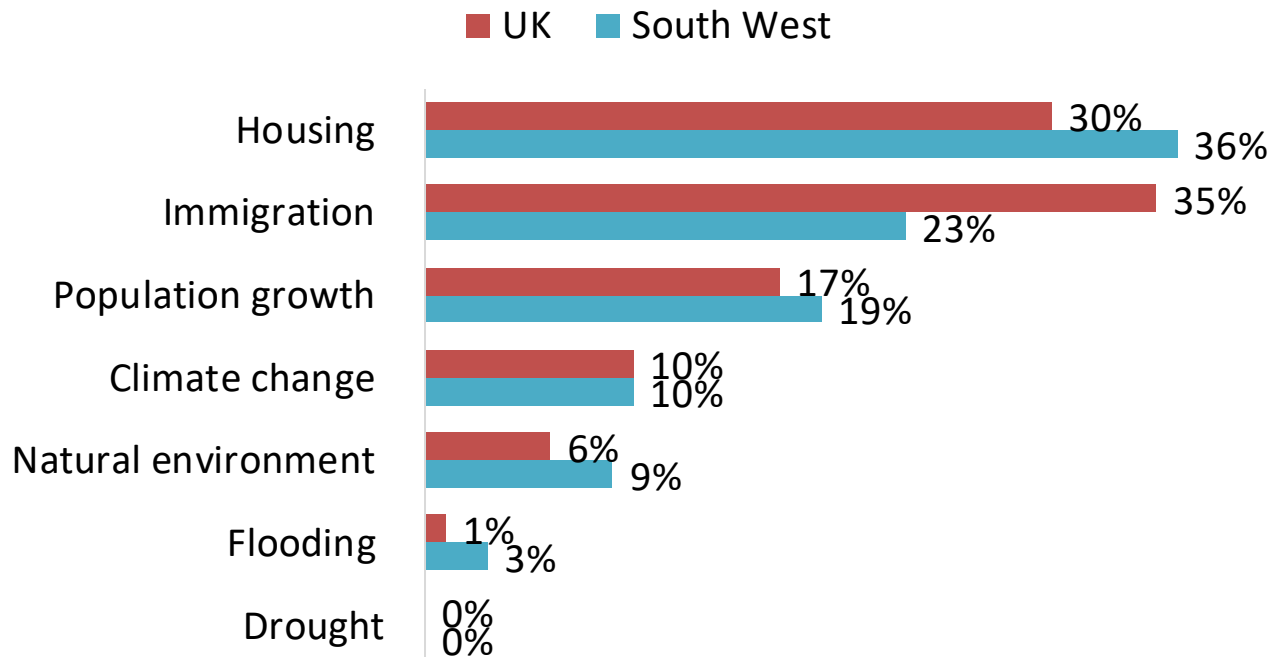
Inability of governments, companies and individuals to look at a long term view.

Housing prices for younger people - not much future for lower paid young people

- The issues which Panel members think will be most significant in the next 10-15 years are: housing, immigration and population growth.
- Panel members are *more* likely to think housing will be a significant issue for the South West than nationally
- They are *less* likely to think immigration will be an issue for the South West than nationally.
- One in ten Panel members think climate change will be the most significant future issue (both regionally and nationally.).



**% Most significant issue for next 10-15 years**  
(Base: 894)







**Admired brands:**  
applying learning  
to utility sectors

**your say**  **your future**



Waitrose



Sainsbury's



The co-operative

YOUR M&S



Google

dyson



Thompsons Holidays



Clarks



**CONSISTENCY & SERVICE**

- ✓ Exceeding expectations
- ✓ Product quality & confidence
- ✓ Guarantees
- ✓ Response to problems

**RESPONSIBILITY & CORPORATE ETHICS**

- ✓ To staff
- ✓ To community
- ✓ To the environment
- ✓ To suppliers (fairtrade)

Increasingly important

**VALUE**

- ✓ Incentives, offers
- ✓ Low/competitive prices
- ✓ Reward loyalty

Less prominent than 2012

**TRANSPARENCY**

- ✓ Honest rates & deals
- ✓ Ownership & supply chain
- ✓ Tax issues

Increasingly important

**CHALLENGER/SPECIALISM**

- ✓ Product passion
- ✓ Expertise, knowledge
- ✓ Taking a stance, being brave
- ✓ Challenging the competition

**IDENTITY/PERSONALITY**

- ✓ Established/heritage
- ✓ A face/figurehead
- ✓ Britishness/local

Customer focussed rather than money focussed. Younger Poole

Not just about profit, it's more about the greater good. Older, Poole

Admired brands need to be at least one of the above (most position their brands single-mindedly around one of these dimensions)

Greatest admiration is reserved for smaller, local and independent companies/suppliers.



- Good customer service
  - Reliable, no quibbles, resolves problems quickly, trained staff, online access, UK call centre
  - Experts in their field – knowledgeable, understand my business
- Personal relationship and easy to deal with
  - Less corporate and more personal relationship – an account manager or one point of call
- Fair pricing
  - Clear and concise billing
- Quality products – built to last, kite marks



JOHN DEERE



Compared to domestic customers, when things go wrong there's greater urgency to get an immediate and effective resolution



## Building trust:

- Requires a customer to feel they have a *relationship* with the brand / company
- Need to feel like a *valued* customer
- Often built through direct (personal) contact and being *treated with empathy*
- Trust often built *via a person* (i.e. employees) not company as a whole
- Requires customer to believe the company/staff are *experts*



- **Customers of Tomorrow** less able to give examples of trusted brands
- Part of general cynicism re corporations
- Behaviour is to 'date' brands, not seek long term relationships

**Although very rarely mentioned as admired or trusted (OVO is the exception) strong negativity towards utilities seen in 2012 has weakened and is less vociferous**

- utility prices not as big a news story in 2016; and less domination of 'big 6'
- other sectors in the spotlight for poor practices (Amazon, Starbucks, Co-op)
- (we have considered the 'observer effect' of Wessex personnel present at the deliberative events but think other factors having a much more significant effect on attitudes)

## CONSISTENCY & SERVICE

- Improvements not about quality of product (*it's all the same*), but **quality of service**: UK call centres; real person not IVR; attitude of staff; speed of getting through

## VALUE

- **Fair pricing**, bills should go down as quickly as they go up, pass savings onto customers
- Incentives for loyal customers, deals, reward for using less

## TRANSPARENCY

- Easier to **make comparisons and shop around**
- Clearer bills

## CORPORATE ETHICS

- Improve **honesty & transparency of bills**: return overpayments from estimated bills quickly or pay customer interest (OVO as good example)

## CHALLENGER/SPECIALISM

- Not explicit customer priority for utilities (but many 'admired brands' have this dimension)

## IDENTITY/PERSONALITY

- Few utilities have strong brand identity ("*They are all as bad as each other*") hence not explicit customer priority

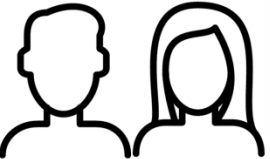


*The worst thing they (Wessex Water) could be is just another energy company. Middle age group, Bath*

### Starting point for most customers:

- High levels of satisfaction with the product
  - Low levels of contact with Wessex Water
- ↓
- Has better reputation than electricity and gas companies
  - Good customer experience examples e.g.
    - Proactive contact to alert customer of increased use and potential leak - resulted in £350 refund
    - Good experience surrounding supply interruptions and associated communications

But some question why Wessex Water care about customer opinion in the monopoly context



- **Customers of Tomorrow** have no perceptions of Wessex Water (positive or negative)
- Lack of knowledge and understanding
  - Unsure of relative cost to other utilities
- (Engagement waned as discussion focused on WW's specific goals)

*It's included in my rent so it's something I don't have to think about.*  
Customer of tomorrow, 26-30 years, Chippenham

Water companies (and Wessex specifically) perceived more positively than other utilities.



- Unlike other utilities, seen as less ruthless, mercenary: instead more about working with customers
- Better service, react more quickly to problems and will come out and resolve them
- For water critical businesses Wessex Water more visible vs. other utility companies who you never see (e.g. account managers, or meter readers)
- Larger businesses (account managed) have particularly good relationship with Wessex Water, valuing a single point of contact / consistency of personnel for many years



*I'd sooner have somebody there that's accountable for whatever your problem...  
make somebody accountable for it.  
SME*

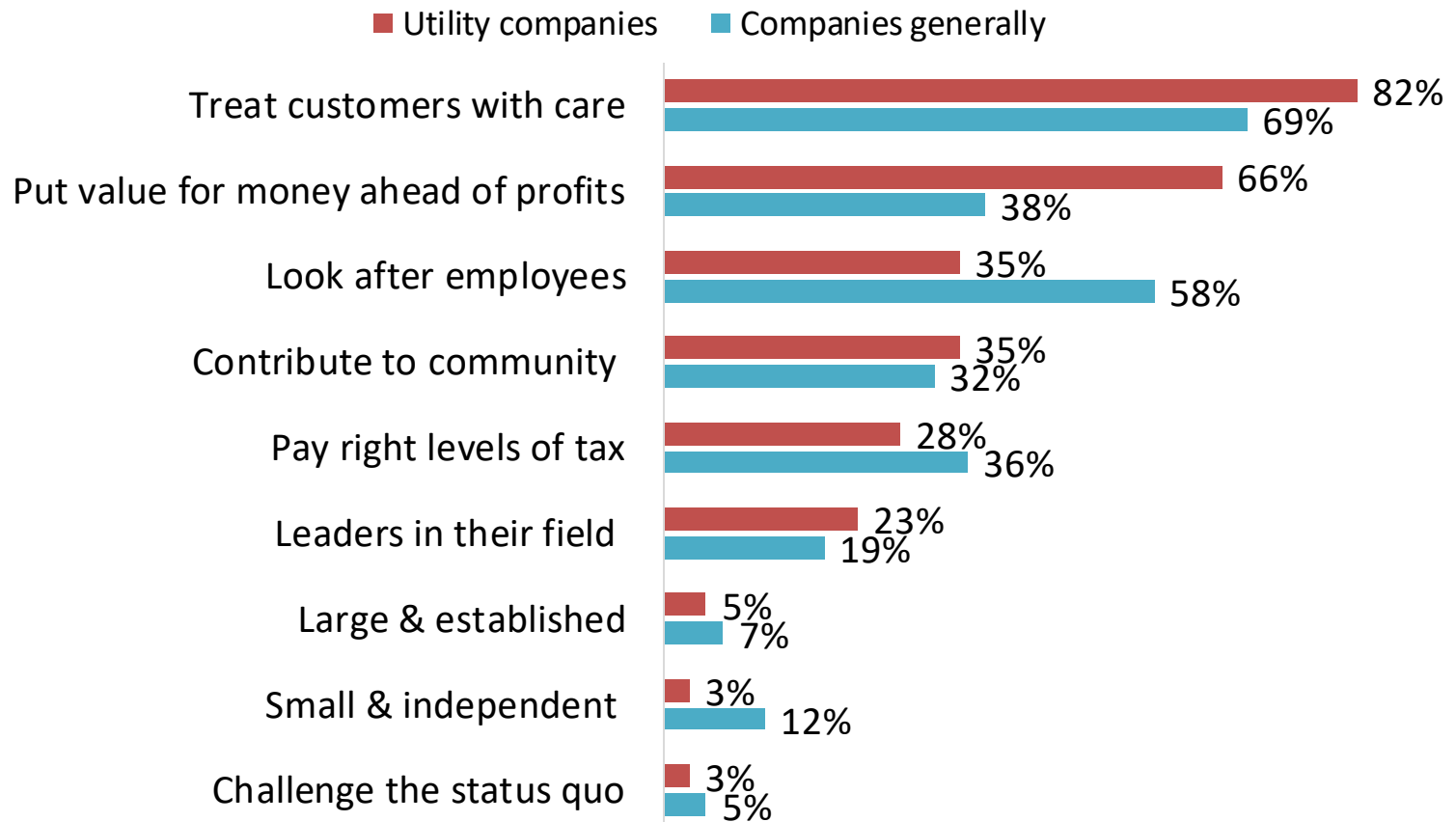
Businesses want to be treated as businesses i.e. for some, personal account management while for others (smaller/SMEs) this is about a dedicated service (contact centre etc.)



- When thinking specifically about utility companies, *treating customers with care and putting value for money ahead of profits* are seen as more important than for companies generally.



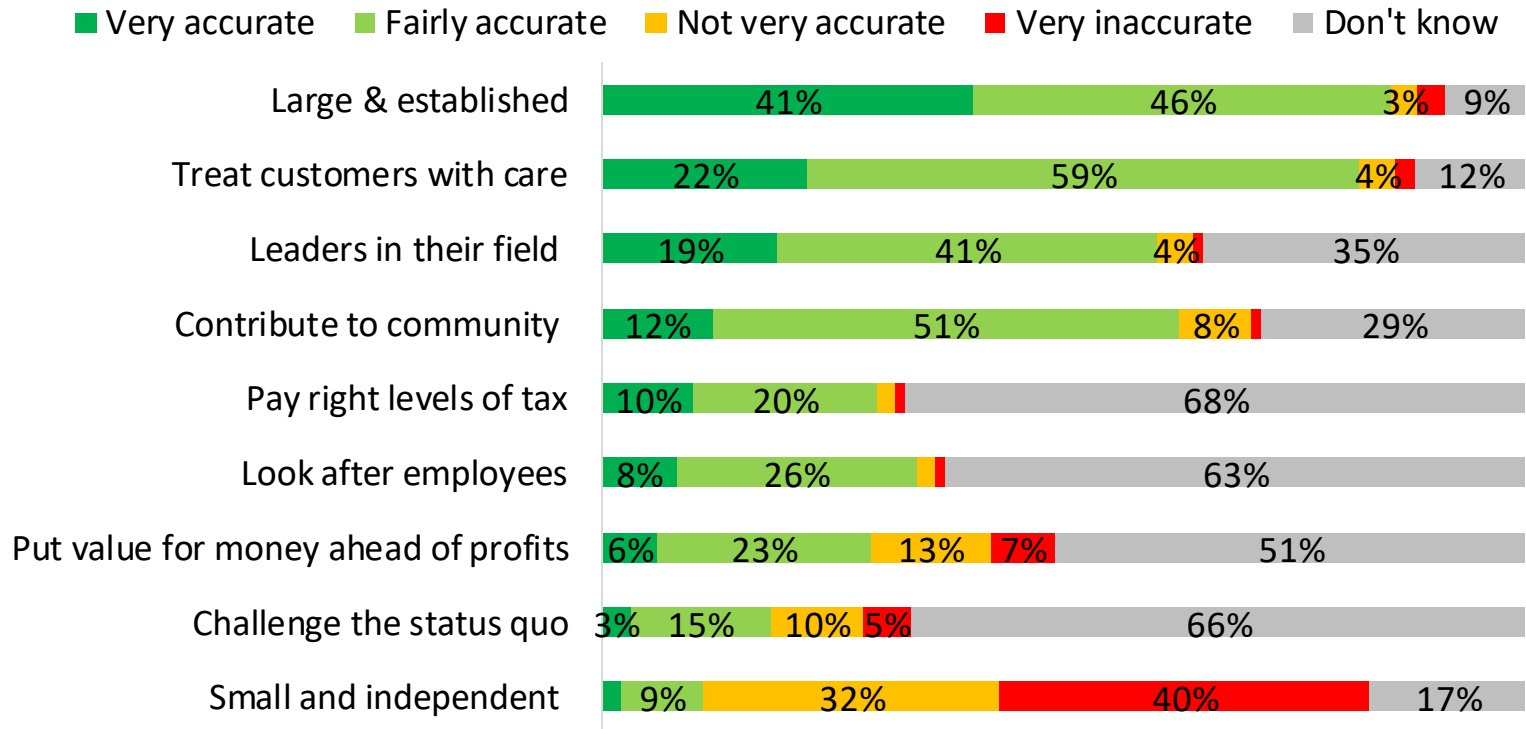
## Which are the three most important factors for a company/utility company to be trustworthy (Base: all)



- Wessex Water is seen as good at *treating customers with care*, and *leaders in their field* by a majority
- However, there are high levels of uncertainty around whether Wessex Water *pays the right levels of tax*, *looks after its employees*, *challenges the status quo* and *puts value for money ahead of profits* (one of the areas considered to be most important for utility companies).



**I would like you to rate Wessex Water in terms of these statements: from what you know, how accurately or inaccurately does each describe Wessex Water? Trust factors (Base: all)**

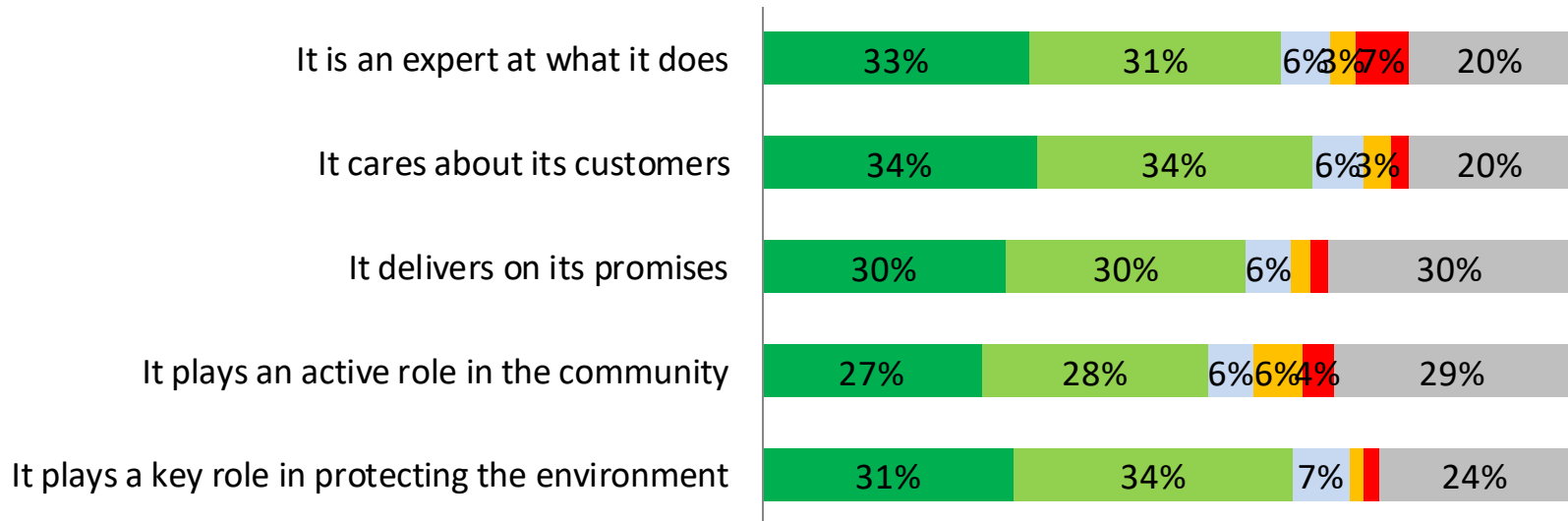


- Highest agreement that *Wessex cares for its customers*, is an *expert* and *plays a key role in protecting the environment*
- However, high levels of uncertainty suggest that more could be done to communicate these values to customers, particularly with regards to *delivering on promises* and being *active in the community*



**Thinking about your overall image of Wessex Water, how much would you agree or disagree with the following statements?  
(Base: all)**

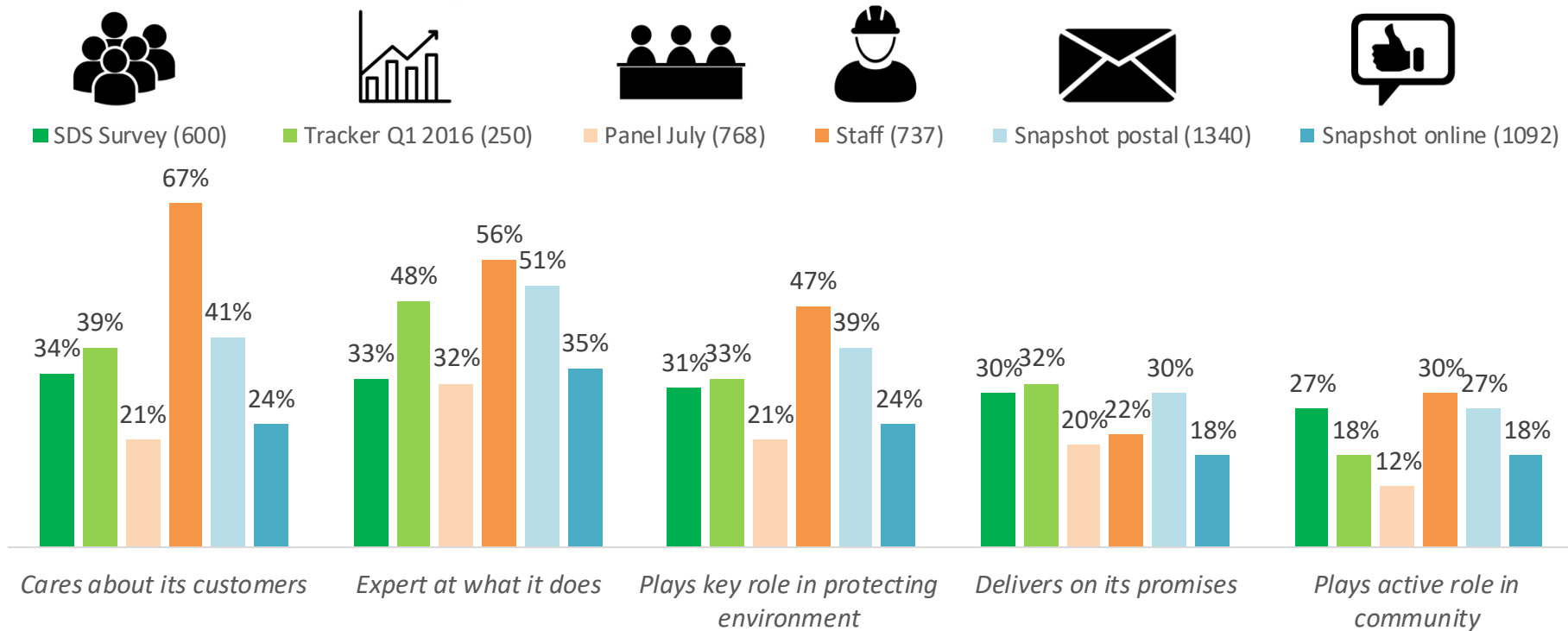
■ Strongly agree 
 ■ Tend to agree 
 ■ Neither/nor 
 ■ Tend to disagree 
 ■ Strongly disagree 
 ■ Don't know



# All samples | Image of Wessex Water

- Comparing the different data sources shows the (informed) Panel to be more critical of Wessex Water
- Staff think Wessex Water is more *customer focussed* than its customers do
- Staff (and magazine readers completing snapshot survey) are more likely to feel Wessex Water *plays a key role in protecting the environment* and has *expertise*
- Lower levels of agreement generally that Wessex Water plays an *active role in the community*.

**Thinking about your overall image of Wessex Water, how much would you agree or disagree with the following statements?  
(% strongly agree)**





**Wessex Water's  
long term plans:  
what do customers  
think should be  
included?**

**your say  your future**



## Step 1: informing at a high level

Wessex Water staff/Blue Marble gave an initial short presentation about the company providing an overview of the organisation, its: size, role, remit and partners.

This was intended to inform customers and give them a starting point to think about what they would like to see included in the long term strategy.

Following the presentation customers carried out a brainstorming activity to think about all the different issues they would expect to see included in Wessex Water's long term strategy.



Spontaneous comments of domestic and business customers relate to most of the main themes in the SDS



*“Improve customer call centre”, “Clear, accurate, transparent bills” (business)*



*“Keep costs down”, Offer water saving devices”, “Help those with difficulties paying”, “Compulsory meters”*



*“Flood prevention”, “Stop wipes being flushed”*



*“Leakage repair”, “Mend leaks quicker”*



*“Make sure rivers are clean” (but few other mentions)*



*“Maintain water quality”, “Safe water to drink”*



*“Plan for climate change”, “Plan for population change”, “Better water storage in winter to plan for droughts”*



*“Aim to be carbon negative”, “More poo vehicles”, “More green energy”*



No spontaneous mentions



## CUSTOMER COMMUNICATIONS

- The company: ownership, future plans and investments
- Water quality information (tap vs. bottle, fluoridisation)
- Education including children/schools
- Inform about environmental impact of activities
- Advice to tenants



## PROMOTE WATER SAVING

- Customer water efficiency advice
- Smart metering, personalised billing, leak alerts
- Subsidised water butts, and devices
- Promote use of grey water/more technology



## INFLUENCE OTHERS

- Involvement with flood prevention
- Role in building new homes, regulations for new homes
- Work with manufacturers to develop water efficient products e.g. washing machines, use of grey water
- Work with other utilities to prevent disruption



## REWARD CUSTOMERS

- Rewards for being loyal
- Rewards for being water efficient/reducing usage





## COMMUNITY /CSR

- Give back to the local community
- Promote existing activities
- Help other countries, link with Water Aid

*They have a captive audience so they should be putting back, funding community projects. Middle age group, Bath*



## LOCAL ENVIRO ISSUES

- Sewerage smells
- Visual impact of infrastructure on the environment
- Soften water



## TECHNOLOGY

- Keep up to date e.g. filtering out latest pollutants
- To ensure using most efficient systems and practices



## OTHER ISSUES

- Protect against potential terrorist attacks on water supply
- Penalise non-compliant industries
- Invest in desalination
- Consider impact of new industries/infrastructure e.g. Hinkley Point
- Exporting/trading water
- Team up with other utilities to offer joint services – similar to dual fuel offers



## Maintain

- Quality of water
- Reliable supply
- Good customer service

## Invest & improve

- Infrastructure to reduce leaks
- Technology to be more efficient
- Environmental issues (including educating customers)

## Prepare for future

- Increasing demand due to population increase
- Climate change
- Competition and the open market

**Larger non domestic customers** (aware of competition) expect Wessex to be preparing for consequences of competition. They want reassurances that their needs will be met at the same standards (if not improved!).

## Spontaneous discussions of the long term strategy generally support the current SDS

However indications that customers expect to see greater emphasis on:

- Promoting water saving - both internally by Wessex and customers
- Use of technology and innovation
- Communications with customers

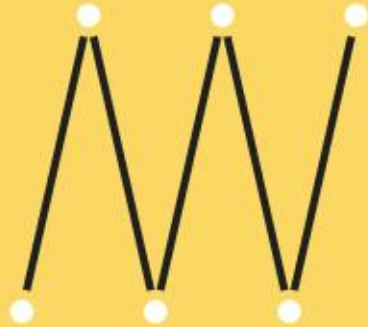
- Wide range of spontaneous ideas for the long term strategy developed by customers after relatively brief 'informing process' demonstrates level of engagement with Wessex
- Customers have an appetite for more information and communications from Wessex:
  - 'familiarity breeds favourability'
  - greater transparency will build greater trust
  - impact of behaviour change campaigns depend on initial levels of understanding of the issues
  - evidence of urban myths and common misconceptions (e.g. can't drink from bathroom tap/softened water, oral contraceptives & antibiotics in tap water)

*They should communicate more with customers, generally. Middle age group, Bath*

*They should inform us a bit more on the things that are happening. Customer of tomorrow, older, Chippenham*

*They need to be good enough to make you want to stay if this becomes an option.  
Middle age group, Bath*

# Importance and priorities



**your say**  **your future**

# Qualitatively, domestic customers support but find it hard to prioritise 9 goals

Customers found it very difficult to prioritise or rank order the 9 goals – they are all perceived to be important.

*What I would expect*      *Covers everything*      *A good overview of what a water company should be doing*



•Drinking water quality universally given highest priority



•Sewage flooding given lower priority by non domestic



•Reliability given higher priority by non domestic  
•Customer service given higher priority by non domestic



•Carbon footprint given higher priority by younger samples

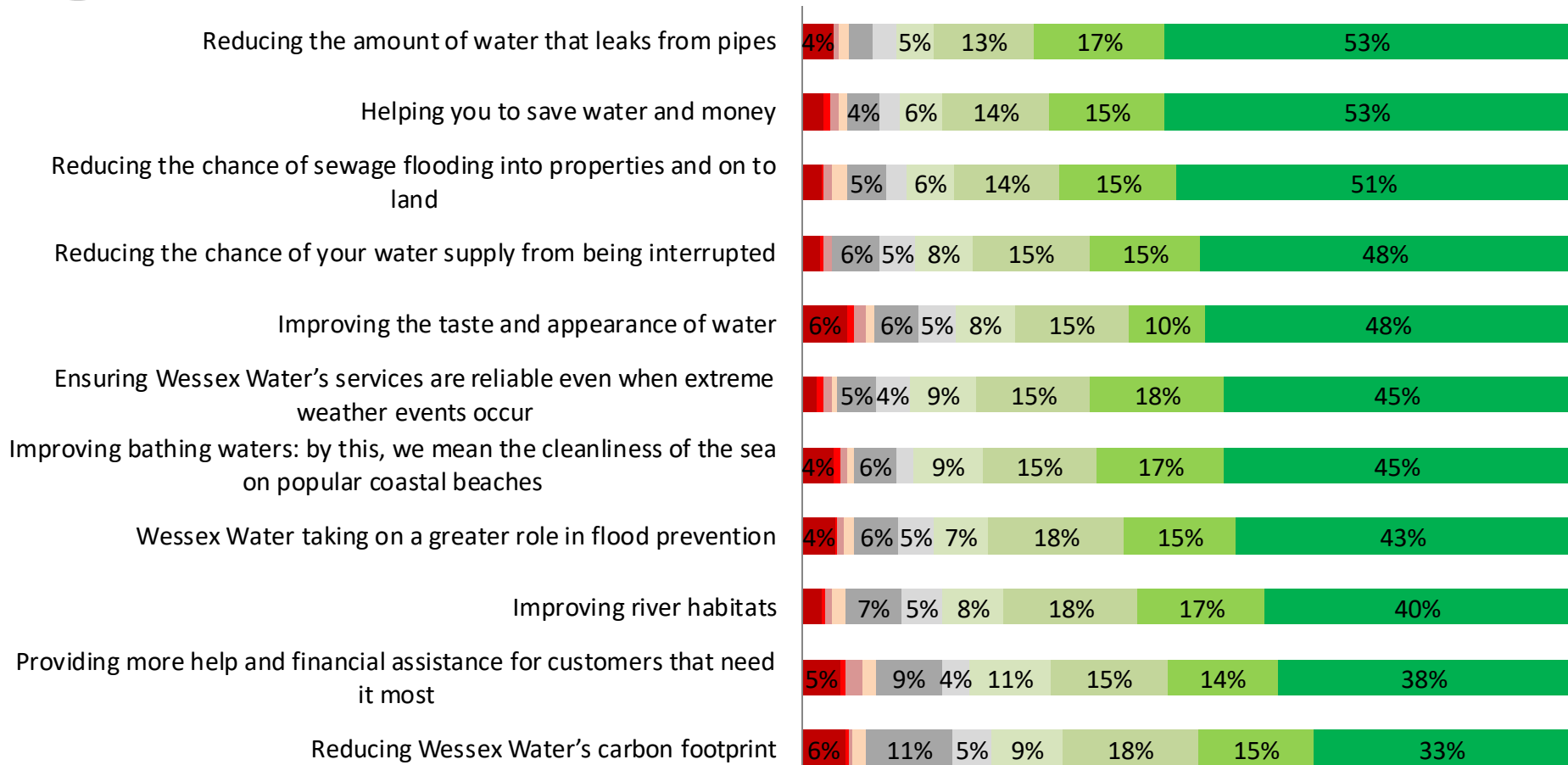
# Quantitatively, domestic customers find all 11 goals are important <sup>43</sup>

- Top 3 priorities are: *reducing leaks, consumer advice on saving water/money and minimising sewage flooding risks*



## How important are the following? Total (600)

■ 1. Not at all important ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10. Very important



# Has importance of issues changed for domestic customers since 2012?

- The findings from 2012 and 2016 are not directly comparable due to differences in question wording and variation in issues asked about. However, the most important issues remain: *leakage, reducing sewage flooding, resilience* and *preventing interruptions to supply*.
- The one area which was consistently rated as less important is reducing carbon footprint (however, the majority do think this is important)



	2012	2016
Top 3 most important	<ul style="list-style-type: none"> <li>• <b>Reducing risk of sewage flooding</b></li> <li>• <b>Reducing leaks</b></li> <li>• Ensuring water supply in the future can cope with population increase &amp; drought</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Reducing risk of sewage flooding</b></li> <li>• <b>Reducing leaks</b></li> <li>• Helping save water/money</li> </ul>
3 least important	<ul style="list-style-type: none"> <li>• <b>Reducing CO2 emissions</b></li> <li>• Telling customers what Wessex Water is doing to reduce leakage</li> <li>• The hardness softness of water</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Reduce carbon footprint</b></li> <li>• Financial assistance for those in most need</li> <li>• Improve river habitats</li> </ul>

- When asked to prioritise, customers are most likely to want Wessex Water to focus on *reliability in face of extreme weather, reducing sewage flooding and reducing leakage.*

**Q. Wessex Water develops long term plans which have to balance the needs of customers today, while making sure water and waste services meet the needs of future generations of customers. I am going to read out 3 of the areas they have to consider. Please prioritise these issues in terms of their importance to you. % ranked first**

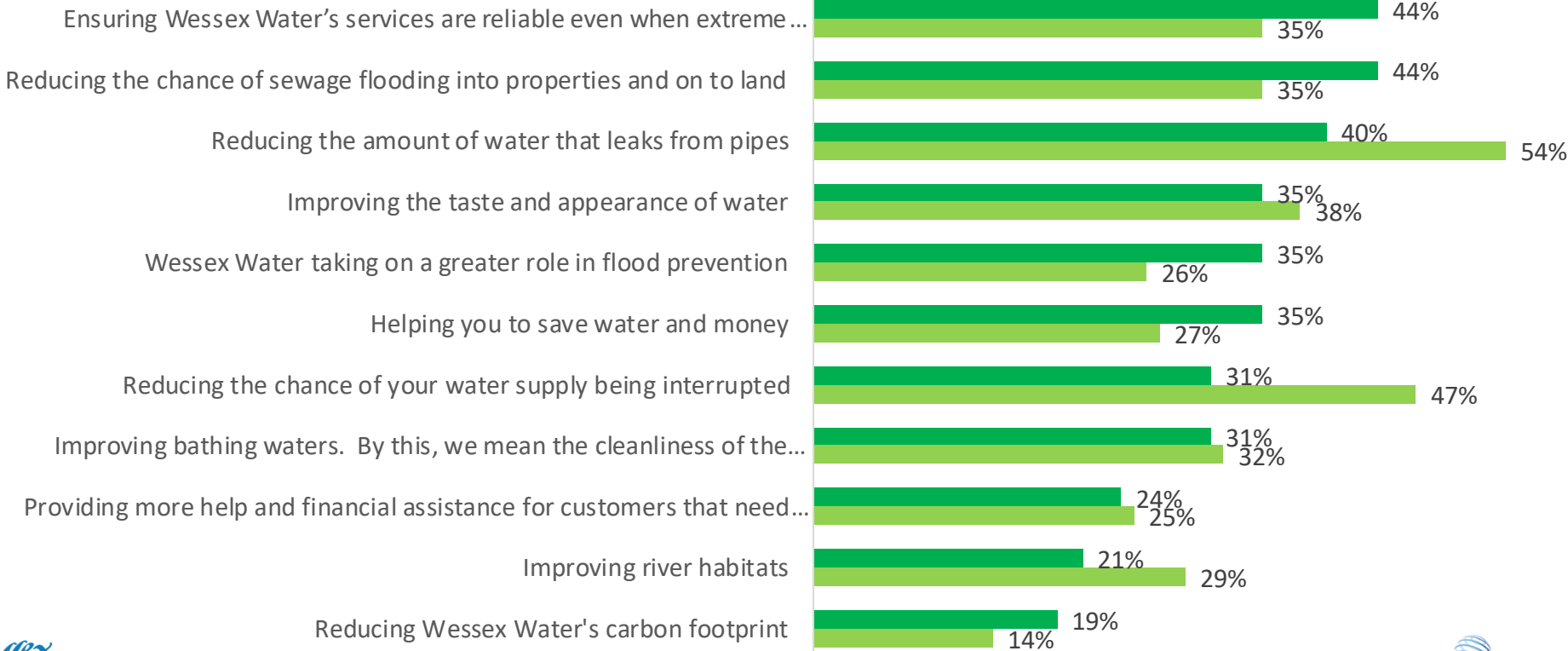


■ SDS (c.164 per statement)



■ Tracker (c. 68 per statement)

*N.B. Caution with Tracker data as based on small sample sizes*





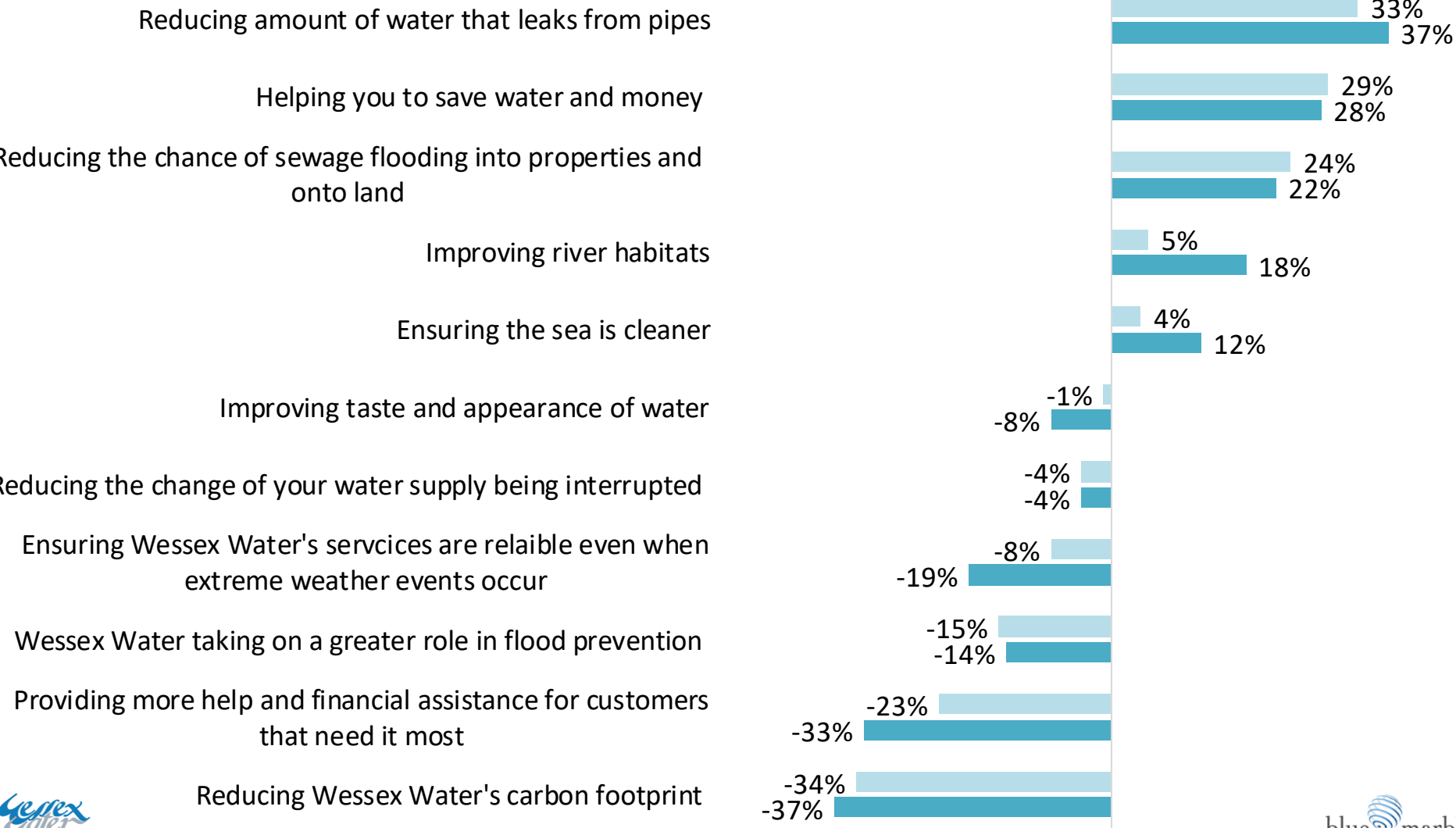
Q. What's most/least important for you? Select three statements. (Difference in most/least important.)



Postal (1350)



Online (1092)



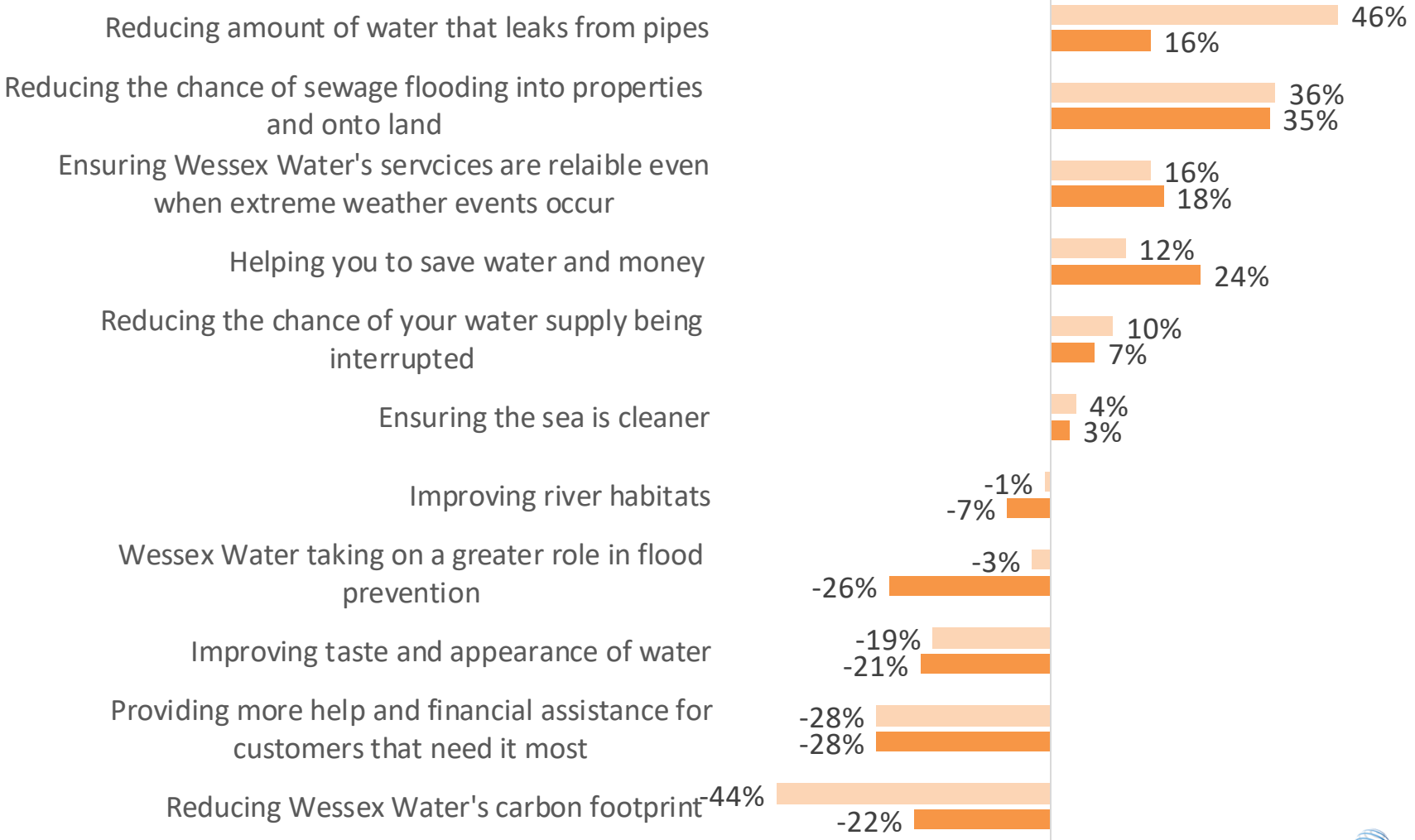
Q. What's most/least important for you? Select three statements. Difference in most/least important.















Panel (768)



Staff (737)



							
		SDS	Tracker	Postal	Online	Panel	Staff
Most important	Reduce sewage flooding	✓	✓	✓	✓	✓	✓
	Reduce leaks	✓	✓	✓	✓	✓	✓
	Ensuring reliable in face of extreme weather	✓	✓			✓	✓
	Improving taste & appearance		✓				
	Helping save water & money	✓		✓	✓		✓
	Improving river habitats				✓		

					
SDS	Tracker	Postal	Online	Panel	Staff

Less important	Improving taste & appearance					✓	✓
	Ensuring reliable in face of extreme weather				✓		
	Greater role in flood prevention			✓	✓		✓
	Financial assistance for customers in need	✓	✓	✓	✓	✓	✓
	Improving river habitats	✓	✓				
	Reducing carbon footprint	✓	✓	✓	✓	✓	✓

# Areas in need of improvement



**your say**  **your future**

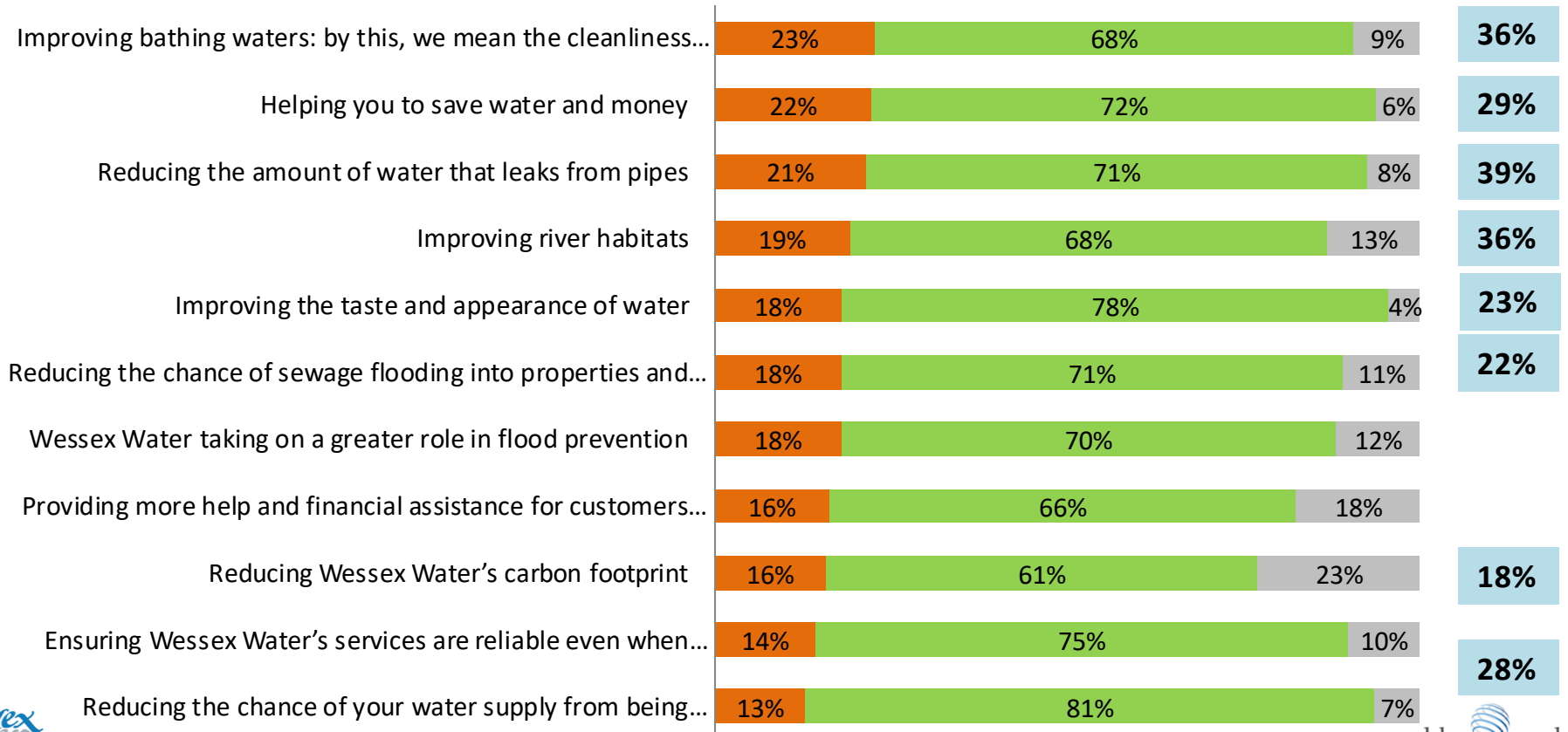
- Levels of satisfaction with current services are very high, particularly for *reliability of supply* including in extreme weather and *water taste/appearance*
- Areas most considered in need of improvement are: *bathing waters, saving water and money; leakage.*
- Customers consistently less likely to see a need for improvement than in 2012 (NB comparability)

## And would you say that (xxx) is satisfactory or should it be improved? (Base: all)



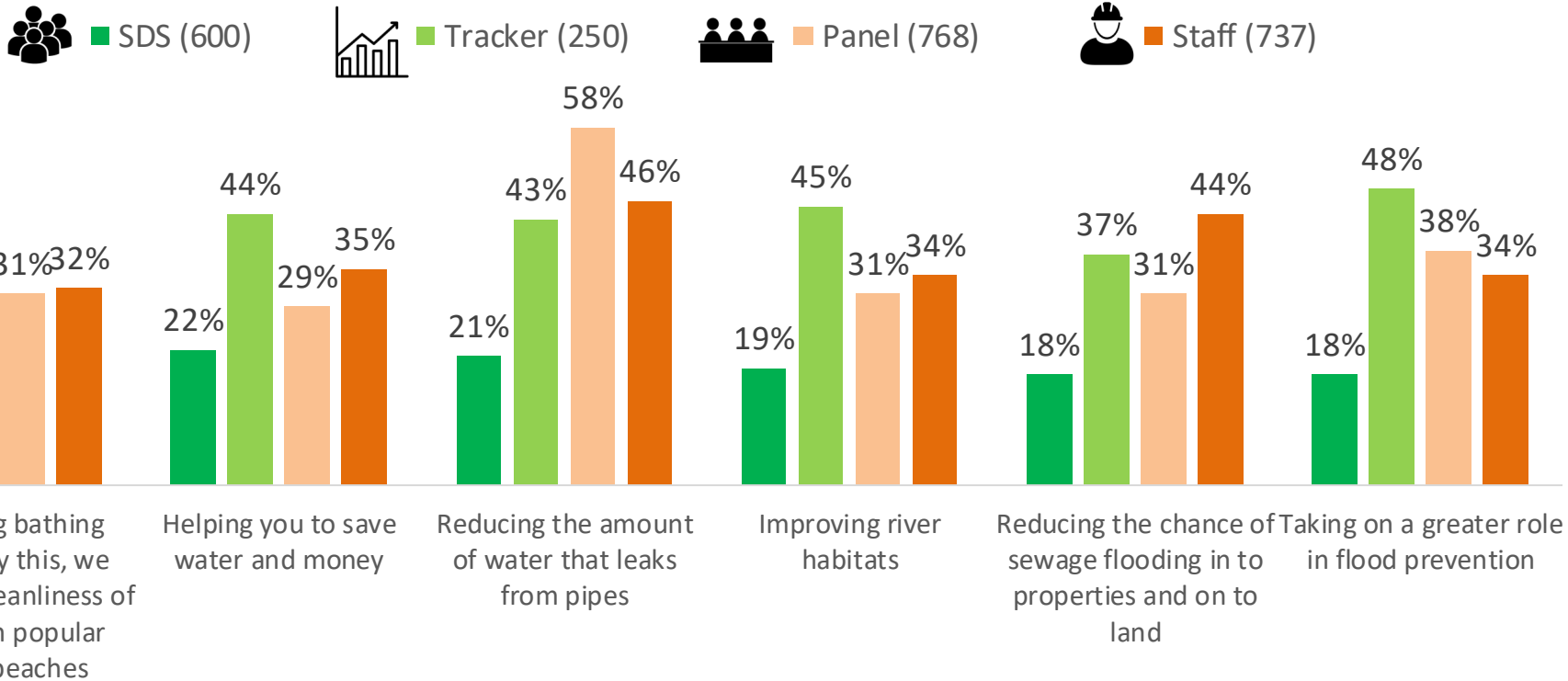
■ Should be improved ■ Satisfactory ■ Don't know

2012 "should be improved"



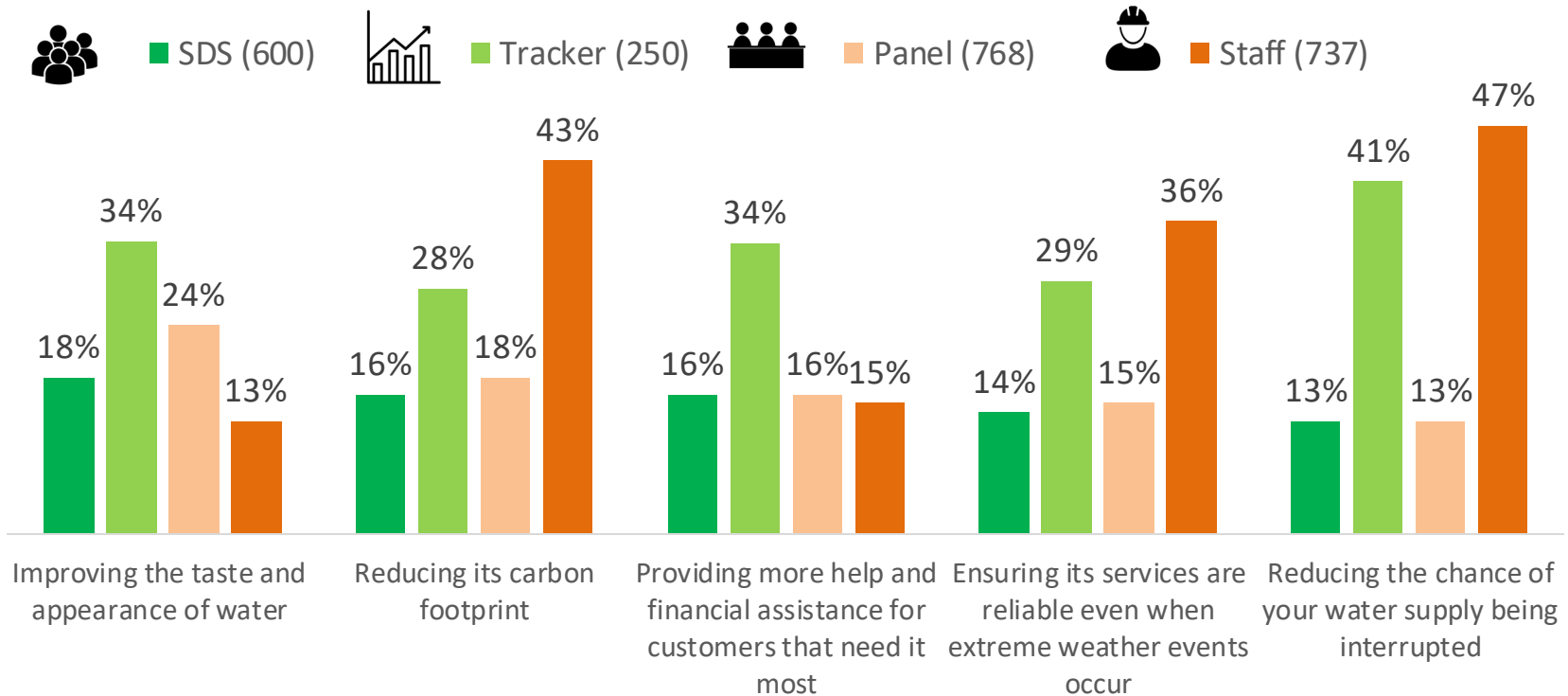
- NB question wording is affecting response: SDS used *'satisfactory or should be improved'*; Tracker used *'happy with service or room for improvement'*
- 'Informed' samples (Staff and Panel) more likely to see room for improvement in leakage whereas the 'uninformed' customers see more room for improvement in all other areas

## % saying 'room for improvement' (tracker, panel, staff) / 'should be improved' (SDS)



- Staff are more likely to see room for improvement reducing carbon, resilience and supply interruptions
- Customers have more concerns about water aesthetics/taste and providing financial help to customers

## Are you happy with the service or is there room for improvement with...?





# Response to SDS | overarching principles

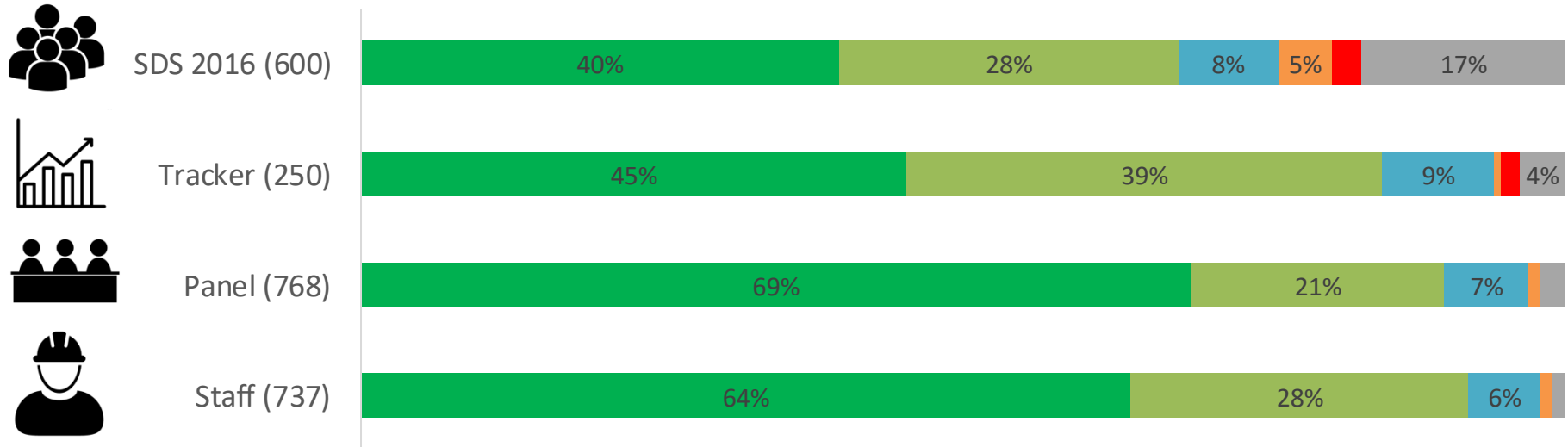


**your say**  **your future**

- The majority of customers are supportive of Wessex Water trying less proven, less expensive approaches instead of the more 'tried and tested' ones.
- The informed samples (Staff and the Panel) are more likely to be in strong support of this principle than customers overall
- Customers in Bournemouth (53%), in the 35-54 age range (49%) and AB social grade (49%) are most likely to be supportive of this idea (SDS data)
- NB in 2012 SDS the same question was asked with a different example (using reed beds at sewage works) and received higher support: 63% strongly supported, 19% tend to support.

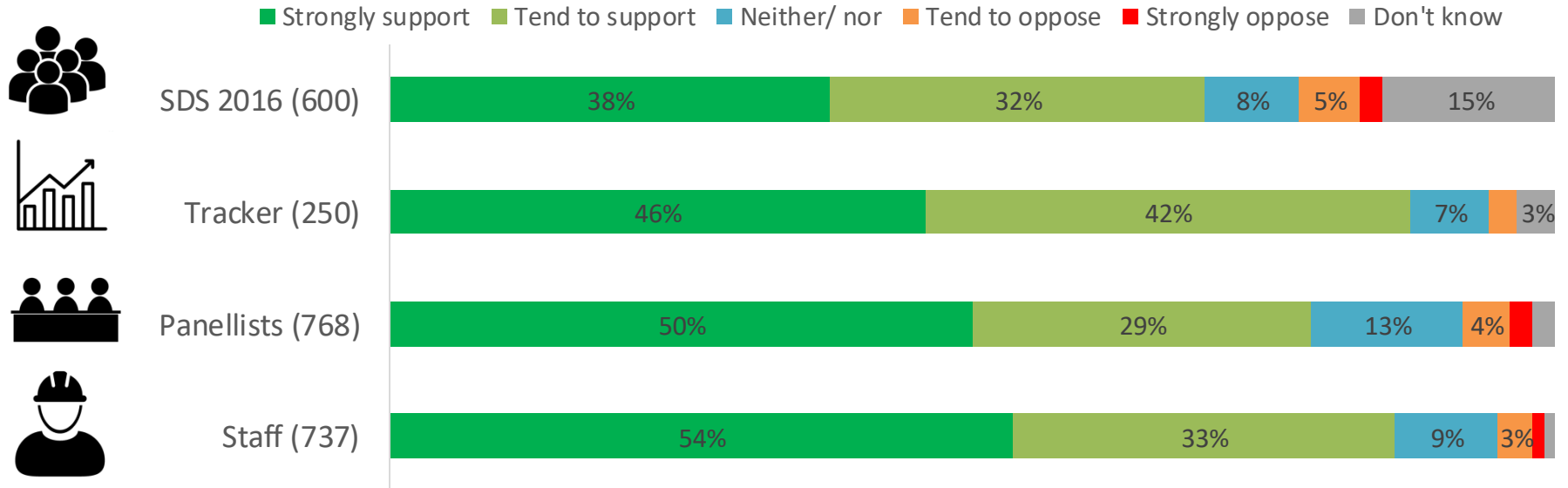
**Try different solutions which might be less proven but are less expensive and use less energy than the more tried and tested approaches. E.g. incentivising farmers to reduce pollutants getting into streams and rivers rather than spending more time processes**

■ Strongly support  
 ■ Tend to support  
 ■ Neither/ nor  
 ■ Tend to oppose  
 ■ Strongly oppose  
 ■ Don't know



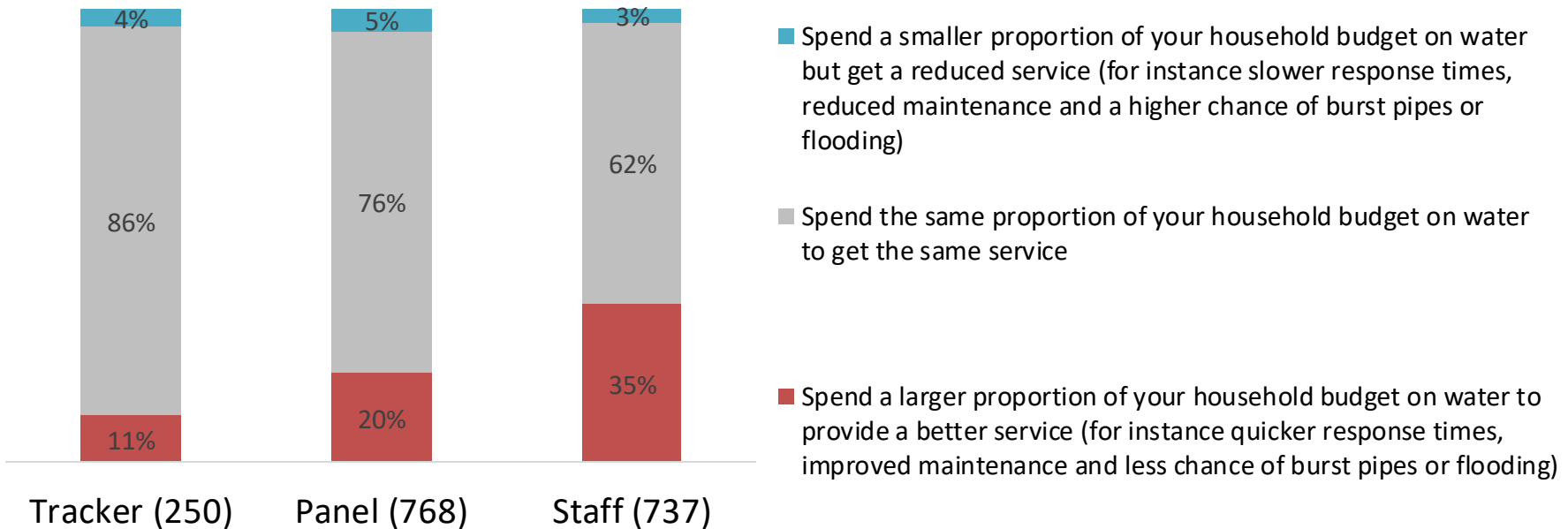
- Similarly, customers and staff are broadly supportive of Wessex Water helping customers to save water rather than focus on intensive building projects.
- Similar patterns are seen in the sub-groups: customers in Bournemouth (47%), in the 35-54 age range (45%) and those of AB social grade (54%) are most likely to be supportive of this idea
- NB: in 2012 SDS, there was greater support for this principle with 54% strongly supporting and 23% tending to support. Are customers becoming more risk averse?

**Focus more on helping customers to use less water rather than opting for expensive and energy intensive building, such as new reservoirs. How much do you support or oppose this idea?**



- The majority of customers, Panellists and staff think that Wessex Water should continue to spend the same proportion of customers' household budget for maintaining the same service
- Very few think that Wessex should reduce service
- Staff are more likely (35%) to think that Wessex should spend a larger proportion of customers' household budget for an improved service – particularly those that work in operations (42%)
- NB in 2012 Tracker, the same question resulted in the same response (10% spend a larger proportion; 86% spend the same)

## If it was down to you, which of the following options do you think Wessex Water should adopt?

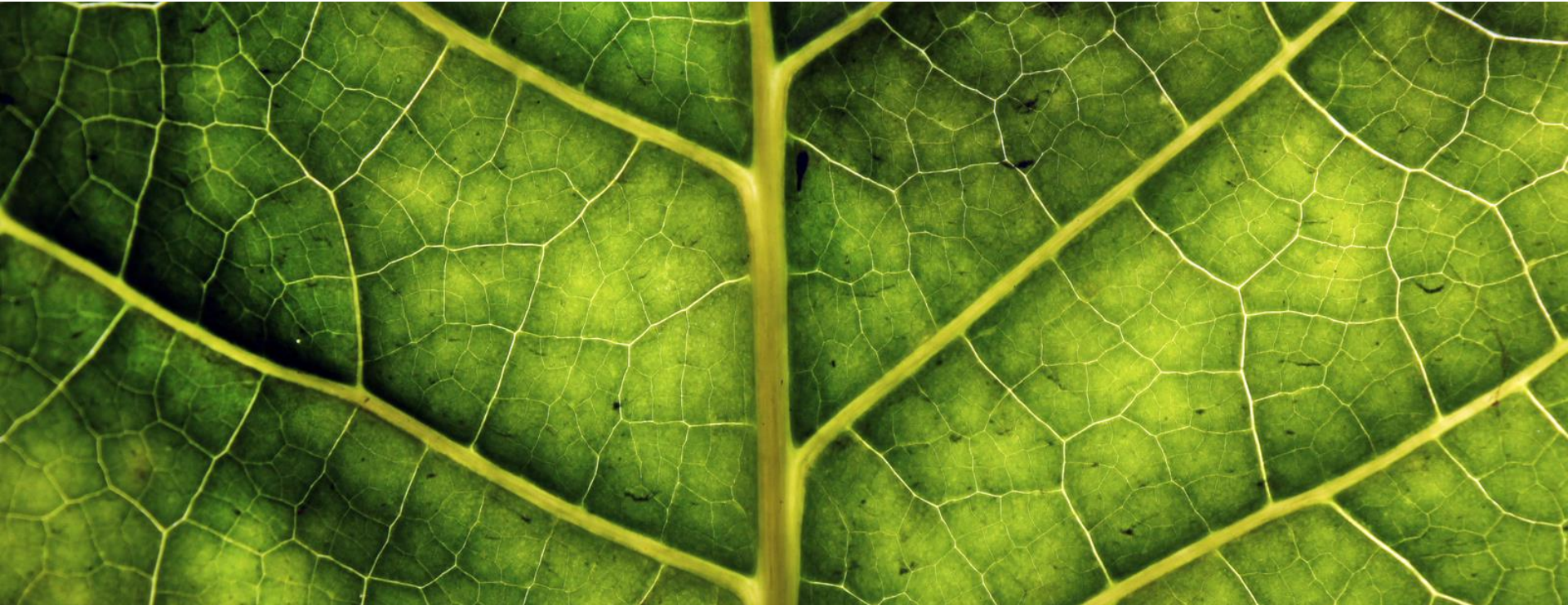


- Spend a smaller proportion of your household budget on water but get a reduced service (for instance slower response times, reduced maintenance and a higher chance of burst pipes or flooding)
- Spend the same proportion of your household budget on water to get the same service
- Spend a larger proportion of your household budget on water to provide a better service (for instance quicker response times, improved maintenance and less chance of burst pipes or flooding)



# Response to SDS | by each goal

- uninformed (quantitative)
- after deliberation



**your say**  **your future**

## Considerations between now and 2040



## Step 2: informing of whole plan

Wessex Water staff gave a brief presentation introducing the business planning process and the Wessex Water Business Plan PR14 video.

Customers completed a prioritisation exercise on the 9 goals followed by a brief discussion.

**Reduce leakage**  
The Situation Now

Customers tell us leaks should be a top priority

Currently, 20% of water processed for drinking, is lost because of leaks

£12m a year is spent on reducing leaks, renewing pipework and fixing 12,000 leaks

Wessex Water has halved leakage since 1995

Currently at the point when reducing leakage further will cost more than the value of water which has leaked

**Reduce leakage**  
Our Goals

As a Wessex Water Customer I can say:  
"They keep the amount of water leaked at the practical minimum"  
"If I report a leak it will be fixed within a day"

**Option 1:** to implement a widespread pipe replacement programme to reduce leakage

**Option 2:** to proactively target weak spots using leak detecting technology - and react more quickly to leaks when they occur

## Step 3: deliberating options

Focussing on individual goals customers were provided extra information (outlining current performance and key facts) and were presented with two alternative options for how the goal could be achieved.

Small groups deliberated the two options which was followed by a vote.



## Greater variability in the priority given to this goal (higher priority amongst younger customers)

*"I get good value for money"*

*"If I were able to choose my supplier  
I would choose Wessex Water"*

- Currently happy with service levels
- Statements about choice (and recommendation) confusing – *"How can you recommend if you can't compare"*
- Difficult to rate VFM if no comparison
- Assume from this means competition will happen soon

### Option 1: be best water company for service

- Majority happy with service (especially as few need to contact water company), supported by evidence of 95% satisfaction levels
- Impressed that Wessex Water is ranked first in industry - want to retain this!
- Happy now with real person answering the phone
- Expect this Option will meet all current (and increasing) service needs and keep Wessex top of industry table

### Majority vote for Option 1

**Do not want to vote for bill rises unless they know exactly what the customer benefit will be**

### Option 2: match best brands in country

- Most unwilling to pay more for improved service over and above being the industry leader – no perceived need
- When asked explicitly, most do not think appropriate to compare Wessex to other brands i.e. Amazon
- Those who vote for Option 2:
  - think always need to improve, customers will expect more
  - need to keep up to date with technology
- Most unwilling to vote for higher bills without understanding customer benefits (some call for text alerts, faster call outs, specific appointment times)



*"I get good value for money"  
"If I were able to choose my supplier I would choose Wessex Water"*



## Non Domestic:

- Greater desire for improvement on billing: greater transparency, use of accurate not estimated figures, online monitoring/tracking
- Some evidence of desire for improved service in terms of dedicated business contacts, use of technology e.g. web chat - but no evidence that happy to pay for it, expected as normal for modern company

## Customers of tomorrow:

- Unable to comment on whether customer service needs improving as no experience
- Indication that would like to choose level of service and use digital channels



*I know one thing that Ovo do. You can save a bit of money by promising to never call their Call Centre. I never call Call Centres because I know what a nightmare they are so I always, always email. By emailing and doing it through the App I get money off, I get like £2.50 off a month.*

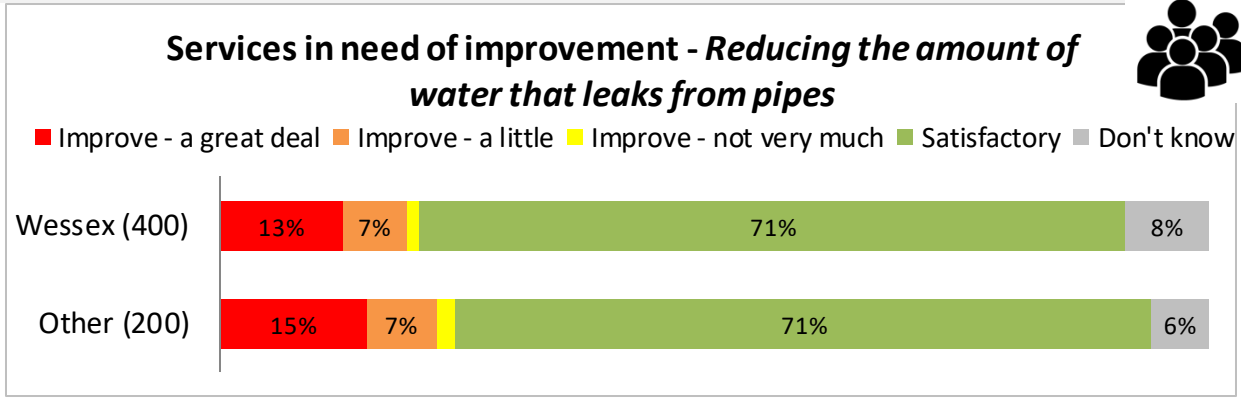
*Customers of tomorrow, 26-30 years,  
Chippenham*

- Votes for Option 1 assume Wessex Water will continue to be top of water industry league table.
- N.B. Customers claim direct comparisons to other brands are not relevant, however customers do have increasing service expectations (e.g. shorter appointment times, online tracking) which are being set by the likes of Amazon etc.
- Positioning service levels beyond the water industry is difficult for customers to understand. Possibly better considered as an internal ambition and expressed externally as: *we will remain the best in the water industry by adopting the practices of the best in the world...*



# Fixing Leaks: *uninformed view* - high importance & need for improvement

- Reducing leaks is one of the top priorities for customers (70% rate as 9 or 10 out of 10)
- One in five Wessex customers (20%) believe that improvement is needed in reducing leaks
- Perceptions don't vary by region, but they do by age
- Fixing leaks speedily is how customers want to see improvement (along with new technology and easier reporting)

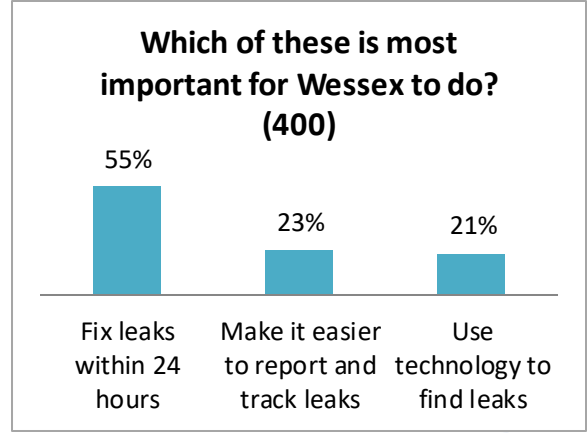
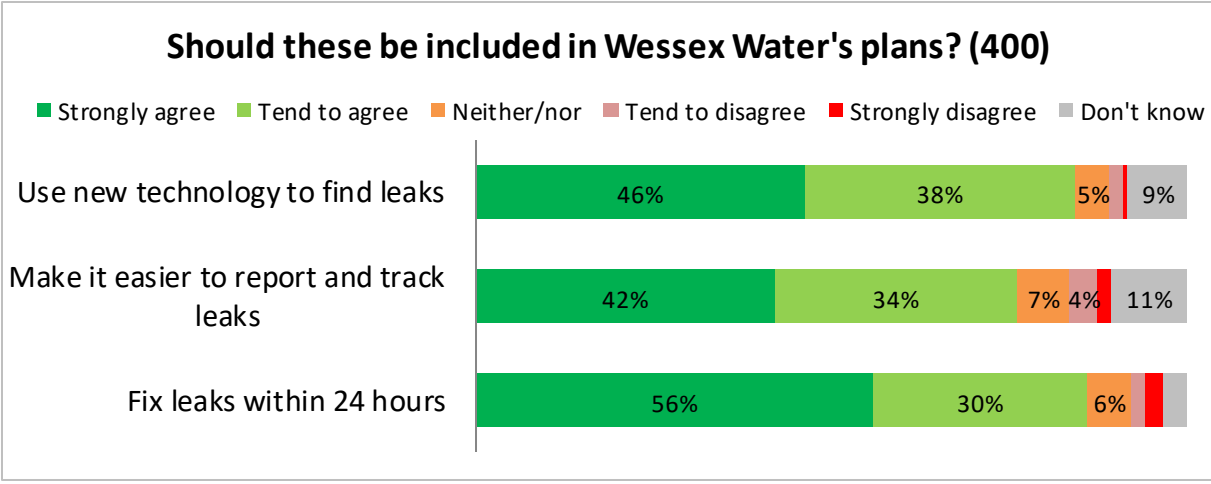


**How important is 'reducing the amount of water that leaks from pipes'? (% scoring 10)**

Under 35 = 36%  
 35-54 = 50%  
 55+ = 61%

**Same statement – satisfactory or should be improved? % saying 'satisfactory'**

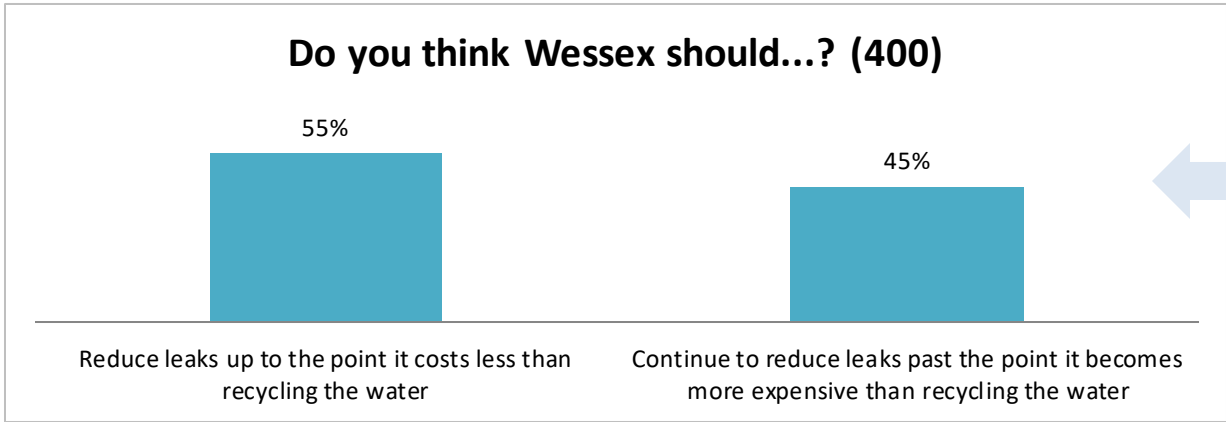
Under 35 = 90%  
 35-54 = 65%  
 55+ = 68%





- Difficult to understand, but even when explained continues to be important for some
- Economic leakage argument appears weaker now than it was in 2012

*Q: It can cost more for water companies to reduce the amount of water that leaks than it costs to re-cycle the water. This is because leaked water seeps back into the environment and the water cycle where it is treated and put back into the water supply. There is a point at which it costs less for water companies to re-cycle the water than reduce leaks further.*



**Polarised response :**

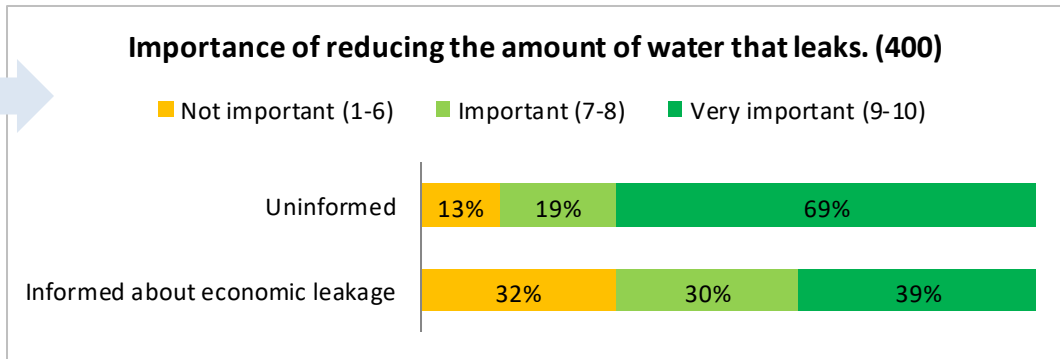
55% accept (2012 56%) = *it's a logical argument*

45% reject (2012 44%) = *financial excuses not to act*

Informing customers leads to perception that reducing leaks is less important.

**But,** this year an increased majority of customers want reduced leakage even with increased bills (69% vs 58% in 2012)

*Q: Since 1995 Wessex Water has cut in half the amount of water that leaks. It is now at the point where it would cost more to further reduce leaks than to re-cycle the water. In other words if they cut leaks further bills would increase. Now you know this, how important do you think it is that Wessex Water further reduces leaks?*





## Greater variability in the priority given to this goal (lower priority amongst younger customers)

*“They keep the amount of water leaked at the practical minimum”*

*“If I report a leak it will be fixed within a day”*

- Question how will be achieved: will it reduce pressure (disliked)
- What does ‘practical minimum’ mean?
- Not just an economic issue, but also ethical/environmental issue
- One day fix seen as unrealistic

### Option 1: widespread pipe replacement

- Will need to do this eventually, system is outdated
- This is long term, future focussed option, suitable for 25 year plan
- Expensive – should put profits into this
- Prevents the need for Option 2 in future

### Option 2: targeting and quicker response

- Short term – priority for now/the next 5 years
- Will this be sufficient alone - is it just ‘*patching up*’?
- Do this whilst plan/save up for Option 1
- Only less expensive in short term?

**No clear option chosen – many want combination of two options**

N.B. Statement about water leaking back into the ground makes leaks a lower priority goal for many



*“They keep the amount of water leaked at the practical minimum”*  
*“If I report a leak it will be fixed within a day”*



## **Non Domestic:**

- Greater cynicism about ‘practical minimum’ – sounds vague
- Greater scepticism about whether realistic to fix in a day
- Want targets around leak prevention – better monitoring, including consumption figures

**Want combination of two options**



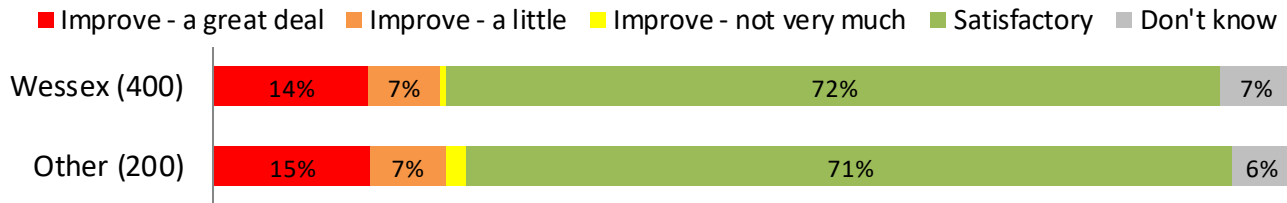
## **Customers of tomorrow:**

- Supportive of overall aims – perceived as reducing wastage
- Want to see targets in terms of volume of water in meaningful measurements (e.g. bath tubs, swimming pools)

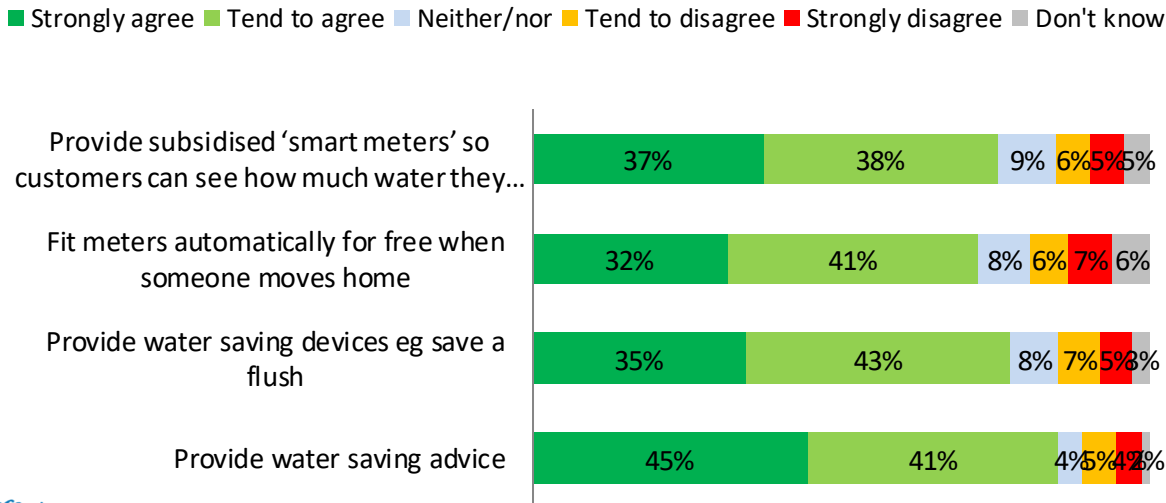


- Widespread interest in help to save money esp. through smart meters and advice
- Automatic installation of meters was a contentious issue in 2012 - even less desirable this year (in 2012 most important for 21%, in 2016 most important for 11%). Reflects qualitative findings.
- No variation by region

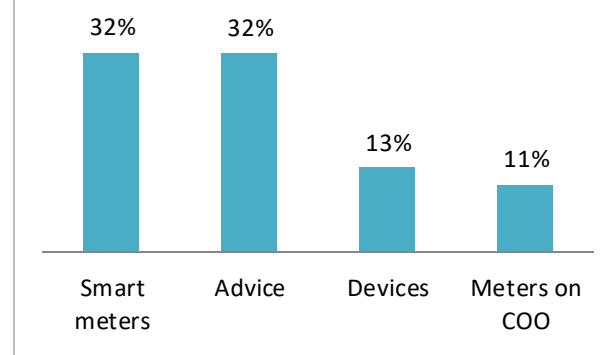
## Services in need of improvement - *Helping you to save water and money*



## Should these be included in Wessex Water's plans? (400)



## Which of these is most important for Wessex to do? (400)





## Consistently rated as one the most important goals

*“Whatever my income I can afford to pay for the water I need”*

*“I am able to control my water bill and to use water wisely”*

- General perception that water bills currently affordable - but should this include payment plans for lower income households?
- Supportive of idea of being able to control bill (but some scepticism/lack of knowledge about how this is achieved)

N.B. Metering is emotive issue, not all customers convinced metering will reduce usage. Expect/would like to see greater range of water saving measures to reach this goal.

### Option 1: smart meter in every household

- Don't like element of compulsion
- Question if customers will save water if they are forced to be metered
- Some unclear about benefit of smart meters
- Expensive – don't expect to pay for smart meters (ref. energy sector)
- Is there choice to have meter removed?



### Option 2: gradual increase of metering

- Instinctively favour this option
- What does 'encouraging' mean (different tariffs?)
- Will this include water saving devices?
- Want protection/options for large families

**Vast majority vote for Option 2**



*“Whatever my income I can afford to pay for the water I need”  
“I am able to control my water bill and to use water wisely”*



## **Non Domestic:**

- Having control over bill especially important – want Wessex Water to help/support them do this. Want audits, smart meters, monitoring and more innovative ‘*revolutionary*’ ways to help save
- ‘Affordability’ is not relevant – more about reasonable and fair pricing
- Expect Wessex Water to improve own internal efficiencies to help reduce costs



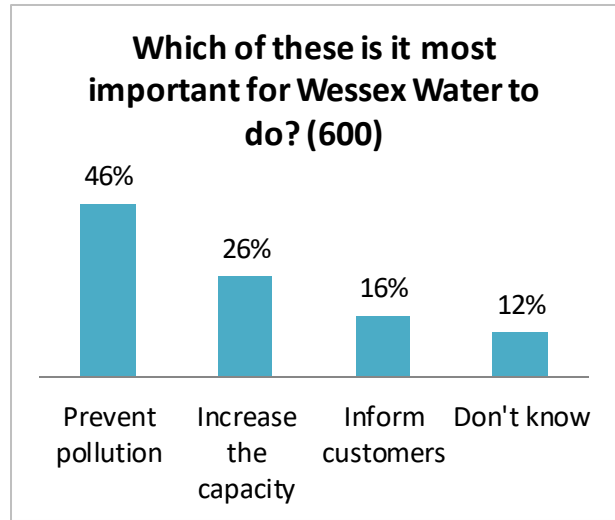
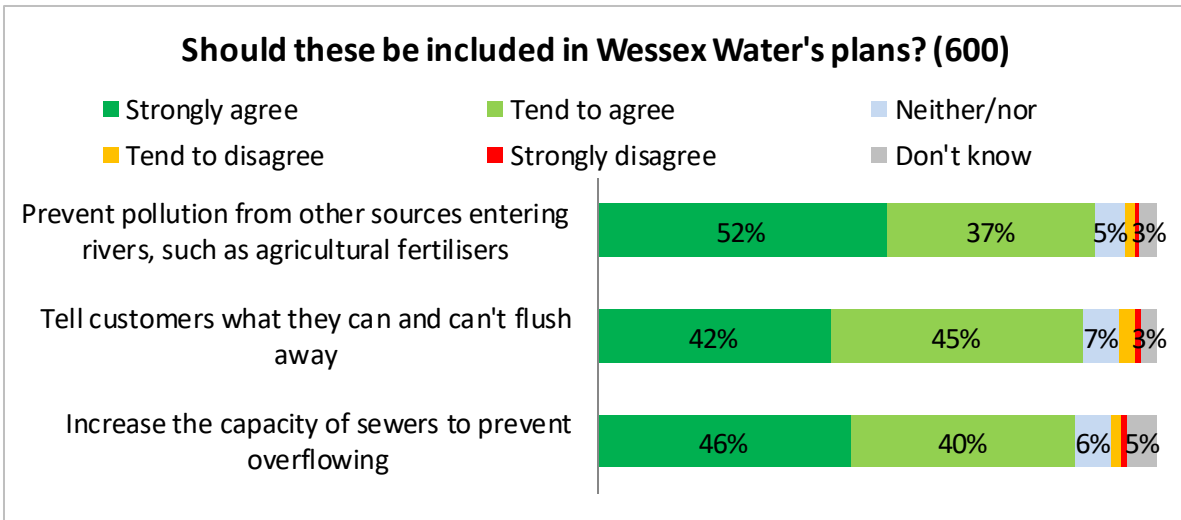
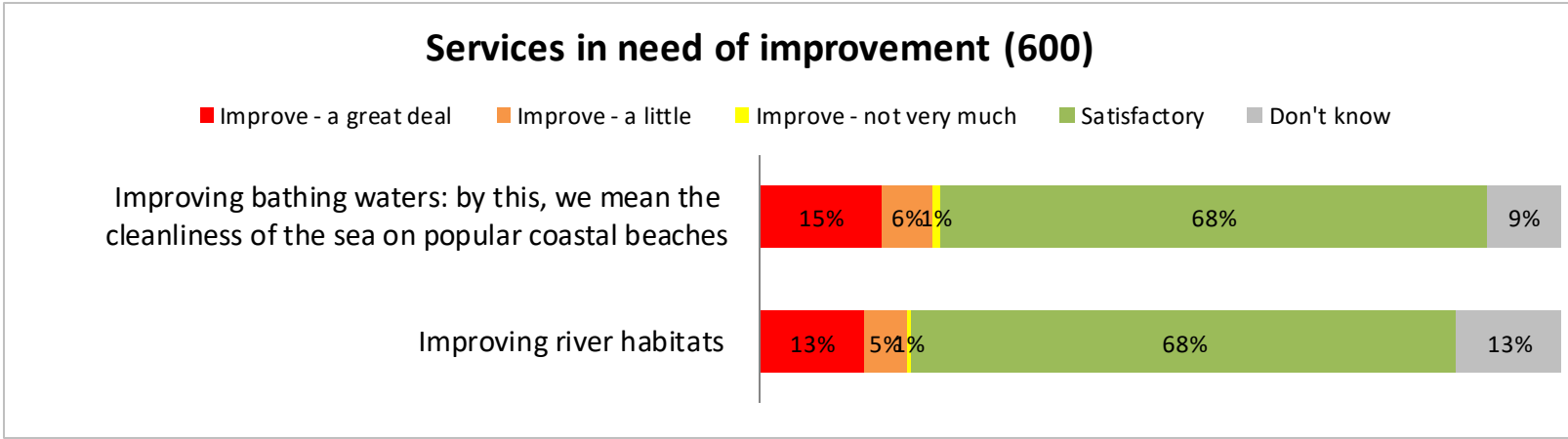
## **Customers of tomorrow:**

- Have no context for cost of water bill, but expect less than gas or electricity
- Unsure how Wessex will ensure affordability for all
- Like idea of control – unsure what this means App?

- This goal is weakened by linking saving both water and money:
  - Customers expect to see greater emphasis on water saving by other means, not just metering (e.g. use of technology, grey water)
  - Customers want money saving ideas not reliant on being metered
- In customer minds water and money saving not automatically linked (esp. if not metered)



- A consistently important area across all locations
- Customers want to see Wessex taking an active role, particularly in pollution prevention







## Rated in the middle to lower end of the priority ranking

*“Rivers in my region have improved and now meet tighter EU standards”*

*“Wessex Water is the leading water company for environmental performance”*

- Expect Wessex to meet EU standards, not an ambitious statement
- Issues not previously considered, unsure how serious the problems are currently
- Like idea of ‘leading for environmental performance’- although could be vague

### Option 1: more cleaning processes

- Quicker fix and guaranteed
- More expensive
- Not sustainable, not solving the problem
- More chemicals not seen as a solution
- (Farmers might vote for this)

### Option 2: prevention via collaboration/ technology

- Prevention is always a good thing
- Cost effective, cheaper
- Light touch feels appropriate
- Better for the environment
- Encouraging customers to take ownership is positive
- But unintended consequences e.g. will farmers play the system or will it affect productivity?



Less important than for domestic



Like idea of tighter standards – want to see improvements

**Unanimous vote for Option 2**



## Rated lower in priority ranking

*“If bathing waters fail EU standards it won’t be due to my water company”*

- Language not always clear – what are *bathing waters*?
- Dislike way goal written – sounds defensive, blaming others (*it’s not our fault*)
- Understand quality affected by external issues (but unclear exactly what), but want to hear what Wessex is doing to help
- Some recognise improvement occurred in last 10 years

### Option 1: invest in assets and cleaning processes

- Long term plan
- Guaranteed outcome
- Investing now so not leaving children/next generation with the problem
- One off cost which will remedy problem (in contrast to ongoing cost of Option 2)

### Option 2: incentivise landowners/farmers

- Preventative more appropriate to stop problem happening at source
- Will this be sufficiently effective – will Option 1 be required in the future anyway?
- Can we trust farmers to act?
- For some who think issue is less important chose this option as cheaper



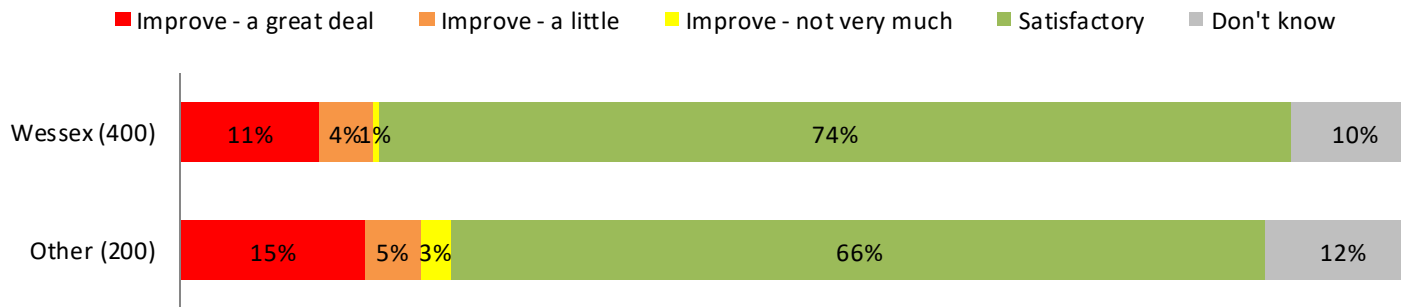
More likely to think greater scope for businesses to work in partnership and take greater shared responsibility

**Difficult to come to conclusion**  
**Majority vote for Option 2, but desire for both approaches**



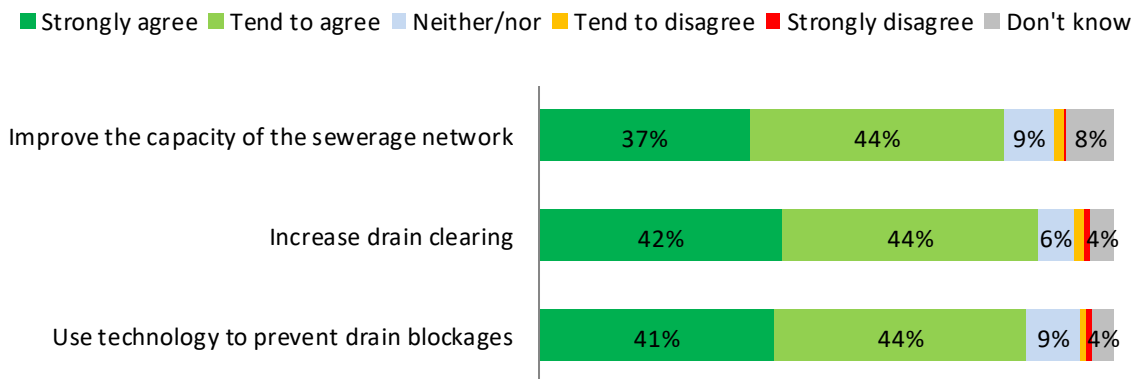
- Reducing risk of sewage flooding is more important than general flood prevention (Net 9/10 67% versus 58%), although the two clearly go hand in hand
- Solutions equally important

## Services in need of improvement - Reducing the chance of sewage flooding into properties and on to land

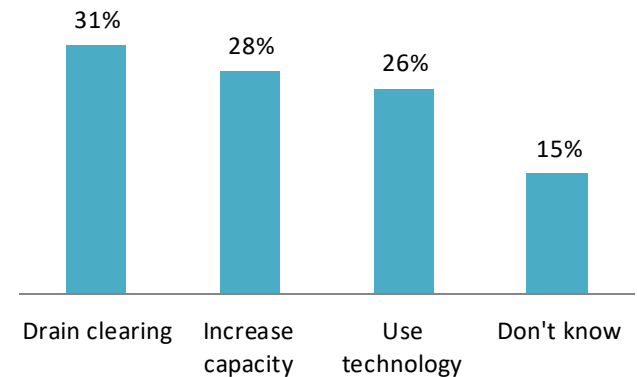


Other water regions more likely to perceive the need for improvement

## Should these be included in Wessex Water's plans? (600)



## Which of these is it most important for Wessex Water to do? (600)





## Consistently rated as one the more important goals (although less so after deliberation)

*“The number of properties – in my region – affected by sewage flooding is the lowest in the UK”*

*“The risk of my home being affected by sewage flooding has not increased despite climate change”*

- None had experienced sewer flooding which set context for discussion
- Approve of promise to be best in the UK – suitably ambitious
- Uncertain how climate change impacts sewer flooding – need explanation, not intuitive
- Would like goal to include what actions Wessex will take

### Option 1: invest in physical assets

- Demonstrates Wessex Water taking responsibility
- Preventative = a good thing
- Don't anticipate significant disruption
- Expensive

### Option 2: combination of measures

- More environmentally friendly option
- Education and prevention = a good thing
- Lack of guarantees – worrying, long term solution only
- Putting responsibility onto customers

**No clear option chosen – many want combination of two options  
Customers and Wessex Water need to work together**

N.B. Discussion of how customer behaviour causes blockages sways customers to vote for more education and therefore Option 2



*“The number of properties – in my region – affected by sewage flooding is the lowest in the UK”*

*“The risk of my home being affected by sewage flooding has not increased despite climate change”*



## **Non Domestic:**

- Some acceptance that can't eradicate the problems, therefore want promises about how will deal with sewage flooding (response times)
- Want Wessex Water to lobby companies to ensure that all wipes are flushable – put pressure on manufacturers

**Want combination – Option 1 in short term followed by Option 2 i.e. education**



## **Customers of tomorrow:**

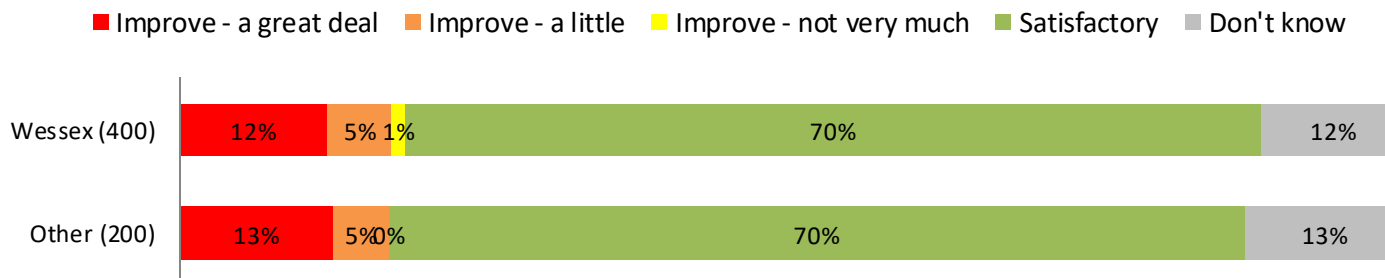
- Question whether regional comparisons are fair – due to different geography, and infrastructure
- Concerned that climate change being ‘blamed’ for other problems/issues causing sewage flooding

# Taking a greater role: *uninformed*



- Over half strongly support the idea of Wessex to play a greater role in flood prevention alongside EA
- However the rationale for taking greater responsibility is issue-specific: taking on responsibility for private supply for rural homes is less clear with 28% strongly agreeing

## Services in need of improvement - *Wessex Water taking on a greater role in flood prevention*



NB: Qualitative deliberative groups revealed concerns about taking on greater remit

## Should these be included in WW plans? (600)

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

WW has no remit to prevent flooding. Should it pay more of a role working alongside the EA in flood prevention initiatives in high risk areas?



WW currently has no remit to ensure water quality for rural homes not on mains, but who have a private supply. Should it take greater responsibility for the quality of these private water sources?



*"I trust Wessex Water to help solve wider issues in the local water environment"*

No spontaneous mention of e.g. flood prevention, private water supplies (problem not perceived by customers)

New information (not referenced in the briefing presentations): require fuller picture of the costs and benefits to evaluate this proposal

## Option 1: continue as we are

- Should continue to work in collaboration as do now
- Stick to specialism, don't over stretch
- Assume will be cheaper/not affect bills

Majority vote for Option 1

## Option 2: take greater responsibility

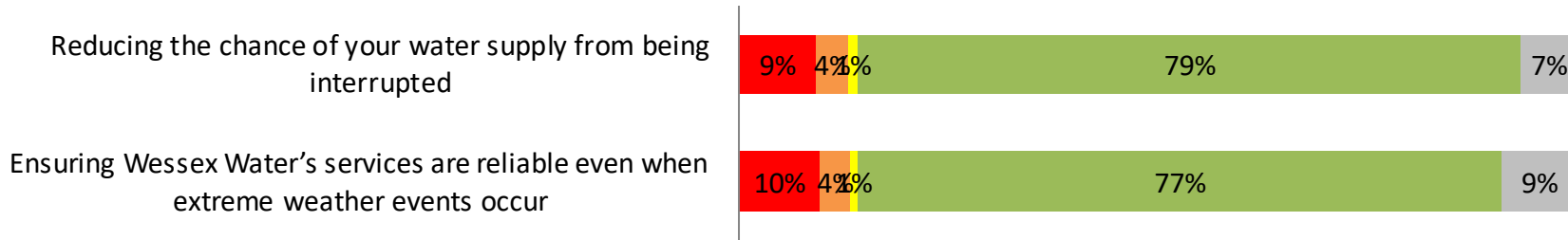
- Wessex Water are capable – but will it affect our bills?
- Unclear about advantages/benefits and whose idea (government?)
- Presents reputational risk:
  - Other agencies involved, complex
  - EA can decide to flood a village but can Wessex Water when villagers are its customers?
  - Will get blamed when things go wrong
- Government delighted, but would shareholders be happy?
- Will it be the end of EA?
- Would require all water companies to take on responsibilities – otherwise unfair (Wessex customers paying twice via tax and bills)



- Reliable supply is important – and current performance is high: customers are satisfied with the service and as a result find it more difficult to prioritise what should be included in Wessex’s plans

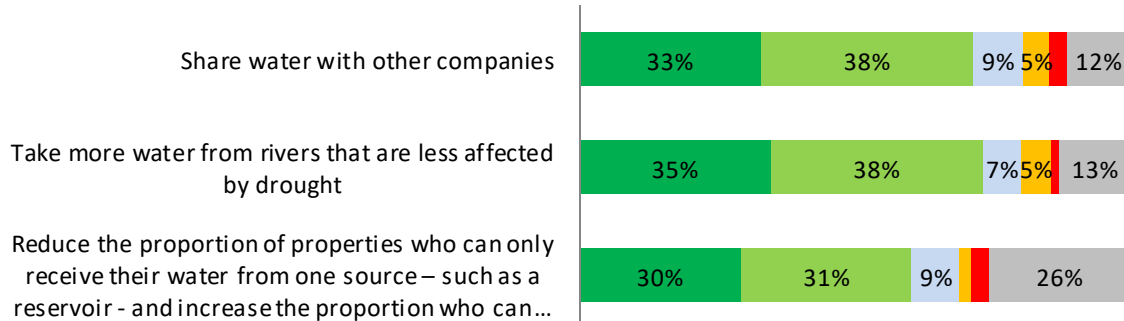
## Services in need of improvement (400)

■ Improve - a great deal   ■ Improve - a little   ■ Improve - not very much   ■ Satisfactory   ■ Don't know

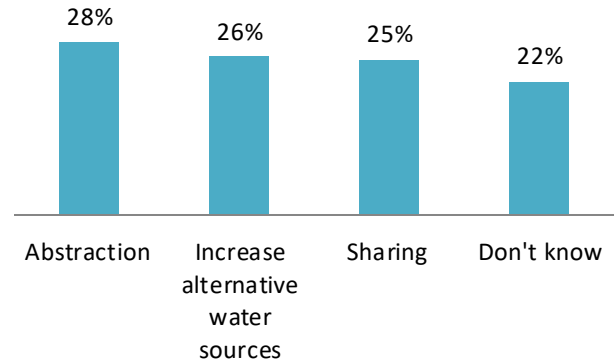


## Should these be included in Wessex Water's plans? (400)

■ Strongly agree   ■ Tend to agree   ■ Neither/nor   ■ Tend to disagree   ■ Strongly disagree   ■ Don't know



## Which of these is it most important for Wessex Water to do? (400)







## Rated in the middle of the priority ranking

*“There will never be a hosepipe ban here”*

*“I can trust their services to keep going even when unexpected events happen (such as floods and droughts)”*

- Impressive, ambitious
- Hosepipe ban not relevant to many (*rich person’s promise*, drinking water more important)
- Few have experienced interruptions to supply – not an issue they ever think about
- Expect more problems due to climate change

### Option 1: investment in assets

- Reservoirs feel like logical solution (necessary if other regions in drought and to plan for population increase)
- Positive as not reliant on others (and could sell to others)
- Uncertain where will build reservoirs
- Will this encourage greater water use (analogy to new motorways)

### Option 2: mix of alternative approaches

- Like idea of encouraging reduced usage – education is a good thing but takes time
- Feels too long term (Option 1 quicker)
- Too uncertain, insufficient guarantees
- Water trading not helpful if a national problem
- How will this address flooding problem?

**Difficult decision, no clear consensus  
Want a mixture of Option 1 and Option 2**



*“There will never be a hosepipe ban here”  
“I can trust their services to keep going even when unexpected events happen (such as floods and droughts)”*



## **Non Domestic:**

- Hosepipe bans polarise: ambitious goal vs. necessary and responsible environmental measure in extremis (assume businesses exempt)
- Concerned about reputational damage making promises for ‘unexpected’ events

**More sceptical about challenge of getting customers to change behaviour – therefore need balance of 2 options**



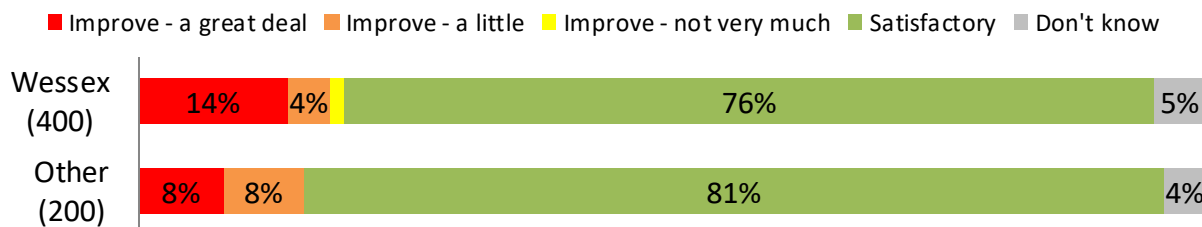
## **Customers of tomorrow:**

- More positive about hosepipe ban promise - feels like a tangible goal
- Concerned that too ambitious – it may be necessary/helpful in the future to have hosepipe ban (assume it won’t affect them and there won’t be other restrictions)



- Overall customers are happy with the taste and appearance, hence it is described as less important than other areas such as leakage, flooding, saving money and reliability of supply
- That said, it presents an issue for some with almost one in five (18%) feeling it needs improvement – 19% in the Wessex-only region
- Working with farmers is the most popular approach to improve

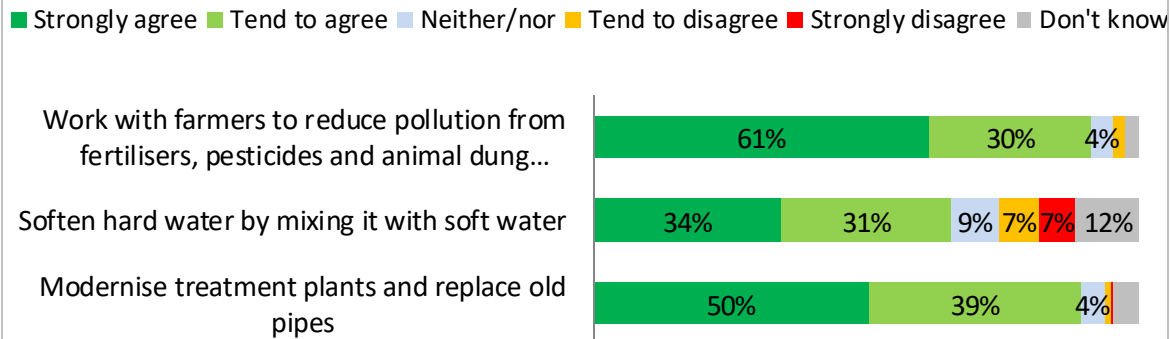
## Services in need of improvement - *Improving the taste and appearance of water*



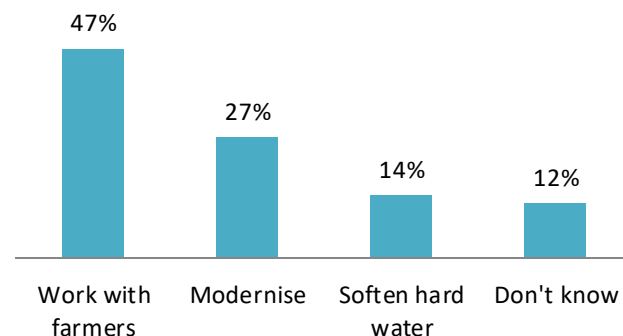
2015 tracker data shows similar measure: *provides water that smells, looks and tastes good*

87% score 10 for importance  
81% score 8-10 for performance

## Should these be included in Wessex Water's plans? (400)



## Which of these is it most important for Wessex to do? (400)





## Consistently rated as the most important goal

*First and foremost what they supply to your home has to be safe.  
Middle age group, Bath*

*“My water is safe and healthy to drink”*  
  
*“My water tastes and looks good”*

- Viewed as an expectation → a **hygiene factor** for a water company
- This should already be achieved – should be reality now, not an aspiration
- Not just about how it looks and being healthy, but also want high quality (including hardness)
- Want it to be best in country/better than bottled water





**Option 1: avoid additional water treatment**

- Long term solution, may take longer
- Less certain, can't always rely on others
- Better to be proactive and prevent problems
- Important to work with farmers
- More natural, environmentally friendly

**Option 2: additional treatment processes**

- Greater certainty & guarantees (can't trust farmers to act)
- Opposition to water softening (too many chemicals, worse for health)
- Too expensive *“waste of money adding chemicals”*

**Vast majority vote for Option 1**

  • Express very similar views  
• Water softening more polarising issue for some non-domestic

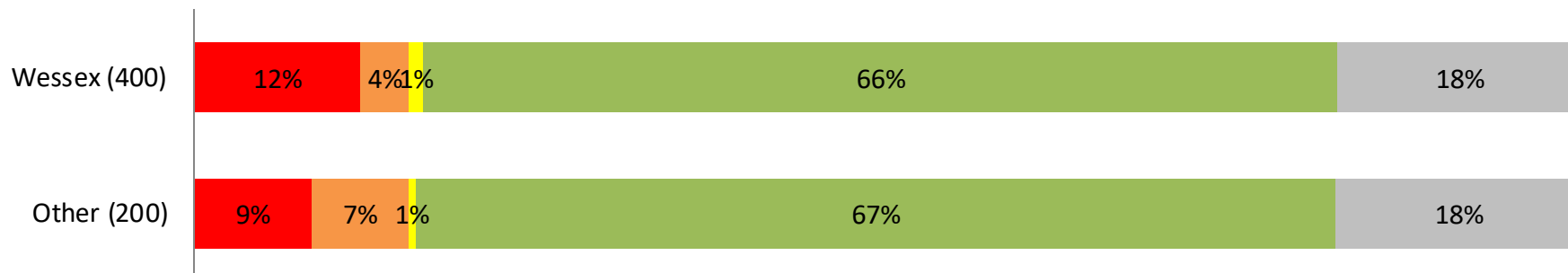
# Financial support: low importance due to limited relevance



- Uncertainty as to whether Wessex should provide more help and financial assistance suggests a lack of relevance to most customers and that they perhaps do not know what help is currently offered
- No differences by region

## Services in need of improvement - Providing more help and financial assistance for customers that need it most

■ Improve - a great deal  
 ■ Improve - a little  
 ■ Improve - not very much  
 ■ Satisfactory  
 ■ Don't know

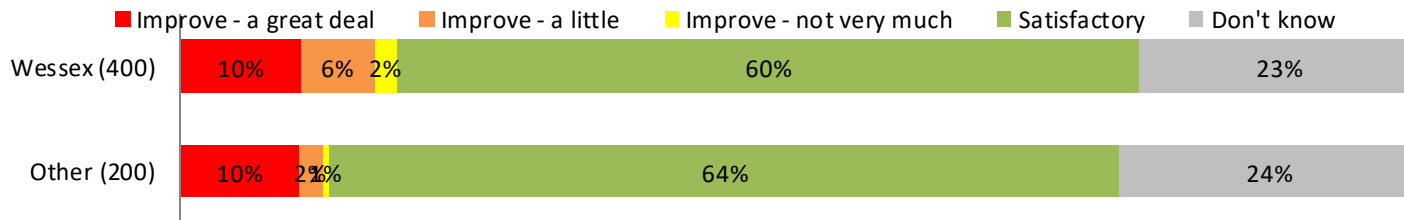


Over 35s (19%) and unmetered customers (21%) are more likely to believe that Wessex should improve the support offered for customers in most need

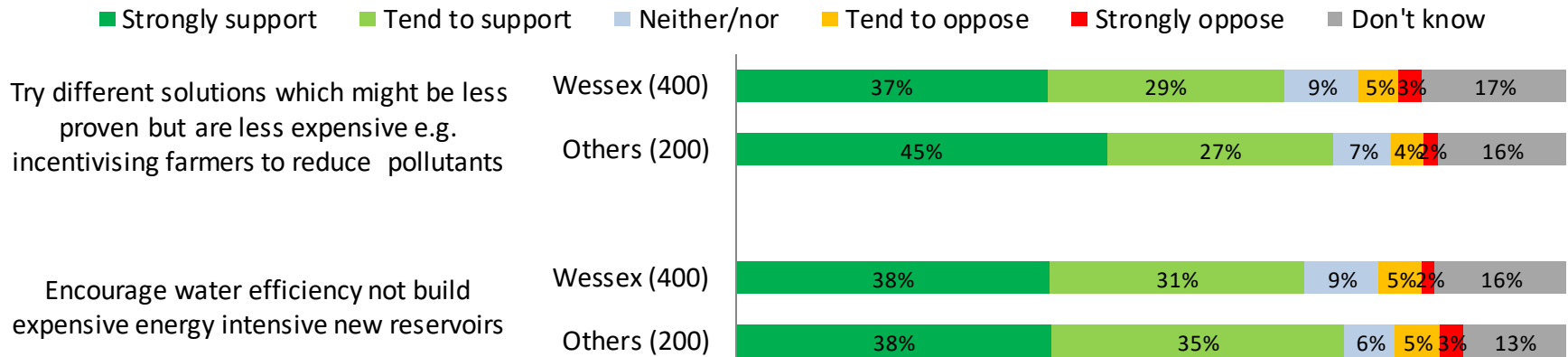
- Whilst most customers are inclined to support initiatives such as incentivising farmers and encouraging water efficient behaviour to increase sustainability, there is less awareness about the need to reduce carbon footprint
  - opportunity to communicate current efforts?



## Services in need of improvement - *Reducing Wessex Water's carbon footprint*



## Wessex Water is planning to take a more sustainable approach to their business. How much do you support or oppose... ?





*“My water company is carbon neutral”*

## Consistently rated as lower priority (But still considered important)

Carbon footprint raised spontaneously as goal for long term plan:

- Be more environmentally friendly
- Invest in green energy, use solar panels
- More ‘poo’ buses
- Be more energy efficient

Often polarising, reasons for lower priority rating:

- Other goals on list more important/relevant - not core (rather than not wanted or important)
- Too ambitious
- Expected of large corporate organisations (especially non domestic)
- Is this jumping on the ‘green bandwagon’

Support for inclusion of reduction in carbon footprint also demonstrated throughout discussions and deliberations of other goals



- Place higher priority – think should be aspiration of all companies
- Some claim prepared to pay more for this



**Stakeholders**

**your say  your future**





STAKEHOLDERS:  
2 meetings and 8  
depth interviews

Stakeholder profile	
Wessex Water Partnership	<b>7 participants</b> <b>April 5<sup>th</sup></b>
Catchment Management Panel	<b>9+ participants</b> <b>April 12<sup>th</sup></b>
Wider stakeholder voices <ul style="list-style-type: none"> <li>• Pre-task exercise</li> <li>• Read key sections of <i>The Way Ahead 2015-40</i></li> </ul>	<b>8 x 45 minute</b> <b>telephone</b> <b>interviews</b>

## Objectives

- To review relevance of the Strategic Direction Statement with stakeholders
- To identify themes and issues that stakeholders wish Wessex Water to accommodate in its planning



**Catchment Management Panel**

**Wessex Water Partnership**

## Environmental

Protecting the environment

Climate change

Flood prevention

Increasing pollution

Pressure on the countryside: housing, large building projects

Innovation in relation to sustainability

Consumers unaware of their impact

## Customer

Demographic trends: aging & growing population

Welfare reform (increasing debt)

Health trends: mental and physical

Customers becoming more demanding/saavy

Digital inclusion and exclusion

Need to influence customer behaviour

## Political/economic

Global economy

Global security

Intergenerational fairness

Impact of Brexit on legislation

Greater collaboration (with public sector)

Political 'indifference' to environment

Pressure to build more houses

## Environmental

- Joint public / private sector initiatives
- Innovation: energy and resource efficiency, grey water, SUDs
- Collaborations to improve pollution

## Customer

- Smart technology
- Engaging customers e.g. householders and businesses on environmental impacts
- Embed messages via large employers
- Canvass youth for their outlook
- Assess willingness to pay for a premium service
- Improve customer service via technology (overcome legacy issues)
- Ensure competency of staff

## Political/economic

- Supporting local (supply chain)
- Extend influence to local planning and new build laws (to improve water usage)
- Pressure to act may come from online petitions rather than government

**Depth stakeholders (i.e. those not already working with Wessex Water as part of a specialist panel) are only able to give a high level assessment of the SDS**



## **Acceptability of SDS based on different factors for different stakeholders**

- Trust Wessex to do the right thing
- Review from 'citizen' rather than specialist viewpoint: looks sensible
- See the need to balance bills with service: hope the balance is fair
- Nothing disappointing or perceived as unfair
- Consider reputational risk to Wessex Water of setting goals too high
- Wider influence around flood prevention (but not at risk of weakening core operation)



## **Some questions over emphasis or missing areas**















- Lacks emphasis on need for water efficiency and education for consumers on how to use less
- How is Wessex Water itself going to reduce, recycle, reuse?
- Can it do more to help low income customers post welfare reform e.g. pay as you go options?
- Implications of an open market e.g. will sustainability be undermined?

Panel members (i.e. those who attended the Catchment Management Panel or WW Partnership meeting) reviewed the options posed in the customer deliberative events

### Option 1

### Option 2

 *Catchment Management*  
 *WW Partnership*

	Avoid additional water treatment	 	Additional treatment processes
	Smart meter in every household	 	Gradual increase of metering
	Invest in physical assets		Combination of measures
	Widespread pipe replacement		Targeting and quicker response
	Be the best water co	 	Compete with best brands
	Build more assets		Combination of measures
	Introduce more cleaning processes		More prevention and collaborations
	Build more assets e.g. storm storage		Incentivise farmers to pollute less



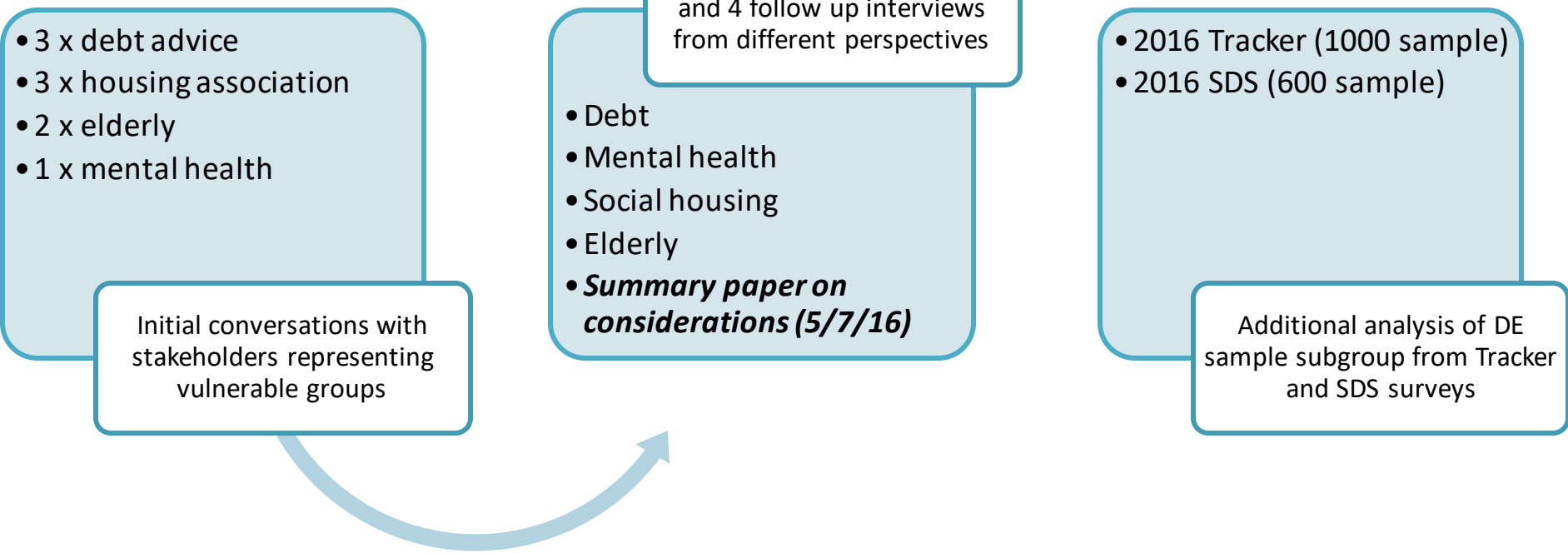
**High degree of consistency for options from all panel member stakeholders**

- Overall the more 'innovative' and/or environmental option is favoured
- Partnership have stronger support for voluntary metering and increasing service levels
- Also strong views for 'best of both' options

## VULNERABLE & SELDOM HEARD

- Data analysis of lowest income sub group
- Feedback from interviews about 'seldom heard' groups
- Implications for engaging seldom heard throughout business planning process

**your say**  **your future**





- Universal credit and welfare reform creating large case load and appeals
  - Rent arrears
  - Bedroom tax
  - Change from JSA to Employment & Support Allowance
  - DLA to PIP/new PIP criteria
- Increasing levels of referrals from rent teams in social and council housing
- Increasingly doing 'crisis' work rather than ongoing support/education
- Mental health: broad range of people and experiences – highly individual circumstances.
- Older people: multi-agency referral approach to enabling access to signposting, support, and services for older experiencing vulnerability.

- Water a 'quick win' if eligible for Assist tariff – can be a hook at events
- But very low awareness amongst customers
- CAB and Wessex Water praised

*Wessex Water are very well intentioned*  
Mental health charity

*Wessex Water: incredibly helpful*  
Government funded community programme for elderly

*Of all the companies we deal with Wessex Water are definitely one of, if not the best. Very supportive of what we do*  
Debt advice charity

Vulnerability  
driver: financial  
stress

- Community outreach difficult with very low income/in debt (low engagement):
  - Budgeting workshops poorly attended: increasingly run as e.g. coffee mornings, cookery workshops, winter craft workshops as a means to discuss budgeting/managing expense of Christmas, nutrition
  - Incentives used e.g. 6 week course designed to break homelessness cycle: housing application backdated by 6 months. £25 shopping voucher etc. plus skilled facilitator
- High engagement from refugees who are keen to get on

*I can't imagine [engaging about business plans] will work in the group we work with*  
Debt advice charity

- **Housing Association:** all group/f2f engagement now being cut but increasing use of online survey tools which is proving successful

- **Debt charity:** primarily one to one meetings with people in crisis: inappropriate to intercept
- Existing workshops/drop-ins/visits to children's centres present opportunities
  - Wessex Water in the community: giveaways, quizzes/games/fun and accessible

Vulnerability  
driver: mental  
health

- Examples of weekly drop in sessions: some attend weekly, others less often
  - Often only social contact
  - Safe space, non judgemental (staff able to monitor changing mood/behaviour of 'regulars')
  - Signposting to other help e.g. GP, CAB, debt advice
- Key issues for companies:
  - Understanding how actions/interventions can impact this group (e.g. paranoia and wariness of authority)
  - Understanding that ability to pay is not necessarily related to mental health

- **Mental health charity:** while no organisations have attended these drop-ins some interest in Wessex Water attending
  - Wessex Water in the community: informing, promoting Assist
  - And direct dialogue about plans (i.e. with Wessex Water staff)

*The guiding principle here is that there must be something in it for our clients*  
Mental health charity

Vulnerability  
driver: old age

- Participating organisation (Dorset POPP): focused on community-based preventative activities
  - Improve physical and mental health & wellbeing
  - Avoiding or delaying need for residential care & hospital admissions
  - Preventing social isolation
- Relevant issues:
  - Energy advice and achieving best price deals is a hot topic
  - Energy links to water bills/special tariffs – but not currently being made through its referrals and signposting networks

- **Regional partnership organisation:** very active stakeholder networks that meet regularly and welcome participation from companies e.g.
  - In one region, 6 x quarterly meetings attended by 20-30 people (representatives of community groups, interested individuals etc.)
  - Potential to send survey to a wide range (in the hundreds) of contacts via programme manager
  - Opportunity to promote Assist via highly organised signposting initiative 'Safe and Independent Living' or SAIL

## Direct engagement: clear themes

- **Clear benefit:** engaging with seldom heard should have real benefit for the participants
- **Relevance to participants:** most relevance seen (and support offered) when relating to managing water bills (Assist Tariff)
- **Direct, not intermediated:** engagement is expected from Wessex Water representatives (and to include information, signposting, giveaways)

## Engagement via partners:

- In addition to direct engagement: to understand policy context
- To get stakeholder view on **relevant** aspects of business plan
- For non English-speaking communities
- Instead of direct engagement where drivers of vulnerability relate to cognitive capacity

## Opportunities to consider

- Online surveys sent out by housing associations
- Attendance at partnership network groups (e.g. Dorset Age Partnership) to present business plans and get feedback
- Introducing games/online tools to use during community engagement that supports business plan engagement

## Desire for broader engagement activities e.g.

- Raise profile of Assist
- Participate in SAIL
- Send plain English letter re bill rises – alert low income groups
- Support charities to do more outreach
  - Help to train staff and volunteers, job centre staff
  - Identify journey that takes people into vulnerability and identify opportunities to engage e.g. first job centre interview

	National profile	Usual SEG weighting	SDS sample (weighted) – accounting for refusals
<b>A</b>	4%	27%	6%
<b>B</b>	23%		17%
<b>C1</b>	29%	29%	25%
<b>C2</b>	21%	22%	19%
<b>D</b>	15%	23%	17%
<b>E</b>	8%		2%
<b>REFUSED</b>			<b>14%</b>

## A note on DE data

- We weight according to the combined DE profile rather than each grade separately
- Es make up a small proportion of sample
- However, we also get high levels of refusals (82/600 or 14%) which are likely to include low income groups

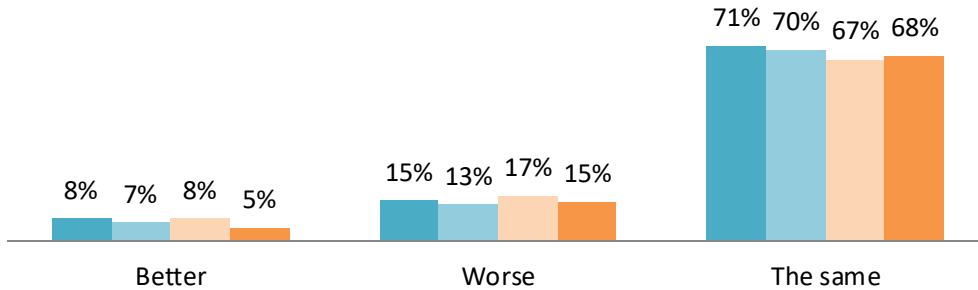
## Implications for future engagement

- We decide not to accept refusals?
- We set quotas on individual grades?
- We adopt different classification (Census)?

e.g. CCW's profile achieved last time in WW:

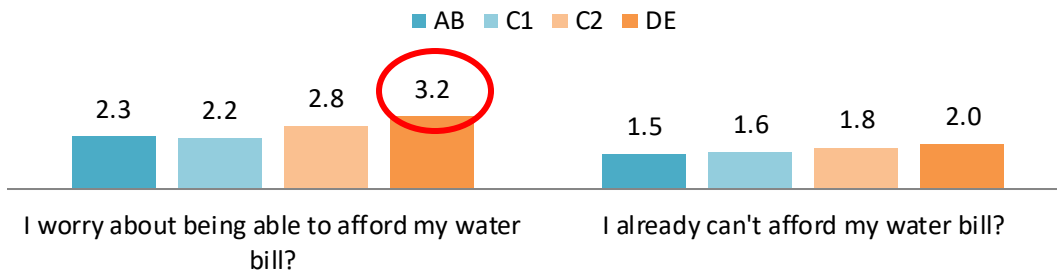
- 41% Higher managerial, administrative & professional occupations
- 23% Intermediate occupations
- 29% Routine & manual occupations
- 8% Never worked and long-term unemployed/ Full-time students

**Q11. Thinking about the current economic climate, do you expect your household to be better off, worse off or about the same in the next 12 months? 2016 TRACKER**



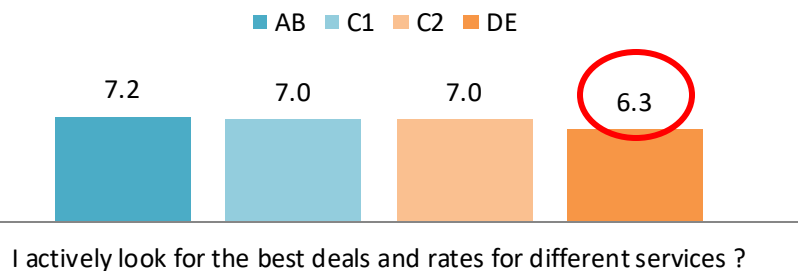
No significant differences in financial outlook

**Q19. How strongly do you agree or disagree with... 2016 TRACKER**



However, lower income groups have greater concerns about bill affordability

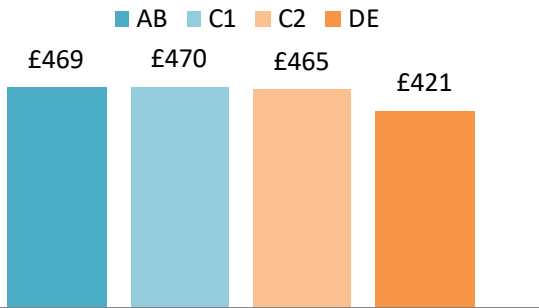
**Q19. How strongly do you agree or disagree with... 2016 TRACKER**



DE less likely to be actively seeking deals

Denotes significance

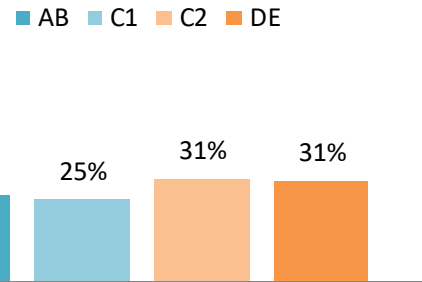
## £ 2016 TRACKER



How much do you think you currently pay?

DE's think they pay an average of £44 less than other social grades

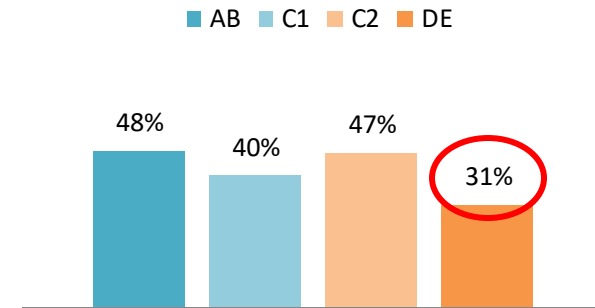
## % Don't know what pay 2016 TRACKER



How much do you think you currently pay?

Though a greater proportion of DEs say they don't know what they pay.

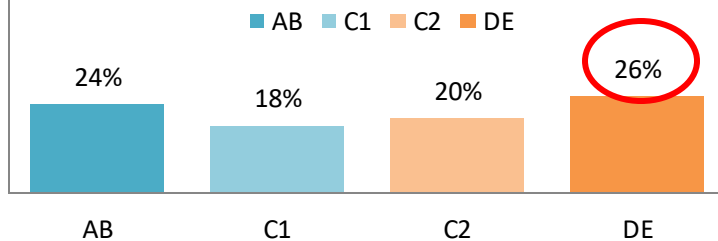
## % with meter 2016 TRACKER



% with a water meter

Fewer DEs have a water meter.

## Q22. How would you rate the drinking water supplies and the sewage service you receive in your area in terms of value for money? ('Very good')



## Low income groups give higher vfm scores than C1C2, however:

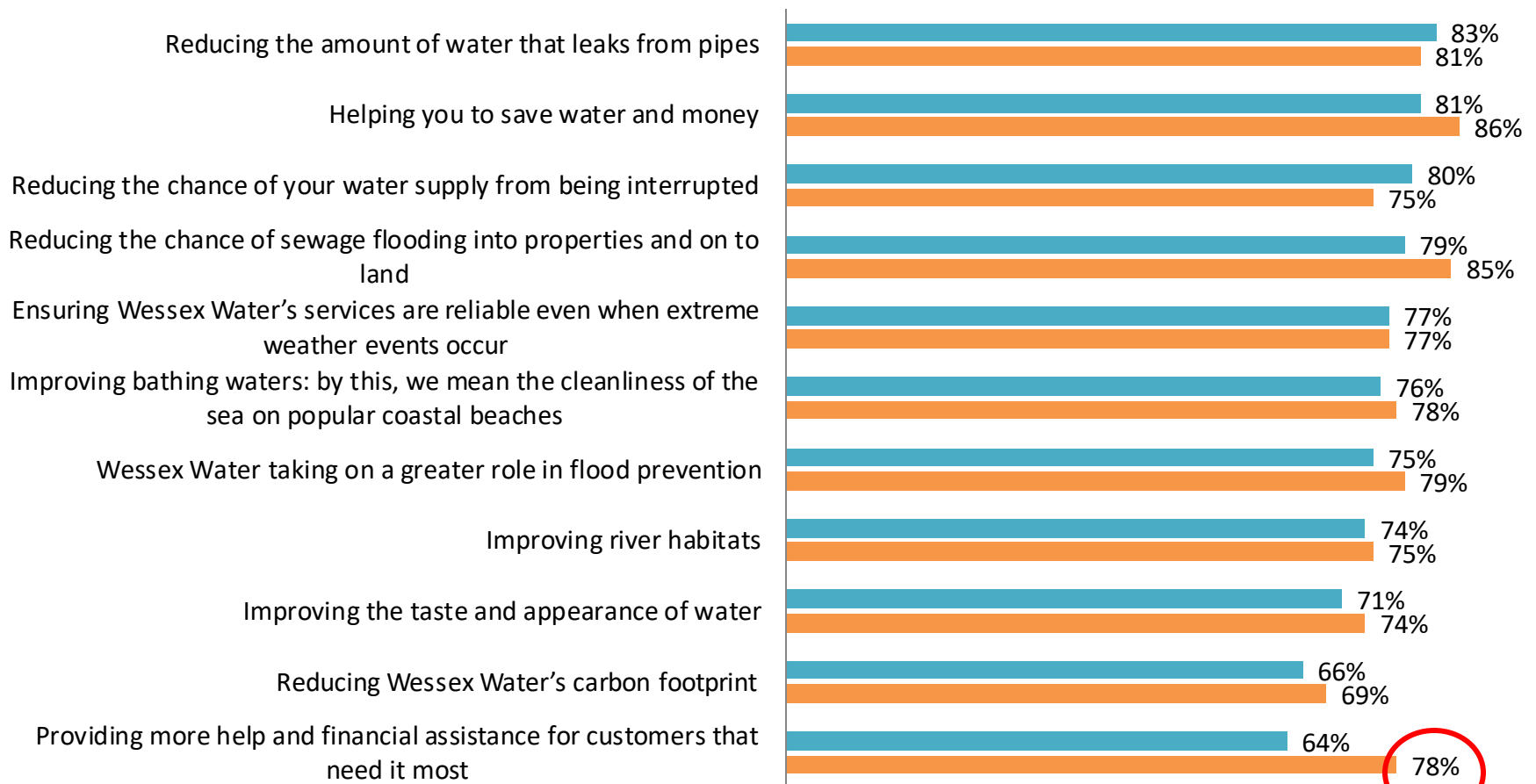
- More likely to think they pay less than others
- More likely not to know what they pay than ABC1s
- Less likely to have meter



DE customers reflect same top two priorities. However DEs more likely to prioritise *‘providing more help and financial assistance’*.

## How important is...10 is the most important? SDS Survey

■ ABC1C2Score 8/9/10 (Base 402) ■ DE Score 8/9/10 (Base: 114)



## Financial vulnerability

- Additional analysis supports need for increasing financial support for DEs
- (Part of wider priority to promote water/money saving)
- Inclusion in mainstream engagement and community outreach work
- Incorporate new strand of data via local housing associations

## Other drivers of vulnerability

- Use existing community outreach to inform business planning
- Strong emphasis on informing and benefitting participants (not simply a data gathering exercise)
- Enable direct engagement where possible by developing engaging toolkit of games/quizzes relating to individual aspects – not the whole – plan (with means to capture scores)

## Implications for survey design

- Refusals?
- Quota for E sub group?
- We adopt new classification



*Prince*

Key account manager



*Ruth*

Environment manager

## Staff views

**your say**  **your future**



5 x STAFF  
workshops  
1½ hours



Online survey  
with 737  
members of  
staff

Staff sample profile	
Retail • CSU; ROC, R&M Supply	<b>Claverton Down</b> <b>1 group</b>
Wholesale • Operations staff : supply and waste	<b>Yeovil</b> <b>2 groups</b>
Retail • Billing services • Account Managers (W2B)	<b>Nailsea</b> <b>2 groups</b>

## Objectives

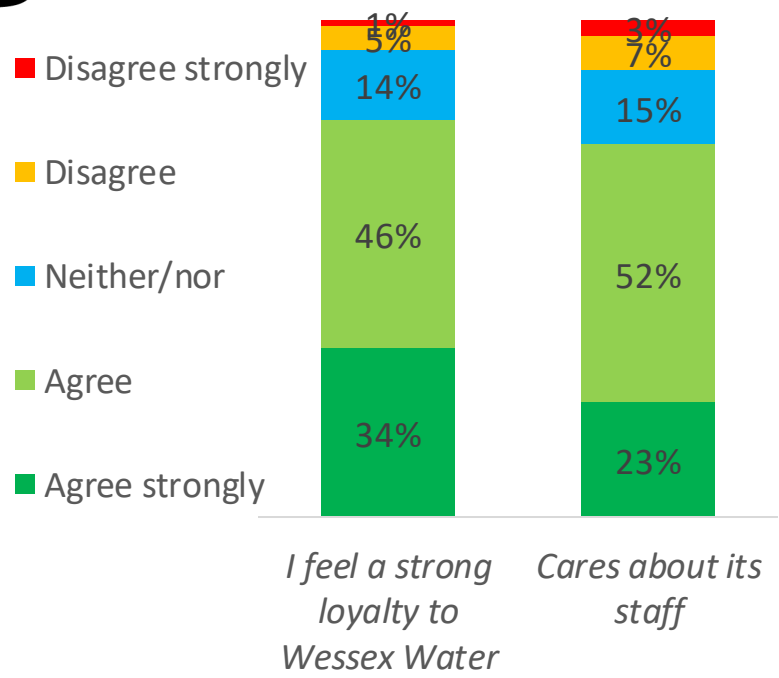
- To understand the staff perspective on the Strategic Direction Statement
- To engage a broad representation of staff qualitatively before issuing an inclusive staff survey

# Staff image of Wessex Water

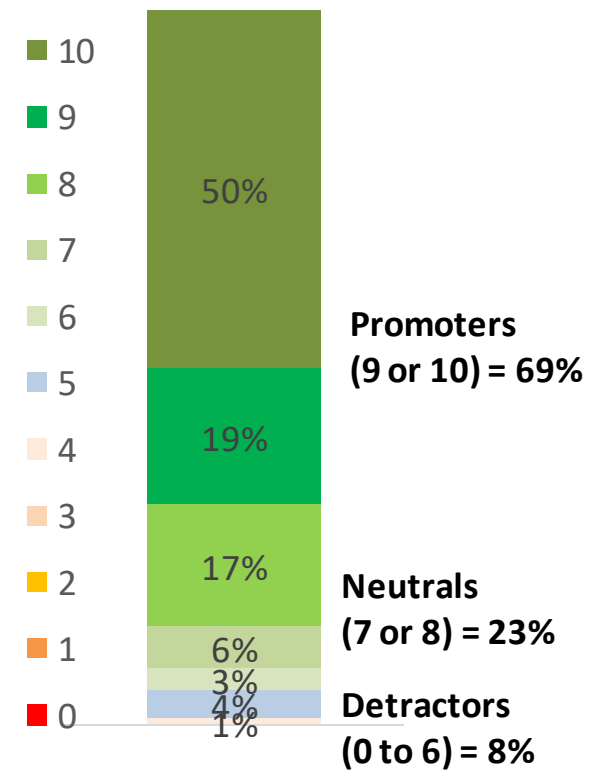
- Staff have a strong sense of loyalty to Wessex Water
- While 67% of staff think Wessex Water cares about its customers (a finding supported in the qualitative research), they are less likely to think Wessex Water cares about its staff: only 23% strongly agree that Wessex Water cares about its staff
- Staff demonstrate a high NPS score of +61 (compared to an NPS score of +39 in the tracker)



## How strongly do you agree or disagree with...?



## Net promoter Score = +61



None are aware of the SDS, but many aware of AMP cycles and some awareness of broader strategic intentions

## Several themes relating to what imagine/expect to be in a long term plan

### Competition preparation

- Moving to being a retailer vs. wholesaler
- Adapting internally: BWBSL arms length with operations
- Operations will be able to do less for customers
- Prepare for domestic competition too

*It'll be very different in future. We'll be mercenary, we won't have allegiance, we will be our customers' champion because we'll be after the customers.*

### Strategic plans to become a service brand

- To be judged against consumer facing brands, not just water companies
- Become better known/higher profile
- To remain number 1 in the industry
- Self service, Apps etc.

*We know that Colin wants to be the Amazon of transactions and the John Lewis of the service*

### Resilience of infrastructure

- Taking more innovative environmental approach
- Being more proactive than reactive in preventing problems
- Climate change adaptation
- Asset replacement
- IT improvements

*We need to start updating some of our assets: sewers, pumping stations, waterworks.*

## Staff believe that customers simply do not know that they receive a premium service

- GEM is increasing customer expectations (not necessarily making them more satisfied)
- Major sums spent on meeting the needs of users (non domestic) when supply disrupted
- Increasing 'unwanted contact' when dealing with customer side leaks etc.
- Anticipate problems if and when the market opens (business and domestic) as customers have not appreciated they pay for a premium service

*We go above and beyond , like working with communities, we don't have to do it - we do it because we are a good water company.*


*[Customers] have taken the [high levels of] service for granted and not realised the cost – because we haven't told them*


*We don't do enough about telling people what we do from an environmental point of view.*


*[About building a lay-by for 8 cars] where does it stop? Whose money are we spending?*


*We have smaller timescales than is expected of us, we give shorter timescales than we are legally obliged to do.*

# Response to the 9 goals


 **Provide excellent customer service**  
High levels of satisfaction by consistently meeting or exceeding customers' expectations; being viewed as a trusted, reliable and preferred service provider


 **Reduce leakage**  
Continue to drive leakage down and fix leaks reported by customers within 24 hours


 **Provide high quality drinking water**  
Safe, wholesome and pleasant drinking water, which complies with mandatory standards and supports well-being of our customers and communities


 **Help customers save money & water**  
Affordable bills for our customers; and wiser and more efficient use of water and sewage services

 **Help safe-guard quality of bathing waters**  
Contributing to bathing water quality being in good or excellent condition

 **Improve reliability of the water supply**  
Assets and working practises that continue to deliver high quality reliable services, even in the face of unusual events

 **Prevent sewage flooding**  
The risk of sewage flooding kept to a minimum, benefitting the well-being of our customers, communities and environment

 **Protect rivers, and lakes**  
Watercourses in good ecological and chemical condition, with abstraction, effluent and land runoff fit to be sustainably accommodated by the environment

 **Reduce our carbon footprint**  
Achieving carbon neutrality in our combined activities and generating our own renewable energy

- Nine goals largely seen to reflect what WW does already: not challenging at first glance
- But reluctant to agree to higher targets... equates to more pressures for staff
- All important, central to what Wessex Water does, some obligatory
- Generic: no different to other water companies
- Some re-group as:
  - **Core:** customer service, leakage, sewage flooding, quality water and resilience
  - **Environment and shared responsibility:** bathing water, rivers, carbon footprint
  - **Innovative:** saving money and water

## Missing goals?

- no mention of staff/investing in people
- investment in technology/innovation
- a more ambitious/prominent green commitment

## Meeting customer needs?

- Staff perceive goals will meet customers needs (see customers as having basic expectations: clean water, low bills and no leaks...)





## Provide excellent customer service

- High service (SIM) is a reason to feel proud
- HOWEVER: risk of service deterioration in a competitive world
- WW chose to offer and charge for a premium service, but customers do not know they get this... and may choose a cheaper option



## Prevent sewage flooding

- Important ambition but staff see it not entirely in WW control
- *Lowest in UK* admirable: but know WW can not eliminate the risk entirely
- Customer behaviour key (education strategy)
- Hard to factor the impact of climate change (is goal too ambitious?)




## Reduce leakage

- 'Practical minimum' odd language...or '*a cop out?*'
- Customer service staff embrace the goal... (knowing how this matters to customers)
- Operations think impossible to achieve: many impediments to fixing within a day
- More calls for compensation payments



## Provide high quality drinking water

- Acknowledge that while goal does not look ambitious, in reality it is ambitious
- See as already achieved '*we do this now*'
- Need for customer education about cloudy water
- Provenance of water: *People want to know where food comes from...they should know where water comes from too*



Improve  
reliability of the  
water supply

- Goal relating to hosepipe bans sounds 'old hat'; '1970s' – prefer 'no restrictions'
- *But also see as very ambitious for a 25 year plan*
- Reliability also about pipe work, leak management




Help  
safe-guard  
quality of  
bathing waters

- Difficult to make promises about aspects can't fully control 'we get bad press when it's from farms'; also reference SWW, Welsh and Thames bordering region
- Some call for WW to be better at communicating 'We're doing our bit': and about working with stakeholders
- Customer service staff have no reference points for this goal



Protect  
rivers, and  
lakes

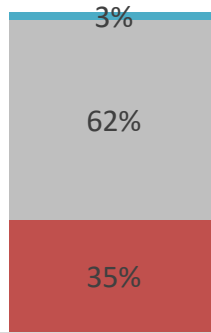
- Many feel distant from this area of business
- Want to be 'leading' in this area – but not a tangible goal
- Operations see complexity of issue: water management in dry periods etc.
- Some see as a good public message to promote



Help  
customers  
save money &  
water

- Already supporting lowest incomes
- Need to communicate value for money and how to save water
- Widespread support for compulsory metering and/or education
- Industry seen as behind re Smart meters
- Encouraging customers to take social responsibility for water use more effective?

## If it was down to you, which of the following options do you think Wessex Water should adopt?



Staff (737)

- Spend a smaller proportion of your household budget on water but get a reduced service (for instance slower response times, reduced maintenance and a higher chance of burst pipes or flooding)
- Spend the same proportion of your household budget on water to get the same service
- Spend a larger proportion of your household budget on water to provide a better service (for instance quicker response times, improved maintenance and less chance of burst pipes or flooding)

As a customer I'm happy with the way things are - like many people, I wouldn't see a tangible benefit as a result in a bill increase. As an employee, however, I'm aware of the enormous costs of delivering robust services to a relatively small number of customer over a large geographical area.

Service is currently better than most, and is more than satisfactory

We provide a good service already

It seems to me what we are doing is working - a smaller proportion may lead to an erosion in customer satisfaction and a larger proportion may result in unnecessary expenditure.

With competition coming we need to offer the best possible service to maintain our commercial customers ... and word of mouth is still the best advertisement.

Likely to need to spend a much higher proportion to see a much lower return. Not always cost effective. Failure will have a big impact on customer views to the company. Customers are currently happy so best to maintain the status quo, and try to make small improvements over time.

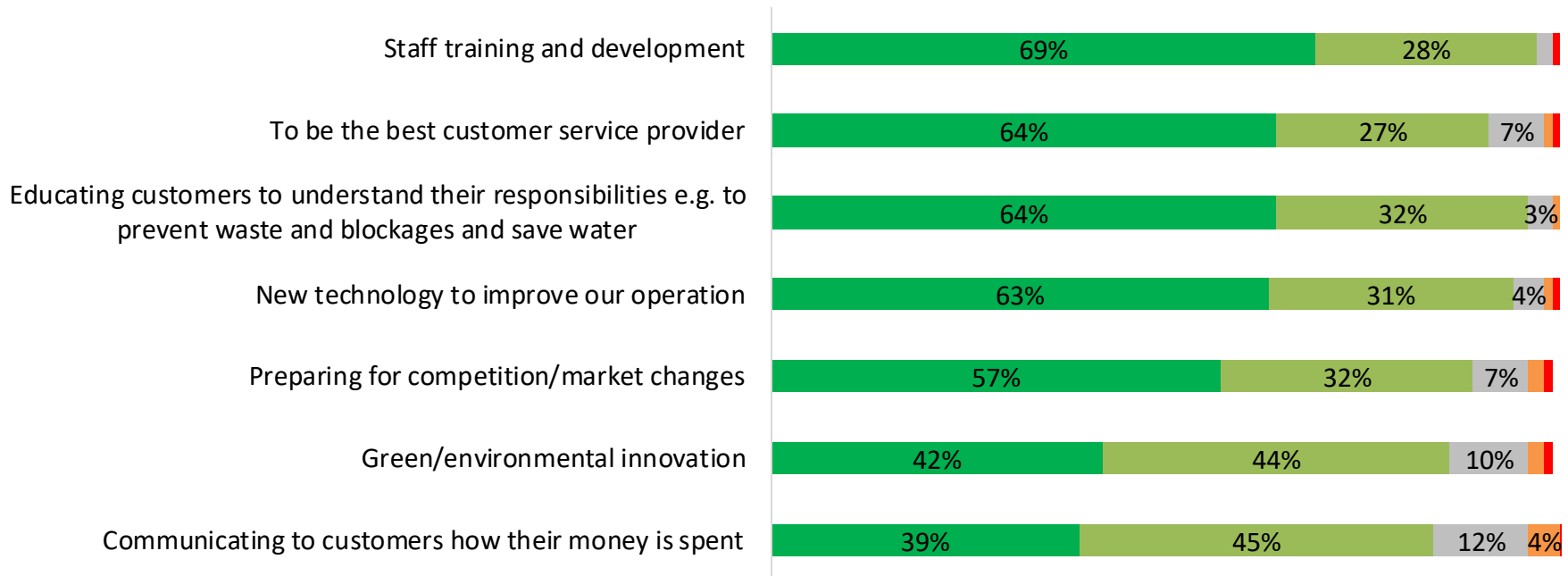
Going forward, it is likely that all budgets, including customers, will be constrained. It may be unlikely that we can always increase bills to produce ever higher standards of service, however, by maintaining bills at the present rate, we should be able to meet customer needs, continue with our existing good work and also have facility to improve assets when needed.

- The majority of staff think that *training and development, being the best customer service provider, educating customers, using new technology and preparing for the open market* are ‘very important’ areas for investment.
- *Environmental innovation, and communicating with customers about how their money is spent* are also seen as important overall – but with a lower proportion saying ‘very important’.

## How important will it be to invest in the following when considering the long term plans for Wessex Water? (Base: all)



■ Very important   
 ■ Fairly important   
 ■ Neither/nor   
 ■ Fairly unimportant   
 ■ Very unimportant



- Some clear themes emerge from the open ended question, listed in order of frequency of mentions



## Are there any goals we should be striving to meet/invest in that we are missing?

- 1. Invest in staff:** improve morale/enable career progression
- 2. Be the best place to work** to achieve the best customer service (the two are linked)
- 3. Achieve greater efficiency:** working practices, operations, better tools, better IT, keep work in-house
- 4. Fairer treatment of staff:** fairer structures/workloads, build closer teams, senior management to listen, more senior management accountability
- 5. Be more future focussed:** future staffing, post Brexit opportunities, asset planning for future generations, competition
- 6. Become a leader in environmental innovation/green solutions:** do more 'recycling' at treatment works

Continue to invest in innovation as new technologies and strategies are integral in ensuring Wessex Water continue to be the number one water company in the UK.

Richard Branson once said "*If you look after your staff, then your staff will look after your customers*". I think that is very true. A happy and appreciated workforce will always go the extra mile.



**Staff do give their support the SDS, but they are not emphatic...they understand the complexity that lies behind the goals**



**Most staff tend to be quite conservative in terms of how ambitious the goals should be:**

- Too ambitious could lead to more stressful working practices
- Service promises/SLAs could be used against them

**Not sure how achievable some goals are**

- Particularly relevant where Wessex Water are not in control of the outcome

**Nothing here for staff to really get behind or feel proud about**

- Plan feels generic, standard, like other water company plans would be

**Reoccurring theme relates to customer education:**

- They want Wessex Water to tell customers that they get a high quality service

*Customer service is bang on. The others are good but not sure how achievable they are as there are a lot of implications involved*

*Hard for customers to judge value for money if don't know what paying. We need to create a greater awareness of what they are getting*



## Summary and conclusions

**your say**  **your future**

## What is the consumer context in which Wessex Water is developing its long term plans?

- Water bill affordability remains a real issue for approximately 1 in 10 customers
- Affordability attitudes are at similar levels to PR14 research
- Brexit appears to be increasing uncertainty in household confidence
- Hence, customers continue to support overwhelmingly the 'same bill for same service' option

## How is Wessex Water perceived?

- Overall service satisfaction is very high (see appendix)
- As a utility it is especially important for Wessex Water to demonstrate its customer care and that it puts value for money before profit: perceptions of Wessex Water are very positive in relation to its customer care but unclear for its corporate behaviour re. profits
- Staff are strong advocates of the brand (but perceive the business to care more for its customers than its staff)














# Summary headlines and conclusions

## Is the SDS endorsed by customers and staff?

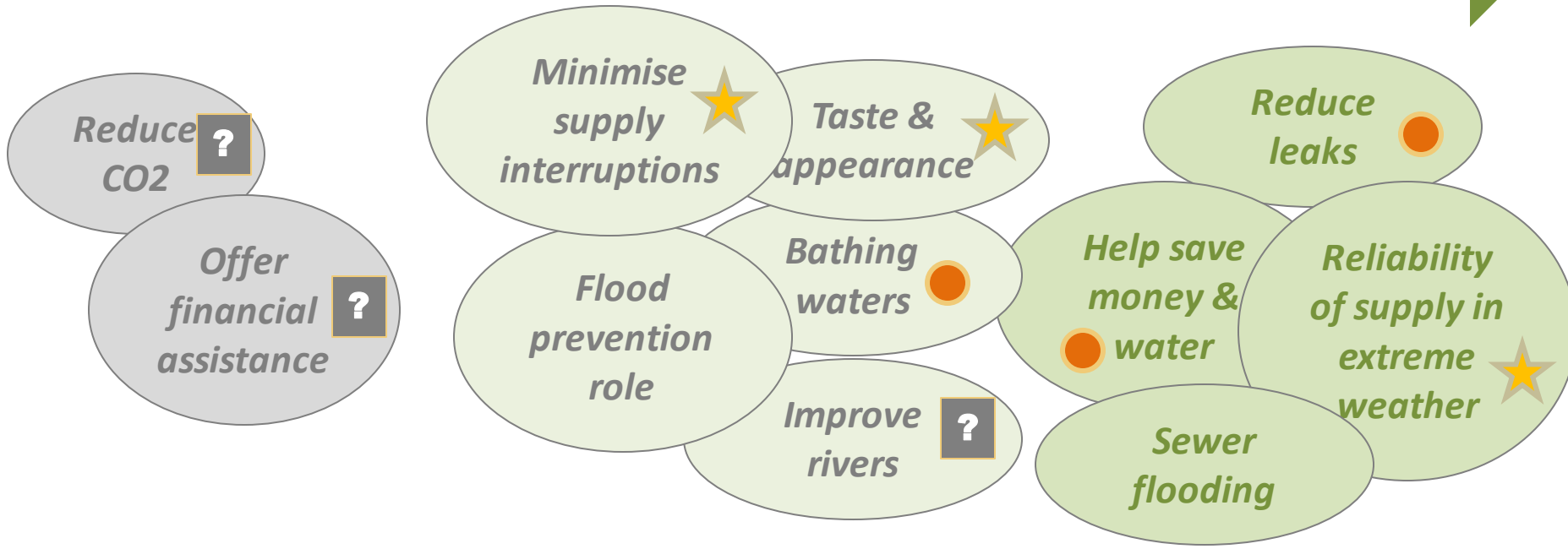
- Yes - customers agree with the underlying principles and specific improvements
  - They support the use of 'innovative'/sustainable approaches (however the strength of support appears to vary depending on the example given e.g. reed beds in 2012 were endorsed more strongly than incentives for farmers in 2016)
  - A focus on behaviour change vs. capital investment achieves majority support in 2016 (but there are indications that customers are becoming more risk averse)
- Staff also endorse the plans (but are more likely than customers to support higher bills for better service)

## What are customers' priorities for investment/improvement?

- All 11 'goals' are very important to customers: choosing priority areas is difficult for customers
- *Reducing leaks* and *helping customers to save water and money* are both potential areas for improvement. Bathing water quality is not prioritised as highly, but it is in the top three goals in need of improvement
- Areas such as *resilience in extreme conditions*, *supply reliability*, *reducing sewer flooding* and *water quality* are important but not in need of improvement
- *Reducing carbon footprint*, *offering assistance to customers struggling with bills* and *river habitats* are not priority areas for the majority – these are also the three goals that customers are less likely to know whether their standard is satisfactory or in need of improvement

Sample	Overall acceptance of SDS	Any contentious aspects	Desire for greater emphasis
	✓	 <ul style="list-style-type: none"> <li>• Strong rejection of compulsory metering</li> <li>• Reject taking a bigger role (but lack info)</li> <li>• Best in class, not best in the land</li> </ul> 	<ul style="list-style-type: none"> <li>• Communications generally</li> <li>• Water saving information and initiatives over and above metering</li> <li>• Water saving innovation</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Leaks are less contentious for younger people</li> </ul>	<ul style="list-style-type: none"> <li>• Higher expectations for online services, Apps etc.</li> <li>• Reduction of carbon footprint and green credentials</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Larger businesses aware of impending competition: what are the plans?</li> </ul>	<ul style="list-style-type: none"> <li>• Looking for high service levels (online, accurate bills etc.) – but not at a premium price</li> <li>• More on smart metering, monitoring, leak prevention/alerts on their premises</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Strong support for compulsory metering</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage water efficiency behaviours in customers</li> <li>• Other areas reflect organisational agendas</li> </ul>
	✓	 <ul style="list-style-type: none"> <li>• Same day leak commitments impossible to achieve</li> </ul>	<ul style="list-style-type: none"> <li>• Inform customers that Wessex offers a premium service (manage customer expectations, create sense of value)</li> <li>• Encourage responsible behaviours in customers</li> </ul>

Although cost of living not dominating in 2016, post recessionary cost consciousness is the 'new normal'



- ★ Highest levels of performance satisfaction (top 3)
- Highest potential for performance improvement (top 3)
- ? Higher proportions unable to say whether needs improvement (top 3)

# Summary headlines and conclusions

## Implications for business planning

*Comprehension/engagement (or lack of it) is driving responses*

- Leakage will remain a key indicator for customers until generic perceptions of leaky water companies are changed (note customers of tomorrow in qualitative stage who did not prioritise leaks)
  - Reconsider economic leakage as a means of rational persuasion: move to perceived acceptability of leaks and support with communications
- Appetite for ways to save water/money evident in deliberative work and supported by the quantitative
  - Innovation in this area has potential to improve trust ratings
  - Note magazine readers have more positive image perceptions

*Me vs. others*

- Some goals are not valued as highly by the mainstream e.g. reducing carbon and supporting vulnerable audiences
- These, plus community involvement, employee treatment are more about *how* you do business (CSR) and distinct from *what* you do i.e. service delivery.
- Making a greater distinction between what you do and how you do it will present a better foundation for promoting trust and 'brand image'
- Implications for business plan communications (and stimulus materials): presenting goals in terms of both customer benefits and brand values

# Truth.



“We'd like to confirm, from the crew of Apollo 17, that the world is round.”

**Eugene Cernan,  
Commander**

## Contact

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**Wessex Water – SDS**  
**Deliberative Customer Workshops**  
**Discussion Guide FINAL REVISED 22.3.16**

**N.B. The room will be arranged to enable both plenary presentations/discussions and smaller table based discussions. A Blue Marble moderator will sit on each table throughout the evening. All discussions will be digitally recorded.**

Summary of Programme		
5.45 - 6.00	Arrival and registration	
6.00 - 6.05	Welcome & Introductions	5 mins
6.05 - 6.25	Warm up & temperature check	20 mins
6.25 - 6.45	Corporate imagery	20 mins
6.45 - 6.55	<b>Wessex Water Introduction</b> (Presentation A)	10 mins
6.55 - 7.15	Unprompted discussion of WW's future plans	20 mins
7.15 - 7.30	BREAK	15 mins
7.30 - 7.40	<b>Wessex Water Introduction to long term plan &amp; Film</b>	10 mins
7.40 – 7.50	Prioritisation of 9 goals	10 mins
7.50 – 8.05	<b>Goal 1</b> Detailed deliberation of promises/outcomes	15 mins
8.05 – 8.20	Feedback deliberation & <b>Q&amp;A with Wessex Water</b> Voting on options	15 mins
8.20 – 8.35	<b>Goal 2</b> Detailed deliberation of promises/outcomes	15 mins
8.35 – 8.50	Feedback deliberation & <b>Q&amp;A with Wessex Water</b> Voting on options	15 mins
8.50 - 8.55	Final self-completion	5 mins
8.55 - 9.00	Final Q&As and Thank you	5 mins

### 5.45pm Arrivals & registration

*Participants arrive and register*

- Participants greeted, registered, sign permission to photograph and provided with name badge
- Tea, coffee available

### 6.00pm Introduction (5 minutes)

*Blue Marble lead introduces from the front. All participants seated at their designated table*

- *Purpose of the project:* working with a large company to understand more about the lives of consumers to help with planning for the future
- *Housekeeping:* timing for the evening, loos, fire exits, refreshments
- *Reassurances:* confidentiality, taping, how the information will be used
- *Introductions:* to the research and client team
- *Explain table arrangements*

### 6.05 pm Warm-up & Temperature Check on Issues of the Day (20 minutes)

*Table discussion to explore current issues on the mind of customers – both at personal/family level and more widely*

- *Introductions in pairs:* first name, occupation, family set-up, how long lived in the area

- Thinking about you, your home life and work life **at the current time**. Individually, on post-it notes I'd like you to write down:
  - 3 things which you're feeling positive or optimistic about, 3 things that make you feel happy
  - On another note write 3 things which you're feeling more negative or pessimistic about or things that worry you
- Overall was it easier to think of the positive things or the negative things to write down? Overall are you feeling more optimistic or pessimistic at the moment? Why do you say that?
- Firstly thinking about the positive: what types of things did people write down? What type of things are making you happy or are positive in your lives at the moment?
- And thinking about the negatives: what types of things did people write down? What are the things that you worry about or you feel more pessimistic about?
- And now thinking forward to the next 10 years or so, thinking about your home life and work life:
  - What do you think are the main issues facing you, your family and working lives in the next 10 years?
  - What are you looking forward to, what are the potentially exciting things in the next 10 years? Are these different to those at the current time?
  - And what are your main concerns or worries for the next 10 years? Are these the same or different to your concerns now?
- Still thinking forward to the next 10 years or so, but now I'd like you think more broadly – thinking about both the region and the country.
  - What do you think are the most important issues facing the country?
  - What are the issues that concern you most about the next 10 years?
  - What are the potentially worrying changes/issues?
  - And what are the potentially positive or exciting changes/developments?

## 6.25 pm General Corporate Imagery (20 minutes)

*Table discussions: to explore general corporate imagery, admired brands and trust factors*

- 
- *Individually:* on your post-it notes I'd like you to write down 2 or 3 examples of brands which you admire or companies that you trust. These can be in any walk of life – big international brands or small local organisations.
  - Feedback to the group the brands/companies chosen: everyone to feedback at least 1 example and reason why
  - Looking back at the brands/companies which everyone has chosen, what is it about these brands that people admire? Flipchart all reasons. Probe on:
    - Their actions
    - Their values/ the way they present themselves
    - The way they do business
    - The level of services they offer/the way they treat customers
    - The way they treat staff
    - The way they treat the environment
    - The way they treat the local community
    - Use of technology
  - And now thinking specifically about utility companies. Are there any utility companies that you could include in these admired brands or any that are companies you can trust?
    - Which utility companies? What is it about them that you admire/trust?
    - If no utility companies – probe about why not.

- As a group decide on what you think are the 3 or 4 things utility companies should take on board to become more admired and more trusted? (Using items on flipchart)
- **6.40pm Plenary feedback:** each group to feedback 3 or 4 things utility companies should be doing.

## 6.45pm Introduction to Wessex Water (10 minutes)

*Plenary session*

---

- Blue Marble introduce that this research is being conducted on behalf of Wessex Water
- Wessex Water to give presentation overview of introduction to the business (Presentation A)

## 6.55pm Unprompted/uniformed discussion of WW's long term plans (20 minutes)

*Table discussion: open ended exploration of what customers would expect to be in Wessex Water's long term plans*

---

- As you have just heard Wessex Water make long term plans for the business looking forward to 2040. We'd like you to think about what you would expect to be in this long term strategy. What do you think are the issues which Wessex Water will need to consider when making their plans for the future? On your tables make as long a list of things which should be included in the plan - prize for the longest list!

On tables *flipchart exercise:*

- If they are planning for the next 25 years what are the challenges you think they will need to consider. Allow for spontaneous discussion first. Then probe:
    - Climate change
    - New technology
    - Population growth
    - Increasing customer expectations
    - Others.....
  - What are the full range of issues they will need their plan to cover? What is the range of activities they are involved with?
  - **6.50pm Plenary Feedback:** Table with longest list to feedback all issues identified. Other table to add additional comments....
- 

## 7.15pm BREAK WITH REFRESHMENTS (15 minutes)

---

## 7.30pm Wessex Water film and introduction of SDS (10 minutes)

*Plenary: Film and Wessex Water to introduce challenges for long term strategy*

---

- Wessex Water to introduce film of business plan and explain purpose of this evening
- Opportunity for customers to ask questions, points of clarification



## 7.40pm Prioritisation of 9 goals (10 minutes)

Table discussion: more informed discussion of all goals

- Lead moderator to recap on the 9 goals – (using stimulus)
- *Self completion*: individually all customers complete self-completion sheet to rank order the 9 goals in terms of how important they are to them personally (Self-completion sheet)

Referring to self-completion:

- Which goals did you think were most important, would you give greatest priority to? Why?
- Which goals did you think were less important or would you give lower priority to?
- Decide as a group which are the 3 most important goals are and why
- *Plenary Feedback*: each group to feedback 3 most important goals

## 7.50pm Detailed deliberation of the goals (60 minutes)

Table discussion: each table to deliberation of 2 of the goals in detail in response to information

Participants will be seated at 3 tables. Each table will discuss 2 of the 9 goals. Therefore each goal will be discussed at 2 events.

<b>Event 1</b>	<b>Red (older)</b>	<b>Green (Middle)</b>	<b>Blue (younger)</b>
	Saving money & water	Customer service	Rivers, Lakes
	Bathing water	Leakage	Taking a bigger role
<b>Event 2</b>	<b>Red (younger)</b>	<b>Green (older)</b>	<b>Blue (middle)</b>
	Sewer Flooding	Leakage	Resilience
	Saving money & water	Water quality	Rivers and lakes
<b>Event 3</b>	<b>Red (middle)</b>	<b>Green (younger)</b>	<b>Blue (older)</b>
	Bathing water	Water quality	Taking a bigger role
	Customer service	Sewer flooding	Resilience

- Lead moderator to explain that each group will now focus discussion on two of the goals. They will be provided with background information, facts and figures and two options for how the goals can be achieved. As a group need to decide on the best approach and will then be asked to feedback to the group as a whole.
- Lead moderator to introduce things to think about when deciding on the best approach (using stimulus)

## 7.50pm Goal 1 Table discussion (15 mins)

Stimulus: goal and ambition statements

- What is your initial reaction to these statements?
- Are they sufficiently ambitious?
- Would you expect/want to see any other promises under this goal?

Stimulus: background information/evidence

- What is your initial reaction to this information?
- Is there anything surprising about this information?
- Does it raise and questions or queries?

Stimulus: options

- What is your gut reaction? Which option are you immediately drawn to and why?

- Thinking about option 1 – what are the pros & cons of this option. What type of company do you think would take this option? What would the motivations of the company be for taking this option?
- Thinking about option 2 – what are the pros & cons of this option. What type of company do you think would take this option? What would the motivations of the company be for taking this option?
- Thinking about the information and evidence that you were provided with – how does this affect your opinions about which option is the best one? Which piece of evidence sways you in which direction?
- As a group come to a consensus about which option you think Wessex Water should take.
- Do you have any questions, or would you like any other information to help you come to a decision?
- What issues or questions does this raise for you?

### **8.05pm Goal 1 Feedback, Q&A, Voting (15 mins)**

*Plenary session: feedback on deliberation and opportunity to ask questions and deliberate issues further with Wessex Water*

#### **Taking each of the 3 goals discussed in turn (5 mins each)**

- Feedback from tables on which option they selected and reasons why (pros & cons)
- **Wessex Water staff responds** – talks about the option included within the strategic plan and reasoning why
- Opportunity for customers to ask further questions, points of clarification etc of Wessex Water staff
- Show of hands of everyone in the room for preferred option

### **8.20 pm Goal 2 Table discussion (15 mins)**

Repeat as above

### **8.35 pm Goal 2 Feedback, Q&A, Voting (15 mins)**

Repeat as above with input from **Wessex Water**

### **8.50pm Final Self Completion (5 minutes)**

---

- **Self-completion** reflecting discussion and debates heard over the evening
  - Repeat exercise giving rank order goals/outcomes from 1 to 9

### **8.55pm Closing comments and thanks (5 minutes)**

---

- **Wessex Water** to make any final reflections on what they've heard and thank participants
- Opportunity for participants to ask questions of Wessex Water staff
- Participants to complete paperwork and receive incentive payment

# INTRODUCTION TO WESSEX WATER



**your say**  **your future**

# The English Water Market



## Wessex Water

- Supplies water to 1.3 million customers.
- Supplies sewerage services to 2.7 million customers every day

# Facts about Wessex Water



Wessex Water treats & supplies 280 million litres of water a day



It employs 2,200 people in the region



It removes & treats 470 million litres of sewage a day



Wessex gets the highest customer service scores in the industry according to the regulator (Ofwat)



It looks after 7,200 miles of water mains and 22,000 miles of sewer pipes



The Environment Agency assess Wessex to be a “leading” water company for environmental performance

# Water companies have 'assets'



# Water companies have 'partners'



ENVIRONMENTAL BODIES



HOUSEHOLDERS (LIKE YOU)  
WHOSE EVERYDAY ACTIONS  
IMPACT THE NETWORK

INDUSTRIAL SITES WHO MAY DRAW  
WATER FROM OR RELEASE WATER INTO  
RIVERS

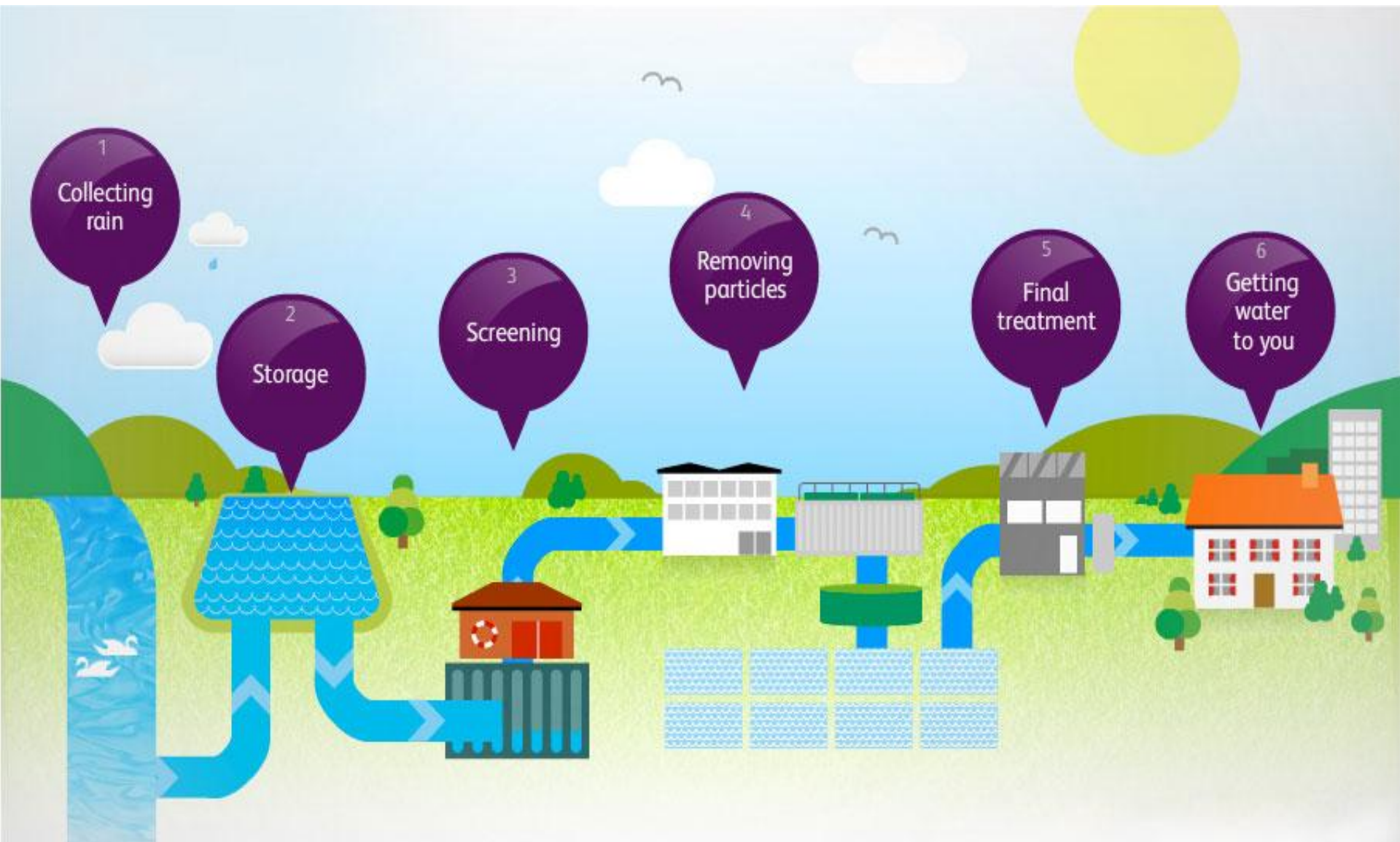


FARMERS AND LAND OWNERS  
WHOSE ACTIVITIES MAY  
CONTAMINATE RIVERS AND  
STREAMS



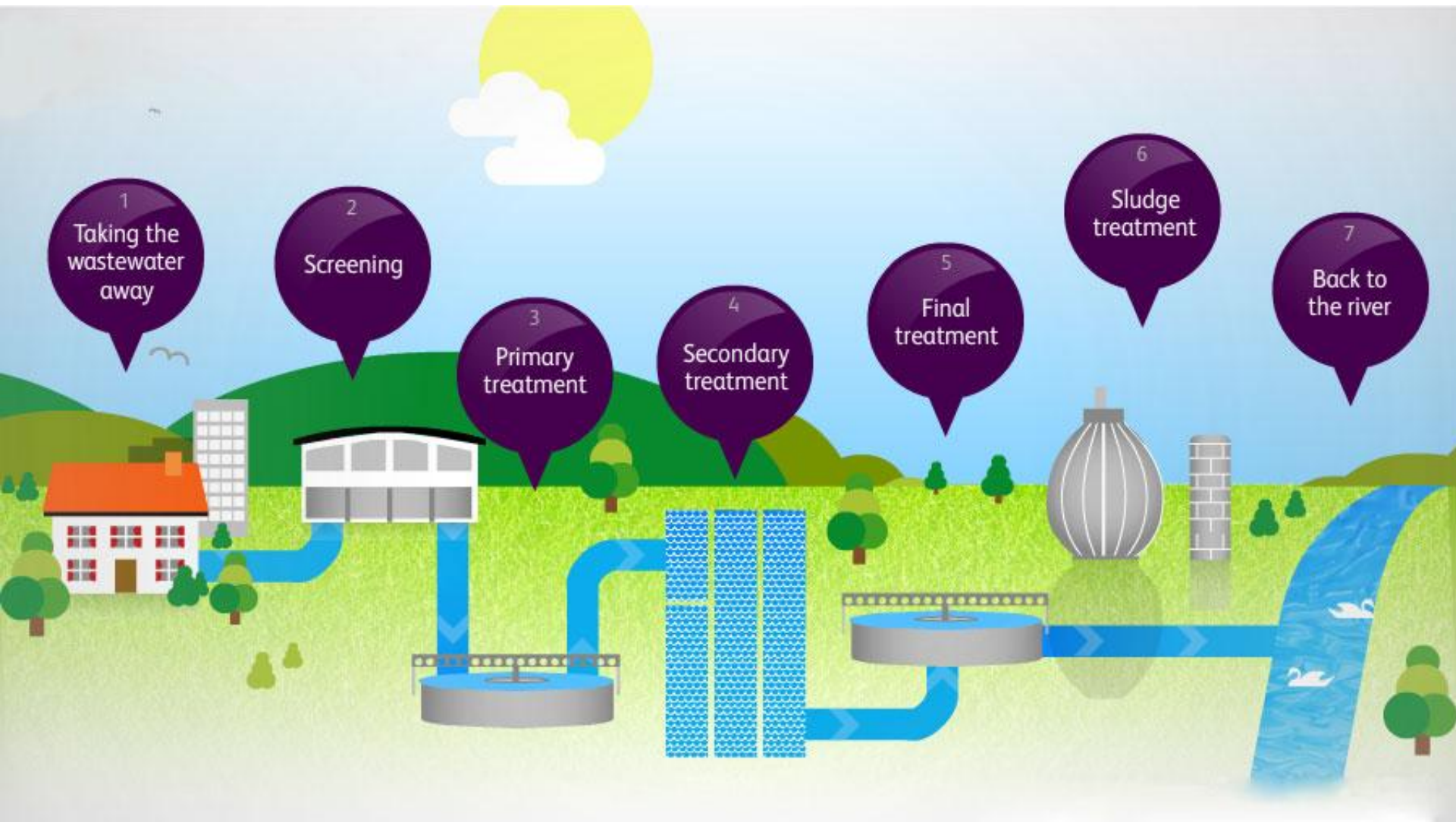
FLOOD PREVENTION AGENCIES

# Water treatment





# Wastewater treatment



# Regulating the water industry



- Regulates environmental impact of water industry



- Reviews company performance and sets bills



- Setting policy and law



- Ensures water is clean and healthy to drink



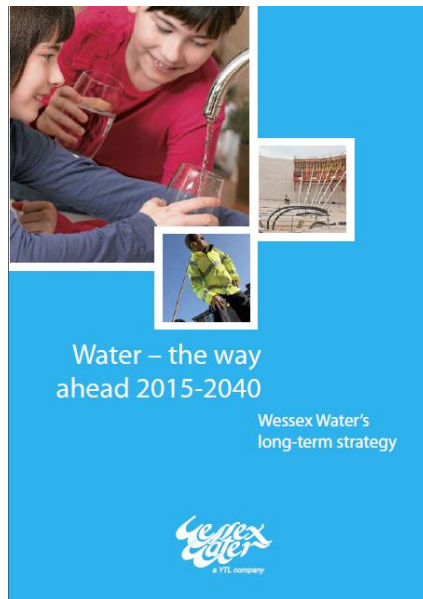
- Represents customer interests



- Regulates environmental impact of water industry

# Water companies need to make plans

- How much water will be needed – and where?
- How will changes to weather affect us?
- How will the needs of the local population change?
- What do our customers expect from us?
- How do we meet new regulatory standards?
- What new technology should we use and when?
- How much do we need to charge customers in their bills?





**your say**  **your future**

# Considerations between now and 2040



**Economic situation & keeping customer bills affordable**



**Tighter environmental regulations for rivers and beaches**



**Impacts of changing climate and weather patterns**



**Population growth: 20% more people in the Wessex region by 2040**

# Considerations between now and 2040

## Traditional approach

More expensive and energy intensive building projects.



High investment and high bills, standards guaranteed.

## Different solutions

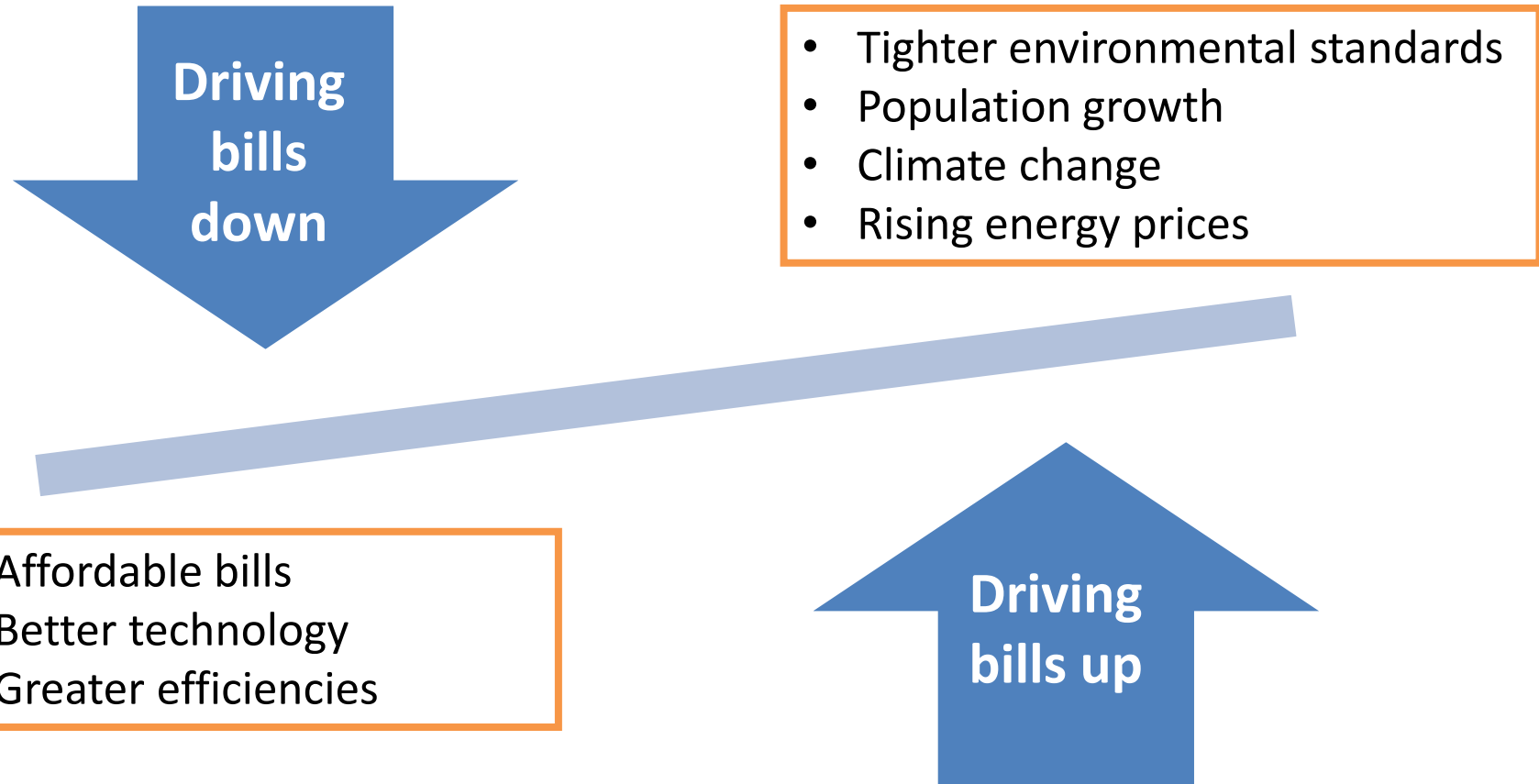
Keeping standards high with less energy intensive and less expensive solutions.



Lower investment costs and lower bills, but less control over outcomes - standards will need to be monitored closely.

# Business plan for 2015-2020

- Developed after customer consultation
- A plan to achieve the right balance



# Business plan for 2015-2020

- **VIDEO**



# What next?

## Time to think about our plans after 2020

- Are these still our customer priorities?
- Does this long term vision still match what customers want?
- Are there new priorities we should be considering?

**your say**  **your future**

# Blue Marble stimulus

# 9 goals identified in long term strategy - 2040



**Provide  
excellent  
customer  
service**



**Help  
customers  
save money &  
water**



**Prevent  
sewage  
flooding**



**Reduce  
leakage**



**Help  
safe-guard  
quality of  
bathing waters**



**Protect  
rivers, and  
lakes**



**Provide  
high quality  
drinking water**



**Improve  
reliability of the  
water supply**



**Reduce  
our carbon  
footprint**

Show cards for initial table discussion  
on long term plan



## Provide excellent customer service

As a Wessex Water Customer I can say:

*“I get good value for money”*

*“If I were able to choose my supplier I  
would choose Wessex Water”*



## Help customers save money & water

As a Wessex Water Customer I can say:

*“Whatever my income I can afford to pay for  
the water I need”*

*“I am able to control my water bill, and to use  
water wisely”*



## Prevent sewage flooding

As a Wessex Water Customer I can say:

*“The number of properties - in my region - affected by sewage flooding is the lowest in the UK”*

*“The risk of my home being affected by sewage flooding has not increased despite climate change”*



## Reduce leakage

As a Wessex Water Customer I can say:

*“They keep the amount of water leaked  
at the practical minimum”*

*“If I report a leak it will be fixed within a  
day”*





## Help safe-guard quality of bathing waters

As a Wessex Water Customer I can say:

*“If bathing waters fail EU standards it won’t be due to my water company”*



## Protect rivers, and lakes

As a Wessex Water Customer I can say:

*“Rivers in my region have improved and now meet tighter EU standards”*

*“Wessex Water is the leading water company for environmental performance”*



## Provide high quality drinking water

As a Wessex Water Customer I can say:

*“My water is safe and healthy to drink”*

*“My water tastes and looks good”*



## Improve reliability of the water supply

As a Wessex Water Customer I can say:

*“There will never be a hosepipe ban here”*

*“I can trust their services to keep going even when unexpected events happen (such as floods and droughts)”*



## Reduce our carbon footprint

As a Wessex Water Customer I can say:

*“My water company is carbon neutral”*

Show cards for table discussions about individual goals

# Things to think about when deciding on the best option for achieving a goal

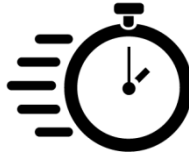
Higher  
Cost/bills



Lower Cost  
/bills



Short term/quick



Longer term



Guaranteed  
outcome



Uncertain outcome



Environmentally friendly



Level of disruption



Requires partnership or others actions



Evidence of customer  
support



High energy/Co2



Low energy CO2





# Help customers save money & water

## The situation now

### Save water

All of us can reduce the amount of water we use and reduce energy bills in our home



Our top three tips are designed to help you save water in the place you use it most - the bath

Wessex Water education advisors have spoken to 25,000 thousand school pupils about being waterwise

We've helped more than **20,000** customers facing problems paying their water bill

More than **90%** of our customers who had help with water debt are now back on track

More than **15,000** customers are benefiting from lower bills



People use **140** litres per day on average (target to reduce to **131** litres by 2020)

In Germany they use 120 litres per day...in the USA they use more

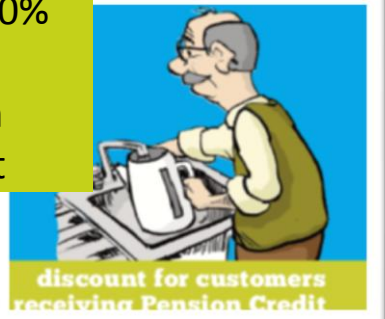
On average, customers spend less than 2% of their household budget on water

Research has shown that fitting a meter when people move house reduces their water use by up to 15%

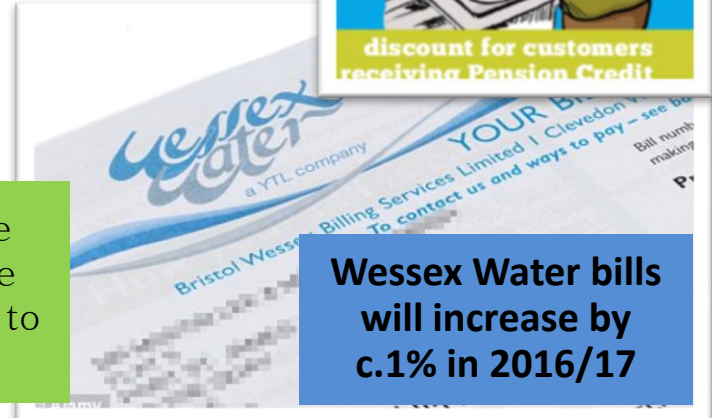
Currently **58%** of Wessex Water customers have a water meter

14% of customers worry about being able to pay their water bill (Blue Marble Research 2016)

Wessex offer a 20% discount to pensioners on Pension Credit



Wessex Water have provided 13,000 free water saving devices to their customers







# Help customers save money & water

## Our Goals

As a Wessex Water Customer I can say:

*“Whatever my income I can afford to pay for the water I need”*

*“I am able to control my water bill, and to use water wisely”*

**Option 1:** we will install water smart meters into **every** household in our region.

**Option 2:** we will gradually increase metering by:

- encouraging customers to volunteer to have a water meter
- putting meters in when customers move home



N.B Both options will include special tariffs to help those struggling to pay



# Help customers save money & water

## Some customer views

*Water meters aren't  
fair for large  
families*

*They'll never get  
people to use less  
water voluntarily –  
better to get everyone  
metered*

*I think people should  
learn to be more efficient  
– water isn't limitless!*

*If we all had a smart  
meter and could see how  
much water we used we  
would all be more careful.*



# Provide excellent customer service

## The situation now

**ACTION ON HEARING LOSS**

**bsi.**

- ✓ British Standard for Inclusive Services (BS 18477)
- ✓ Louder than Words charter mark from Action on Hearing Loss



Net promoter score (would you recommend...)

amazon.com

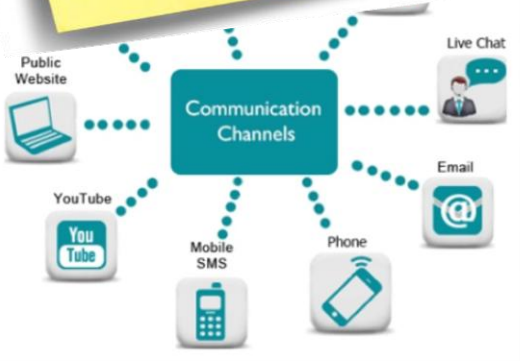
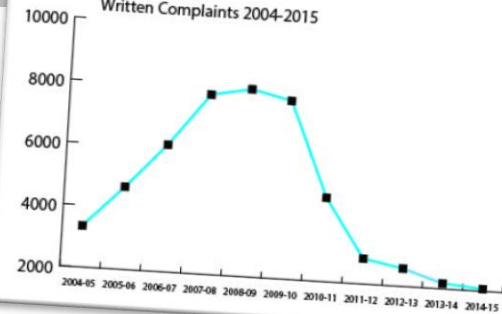
Apple 64.2%  
Amazon 55.5%  
Wessex Water 47.7%



Fewer than 10% of customers have cause to contact Wessex Water each year.

Number of complaints has fallen every year since 2008

Wessex Water Written Complaints 2004-2015



# BATH ECHO

Wessex Water 'demonstrates best practice' to vulnerable customers

FRIDAY 19TH FEBRUARY 2016 BATH ECHO NEWS TEAM COMMUNITY



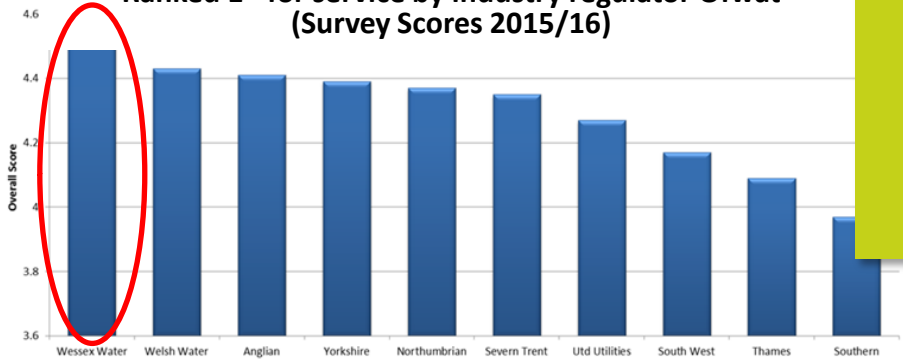
CUSTOMER SERVICE EXCELLENCE



Regionally based call centre and all calls are answered by a real person



Ranked 1<sup>st</sup> for service by industry regulator Ofwat (Survey Scores 2015/16)



- ✓ 95% of customers are satisfied with their water supply service
- ✓ 94% of customers are satisfied with their sewerage services (Consumer Council for Water 2014/15)



# Provide excellent customer service

## Our Goals

As a Wessex Water Customer I can say:

*"I get good value for money"*

*"If I were able to choose my supplier I would choose Wessex Water"*

**Option 1:** to continue to be the best water company for customer service



**Option 2:** to use new technologies so that we provide you with a quality of customer service to match the best brand names in the country





# Provide excellent customer service

## Some customer views

*I want to deal with them using the latest technology*

*They simply need to keep doing what they already do*

*We're becoming more demanding as customers so all companies need to invest to keep up*

*I never have any problems with my water or sewerage services so I'm happy with things as they are*

*All good companies need to invest to become more efficient and provide better service*



# Reduce leakage

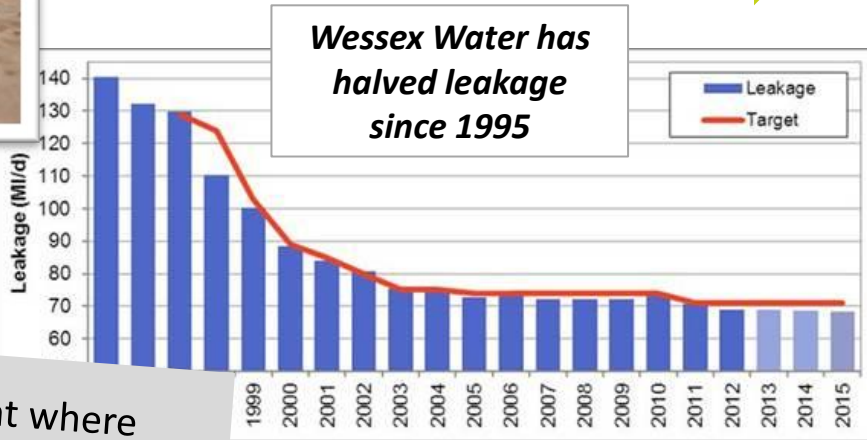
## The Situation Now



£12m a year is spent on reducing leaks, renewing pipework and fixing **12,000** leaks

*Customers tell us leaks should be a top priority*

Currently, 20% of water processed for drinking, is lost because of leaks



Currently at the point where reducing leakage further would cost more than the value of the water which has leaked



24 hour leak repair programme in place

This is because:

- Leaked water seeps back into the ground and is not wasted
- As leakage reduces it is more difficult (and costly) to find and fix the remaining leaks

Amongst internationally best performing 'Band A' water companies



Beaten regulator targets every year since introduced in 1997

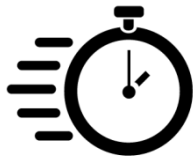


# Reduce leakage

## Our Goals

As a Wessex Water Customer I can say:  
*“They keep the amount of water leaked at the practical minimum”*  
*“If I report a leak it will be fixed within a day”*

**Option 1:** to implement a widespread pipe replacement programme to reduce leakage



**Option 2:** to proactively target weak spots using leak detecting technology - and react more quickly to leaks when they occur





# Reduce leakage

Some people say

*Leaks just make the water company look complacent*

*The replacement programme will mean digging up roads*

*Replacing old pipes now will avoid greater problems – and higher bills- in the future*

*It's the old pipe work that causes the leaks*





# Provide high quality drinking water

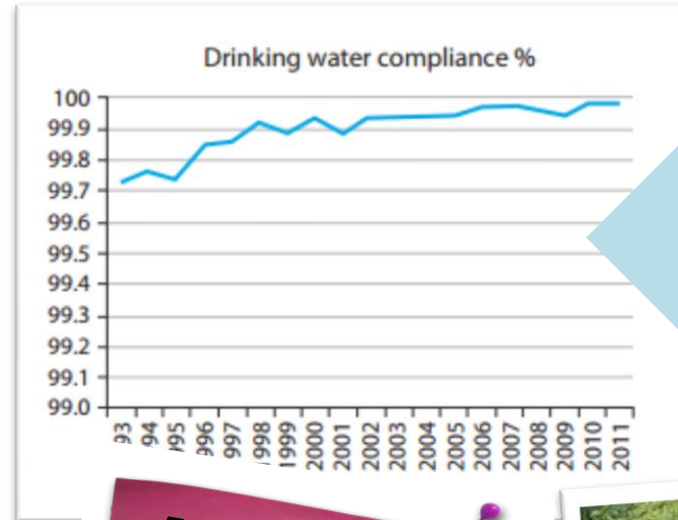
## The situation now



- Complaints about tap water have fallen since 2009

- 2,400 complaints about appearance, taste & odour each year (about 0.5% of all customers)

*But Wessex Water gets more complaints about this than the average water company*



Over last 3 years 99.97% compliance with water quality standards

*76% of customers rate value for money for drinking water supplies good or excellent (Satisfaction survey 2016)*



Quality of drinking water is governed by UK and EU laws. The drinking water inspectorate is responsible for ensuring standards



Some customers have issues with water hardness which is due to the geology of region. Most customers accept that softening water is very expensive.



# Provide high quality drinking water

## Our goals

As a Wessex Water Customer I can say:

*"My water is safe and healthy to drink"*

*"My water tastes and looks good"*

**Option 1:** To **avoid** additional water treatment by:

- working with farmers to improve water quality
- improving information to customers about water softening



**Option 2:** to invest in additional treatment processes to improve the appearance of water and to soften water in problem areas





# Provide high quality drinking water

Some people say

*Water that tastes good is a basic requirement*

*Problems with water quality are so rare – I don't think we need to spend more on this*

*If the water is safe it doesn't matter if it is cloudy*

*It's not fair to make other customers pay to soften water only in some areas*



# Help safe-guard quality of bathing waters

## The situation now

95% of beaches affected by Wessex Water are rated 'good' by EU standards.

What else can affect our beaches?

- sea bird and dog poo
- farm fertilisers livestock

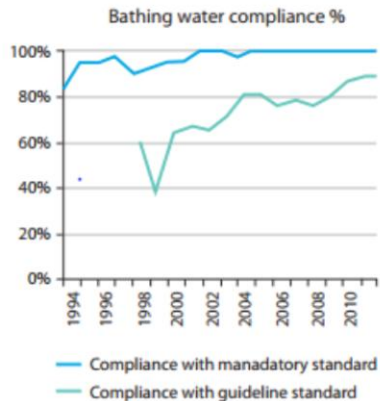
At times of heavy rainfall the sewerage system can become overwhelmed. In some places the system is designed to spill rain water and sewage into the sea to stop it flooding homes and roads. This can affect the quality of the sea water at the site of the overflow. Wessex Water publishes online when it has needed to do this.



Weston beach earlier this year. Photo sent into iwitness24.co.uk by Ian Heard.

WATER off Weston's beaches has been praised for its 'progressive improvement' in terms of its cleanliness.

100% compliance with EU standards

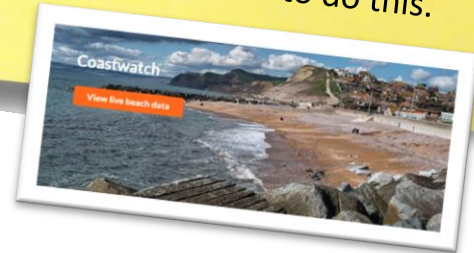


### Water companies and farmers collaborate to improve water quality

By working with farmers, Wessex Water has slashed greenhouse gas emissions, improved quality and saved money



theguardian



PUBLISHED: MARCH 23, 2012  
Wessex Water starts project to improve Burnham's sea water quality



Burnham-On-Sea.com





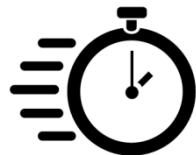
# Help safe-guard quality of bathing waters

## Our Goal

As a Wessex Water Customer I can say:

*“If bathing waters fail EU standards it won’t be due to my water company”*

**Option 1:** to introduce additional cleaning processes at treatment works as well as building more storm water storage tanks to prevent sewage spills getting into the sea





# Help safe-guard quality of bathing waters

*More should be done to protect the environment around beaches*

*We can't all pay more to ensure the water is clean for a small number of surfers*

*If the beaches are meeting the legal standards that's good enough for me*

*We need to build more capacity to make sure sewage never spills into the sea even if it does cost more*



# Protect rivers, and lakes

## The situation now

In times of heavy rainfall, water companies are allowed to discharge diluted sewage into rivers to stop properties flooding

There are 4,000km of rivers and streams in Wessex Water's region



Environmental Performance Assessment.

	Overall rating
2011	Industry leading
2012	Industry leading
2013	Above average
2014	Above average
2015 forecast	Industry leading

### Working in partnership with farmers can cut water pollution

07/09/2011

Share: [in](#) [Share](#) [0](#) [Tweet](#) [G+](#) [0](#) [Like](#) [0](#) [Share](#)

Wessex Water has proved that working with farmers can protect drinking water quality for a fraction of the cost of end-of-pipe treatment. Luke de Vial explains.



### UtilityWeek

### Cleaning up for a greener Bristol

One of our specialist teams is helping improve the environment in Bristol by tracing sources of watercourse pollution. Operation Streamclean is a team dedicated to investigating drainage misconnections and is run by us to reduce pollution in streams and rivers across the region.



10,000 misconnected washing machines etc. plumbed correctly

99.7% compliance with sanitary standards (2015)

Currently running 40 projects to reduce river pollution



# Protect rivers, and lakes

## Our goals

As a Wessex Water Customer I can say:

*“Rivers in my region have improved and now meet tighter EU standards”*

*“Wessex Water is the leading water company for environmental performance”*

**Option 1:** to introduce more cleaning processes at the sewage treatment works



**Option 2:** to prevent rivers and streams becoming polluted in the first place by using technology and collaborative approaches e.g. paying farmers to prevent pollution getting into rivers







# Protect rivers, and lakes

Some people say

*It's only fishermen that care about the river levels or water quality*

*Prevention is always better than cure*

*Water companies shouldn't rely on working with others but should take actions themselves*

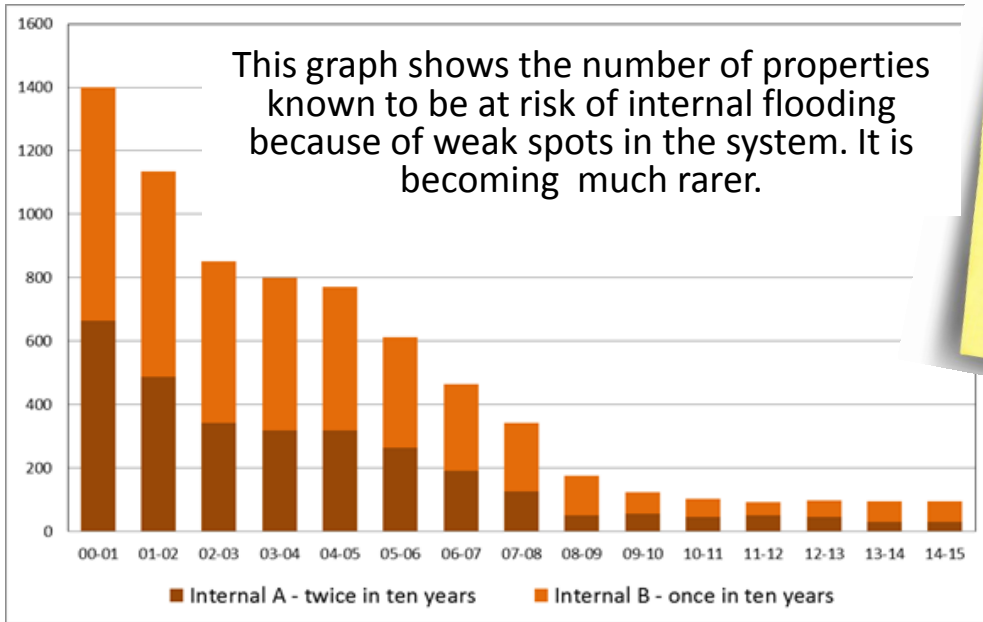
*The water companies need to take responsibility to make sure pollutants get into our rivers*

*Rivers and lakes are in much better condition than they used to be and don't need further improvement*



# Prevent sewage flooding

## The situation now

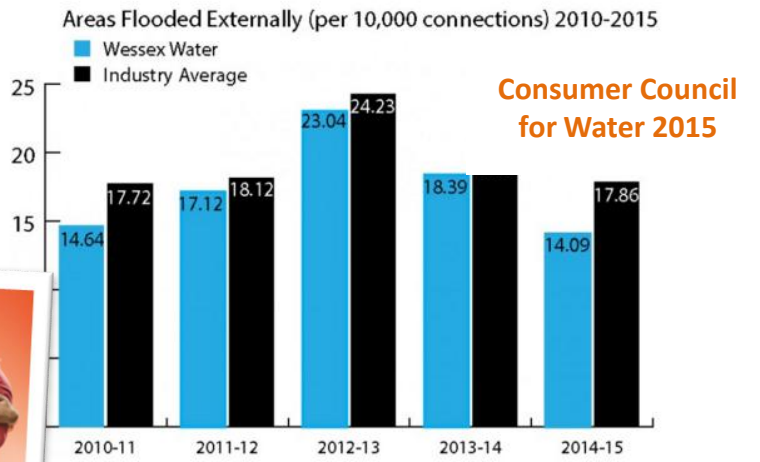


93% of Wessex Water customers said they were fairly or very satisfied with sewerage service in last 12 months (2016 Satisfaction Survey).



Flooding incidents are also caused by people flushing the wrong things: last year Wessex dealt with 13,000 blockages with a cost of £5m to clear

### Wessex Water – Number of Areas Flooded Externally



Wessex Water's Be Smart Love Your Loo campaign aims to raise the alarm on this issue and asks customers to do their bit to prevent blockages.



**BE SMART  
LOVE YOUR LOO**



Heavy rainfall due to climate change will make the risk worse.



# Prevent sewage flooding

## Our goals

As a Wessex Water Customer I can say:

*“The number of properties - in my region - affected by sewage flooding is the lowest in the UK”*

*“The risk of my home being affected by sewage flooding has not increased despite climate change”*

**Option 1:** to invest in physical assets e.g. replace problem sections of the network with larger pipes, install more pumps, improved cleaning with sewer jetting.

**Option 2:** to do a combination of:

- sewer renovation, pipe replacement and improved monitoring
- working with other flood risk agencies
- running advertising campaigns to households to reduce pressure on the sewerage system.





# Prevent sewage flooding

Some people say

*Sewer renovation programmes will cause lots of road works*

*The risk of having sewage flood in your house is so small it's not worth spending lots of money on*

*Sewer flooding is not acceptable – Wessex should not rely on others to stop it happening*

*We all need to take responsibility for what we put down the sewer system*

*I think this is going to get worse with climate change*

*We should invest now to make sure it doesn't get worse in the future*



# Improve reliability of the water supply

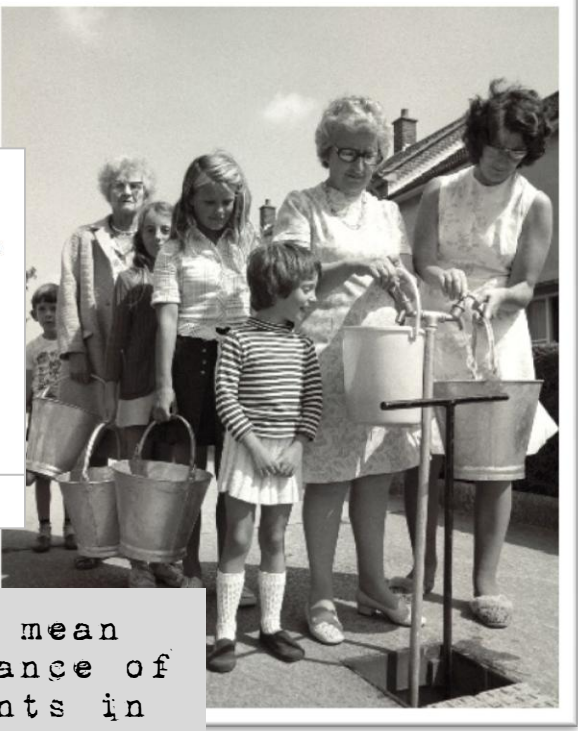
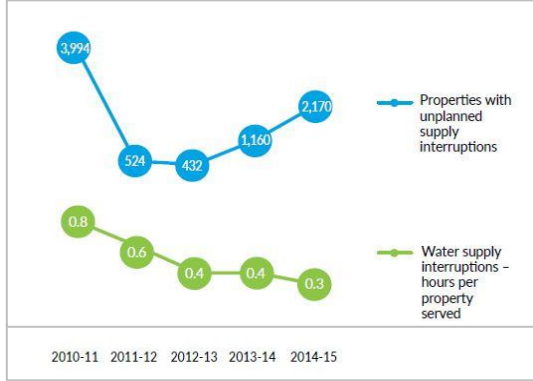
## The situation now

*Wessex Water have not had to impose any water use restrictions (e.g. hosepipe bans) since 1976.*

	2016
The number of households who rely on just one source of water (and would therefore lose the supply if that source is put out of action).	80,000
The number of properties affected by the water going off unexpectedly & lasting longer than 6 hours.	Fewer than 1 in 500 properties per year



Population will rise by 20% by 2040 in this region meaning greater demand for water



Extreme weather events (e.g. floods, cold weather causing burst pipes and long periods of dry weather) cause problems for Wessex Water to provide a reliable water supply



Climate change will mean there is greater chance of extreme weather events in the long term.



# Improve reliability of the water supply

## Our goals

As a Wessex Water Customer I can say:

*“There will never be a hosepipe ban here”*

*“I can trust their services to keep going even when unexpected events happen (such as floods and droughts)”*

**Option 1:** to build more reservoirs, treatment works, storm water storage and protect pumping stations from flooding.

**Option 2:** to use a mix of approaches e.g. early warning systems, trading water between companies, encouraging customers to use less water.





# Improve reliability of the water supply

Some people say

*I've never experienced any problems so they should just wait until it becomes an issue for customers*


*Water is too important – if they need to build more storage and treatment works that's what they should do, even if it's expensive.*

*With an increasing population and climate change we will have to build new reservoirs at some point in the future*

*There must be 'clever' ways to manage the system using technology to keep the system working without big building projects*

# Taking a bigger role?

## The situation now



Currently, water companies are responsible for draining rain water falling on properties and preventing sewers from flooding.


Wessex Water provides a public water supply to 1.3 million consumers. But in the south west of England there is also a large number of people who use private water sources, up to 10% in some rural areas.



**The Environment Agency** is responsible for preventing flooding from large rivers

**Local authorities & private landowners** are responsible for smaller rivers & water courses.

**Local authorities and Highways Agency** are responsible for draining roads.



In general drinking water quality compliance for private supplies is much worse (94%) than for our supplies (>99.95%)

What if Wessex Water were to have responsibility for improving flood defences in the region?  
37% said things would get better  
23% stay the same  
5% things would get worse  
35% don't know  
(Satisfaction survey 2016)

Somerset floods in 2015



# Taking a bigger role?

## Our goals

As a Wessex Water Customer I can say:

*"I trust Wessex Water to help solve wider issues in the local water environment"*

**Option 1:** to continue as we are, working together with other organisations where our responsibilities impact them, and their responsibilities impact us (e.g. helping Environment Agency deal with the impact of floods)



**Option 2:** to take greater responsibility for delivering improvements such as:

- building new flood defences and developing land drainage schemes to slow the flow of water
- improving the quality of private water supplies



Survey	Snapshot surveys	Tracker Q1	Online panel (May)	Online panel (July)	Staff survey	SDS Quant survey
Sample	<ul style="list-style-type: none"> <li>Magazine readers</li> <li>Website/FB visitors</li> <li>Customers post service event</li> <li>Customers at community event</li> </ul>	<ul style="list-style-type: none"> <li>Representative sample of 250 customers</li> </ul>	<ul style="list-style-type: none"> <li>Existing panellists</li> <li>(Engaged customers)</li> </ul>	<ul style="list-style-type: none"> <li>Existing panellists</li> <li>(Engaged customers)</li> </ul>	<ul style="list-style-type: none"> <li>All staff</li> </ul>	<ul style="list-style-type: none"> <li>Representative sample of 600 customers</li> </ul>
Method	Mobile and web survey Coupon	CATI (Telephone)	Online (via email)	Online (via email)	Online (via intranet)	CATI (Telephone)
SDS question style	<ul style="list-style-type: none"> <li>Prioritise top 3 and bottom 3 goals</li> </ul>	<ul style="list-style-type: none"> <li>Prioritise 3 randomised goals</li> </ul>	<ul style="list-style-type: none"> <li><b>NOT COVERING AN SDS QUESTION</b></li> </ul>	<ul style="list-style-type: none"> <li>Prioritise top 3 and bottom 3 goals</li> </ul>	<ul style="list-style-type: none"> <li>Prioritise top 3 and bottom 3 goals</li> </ul>	<ul style="list-style-type: none"> <li>Prioritise 3 randomised goals</li> </ul>
		<ul style="list-style-type: none"> <li>Areas to improve</li> </ul>		<ul style="list-style-type: none"> <li>Areas to improve</li> </ul>	<ul style="list-style-type: none"> <li>Areas to improve</li> </ul>	<ul style="list-style-type: none"> <li>Importance x 12</li> <li>Areas to improve</li> <li>Scale of improvement</li> </ul>
	<ul style="list-style-type: none"> <li>As well as seeing how customers/staff in different contexts (e.g. post event/at community event, engaged, informed) have different priorities</li> <li>Triangulation will allow us to interpret the different priority questions and whether priorities relate to goals that are important, or areas in need of improvement</li> </ul>					<ul style="list-style-type: none"> <li>Detailed questioning</li> </ul>

• Prioritise top 3 and bottom 3 goals

- Online surveys and magazine

Wessex Water develops long term plans which have to balance the needs of customers today, while making sure water and waste services meet the needs of future generations of customers. The following are 10 of the areas they have to consider. Please prioritise these issues in terms of their importance to you... drag across the top three most important and the least 3 important to you.

**DRAG AND DROP - PROGRAMME TO AUTOMATICALLY POPULATE THE MIDDLE 3**

	TOP 3 most important	Middle importance	LEAST important 3
A. Improving the taste and appearance of water			
B. Helping you to save water and money			
C. Reducing the chance of your water supply from being interrupted			
D. Reducing the amount of water that leaks from pipes			
E. Reducing Wessex Water's carbon footprint			
F. Ensuring clean bathing waters			
G. Improving river habitats			
H. Providing more help and financial assistance for vulnerable customers			
I. Reducing the chance of sewage flooding into properties and on to land			
J. Wessex Water taking on a greater role in flood prevention			
K. Ensuring Wessex Water's services are reliable even when extreme weather events occur			

• **Prioritise 3 randomised goals**

- CATI (telephone) surveys where sample size is large enough to analyse each goal.

Wessex Water develops long term plans which have to balance the needs of customers today, while making sure water and waste services meet the needs of future generations of customers. I am going to read out 3 of the areas they have to consider. Please prioritise these issues in terms of their importance to you... most important, 2<sup>nd</sup> most important and 3<sup>rd</sup> most important.

**PROGRAMME TO RANDOMLY SELECT 3 GOALS**

<ul style="list-style-type: none"> <li>A. Improving the taste and appearance of water</li> <li>B. Helping you to save water and money</li> <li>C. Reducing the chance of your water supply from being interrupted</li> <li>D. Reducing the amount of water that leaks from pipes</li> <li>E. Reducing Wessex Water’s carbon footprint</li> <li>F. Ensuring clean bathing waters</li> <li>G. Improving river habitats</li> <li>H. Providing more help and financial assistance for vulnerable customers</li> <li>I. Reducing the chance of sewage flooding into properties and on to land</li> <li>J. Wessex Water taking on a greater role in flood prevention</li> <li>K. Ensuring Wessex Water’s services are reliable even when extreme weather events occur</li> </ul>	<b>TOP 3 most important</b>
	1 <sup>st</sup> :
	2 <sup>nd</sup>
	3 <sup>rd</sup>

• Areas to improve

- CATI tracker (in addition to the top 3 prioritisation question); and adapted for longer online surveys with staff and panellists

Wessex Water develops long term plans which have to balance the needs of customers today, while making sure water and waste services meet the needs of future generations of customers. The following are the different areas they have to consider. For each we'd like to know if you are happy with the service as it is; or if you think there is room for improvement

**PROGRAMME TO ROUTE WESSEX-WESSEX AND WESSEX + SUPPLY COMPANY**

**INTERVIEWER READ OUT EACH STATEMENT - RANDOM ORDER**

	Happy with the current service	Room for improvement	Don't know
<b>(W&amp;W only)</b> The taste and appearance of water			
<b>(W&amp;W only)</b> Helping customers to save water and money			
<b>(W&amp;W only)</b> Working to minimise the chance of customers water supply being interrupted			
<b>(W&amp;W only)</b> Working to minimise the amount of water that leaks from pipes			
<b>(ALL)</b> Working to reduce its carbon footprint			
<b>(ALL)</b> Providing help and financial assistance for vulnerable customers			
<b>(ALL)</b> Working to reducing the chance of sewage flooding into properties and on to land			
<b>(ALL)</b> Working to ensure clean bathing waters			
<b>(ALL)</b> working to improve river habitats			
<b>(ALL)</b> Having a role in flood prevention			
<b>(ALL)</b> Working to ensure its services are reliable even when extreme weather events occur			

**Importance rating for  
each goal**

**Scale of improvement  
for goals needing  
improvement**

- CATI SDS survey
- Broadly following 2012 format to enable trends analysis

**•Detailed questioning**

SDS evaluation CATI questionnaire: **SEWERAGE ONLY**

**200 Wessex Water customers**

100 in Bristol Supply and Wessex Sewerage plus 100 in Bournemouth supply and Wessex sewerage  
**(WW only in separate version)**

*Good morning/afternoon my name is ..... from Blue Marble Research, an independent market research company. We are carrying out a survey on behalf of your sewerage company, Wessex Water, to find out what customers would like from their sewerage services company. Wessex Water is currently making its long term plans for the future and wants to find out whether their customers think these plans are heading in the right direction.*

*Please could I speak to the person who is responsible for paying the water bill?*

*To enable the company to improve its service to customers could you spare approximately 12 minutes to answer a few questions. I can assure you that everything you say will be treated in the strictest confidence and will only be used by Wessex Water for research purposes.*

**Q1 Can I just confirm that you are the person in your household who is responsible for dealing with your water and sewerage company, this includes being the one who pays the bills (either solely or jointly)?**

- Yes
- No

**Q2 And can I check whether anyone in your household is employed in any of the following industries?**

- Journalism
- Market Research
- Marketing
- Public Relations
- Water companies
- None of these

**Q3 Gender (INTERVIEWER DO NOT ASK)**

- Male
- Female

**Q4 In order to ensure we speak to a range of people, please can you tell me which of the following age bands you fit into?**

- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65-74 years
- 75+ years

**Q5a Have you contacted Wessex Water for any reason in the last 12 months?**

- Yes \_\_\_\_\_ ASK Q5b
- No GO TO Q6
- Don't know/can't remember

**Q5b What was the main reason for your contact?** DO NOT PROMPT. RECORD AS MANY AS APPLY

- Payment of bill
- Setting up payment arrangement
- Querying bill/meter reading

- Change of address/name/details
- Advise of meter reading
- To get a water meter fitted
- Report 'no water'/leak/burst pipe
- Report problem with water quality
- Report problem with sewer/drain
- Other (please specify\_\_\_\_\_)

**In your area Wessex Water is responsible for providing your sewerage services. (Your water supply services are supplied by [Bristol Water/Bournemouth Water – as appropriate].**

**Q6b Thinking about your sewerage services, overall how satisfied or dissatisfied are you with the sewerage services you have received from Wessex Water in the last 12 months?**

- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied
- Don't know/can't say

**Q7NEW** Thinking about your overall image of Wessex Water, how much would you agree with the following statements on a scale of 1-5, where 5 is strongly agree?

RANDOMISE ORDER	Strongly disagree	Tend to disagree	Neither/nor	Tend to agree	Strongly agree	Don't know/no opinion
It is an expert at what it does						
It plays an active role in the community						
It cares about its customers						
It plays a key role in protecting the environment						
It delivers on its promises						

**Q8NEW** Wessex Water develops long term plans which have to balance the needs of customers today, while making sure water and waste services meet the needs of future generations of customers. I am going to read out 3 of the areas they have to consider. Please prioritise these issues in terms of their importance to you... most important, 2nd most important and 3rd most important.

**PROGRAMME TO RANDOMLY SELECT 3 GOALS FROM FOLLOWING**

1. Improving the taste and appearance of water
2. Helping you to save water and money
3. Reducing the chance of your water supply from being interrupted
4. Reducing the amount of water that leaks from pipes
5. Reducing Wessex Water's carbon footprint
6. Improving bathing waters: by this, we mean the cleanliness of the sea at popular coastal beaches
7. Improving river habitats
8. Providing more help and financial assistance for customers that need it most



9. Reducing the chance of sewage flooding into properties and on to land
10. Wessex Water taking on a greater role in flood prevention
11. Ensuring Wessex Water’s services are reliable even when extreme weather events occur

1<sup>st</sup> \_\_\_\_\_  
 2<sup>nd</sup> \_\_\_\_\_  
 3<sup>rd</sup> \_\_\_\_\_

**FOR ALL 11 FACTORS**

**Q9a Firstly, how important is (INSERT FACTOR 1) on a scale of 1 to 10 where 10 is very important and 1 is not at all important?**

**Q9b And would you say that (INSESRT FACTOR 1) is satisfactory or should it be improved?**  
*(Don't know option available but not prompted)*

**Q9c ASK ALL THOSE WHO SAY ‘SHOULD BE IMPROVED’ AT Q7b: And how much do you think (INSERT FACTOR 1) needs improving: a great deal, a little or, not very much.?**

**And how important is (INSERT FACTOR 2)?**

**And would you say that (INSERT FACTOR 2) is satisfactory or should it be improved?**

**And how much do you think (INSERT FACTOR 2) needs improving?**

REPEAT FOR ALL FACTORS. RANDOMISE ORDER.

1. Improving the taste and appearance of water
2. Helping you to save water and money
3. Reducing the chance of your water supply from being interrupted
4. Reducing the amount of water that leaks from pipes
5. Reducing Wessex Water’s carbon footprint
6. Improving bathing waters: by this, we mean the cleanliness of the sea on popular coastal beaches
7. Improving river habitats
8. Providing more help and financial assistance for customers that need it most
9. Reducing the chance of sewage flooding into properties and on to land
10. Wessex Water taking on a greater role in flood prevention
11. Ensuring Wessex Water’s services are reliable even when extreme weather events occur

**Q15a Wessex Water’s plans include three activities to improve the quality of river water and beaches. Please tell me whether you agree or disagree that Wessex Water should include each of these in their plans? Is that strongly or tend to? READ OUT**

	Strongly agree	Tend to agree	Neither/ nor	Tend to disagree	Strongly disagree	Don't know/ can't say
Increase the capacity of sewers to prevent overflowing into rivers and the sea						
Tell customers what they can & can't flush away						
Prevent pollution from other sources entering rivers, such as agricultural fertilisers						

**Q15b Which of the three activities do you think it is most important for Wessex Water to do?**  
 (RE-READ OPTIONS IF NECESSARY)

**Q15c And which of the three activities to you think it is least important for Wessex Water to do?**

**Most  
Important**

**Least  
Important**

- Increase the capacity of sewers to prevent overflowing
- Tell customers what they can & can't flush away
- Prevent pollution from other sources entering rivers, such as agricultural fertilisers
- Don't know/can't say

**Q16a** Wessex Water's plans include three ways of keeping **the risk of sewage flooding to a minimum**. Please tell me whether you agree or disagree that each of these should be included in their plans? Currently 2 in every 1,000 households a year experience sewage flooding, either inside or outside their property. **READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Use technology to prevent blockages						
Increase drain clearing						
Improve the capacity of the sewerage network						

**Q16b** Which of these three activities do you think it is most important for Wessex Water to do?  
(RE-READ OPTIONS IF NECESSARY)

**Q16c** And which do you think it is least important for Wessex Water to do?

**Most  
Important**

**Least  
Important**

- Use technology to prevent blockages
- Increase drain clearing
- Improve the capacity of the sewerage network
- Don't know/can't say

**Q17a** Wessex Water plans include three ways of ensuring **Wessex Water's services are reliable even when extreme weather events occur** Please tell me whether you agree or disagree that each of these should be included in their plans? Is that strongly or tend to? **READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Reduce the proportion of properties who can only receive their water from one source – such as a reservoir - and increase the proportion who can be served by an alternative water source if problems arise						
Take more water from rivers that are less affected by drought						
Share water with other companies						

**Q17b** Which of these three activities do you think it is most important for Wessex Water to do?  
(RE-READ OPTIONS IF NECESSARY)

**Q17c** And which do you think it is least important for Wessex Water to do?

**Most  
Important**

**Least  
Important**

Reduce the proportion of properties who can only receive their water from one source  
 Take more water from rivers that are less affected by drought  
 Share water with other companies  
 Don't know/can't say

**Q18a NEW** Wessex Water plans include three ways of ensuring **taking on greater responsibility where it can improve the current level of service for some of its customers**. Please tell me whether you agree or disagree that each of these should be included in their plans? Is that strongly or tend to?  
**READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Wessex Water currently has no remit to prevent flooding. Should it play more of a role working alongside the Environment Agency in flood prevention initiatives in high risk areas?						
Wessex Water currently has no remit to ensure water quality for rural homes not on mains water, but who have a private supply. Should it take greater responsibility for the quality of these private water sources?						

**Q18c** If Wessex Water do both of these activities how much impact do you think it will have?

A great deal  
 A little  
 Not very much  
 None at all  
 Don't know/can't say

Wessex Water is planning to take a **more sustainable approach to their business**.

**Q19** For instance they want to try different solutions which might be less proven but are less expensive and use less energy than the more tried and tested approaches. For instance incentivising farmers to reduce pollutants getting into streams and rivers rather than spending more time and money cleaning polluted water. How much do you support or oppose this idea?

Strongly support  
 Tend to support  
 Neither/nor  
 Tend to oppose  
 Strongly oppose  
 Don't know/can't say

**Q20** Wessex Water is also planning to focus more on helping customers to use less water rather than opting for expensive and energy intensive building, such as new reservoirs. How much do you support or oppose this idea?

Strongly support

Tend to support  
Neither/nor  
Tend to oppose  
Strongly oppose  
Don't know/can't say

**Finally we'd last to ask a couple of questions about your household**

**Q 21 Occupation of Chief Income Earner (Socio-Economic Grade)**

**Q22a How many adults, including yourself are there in the household?**

No \_\_\_\_\_

**Q22b And how many children, under the age of 18 years are there living in the household?**

No \_\_\_\_\_

**Q23 Do you have a water meter in use at your property – a meter is a device connected to your supply pipe which means you pay for the exact amount of water you use?**

Yes  
No  
Don't know

SDS evaluation CATI questionnaire: **Final – supply and waste**

**400 in Wessex Supply and Wessex sewerage region**  
**(Sewerage only in separate version)**

*Good morning/afternoon my name is ..... from Blue Marble Research, an independent market research company. We are carrying out a survey on behalf of your water and sewerage company, Wessex Water, to find out what customers would like from their water and sewerage services company. Wessex Water is currently making its long term plans for the future and wants to find out whether their customers think these plans are heading in the right direction.*

*Please could I speak to the person who is responsible for paying the water bill?*

*To enable the company to improve its service to customers could you spare approximately 12 minutes to answer a few questions. I can assure you that everything you say will be treated in the strictest confidence and will only be used by Wessex Water for research purposes.*

**Q1 Can I just confirm that you are the person in your household who is responsible for dealing with your water and sewerage company, this includes being the one who pays the bills (either solely or jointly)?**

Yes

No

**Q2 And can I check whether anyone in your household is employed in any of the following industries?**

Journalism

Market Research

Marketing

Public Relations

Water companies

None of these

**Q3 Gender (INTERVIEWER DO NOT ASK)**

Male

Female

**Q4 In order to ensure we speak to a range of people, please can you tell me which of the following age bands you fit into?**

18-24 years

25-34 years

35-44 years

45-54 years

55-64 years

65-74 years

75+ years

**Q5a Have you contacted Wessex Water for any reason in the last 12 months?**

Yes \_\_\_\_\_ ASK Q5b

No GO TO Q6

Don't know/can't remember

**Q5b What was the main reason for your contact?** DO NOT PROMPT. RECORD AS MANY AS APPLY

Payment of bill

Setting up payment arrangement

Querying bill/meter reading

- Change of address/name/details
- Advise of meter reading
- To get a water meter fitted
- Report 'no water'/leak/burst pipe
- Report problem with water quality
- Report problem with sewer/drain
- Other (please specify\_\_\_\_\_)

**In your area Wessex Water is responsible for providing both your water supply and sewerage services.**

**Q6a Thinking about your water supply service, overall how satisfied or dissatisfied are you with the water supply services you have received from Wessex Water in the last 12 months?**

- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied
- Don't know/can't say

**Q6b Thinking about your sewerage services, overall how satisfied or dissatisfied are you with the sewerage services you have received from Wessex Water in the last 12 months?**

- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied
- Don't know/can't say

**Q7NEW** Thinking about your overall image of Wessex Water, how much would you agree with the following statements on a scale of 1-5, where 5 is strongly agree?

RANDOMISE ORDER	Strongly disagree	Tend to disagree	Neither/nor	Tend to agree	Strongly agree	Don't know/no opinion
It is an expert at what it does						
It plays an active role in the community						
It cares about its customers						
It plays a key role in protecting the environment						
It delivers on its promises						

**Q8NEW** Wessex Water develops long term plans which have to balance the needs of customers today, while making sure water and waste services meet the needs of future generations of customers. I am going to read out 3 of the areas they have to consider. Please prioritise these issues in terms of their importance to you... most important, 2nd most important and 3rd most important.

**PROGRAMME TO RANDOMLY SELECT 3 GOALS FROM FOLLOWING**

1. Improving the taste and appearance of water
2. Helping you to save water and money
3. Reducing the chance of your water supply from being interrupted
4. Reducing the amount of water that leaks from pipes
5. Reducing Wessex Water’s carbon footprint
6. Improving bathing waters: by this, we mean the cleanliness of the sea at popular coastal beaches
7. Improving river habitats
8. Providing more help and financial assistance for customers that need it most
9. Reducing the chance of sewage flooding into properties and on to land
10. Wessex Water taking on a greater role in flood prevention
11. Ensuring Wessex Water’s services are reliable even when extreme weather events occur

1<sup>st</sup> \_\_\_\_\_  
 2<sup>nd</sup> \_\_\_\_\_  
 3<sup>rd</sup> \_\_\_\_\_

**FOR ALL 11 FACTORS**

**Q9a Firstly, how important is (INSERT FACTOR 1) on a scale of 1 to 10 where 10 is very important and 1 is not at all important?**

**Q9b And would you say that (INSESRT FACTOR 1) is satisfactory or should it be improved?**  
*(Don’t know option available but not prompted)*

**Q9c ASK ALL THOSE WHO SAY ‘SHOULD BE IMPROVED’ AT Q7b: And how much do you think (INSERT FACTOR 1) needs improving: a great deal, a little or, not very much.?**

**And how important is (INSERT FACTOR 2)?**

**And would you say that (INSERT FACTOR 2) is satisfactory or should it be improved?**

**And how much do you think (INSERT FACTOR 2) needs improving?**

REPEAT FOR ALL FACTORS. RANDOMISE ORDER.

1. Improving the taste and appearance of water
2. Helping you to save water and money
3. Reducing the chance of your water supply from being interrupted
4. Reducing the amount of water that leaks from pipes
5. Reducing Wessex Water’s carbon footprint
6. Improving bathing waters: by this, we mean the cleanliness of the sea on popular coastal beaches
7. Improving river habitats
8. Providing more help and financial assistance for customers that need it most
9. Reducing the chance of sewage flooding into properties and on to land
10. Wessex Water taking on a greater role in flood prevention
11. Ensuring Wessex Water’s services are reliable even when extreme weather events occur

**Q10a Wessex Water’s plans include three ways of helping to reduce the amount of water that leaks from pipes. Please tell me whether you agree or disagree that each of these should be included in their plans? Is that strongly or tend to? READ OUT**

	Strongly agree	Tend to agree	Neither/ nor	Tend to disagree	Strongly disagree	Don’t know/ can’t say
Fix leaks within 24 hours						

Make it easier to report and track leaks						
Use new technology to find leaks						

**Q10b Which of these three activities do you think it is most important for Wessex Water to do?**  
(RE-READ OPTIONS IF NECESSARY)

**Q10c And which do you think it is least important for Wessex Water to do?**

	Most Important	Least Important
Fix leaks within 24 hours		
Make it easier to report and track leaks		
Use new technology to find leaks		
Don't know/can't say		

**Q11 It can cost more for water companies to reduce the amount of water that leaks than it costs to re-cycle the water. This is because leaked water seeps back into the environment and the water cycle where it is treated and put back into the water supply. There is a point at which it costs less for water companies to re-cycle the water than reduce leaks further. Do you think Wessex Water should....**

- Reduce leaks only up until the point it costs less than re-cycling the water
- or
- Should they continue to reduce leaks even if it is more expensive than re-cycling the water

**Q12 Since 1995 Wessex Water has cut in half the amount of water that leaks. It is now at the point where it would cost more to further reduce leaks than to re-cycle the water. In other words if they cut leaks further bills would increase. Now you know this, how important do you think it is that Wessex Water further reduces leaks on a scale of 1 to 10 where 10 is very important and 1 is not at all important.**

Rating 1 to 10.....

**Q13a Wessex Water's plans include four ways to help customers use less water and help metered customers save money. Please tell me whether you agree or disagree that each of these should be included in their plans? Is that strongly or tend to? READ OUT**

	Strongly agree	Tend to agree	Neither/ nor	Tend to disagree	Strongly disagree	Don't know/ can't say
Provide water saving advice						
Provide water saving devices eg <i>save a flush</i>						
Fit meters automatically for free when someone moves home						
Provide subsidised 'smart meters' so customers can see how much water they are using*						

(\* if respondent asks interviewer to give explanation: a meter in the house which will show you how much water you are using and how much this costs similar to the idea of an electricity smart meter)

**Q13b Which of the four activities do you think it is most important for Wessex Water to do?**  
(RE-READ OPTIONS IF NECESSARY)

**Q13c And which of the four activities to you think it is least important for Wessex Water to do?**

Most Important	Least Important
-------------------	--------------------



- Provide water saving advice
- Provide water saving devices eg save a flush
- Fit meters automatically for free when someone moves
- Provide subsidised 'smart meters' so customers can see how much water they are using
- Don't know/can't say

**Q14a** Wessex Water's plans include two activities to **improve the taste and appearance of water**. Please tell me whether you agree or disagree that Wessex Water should include each of these in their plans? Currently 4 in every 1,000 households a year report a problem. Is that strongly or tend to? **READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Modernise treatment plants and replace old pipes						
Soften hard water by mixing it with soft water*						
Work with farmers to reduce pollution from fertilisers, pesticides and animal dung getting into the water system						

(\* if respondent asks interviewer to give explanation: as Wessex Water region has areas of both hard and soft water it is possible in some places to soften hard water by mixing it with soft water)

**Q14b** Which of the three activities do you think it is most important for Wessex Water to do?

- Modernise treatment plans and replace old pipes
- Soften hard water by mixing it with soft water
- Work with farmers to reduce pollution getting into the water system
- Don't know/can't say

**Q15a** Wessex Water's plans include three activities to improve **the quality of river water and beaches**. Please tell me whether you agree or disagree that Wessex Water should include each of these in their plans? Is that strongly or tend to? **READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Increase the capacity of sewers to prevent overflowing into rivers and the sea						
Tell customers what they can & can't flush away						
Prevent pollution from other sources entering rivers, such as agricultural fertilisers						

**Q15b** Which of the three activities do you think it is most important for Wessex Water to do?  
(RE-READ OPTIONS IF NECESSARY)

**Q15c** And which of the three activities to you think it is least important for Wessex Water to do?

**Most Important** **Least Important**

- Increase the capacity of sewers to prevent overflowing
- Tell customers what they can & can't flush away
- Prevent pollution from other sources entering rivers, such as agricultural fertilisers

Don't know/can't say

**Q16a** Wessex Water's plans include three ways of keeping **the risk of sewage flooding to a minimum**. Please tell me whether you agree or disagree that each of these should be included in their plans? Currently 2 in every 1,000 households a year experience sewage flooding, either inside or outside their property. **READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Use technology to prevent blockages						
Increase drain clearing						
Improve the capacity of the sewerage network						

**Q16b** Which of these three activities do you think it is most important for Wessex Water to do?  
(RE-READ OPTIONS IF NECESSARY)

**Q16c** And which do you think it is least important for Wessex Water to do?

	Most Important	Least Important
Use technology to prevent blockages		
Increase drain clearing		
Improve the capacity of the sewerage network		
Don't know/can't say		

1. **Q17a** Wessex Water plans include three ways of ensuring **Wessex Water's services are reliable even when extreme weather events occur** Please tell me whether you agree or disagree that each of these should be included in their plans? Is that strongly or tend to? **READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Reduce the proportion of properties who can only receive their water from one source – such as a reservoir - and increase the proportion who can be served by an alternative water source if problems arise						
Take more water from rivers that are less affected by drought						
Share water with other companies						

**Q17b** Which of these three activities do you think it is most important for Wessex Water to do?  
(RE-READ OPTIONS IF NECESSARY)

**Q17c** And which do you think it is least important for Wessex Water to do?

	Most Important	Least Important
Reduce the proportion of properties who can only receive their water from one source		
Take more water from rivers that are less affected by drought		
Share water with other companies		
Don't know/can't say		

**Q18a NEW** Wessex Water plans include three ways of ensuring **taking on greater responsibility where it can improve the current level of service for some of its customers**. Please tell me whether you agree or disagree that each of these should be included in their plans? Is that strongly or tend to?  
**READ OUT**

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know/can't say
Wessex Water currently has no remit to prevent flooding. Should it play more of a role working alongside the Environment Agency in flood prevention initiatives in high risk areas?						
Wessex Water currently has no remit to ensure water quality for rural homes not on mains water, but who have a private supply. Should it take greater responsibility for the quality of these private water sources?						

**Q18c** If Wessex Water do both of these activities how much impact do you think it will have?

- A great deal
- A little
- Not very much
- None at all
- Don't know/can't say

Wessex Water is planning to take a **more sustainable approach to their business**.

**Q19** For instance they want to try different solutions which might be less proven but are less expensive and use less energy than the more tried and tested approaches. For instance incentivising farmers to reduce pollutants getting into streams and rivers rather than spending more time and money cleaning polluted water. How much do you support or oppose this idea?

- Strongly support
- Tend to support
- Neither/nor
- Tend to oppose
- Strongly oppose
- Don't know/can't say

**Q20** Wessex Water is also planning to focus more on helping customers to use less water rather than opting for expensive and energy intensive building, such as new reservoirs. How much do you support or oppose this idea?

- Strongly support
- Tend to support
- Neither/nor
- Tend to oppose
- Strongly oppose
- Don't know/can't say

Finally we'd last to ask a couple of questions about your household

**Q 21 Occupation of Chief Income Earner (Socio-Economic Grade)**

**Q22a How many adults, including yourself are there in the household?**

No \_\_\_\_\_

**Q22b And how many children, under the age of 18 years are there living in the household?**

No \_\_\_\_\_

**Q23 Do you have a water meter in use at your property – a meter is a device connected to your supply pipe which means you pay for the exact amount of water you use?**

Yes

No

Don't know



## PR19 Foundation Stage

Proposals for customer & stakeholder engagement

STAGE 1 (Qualitative): Method, timetable and costs

19<sup>th</sup> February 2016

# Detailed approach

DOMESTIC BILL PAYERS: 3  
large community events

- We propose 3 x 3 hour events, each comprising 24 respondents (we will recruit 27 allowing for some drop out to ensure a minimum of 24)
- Respondents will reflect a broad cross section of customers: proposed specification below
- This will break down into 3 tables of 8 respondents each with a table moderator (one of the Blue Marble team)
- The meeting structure will be designed to incorporate both open conversation about confidence and expectations, followed by presentations, then a deliberative element focusing on the 9 key areas of the SDS



- At recruitment, the format of the event and the process will be explained to ensure participants are confident and therefore able to contribute as a representative of their community.
- We will design the format of the event with Wessex Water. There is scope (but it is not obligatory!) for senior management to play an active role in the events if desired. Certainly we would welcome clients to observe the session (with a caveat of keeping this to 3 or 4 per event).

## Quotas for each event of 24 customers (72 customers across the whole sample)

Gender	12 x male, 12 x female
Age & life-stage	Minimum of 4 per decade: i.e. 4 x 20s, 4 x 30s, 4 x 40s, 4 x 50s, 4 x 60s, 4 x 70s Mix of life stage to fall out naturally i.e. pre-family, younger family, older family, empty nester
SEG	Minimum of 4 per SEG: A, B, C1,C2, D, E
Minority groups	Ethnic minority and faith group quotas to reflect local population
Water metering	Quotas to reflect metering levels within region
Vulnerable groups	Minimum of 4 to be considered vulnerable in terms of: - be/live in household with someone with a disability requiring high water use - low income/unemployed
Contact with Wessex Water	Minimum of 4 to have had contact with Wessex Water in last 12 months for service related issue (i.e. not just bill paying/change of address)

# Detailed approach

CUSTOMERS OF TOMORROW: 4 mini-group discussions

- Without direct experience to bring, we propose shorter and smaller groups with young adults i.e. those not yet paying water bills
- We recommend 1.5 hour groups. We will recruit groups of 6; a slightly smaller size allowing more ‘airtime’ for each respondent
- The group structure will replicate some areas of the deliberative events e.g. exploring financial confidence and general customer expectations – particularly drawing on services they use e.g. phone contracts
- The customers of tomorrow will also be shown the SDS presentations with a facilitated discussion about importance and prioritisation of the 9 key areas



Group profile	
1 x 26-30 ABC1	1 x 20-25 ABC1
1 x 20-25 C2DE	1 x 26-30 C2DE
<ul style="list-style-type: none"> <li>• mixed gender groups</li> <li>• one urban and one rural location</li> </ul>	



VULNERABLE CUSTOMERS: facilitating 3 x sessions in partnership with a stakeholder organisation

- Vulnerability is complex and dynamic. It is not necessarily a permanent state that one experiences throughout their lifetime. Rather, it is transient – people can move in and out of vulnerability at different moments in their life and for many different reasons.
- While we can include many areas of vulnerability within the community events, we also need to ensure that the voices of the ‘seldom heard’ are also included in the research. This means reaching out to places where we will find such groups, rather than expecting them to come us.
- We propose to do this by collaborating with organisations which act as a touch-point for people experiencing vulnerability - such as Citizen’s Advice, Age UK, Debt Advice Foundation and Housing Associations.
- We will convene an informal group discussion/interviews via three such organisations. The exact format of this will be tailored depending on the needs of those involved.

# Detailed approach

NON DOMESTIC  
CUSTOMERS: 4 x Breakfast  
Meetings & 10 tele-depth  
interviews



- We have drawn on the sample design we used successfully for PR14 projects and ideally we will have access to customer lists for recruitment purposes.
- Increasingly we are conducting *breakfast events* with business samples because energy levels are higher than at evening groups and we experience better attendance levels.
- We have also included depth interviews as these are ideal for revealing the detailed context in which decision-making takes place. Indeed, larger customers expect to have one to one conversations. Telephone interviews are time (and cost) efficient when samples are geographically dispersed
- NB: we have not included the largest account managed customers for this stage (mindful that we risk 'over-researching' this important group whose engagement will be vital when the draft business plan is in consultation). We have suggested interviews with Account Managers as part of the staff research as a means to capture the needs and expectations of these organisations who are very well known to the business.

## Non-domestic sample profile

Low users & unengaged: whose priorities reflect those of domestic customers

*Spend <£5k; water for domestic- purpose (loos, kitchen, shower etc) and not critical to processes e.g. professional business services, high street retailers*

**2 x 2 hour  
breakfast groups  
(6-7 businesses in  
each)**

Low users & engaged: water critical to their business

*Spend <£15k; water integral to business/significant cost to business e.g. café, independent retailer, pub, b&b, leisure centres, sports clubs, garages, light manufacturing, agriculture*

**2 x 2 hour  
breakfast groups  
(6-7 businesses in  
each)**

High users & engaged: water critical to their business

*Spend £15k-£100; water integral to business operation e.g. leisure and hospitality, healthcare, entertainment, manufacturing, education, heavy industry*

**10 x tele-depth  
interviews (1 hour)**

Quotas across the sample which will comprise 34-38 non domestic customers in total:

- Sector spread to reflect usage as indicated above (and to include public and private sector)
- Size quotas: 18 x Micro 1-9; 9 x Small 10-49; 5 x Medium 50-249 and 5 x large 250+ employees
- A minimum of 10 with multiple sites
- A minimum of 10 to operate in rural settings
- A minimum of 3 to be in a mixed use premises e.g. where a flat and a shop share water supply



# Detailed approach

5 x STAFF workshops



- Staff engagement was largely missing from PR14 programmes across the industry – but staff have an important role to play in improving the customer-centricity of any service business
- Many staff are at the point of service delivery and therefore see first hand how customers really experience their water and waste provision
- The ‘safe’ environment of a confidential research event will provide the opportunity to reflect on their own observations of customers when considering the strategic direction of Wessex Water
- Staff, in effect, provide another route to customers’ revealed preferences and behaviour: what really delights customers... what doesn’t
- Staff are also customers albeit with a particularly informed view – and are in a position to understand and respond to the SDS from their particular perspective

Staff sample profile	
Customer contact centre (Retail): <ul style="list-style-type: none"> <li>• Managers &amp; team leaders:</li> <li>• Customer call handlers</li> </ul>	<b>2 x 1.5 hour workshops (6-7 members of staff in each)</b>
Operations staff (Wholesale): <ul style="list-style-type: none"> <li>• Managers &amp; team leaders</li> <li>• Field engineers</li> </ul>	<b>2 x 1.5 hour workshops (6-7 members of staff in each)</b>
Account managers for Wessex Water’s largest water users (non domestic)	<b>1 x 1.5 hour meeting</b>
Notes on convening staff research: <ul style="list-style-type: none"> <li>• We always recommend that staff groups are as homogenous as possible so that participants feel free to express themselves without their line manager or another more senior person in the room</li> <li>• We would require convening the meetings (and releasing staff from their normal duties), room booking and refreshments to be organised by Wessex Water</li> <li>• Feedback is especially important when canvassing the views of staff. Ideally a thank you communication (and even a small gift such as chocolates) can be organised giving the clear message that their views are valued and being listened to.</li> </ul>	

# Detailed approach

**STAKEHOLDERS:** facilitating 2 meetings and conducting 6 depth interviews



- Wessex Water is developing strong external links through its various stakeholder panels, and we propose to use these as the starting point for stakeholder engagement at this foundation stage
- Our approach is to pre-task the 30 or so stakeholders who will be participating in meetings scheduled in March/April. The pre-task will encourage stakeholders to consider how customers view Wessex Water – its strengths and weaknesses – and what their ambitions are for the business as the representatives of customers, communities and environment. If it is not already familiar to stakeholders, we will also ask them to read *The Way Ahead 2015-40* as preparation
- We will use these prepared thoughts as a launching point for a facilitated workshop designed to generate important themes and their relevance to Wessex Water’s SDS. We will also collect the pre-tasks to capture the detailed notes of individual stakeholders and feed this into the analysis
- We will use the same pre-task with a number of members of the Futures panel (who are not due to meet in the near future) and other (national) stakeholders where contacts can be made via the Partnership members enabling us to recruit using ‘snowballing’ . We propose to conduct 8 telephone interviews with this group.

Stakeholder profile	
Wessex Water Partnership: 12-16 stakeholders (Meeting during March)	<b>45-60 minute workshop as part of meeting agenda</b>
Catchment Management Panel (Meeting April 12 <sup>th</sup> )	<b>45-60 minute workshop as part of meeting agenda</b>
Wider stakeholder voices (including members of the Futures Panel and other national stakeholders)	<b>8 x 45 minute telephone interviews</b>

Notes on stakeholder engagement:

- We would like to profile the organisations represented across the various stakeholder panels to ensure that the research captures a wide variety of views and is fairly representing the core stakeholder perspectives of consumer protection, environment, infrastructure and business.
- We have recommended relatively short sessions anticipating that agendas are likely to be full. The pre-tasking approach should mean that the time we have is very fruitful
- If you feel it is appropriate – and not asking too much of your stakeholders – we could add a ‘post-task’ to the process such as a truncated online version of the customer SDS Evaluation survey (see next slide) with an open-ended section for their follow up comments.

# Timetable – Stage 1 (Qualitative)

This provides an outline timetable: a detailed project schedule will be drawn up at commission to incorporate meetings and internal reporting milestones.

	February					March				April				May	
w/c	1 <sup>st</sup>	8 <sup>th</sup>	15 <sup>th</sup>	22 <sup>nd</sup>	29 <sup>th</sup>	7 <sup>th</sup>	14 <sup>th</sup>	21 <sup>st</sup>	28 <sup>th</sup>	4 <sup>th</sup>	11 <sup>th</sup>	18 <sup>th</sup>	25 <sup>th</sup>	2 <sup>nd</sup>	9 <sup>th</sup>
Agree programme	█	█													
Briefing and stimulus planning			█												
Agree screener, discussion guides				█											
Stimulus production (video?)				█	█	█									
Forewarning business sample					█	█									
Sample recruitment					█	█	█	█							
Staff and stakeholder organisation					█	█									
Fieldwork: customers, next generation & vulnerable								█		█	█				
Fieldwork: non domestic									EASTER	█	█	█			
Stakeholder research							█	█		█	█				
Staff research - qualitative								█		█					
Analysis										█	█	█	█	█	
Qualitative debrief														█	

# Truth.



*“We'd like to confirm, from the crew of Apollo 17, that the world is round.”*

**Eugene Cernan,  
Commander**

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*Essex  
Water*  
a YTL company

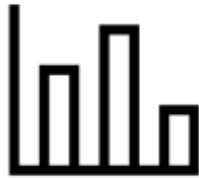
# PR19 Customer Engagement - Foundation Stage

STAGE 2 (Quantitative): Method,  
timetable and costs  
19<sup>th</sup> February 2016

# Detailed approach

## DOMESTIC BILL PAYERS: ad hoc survey to evaluate the SDS

- In summary, this survey will support the qualitative findings by determining the prevalence of views expressed amongst Wessex Water's customer base; it will also establish the relative importance of the headline themes identified in the SDS amongst a representative sample of domestic customers
- We propose to closely replicate the SDS Evaluation survey conducted in 2012 because this will form a benchmark for changes in attitudes to the key themes
- We will review the questionnaire both in light of the published SDS and findings emerging from the qualitative elements, and will recommend any amendments that will enhance the data
- We recommend replicating the 2012 telephone survey as the most effective methodology for achieving a statistically robust and representative sample (providing more control over who responds than postal or on-line methodologies but more cost effective than a face to face approach)



- We propose to schedule the fieldwork so that the questionnaire refinements can be made in light of the early qualitative fieldwork
- The timelines involved mean that we will debrief the qualitative elements first, then integrate the survey data to the final reporting
- This is shown on the timetable (p16)


### Quantitative survey specification

Total sample size	We propose a total sample of <b>600 domestic customers</b> . This will provide a sufficiently robust sample to draw conclusions at a total level (confidence intervals of between $\pm 2\%$ to $\pm 4\%$ ).
Survey length	We propose a survey of 12 minutes (approximately 25 questions). This balances the need to cover the necessary questions whilst achieving a good response rate.
Sample profile	In order to ensure the sample is representative quotas will be set for gender, age and region.
Method	All interviews will be conducted using Computer Assisted Telephone Interviewing by a team of fully trained interviewers specifically briefed on this survey
Key analysis breaks	Region (Wessex only, Wsx/Bristol; Wsx/B'mouth Demographics (age, gender, SEG, household size)

## Staff survey



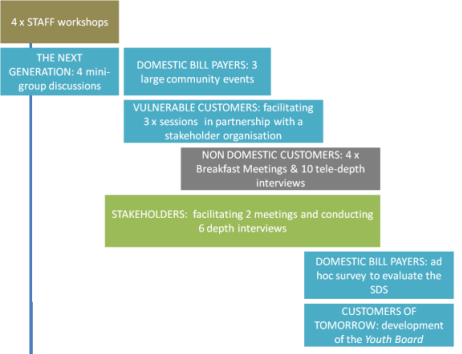
- Staff engagement was largely missing from PR14 programmes across the industry – but staff have an important role to play in improving the customer-centricity of any service business
- Many staff are at the point of service delivery and therefore see first hand how customers really experience their water and waste provision
- Staff, in effect, provide another route to customers’ revealed preferences and behaviour: what really delights customers... what doesn’t
- Staff are also customers albeit with a particularly informed view – and are in a position to understand and respond to the SDS from their particular perspective
- To ensure inclusivity, we will design an online survey – reflecting the key elements of the customer survey - inviting all staff to have their say.

Staff sample profile	
 All staff emailed an invitation to click on a link to complete a confidential survey	<b>Online survey emailed to all staff</b>

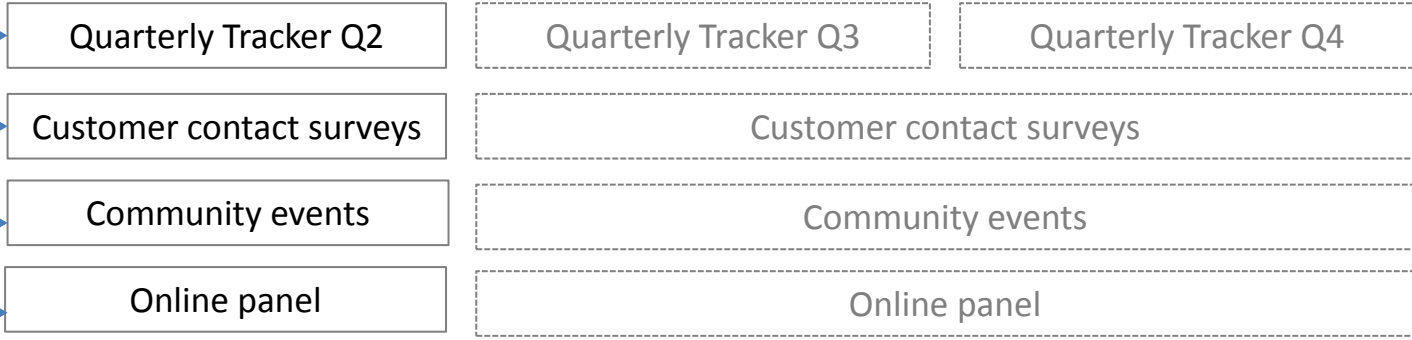
# Key metrics will link across all engagement activity

- When conducting multiple phases of research, and when using mixed methods, it is vital to ensure that all streams of data and evidence are joined up to develop a thorough and streamlined body of evidence. The staging of the different elements of this research means that we can ensure each feeds into the next – we will actively be developing materials that build, test and challenge what has been learned in previous elements.
- As the qualitative phase gets underway, as an integral part of this programme of research, we will design and analyse:
  - **2-3 key ‘snapshot’ questions** to be incorporated into the day to day customer feedback surveys and social media
  - **Short survey of key questions** mirroring the themes in the CATI survey for Wessex to use with the flexi-section of the quarterly tracker, online panel, staff survey and at suitable community events or education activities.

Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
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*We will provide a supplementary report at the end of June. This will be the ‘triangulated’ analysis of the snapshot questions from across customer activities including the quarterly tracker and an online survey. This will be a model for ongoing data gathering and triangulation throughout the business planning process.*





# Timetable – Stage 2 (Quantitative)

	March			April				May				June			
w/c	14 <sup>th</sup>	21 <sup>st</sup>	28 <sup>th</sup>	4 <sup>th</sup>	11 <sup>th</sup>	18 <sup>th</sup>	25 <sup>th</sup>	2 <sup>nd</sup>	9 <sup>th</sup>	16 <sup>th</sup>	23 <sup>rd</sup>	30 <sup>th</sup>	6 <sup>th</sup>	13 <sup>th</sup>	20 <sup>th</sup>
Quantitative fieldwork: customers, next generation & vulnerable															
Fieldwork: non domestic			EASTER												
Stakeholder research															
Staff research - qualitative															
Analysis															
Qualitative debrief															
Agree 'flexi' section questions for Tracker Q2															
Tracker Q2 fieldwork starts															
Agree questionnaires: • domestic survey (CATI) • staff survey (online, hosted)															
Quantitative fieldwork: domestic and staff															
Quantitative analysis															
Integrated debrief: qualitative and quantitative															

# Truth.



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