



Drainage Water Management Plan – Customer Research

A PROPOSAL FOR WESSEX WATER

Dawn Mulvey

Tel +44 (0)7790 030901 | dawn.mulvey@accent-mr.com

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P10319 Drainage Water Management Plan – Customer Research

Wessex Water

YTL GROUP



BACKGROUND & CHALLENGES

Wessex Water is creating:

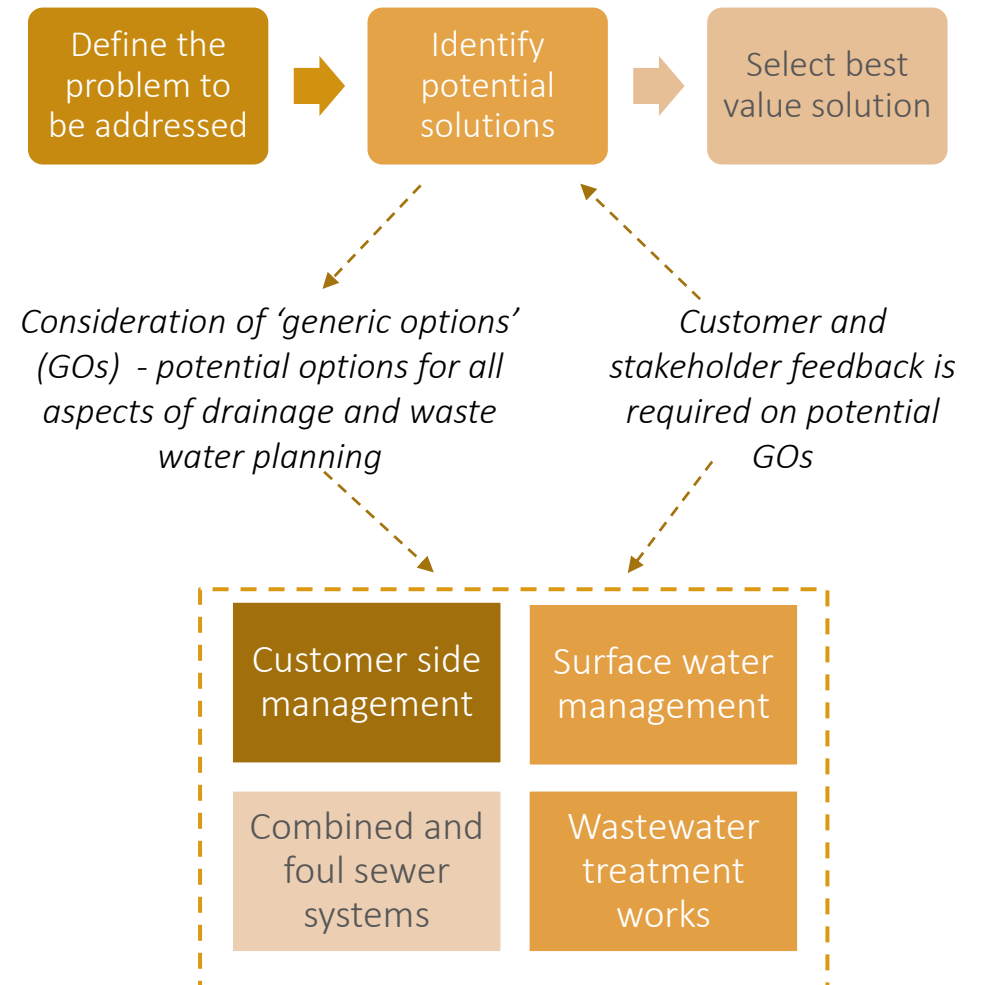
- A company-wide drainage and wastewater management plan (DWMP)
- Drainage and wastewater management catchment plans for Bristol Avon, Dorset, Hampshire Avon and Somerset strategic catchment partnerships
- Local drainage and wastewater strategies for water recycling centres catchments with existing or future risks.

Drainage and Wastewater Management Plans (DWMP)

- Introduced in 2019
- A move towards a more consistent basis for long-term planning of drainage and wastewater services
- A number of organisations collaborate to create a 25 year strategic plan to improve drainage and environmental water quality
- Wessex Water seeks to integrate customers views
- Plans developed by DWMP also feed into Wessex Waters PR24 business plan

Customer and stakeholder input in the water and wastewater industry is crucial. Decisions made now can impact the service provided to customers and the environment for generations to come.

The process of developing DWMP



SPECIFIC OBJECTIVES AND OVERCOMING RESEARCH CHALLENGES

Objectives

1. What are customer views on wastewater drainage (including sewer flooding and storm overflows) and how do these differ by customer segment? **How should WW react to the micro and macro changes** (climate change, urban creep and new developments)?
2. **Customer trade off** on the acceptability of impact and frequency of different variants of sewer flooding (internal vs external, foul vs surface water, property flooding vs storm overflows)
3. Understand customers' willingness to support ranking of a range of potential 'generic options' analysed by high level catchment areas. Preference for engineer solutions vs sustainable solutions, and likely participation in behavioral change projects
4. Customer willingness to pay for alternative GOs
5. Understand customer views on the impact on bills of alternative options and levels of service
6. Intergenerational exploration – when should investment be made to increase resilience to potential future challenges?

How our approach delivers best practice engagement

- ✓ Incorporates and builds upon insight from the SDS engagement
- ✓ Continuous feedback and iterative approach – working debriefs and continuously feeding back insight as the project progresses, with in built flexibility to modify subsequent stage
- ✓ A mix of **informed and uninformed views**. Maximising efficiencies by recontacting participants from current SDS qualitative research who will be informed about WW for a deeper dive into wastewater drainage. Uninformed view from the quantitative survey, and boosts to the qualitative elements
- ✓ Two **interlinked quantitative surveys** to ensure a maximum survey length of 15-20 minutes (industry best practice)
- ✓ **Cognitive testing** of the quantitative survey
- ✓ **Fully inclusive sample**; for example YouthSight panel to maximise input from future (difficult to engage) citizens, depth interviews to target vulnerable customers and f2f quantitative interviews with digitally excluded customers
- ✓ Engagement **across all regions** to identify if views differ according to geography and high level catchment area
- ✓ Overcoming the challenge of guiding customers and stakeholders to **think long term** by incorporating innovative engagement techniques to uncover rich and engaging insights
- ✓ **Analytical power house** and partnership with PJM Economics for design of industry leading trade off techniques, comparable with PR09 WW previous research
- ✓ **Triangulation** of all insight
- ✓ **Swing weighting** used with the qualitative sample
- ✓ **Co-creation** from expert panel

APPROACH OVERVIEW

ITERATIVE PHASES OF RESEARCH CREATING DEPTH OF INSIGHT

1 Immersive Review and Inception Meeting – Recap of results to date from SDS study (likely to be qualitative input only).

2 Expert Co-creation – The expert panel created for the SDS project will meet to discuss WDMP, feedback on GOs and how to convey them to customers

3 Qualitative discovery – Perceptions of wastewater draining reactions to GOs (especially behavioural focussed). Tailored engagement channels to reach different audiences, with an opportunity to draw learnings from each phase and make refinements for subsequent engagement. A unique focus for each audience according to their degree of specialism.

a) Retailer depths (reconvened)*

b) Online workshop with business customers (reconvened)*

c) Online consumer Zoom groups (reconvened)*

d) Tele depths with vulnerable customers (reconvened)*

e) Zoom depth interviews with customers who have experienced sewer flooding/waste water issue (affected but uninformed)

4 Quantification – Online and face to face surveys with customers (HH and NHH)

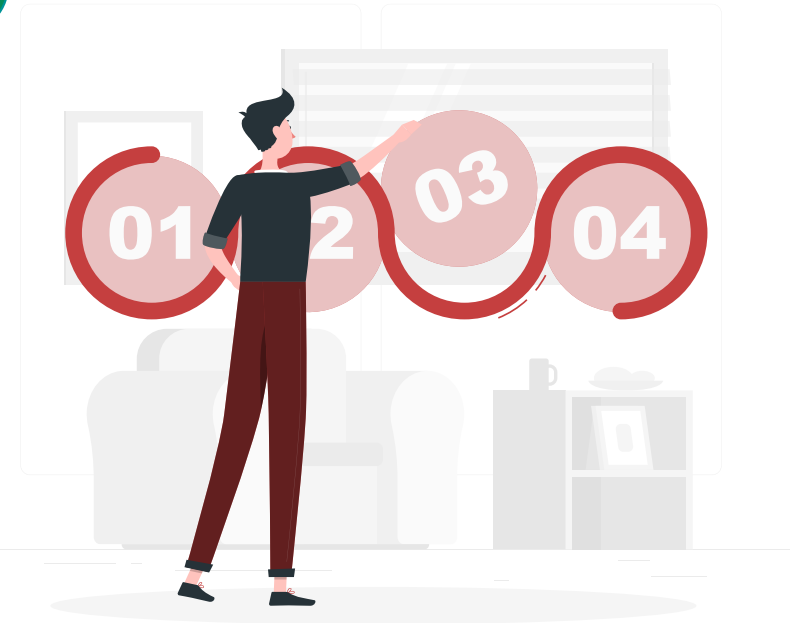
Two interlinked surveys:

A) Acceptability of Impact and support for GO options

B) WTP for alternative GO's, Impact of bill alternative options, When Wessex Water should invest

5 Final refinements – expert panel reconvened to debate research findings and suggested actions

6 Action Planning Workshop to disseminate results



1 INCEPTION WORKSHOP

GETTING IT RIGHT FROM THE START

1. Understand everyone's needs

All key CSO stakeholders to take part in Inception Teams

2. Holistic design

Understand all specific issues and needs of different parties and factor these into the design of the project materials and outputs

3. Knowledge review

Review latest findings from SDS research and triangulate with other WW insights

4. Agree outcomes and deliverables

Develop outline of materials. Following the meeting, we will provide summary notes and actions involving the lead Wessex Water team members

2 EXPERT CO-CREATION

IDENTIFICATION OF POTENTIAL REFINEMENTS

Overview



- Many of the topics to be discussed as part of this research are complex in nature and input from informed and experienced stakeholders will be beneficial.
- The expert panel created for the SDS research will be called upon to meet again to discuss the WDMP and GO's
- In the first instance, the expert panel will take part in an online group discussion to review the GOs which will be circulated to the panel members in advance, and some broad question topics for review so that all attend the discussion ready to contribute
- The expert panel will also be used to cover the views of wider stakeholders (other than end customers and retailers who will be represented in other strands of qualitative and quantitative work)
- This meeting will be held online and last 90 minutes
- Accent moderators will lead the conversation, and encourage the free flow of ideas using task based exercises as appropriate.

Output



- **Summary report** highlighting broad feedback
- Accent will review this in a workshop with key Wessex Water personnel, and feed the findings into subsequent stages of research

ENGAGING WITH WATER RETAILERS AND BUSINESS CUSTOMERS

Overview



- Retailers and NHH customers will be reconvened from the SDS qualitative work
- Bespoke topic guides will be created for each to enable the discussion to focus on elements of the WDMP most appropriate/meaningful to the research audience
- All will be briefed on this phase of work at the completion of the SDS discussions
- Potential to pre-place with some reading materials between the SDS and WDMP engagement phases
- Our Accent moderators will guide the conversations at each stage.

Format



- Digital or telephone depths with water retailers who currently have a relationship with Wessex Water. Groups not appropriate for this audience due to their competitiveness
 - Participants will be reconvened from the SDS work
 - 3 depths of 60 minutes duration
 - Pre-placed reading of outlining challenges and potential GOs to enable considered discussion with this time pressed audience
 - Assume no need for incentive
- Water Retailers**
- Reconvened digital groups with SDS participants
 - Session 1 = 60 minutes to say hello again, introduce WDMP themes, Q&A and gain spontaneous response to challenges and potential GOs
 - Liveminds homework giving more detail on GOs to gain a more considered response
 - Session 2 = 90 minutes to discuss outcomes, impact on business, WTP/support and, where relevant with this audience, potential for behavioural change
 - Expect 5-6 business customers from across the Wessex Water region with an incentive (can be charitable donation)
 - Broad structure will follow that which will be used with current and future bill payers
- Business Water Customers**

Output



- Accent will conduct **thematic reviews on the outputs** and **provide a summary report** of key learnings, discussed with core members of the Wessex Water team
- Transcripts



QUALITATIVE DISCOVERY

ENGAGING WITH CUSTOMERS AND CITIZENS



Overview



- 4 x reconvened digital groups (giving 8 groups in total)
- Customers from different regions brought together (with a mix of ages in each):
 - 1 x social group AB – 6 participants
 - 1 x social group C1C2 – 6 participants
 - 1 x social group DE – 6 participants
 - 1 x future customer group – 6 participants
- Homework exercise on Liveminds will ensure participants have the time and space to consider challenges around micro and macro changes before exploring GOs, WTP and potential to for behavioural change in the second group session
- Homework will also be used to explore current behaviours as participants are more likely to “confess” to any potential negative behaviours in an individual environment
- Liveminds content will be reviewed prior to the reconvened groups and used to structure some of the materials for this second session
- Wessex Water team will have full access to Liveminds to observe first hand the responses from participants
- Enhanced option = 8 reconvened digital groups (giving 16 groups in total). 2 x AB, 2 x C1C2, 2 x DE and x 2 future customers.

Format

- Participants will be reconvened from the SDS roadshow. The format will be similar to that being recommended for business customers:
 - Session 1 = 60 minutes to say hello again, introduce WDMP themes, Q&A and gain spontaneous response to challenges and potential GOs
 - Liveminds homework: the homework will be tailored to the customer and citizen audience
 - Session 2 = 90 minutes to discuss response to GOs from the homework exercises, WTP/support and potential for behavioural change
- Use of swing weighting: a number of techniques are available from the multi-criteria decision analysis (MCDA) literature to elicit trade-offs between attributes comparable to those obtained from stated preference surveys. In MCDA, comparing options against multiple criteria requires that attributes be converted into a single scale and weighted against one another. Swing weighting is one such technique for this purpose. It involves participants starting from a scenario where all attributes are set to their worst levels. Then, they identify the most important attribute by selecting the one that, if improved, would improve the overall situation the most. The most important criterion is assigned 100 points, and then decision-makers are asked about the next criterion to be moved from its worst level to its best – that will receive a point value <100. The outcome of this iterative procedure is a set of weights describing the relative importance of each of the attribute level changes to the group. These can then be compared against the outcomes from the stated preference research for a more robust, triangulated, insight.
- Results will be cross checked by demographic groupings and region for broad differences and verified in the quantitative work
- Feedback responses from different groups into the reconvened second sessions – for example, we can put the future customer view to current customers to help with discussion around intergenerational fairness and timing of changes/improvements and associated bill impacts

3

QUALITATIVE DISCOVERY

ENGAGING WITH HARD TO REACH CUSTOMERS

Customers in vulnerable situations

- There will be customers in vulnerable situations who will not be represented in the SCS roadshow sample. These are likely to include those with mobility issues, the very elderly, those in long term financial stress, etc
- It's important that their views are still considered in the WDMP research but picked up in a more appropriate way
- 5 depth interviews, with relevantly tailored pre-reading to ensure participants are given time to consider the context of the WDMP
- Interviews will be 60 minutes and conducted with SDS reconvened customers
- Conducted by phone or zoom depending on participant preference. We will have already interviewed these customers in home so will have an ethnographic understanding of the customer, their living situation and their wider lives

Customers impacted by sewer/waste water incident

- To complement the informed customer view gained qualitatively from the reconvened SDS audience we are recommending a small number of depth interviews with customers who have been directly impacted by sewer/waste water incidents
- Core option is for 5 Zoom depths, with an option to increase to 10 Zoom depths
- Interviews will provide first hand experience of the impact of sewer/waste water incidents and allow us to filter responses to GOs through this lens
- Participants will be asked to complete a pre-task which will provide detail around the incident to ensure we understand the impact of the event and how participant response to the WDMP objectives is influenced by this
- We will aim to recruit a mix of difference experiences – ie: internal sewer flooding, bathing water pollution, etc

Output



- One page summary at the completion of each stage of work
- A combined report will be developed at the completion of all stages of the qualitative work outlining high level outputs and, where relevant, implications for the development of the quantitative materials



QUANTIFICATION

CUSTOMER UNDERSTANDING

Overview



- There are **5 key Wessex objectives** that we will address in the quantification part of the engagement.
- We will conduct a number of **choice experiments, ranking exercises and a contingent valuation exercise** to meet all your objectives
- There will be **two versions** of the questionnaire, each containing different exercises, to avoid respondent fatigue
- **Most of the interviews will be conducted online** among Wessex Water domestic customers from our panel partners and from sample provided by Wessex Water. We will also free find some business customers (and customers in vulnerable circumstances) using this approach
- This will be **supplemented with face to face interviews to ensure coverage amongst hard to reach, vulnerable and digitally disengaged customers, and potentially citizens.** Interviews will be conducted where customers feel most comfortable - in garden or in home.
- We will ensure that we cover all four regions.
- In order to engage with a representative number of business customers, we will follow a phone- email- phone approach

Format



- **Accent will work with Wessex Water to develop background educational information**, which will be reviewed by the Expert Panel prior to the survey launch
- Both **quantitative surveys will be subject to cognitive testing and formal piloting** to ensure that respondents understand what we require them do, and to ensure that there are no discernible biases in the way questions are answered
- **In the choice experiments**, customers are presented with a set of options and asked to make a choice **between the two**. This is repeated several times with different options
- In the **ranking exercise**, customers are presented with a number of options and asked to choose their most and least important

Output



- A summary report of the cognitive findings and recommendations
- Pilot report outlining findings and any changes required
- Raw data – a full dataset of the respondent level and analysed quantitative data will be provided in Excel
- A combined PowerPoint report which summarises insight from all customer groups engaged with



We propose understanding customer views and your specifications through a series of choice experiments, prioritization exercises and contingent valuations. As this will make the questionnaire too long, we propose conducting 2 questionnaires, each containing different exercises.

Key objectives

EXERCISE

Acceptability of Impact

- Customer views on the acceptability of impact and frequency of sewer flooding to establish - internal vs external flooding; foul flooding vs surface water flooding; property flooding vs storm overflows

How we will achieve this

- Pairwise choice experiment on which alternative would have the most impact on the participant, with alternatives being characterised by attributes including location, type, severity and frequency

1

Support for GO options

- Understand the acceptability of and willingness to support a range of potential 'generic options' (GO's) including willingness to support, relative customer preferences for more traditional engineering-based solutions compared to more sustainable solutions, willingness to support and also participate in behavioural change projects

How we will achieve this

- Pairwise choice experiment on most preferred option, with successive pairs of options shown, and with each option carefully described to include all the relevant impacts, in a form that is readily and quickly understandable
- Stated intention exercise focused on a comparison between current behaviours and intended behaviours given certain incentives

This will provide answers to the ranking objective, and the relative preferences amongst different types of solution.

2

3

Key objectives

EXERCISE

WTP for alternative GO's

- Understand customer willingness to pay for alternative GOs

How we will achieve this

- A contingent valuation exercise focused on valuing a notional default package of GOs. The results from Ex. 2 will then be used to derive values for all GOs consistent with this package valuation.

4

Impact of bill alternative options

- Understand customer views on the impact on bills of alternative options (including removing harm from storm overflows) and levels of service.

How we will achieve this

- A series of questions focused on testing the acceptability of alternative options for levels of service with respect to flooding and storm overflows, including their associated bill impacts.

5

When Wessex Water should invest

- Customer views on when we should invest in systems to make them resilient to potential future challenges such as climate change

How we will achieve this

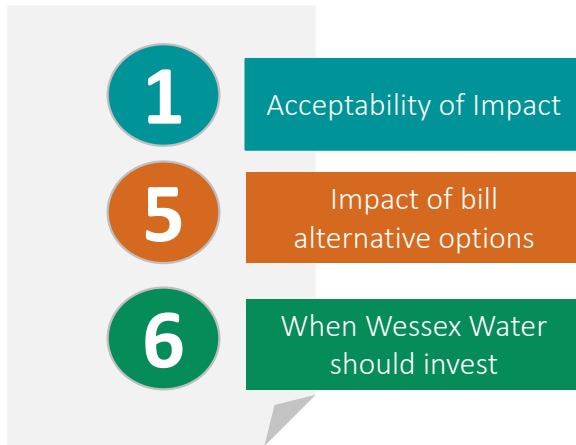
- A ranking exercise to obtain a rank-order of preferences for alternative policies with respect to timing of investment. This would be framed in the broader context of long-term planning for PR24 with each option described including its impacts on bills.

6

4

QUANTIFICATION

UNDERSTANDING CUSTOMER VIEWS: SAMPLE STRUCTURE

SURVEY A
CHOICE
EXERCISES

Focus is on
level of service
and bills

SURVEY B
CHOICE
EXERCISES

Focus is on
preferences over
generic options and
behavioural responses

	OPTION 1	OPTION 2
Sample size	1000 (500 of each survey type)	2000 (1000 of each survey type)
Subgroups	Domestic 800 Future customers 100 NHH 100	Domestic 1600 Future customers 200 NHH 200
Method	Online 900 (panel, Wessex sample, Youthsite, Respondi) F2F 100 (25 in each region)	Online 1800 (panel, Wessex sample, Youthsite, Respondi) F2F 200 (50 in each region)

- We have allowed for a sufficiently robust sample to draw conclusions at a total level with a margin of error of 2-4%
- Both options will allow for breakdown analysis of main segments i.e., Region (Wessex, Bristol, Bournemouth) Demographics, Key Behavioural splits etc., where the sample size is a minimum of 50 respondents
- We will use quota's during fieldwork to ensure representivity of customers. We will weight the data only where we see a deviation of greater than 5%

WORKSHOP AND DELIVERABLES

A SUITE OF DELIVERABLES TO MEET DIFFERENT NEEDS

5

Final refinements

The expert panel will be reconvened to debate research findings and suggested actions



Post engagement 1 page highlight summary report after each engagement which summarizes the key findings and any actions needed in bullet points. Provide Wessex Water with quick and immediate feedback and will be produced after the **qualitative enhancement** phases



Working debrief sessions will be held at the end of the key **qualitative enhancement elements** and **each quantitative survey (A and B)**. These will be led by senior members of the project team and designed to be highly interactive, with key findings discussed and implications for future phases of research

6

Action Planning Workshop

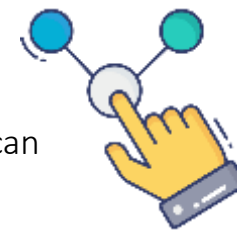
Accent will lead a final workshop, summarising the results across each phase of research. A PowerPoint summary report will be produced and circulated in advance

PowerPoint summary reports will be produced after each phase of engagement. These highly visual PowerPoint reports will summarise key insights and draw conclusions and recommendations to facilitate debate. A combined report will be produced for all **qualitative enhancement and quantification stages**, summarising the key take outs across all stakeholder and customers groups engaged with



Weekly project catch up calls (via Teams) will be set up to monitor progress for the duration of the engagement and ensure all are aligned

A final full **technical report** covering all phases of research. **Raw data** – A full dataset of the respondent level and analysed quantitative data will be provided in Excel. Qualitative transcripts can also be provided.



All our outputs are produced to a high standard so can be used to support the Business Plan submission for PR24 and or communicated via Wessex Water (for example on the website or newsletters)





ACCENT MARKET RESEARCH **WATER EXPERIENCE**

**EXPERIENCED
AND
COMMITTED**

30 years PLUS in water means **we are trusted, dedicated and reliable specialists**. We have supported water companies with strategic engagement since PR99. **Ofwat consult us for best practice customer and stakeholder engagement**. Our MRS credited moderators have proven track record in the water sector, utilities, finance, retail...



**TRUSTED
PARTNER**

We have **Qualitative experts and Quantitative masters**. Our full-service capabilities means we can provide methodologies tailored to the needs of the audience (and fully COVID safe). We are also ISO20252 certified.

- Unrivalled ability to **mesh insights across qualitative and quantitative methods**.
- Our **sector knowledge** ensures we **triangulate and contextualise research insights**.
- **Draw in innovation and experience from work in other sectors** to really paint the best picture.

FRESH

- Incorporating **informed and uninformed** views
- Introducing **efficiencies** by forming 'mini panels' from SDS research
- Enhanced **analytical expertise** by partnership with PJM economics.
- Incorporation of gestalt room techniques to provide **future focus**.
- **Prioritisations qualitative exercises**
- **Vox pops to engage audience and communicate key content**



MEET THE TEAM

WATER EXPERIENCE

Strong integrated team of insight specialists with cross sector experience and ethnographic, qualitative & quantitative expertise:

Rob Sheldon



TECHNICAL CONSULTANT

Rachel Risely



QUANT LEAD

Nancy Curzon



QUAL LEAD

Dawn Mulvey



ACCOUNT DIRECTOR

Kayte Ashton



ADVANCED ANALYTICS

Julian Hollo-Tas



FIELD SUPPORT

Omar Shareef



FIELD MANAGER

Angeline Depaty



TELEPHONE UNIT
MANAGER

Yasamin Mehraj



PROJECT SUPPORT

Paul Metcalfe



ADVANCED ANALYTICS

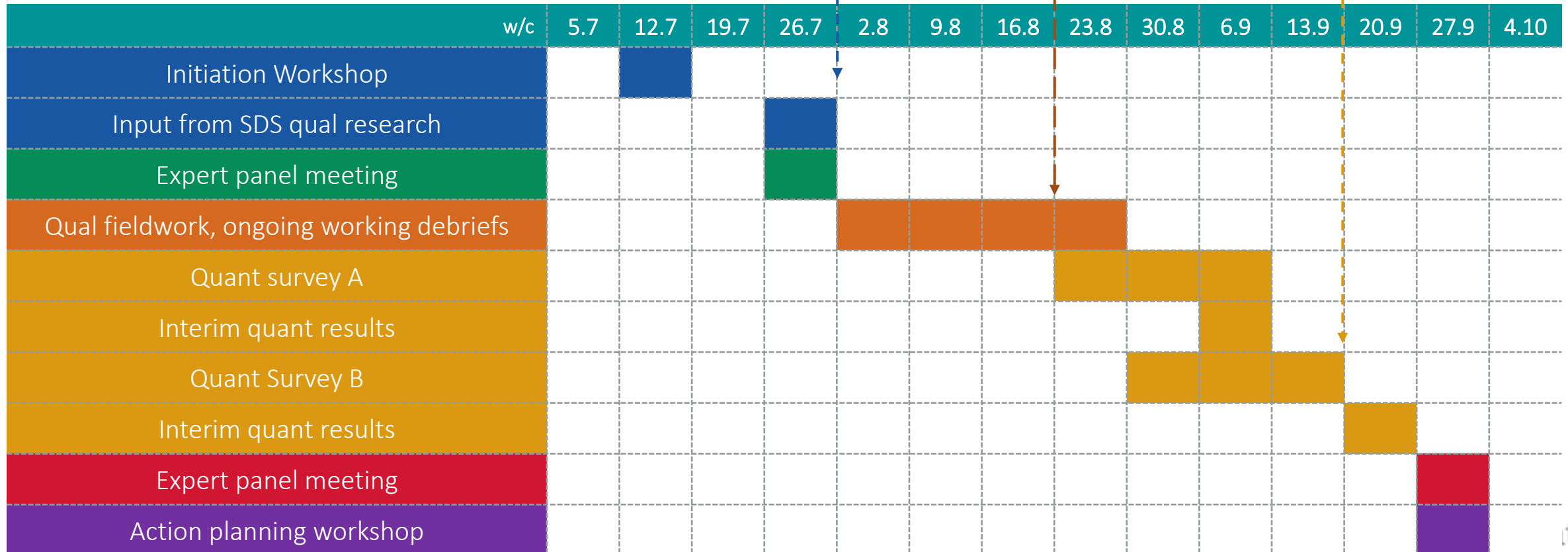
TIMINGS **ITERATIVE DELIVERY OF INSIGHT**

Wessex Water originally requested for this project to be completed by the end of August. However, there are substantial advantages to waiting for results from the SDS research programme, which is running June – September.

Initial qualitative findings from the SDS research will be available at the end of July, so we recommend qualitative fieldwork for the WDMP project runs in August, with quantitative research following.

Our phased approach means that we will provide insight to Wessex Water on an ongoing process via working debriefs.

We will also provide interim top line results at key stages for example after quantitative study A is completed



THANK YOU!



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Accent Marketing & Research Limited
Registered Address: 30 City Road, London, EC1Y 2AB

