Wessex Water
YTL GROUP
your say your future
young people's panel

AQR QUALITATIVE EXCELLENCE AWARD Highly Commended 2021

MRS Awards 2021 Highly Commended New Consumer Insights

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Young People's Panel 2022

November 2022

Sample and methodology

Young People's panel

- A 6-week process
- Attended by 30 x 6th form schools and colleges from across the region
- Organised into 5 teams to compete with a winning pitch presentation

May | June | July | School holidays | Sept | Oct | Nov

Application Process
BM engaged 54 schools and colleges across region

Selection
30 applicants chosen from 17 schools

13th Sept: immersion day at Claverton Down

Teams work on task

1st Nov: pitch day at Claverton Down

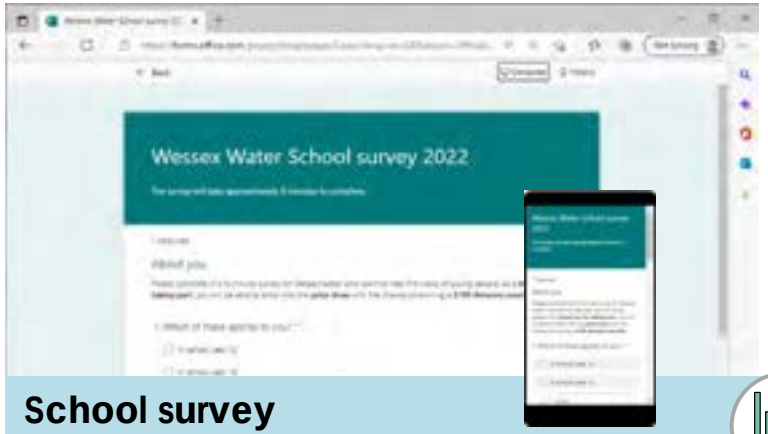
Online school survey

Day 1: focus on business immersion with Wessex Water & CCW experts plus:

- Group discussions: exploring behaviour change and water use
- Task briefing and planning

Day 2: focus on team presentations plus:

- Group discussions: drainage, CSOs and solution priorities



School survey

- **521 students** from years 12 & 13 took part across 13 schools and colleges
- Survey design complementing YPP topics and includes trend questions from previous years
- Fieldwork 2-16th November 2022

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Content

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Future customer perspectives

your say your future
young people's panel

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Life as a 6th former involves pressures and decision making

Overall, sentiment towards school and studies is that there is high **pressure** on students

Issues with school

☹

- The biggest stress for students is succeeding in **exams**
- The majority found studies **difficult to balance** with their social lives
- Another source of pressure is **making decisions** over the future, particularly choosing universities
- There is a perception that school has got **harder** post COVID, e.g. exams in person and stricter assessments

☺

- However, some perceive there is **greater freedom and independence** in 6th form which comes with responsibility

"There is a pressure of succeeding at school, and then how to balance your social life with your school studies and exams"

"There is a decision to "follow the norm" and go to uni or going and getting a job. The pressure forms from these decisions"

"We're still quite young but expected to figure out what to do with our lives. But it's also really exciting. It's tricky"

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Future customers are expecting the cost of living to impact their futures negatively

2022 data show greatest pessimism since 2016 although confidence in own employment prospects holding up

Political and economic concerns

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- Biggest concern is the **cost of living crisis:** all appreciate they will be affected by this in the near future
  - Specifically worry they will be **unable to pay bills** in the future
- All felt **unprepared** to manage their finances as budgeting not taught at school
- A strong sentiment: **life will be harder** e.g. cost of university, future bills, finding a job
- Another concern is the management of the cost of living crisis: many **distrust** politics

☺

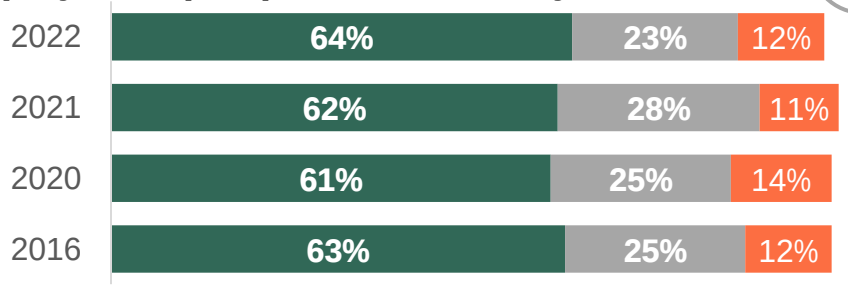
- Isolated comments that are more optimistic:
  - Lucky to live in England and that "**it could be worse**"
  - Culture of **overthinking** the future: live for the moment

*"The future, moving out, is a concern. It is something **we're** going to have to deal with, it's not that far away"*

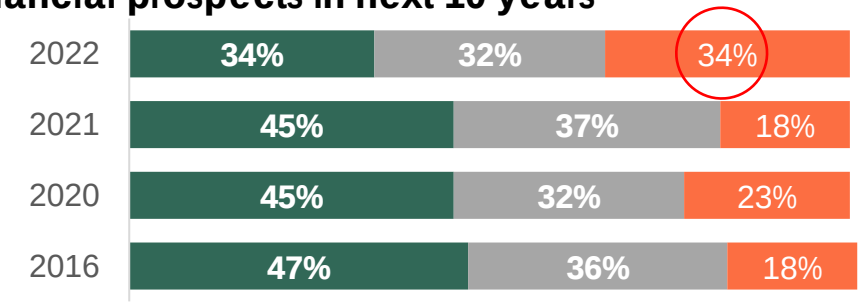
"No one really gets taught how to pay and what happens. How many bills do you get given right away, for everything, including water?"

"The cost of living is worrying, but the people managing it are even more worrying"

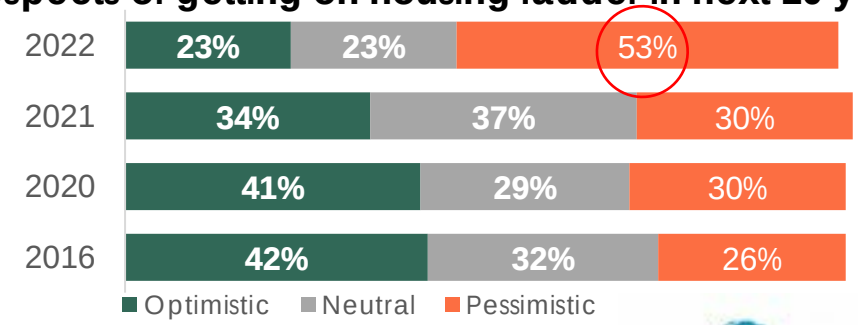
Employment prospects in next 10 years



Financial prospects in next 10 years



Prospects of getting on housing ladder in next 10 years



How are you currently feeling about the following issues in relation to life after education?
Base excluding don't knows: 2016 (578) / 2020 (532) / 2021 (312) / 2022 (532)

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Students think about their impact on the environment but don't want it to take over their lives…

Photo by Markus Spiske on Unsplash

Thinking about what you buy, how you travel and how you live your day-to-day life, which best describes you…

6% **very concerned** about impact on the environment and **spend considerable** time or money to reduce it

49% **think about impact** on the environment and try to make a difference **without spending** too much time or money

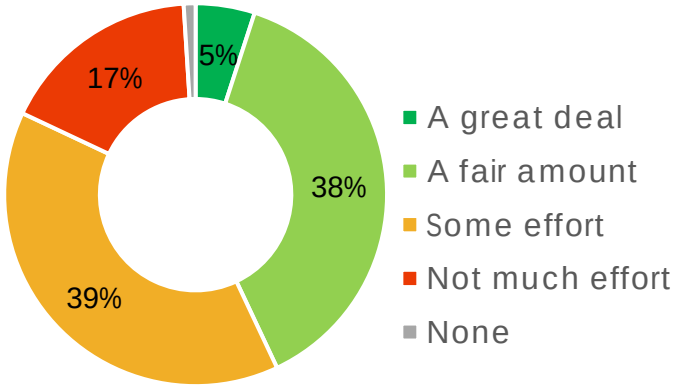
41% **think it's a bonus** if what doing is environmentally friendly

5% **don't tend to think** about impact on the environment

2021

2021 2,090 UK adults 18+ [Blue Marble: 'Cold facts & hot air']

How much effort do you make at home to save water?



Thinking about what you buy, how you travel and how you live your day-to-day life, which of these best describes you?
Thinking specifically about water: how much effort do you make at home to save water? Base: 2022 (532)

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Future customers have concern for environmental impact of heatwave

However, water in the UK is a low priority; food and energy are seen as more pressing issues

Environmental concerns and the summer heatwave

- Views on the summer heatwave are balanced between positive and negative
  - Some worry about effects on the environment of drought e.g. plant die off, fires, increased water usage and pressure of tourism on coasts and rivers
  - However, many see the occurrence of heatwaves as normalised – and enjoy the benefits of hot weather
- Drought is used as a descriptor not a definition: drier/less water than usual – but doesn't sound alarming *"a little bit less water than we already have in the UK, so it's fine".*
- Some awareness of the increased usage of water during the summer heatwave
- However, food and energy, rather than water, is perceived as a more pressing environmental concern at the moment
- Some also referenced other countries**,** perceiving more difficult water situations to which they have been able to adapt

"The heat, and climate change, hit home"

"I kinda enjoyed it"

"Heatwave makes me think of summer, hardly spending any time in the house, not using as much water, it was good. "

"It feels like every year there is a record breaking summer, I feel like I'm getting used to it."

"We don't perceive water as something than could run out because it never has, never could, but with energy bills rising we are focused on energy"

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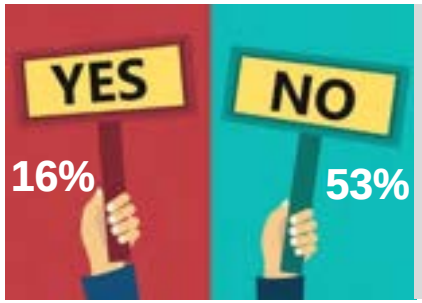
Despite there not being a hose pipe ban, some students and their families adopted water saving behaviours during the summer

Hose pipe ban experienced over the summer?



32% don't know/ can't remember

"I think there was one last year but a woman down the road didn't stop, she kept doing it [watering]."

Different behaviour during the hot weather…

Used less

Took shorter showers to save water	37%
Didn't water the lawn, let it go brown	26%
Re-used water (from left-over drinks, cooking, washing up, etc) to water plants	26%

Used more

Watered plants more often	35%
Went wild swimming / went swimming outside	26%
Used a paddling pool / hot tub	19%
Showered or bathed more frequently	19%
Watered the lawn more often	10%

No change

Didn't use water differently this year compared to a usual summer	23%

Over the summer, several areas of the country experienced a hosepipe ban. Was there a hosepipe ban in the area where you live? And please tell us in what ways, if any, your household used water differently over the hot weather this summer compared to a usual summer… Base: 2022 (532)

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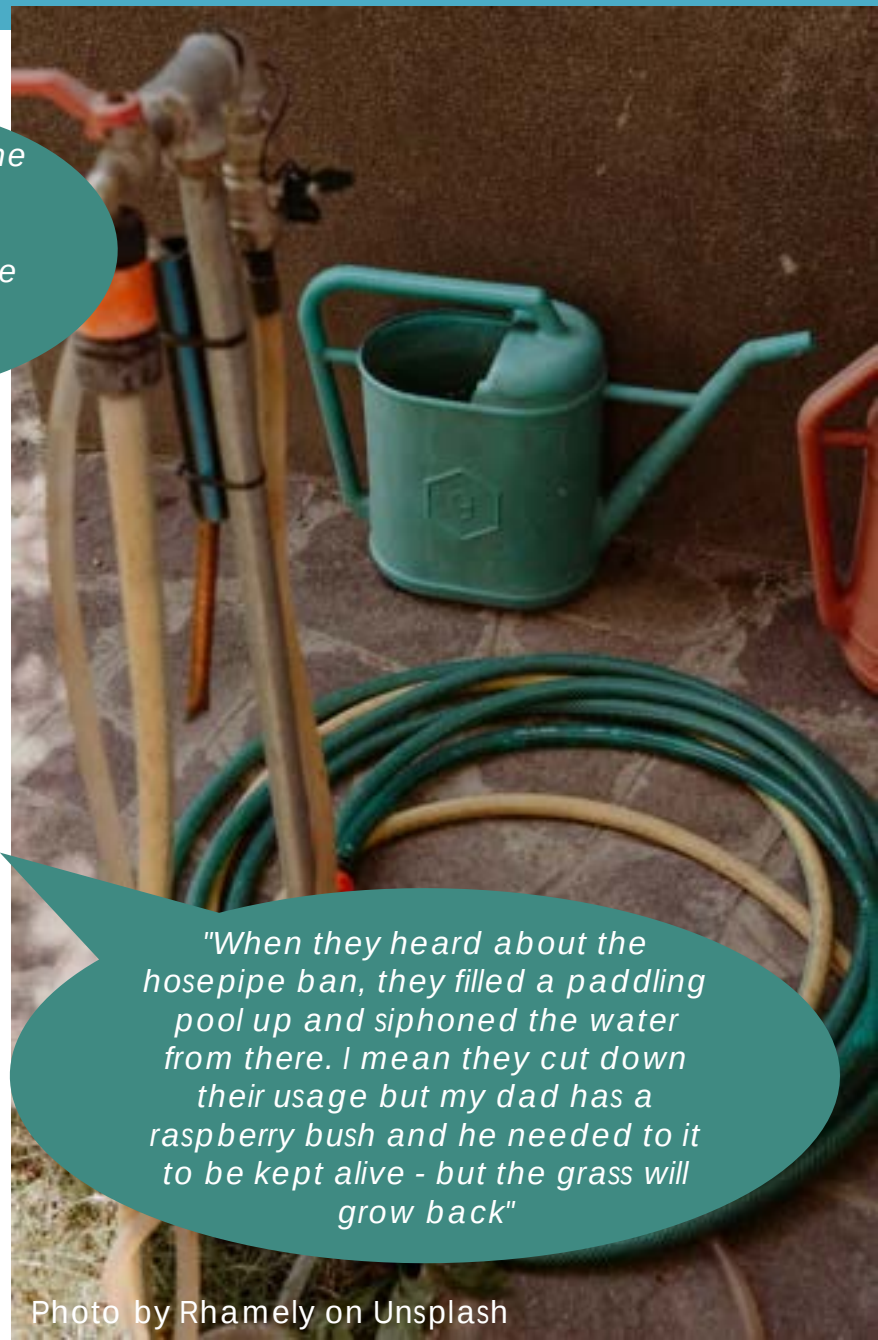
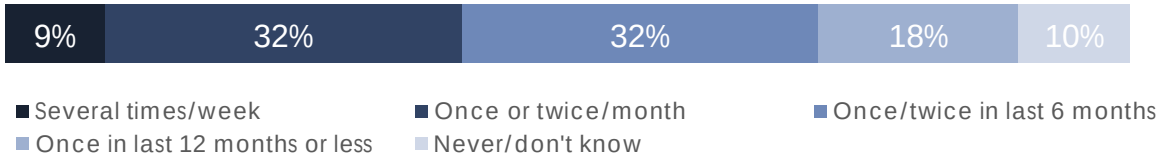


"When they heard about the hosepipe ban, they filled a paddling pool up and siphoned the water from there. I mean they cut down their usage but my dad has a raspberry bush and he needed to it to be kept alive - but the grass will grow back"

Photo by Rhamely on Unsplash

River environments: usage and perceptions of water quality

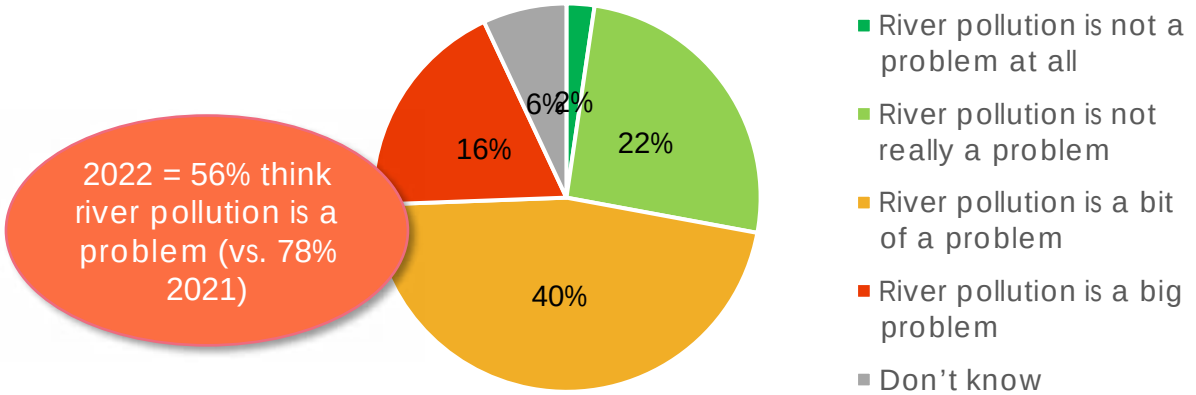
Over 7 in 10 have visited a local river for recreation in the last year



Over a third have swum or paddled in a local river in the last year	
Sitting / relaxing by a river	48%
Swimming or paddling in the river	**35%**
Exercising by a river	34%
Recreation on a river (Boating, canoeing, rafting)	26%
Fishing	7%
Other	4%
None	15%

Expect local river water to be safe enough for…	
Letting a dog swim in it	75%
Dipping your toes in it	68%
Using a paddleboard or canoe in it	67%
Going fishing	53%
Going swimming in it	44%
Letting children play in it	43%
Submerging your head under water	**25%**
Drinking from it	3%
None of these	4%

Local river pollution



- Rivers are well visited, with three quarters having visited their local river in the last 12 months, mainly for relaxation (48%)
- While others use it for activities:
  - A third (35%) use if for swimming/paddling
  - A third (34%) exercise by it
  - A further quarter (26%) exercise on the river
- Most expect river water to be safe enough for paddling or for animals to go into. A quarter think it's safe enough to put your head under the water
- A decrease in those who think river pollution is a problem.

Which activities would you expect the water quality of your local river safe enough for? Which of the following describes your view on levels of pollution in your local rivers? Q5: How often have you visited rivers in your region for recreational purposes? Which activities over the last year, if any, have you visited or used a local river for? Base: 2022 (532)

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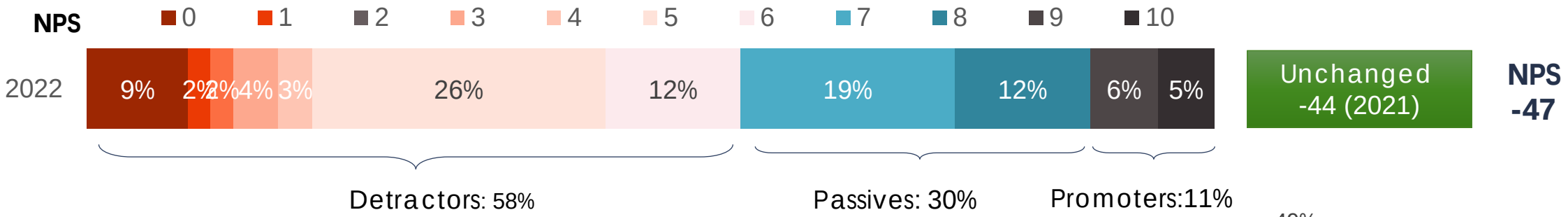
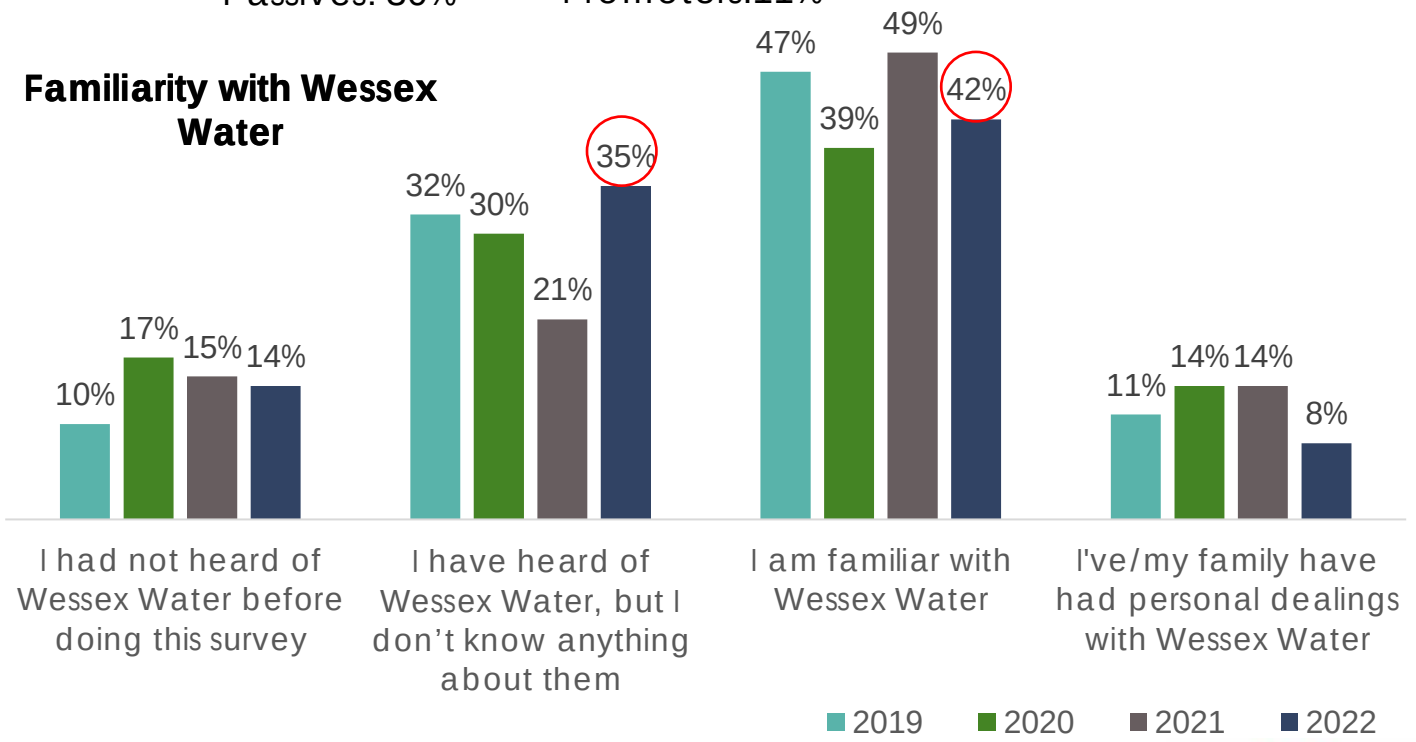
What are future customers' opinions of Wessex Water…

Familiarity with Wessex Water is slightly lower this year, more reminiscent of 2020 levels



Nevertheless NPS is unchanged, with more detractors than promoters, and a net score of -47, despite more students not knowing anything about Wessex Water (35%)



Which of the following reflect your awareness of Wessex Water? How likely are you to describe Wessex Water as a good company to someone you know? Base: All respondents 2019 (703) / 2020 (555) / 2021 (326) / 2022 (532)

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Changing water behaviours

Photo by David Ballew on Unsplash

Future customers have a long list of desired behaviours but generally feel there are more barriers than reasons to change

In general, behaviour change is perceived as very difficult to achieve as there is little extrinsic motivation

- Changing habits is difficult because there is **no reward** or no concrete consequence
- Many **life pressures** were listed as reasons it is easier to stick to the status quo
- However, some felt they **could change behaviour a little**, rather than make drastic changes

Motivations to change

Achieve better **work habits:**

- Get organised
- Create revision schedule
- Efficient time management
- More disciplined with studying

Achieve more **environmentally friendly habits**:

- Stop long showers
- Recycle more
- Save water
- Buy fewer new clothes

Achieve good **health and wellbeing habits**:

- Get fit
- Reduce screen time
- Spend time socialising
- Eat healthily

Barriers preventing change

- **Easier** / more comfortable sticking to **status quo**
- **Convenient** e.g. takeaway food saves time
- A-level pressures affect **priorities** e.g. sleeping in preferred over going for early run
- **Peer pressure** to stick to norms
- **No visible impact or reward** for behaviour change
- **Lack of clear information** to define actions
- **Seems pointless** saving money when savings are minimal

"Sometimes I'm so tired before school I just lean on the wall with the shower on… when I'm older and paying bills I don't want to be having such long showers"

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Future customers find changing their water behaviours difficult

There seems to be no tangible impact on their own lives so they lack the motivation to change what they enjoy doing

"When I'm older and paying bills I don't want to be having such long showers, it's not good for the planet...

...But climate change is a global issue and hard to understand the individual consequence for. If someone said for every degree temp rise I had to pay £50, then I would do more to save water"

"I want to put the plug in the sink to save water...

...But trying to save money and change habits is pointless when it is saving so little"

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Future customers need to understand the long term benefits of changing water behaviours

There are some behaviours future customers would find difficult to change but having learnt how much water they use are open to trying to reduce their usage

Water usage habits

- The overwhelming sentiment is that multiple and **long showers** are largest use of water in households, followed by washing machines and dishwashers
- Many felt optimistic that they could save water with **minor changes** e.g. using rain butts, dual flushes, turn off taps, share laundry loads, different shower heads
- In general, the **Get Water Fit calculator** brought many students to a new realisation of household water use
- However, the Get Water Fit calculator was criticised for not offering more information on impacts of usage and methods to reduce, e.g.
  - Toilet has two buttons but need to convey which one to choose and impact on water usage
  - Explaining impact of long showers on water usage
  - Filling dishwashers and washing machines before using
  - Using water butts and reusing water in the garden
- Generally, water use changes are perceived as doable, but **inconvenient** to family life and lifestyles – potentially another thing to feel bad about…

"The message on water needs to be more of not shaming you, but this is what needs to happen to make a change"

"I use the shower to relax, I could easily do it quicker, but then I like a hot shower"

"If a meter said how much you use daily, and this could be reduced and these are the ways it could be reduced, it would be more beneficial"

What would be the ‘Blue Planet’ moment with water for it to resonate with the public?

How do we change perceptions of water use…

- David Attenborough is a **well-known authority** everyone trusts
  - Able to create an emotional connection, trustworthy, experienced
  - Attention grabbing and though provoking
- The students feel it’s important to **explain the impact and consequences** of human behaviour for people to be encouraged to change – this is what David Attenborough did so clearly
  - Feel there is a need for a ‘David Attenborough’ moment, ‘something grand’, and a ‘water saving mascot’
  - Need to ‘hook’ people into the issue – students question if broader impact of water on the rest of the environment could be more motivating
  - Link saving water to saving energy e.g. reducing shower time saves energy and water
- The students feel that in the same way, Wessex Water can **be open with customers** about the challenges they face so customers can understand the impact of their behaviours
  - Create a human connection with the company
  - Connect customers with the reality of the people who work at Wessex to ensure the water keeps flowing
  - Explain how the impact of the drought impacts on the people at Wessex Water

“Wessex needs to be more open with the struggles they are facing, things like plastic in clothes that can't be filtered out, medication and things off a frying pan I would never have known about… they need to be open with the public”

“Everyone just knows it as Wessex Water but we saw the room where people were working on the summer drought and how stressful that is”

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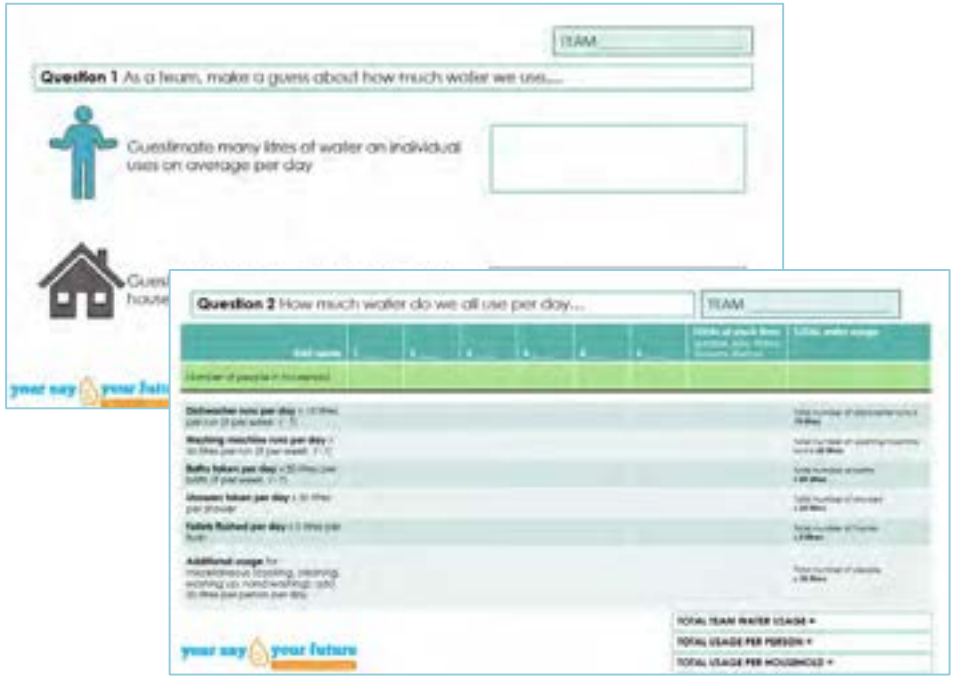
Campaign ideas to reduce PCC

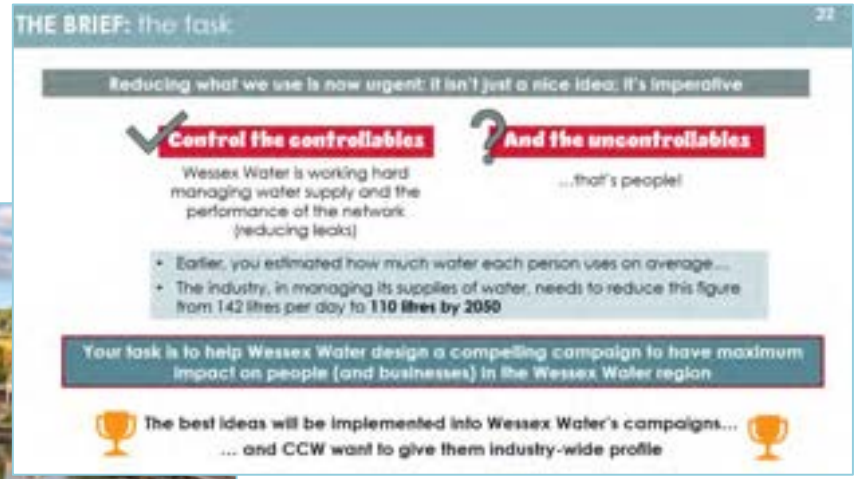
Core task – briefing process

- Panellists were briefed in a number of ways on the water resource challenge faced by water companies
  - Team exercise calculating household water use
  - Speed immersion session with Wessex Water experts
  - A group discussion that included topics on behaviour change generally and water use specifically
- Wessex Water and CCW gave a joint briefing on their 'core task' to develop a campaign strategy to support PCC reduction

Each team worked on the brief to develop their ideas and pitch them to the judging panel 6 week later

- Teams were required to consider the brief against a specific area of water usage: bathroom, kitchen, garden etc.





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Team Bathroom

Key ideas and insights:

- Showers are a big source of excessive water use
- Average shower time for younger people is 13 minutes – equates to 150L water
- Identified a trend for listening to music in the shower – zone out time
- Research on German PCC figures indicates there is excessive use in England
- Other bathroom uses also potentially wasteful: flushing and brushing behaviours
- Toilet leaks

Campaign solutions

- Help people establish new routines – with help from e.g. shower timers
- Drawing on 'the fun theory': encourage don't blame
- Promoting small actions
- Positive campaign using storytelling with a superhero character: Water Warrior
  - Cost effective
  - Adaptable to media, channel, different stories
  - Relevant to all ages
- Underpinned with consistent hashtags and slogans: *#supersmallchanges; #onedropatatime*

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Team Kitchen

Key ideas and insights:

- 10% of water use in the kitchen: a campaign to help make 'better decisions'
- Considered Wessex Water's values: ethical; respect; long term
- Drew on campaign examples that conveyed: *empathy; problem then solution; ease*
- Identified through published research the barriers to using less water (e.g. no need to save water in a rainy country; already doing everything possible)

Campaign solutions

- Story telling approach likely to engage – and educate
- Using much loved and famous personalities (Paddington and Mary Berry) to tell the story: impact across all ages
- Storyboard example conveys 'problem then solution': Paddington's actions are the problem; Mary Berry has the solution (and these are shown to be easy)
- With familiarity, campaign works across media, on Wessex vans etc.
- Social media supported with *#makehastedontwaste*

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Team Laundry

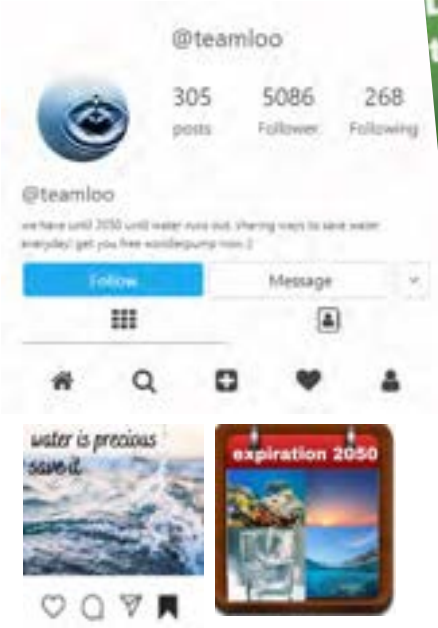
Key ideas and insights:

- Drawing on plastic use behaviour change: bag campaign simplified idea that plastic bags kill animals: demands emotional response – and action. Translates into hard truths, visual, easy to grasp
- 1/6th domestic water used to launder clothes. Identified volume used in typical cycle: target to save 20L per wash
- Conducted survey (59 respondents): claimed behaviour suggests people are water efficient however survey revealed opportunities to communicate pre-treating and using different wash cycle settings.
- Also revealed environmental driver greater than cost for this age cohort to launder in a water efficient way

Campaign solutions

- Identified behaviours to nudge: washing on a full load; wash on cold and quick cycles; use concentrated laundry detergents; pre-treat setting for difficult stains
- Introduced environmental impacts – and 2050 timeframe
- Developed radio ad:
  - States the problem (water scarcity)
  - Gives solutions (full loads etc)
  - Supports with environmental messaging (phosphates; CO2 emissions)
  - Call to action: *'Let's make our washing machines lean machines!'*
- Supported with visual campaign with top tips and slogans: *Save Water or Lose It* and *#level-up-laundry*

Team Loo



Key ideas and insights:

- Led with environmental context and how relates to loos: 5% leak wasting 200L+ per day
- Average person flushes 5 times a day: 24% of our daily water use
- Drawing on Cape Town experience: people limited to 2 flushes a day
- Conducted a survey (17 responses) which demonstrated low awareness of water related issues – and the need for education

Campaign solutions

- 3 strands: a ‘wonder pump’; campaign to encourage less flushing; educate about environmental links to excessive water use
- Campaign developed around *‘if it’s yellow let it mellow’* slogan
- And a ‘Superloo’ character
- Supporting materials drive home the environmental context
- Recommended school visits (targeting secondary level)

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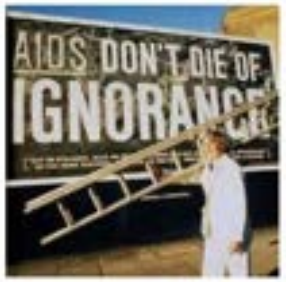
Team Garden



Key ideas and insights:

- Desk research on garden water use: average of 5.5k litres per household per year; and identified causes of excess use e.g. 1 in 10 houses have hot tubs; quarter of a million swimming pools. Identified 11 ways to save water in the garden
- Evidence that people underestimate what they use themselves but are aware of environmental impact of water use – need to connect the two ideas
- Found startling facts about water use in clothing manufacture: and average wardrobe has taken 120,650L of water to produce… it would take the average person 52 years to consume this much water
- Analysed ads ('Meet Graham'; 'Don't die of ignorance') that confront reality

Campaign solutions

- Dual approach: education system and social media campaign
- Visual device: tick and SAVE
- Interactive schools programme (including secondary years): included an example resource
- Use social media as has widest reach
- Hard hitting ads: 'Act now' messaging (confronting reality)
- Social media to be more interactive with competitions and incentives and access to e.g. free planting crystals

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Strong themes from the presentations

Some consistent themes emerged from the 5 presentations

- Message: need to make people aware of impact and consequences of excessive/high water use
  - Awareness is the first base for behaviour change campaigns
  - Belief/engagement follows: for this age group, environmental message resonates
- Execution: help audience to visualise what wasting water looks like – and make it memorable, with impact
- Channel: focus on social media to engage younger – and not so young
- Tone of voice: a serious issue but needs to engage not hector
  - Mascots and characters can say it better; don't carry corporate baggage, bring element of fun
  - Tone needs to be encouraging (but a hard hitting message about consequences of inaction)
  - Need for #hashtags and slogans
- Target audience: it's everyone!

Specific insights have potential for behaviour-specific campaigns

- Listening to music in the shower wastes water
- Not understanding how to use washing machine settings wastes water
- Greater potency in linking garden water use with environmental messages

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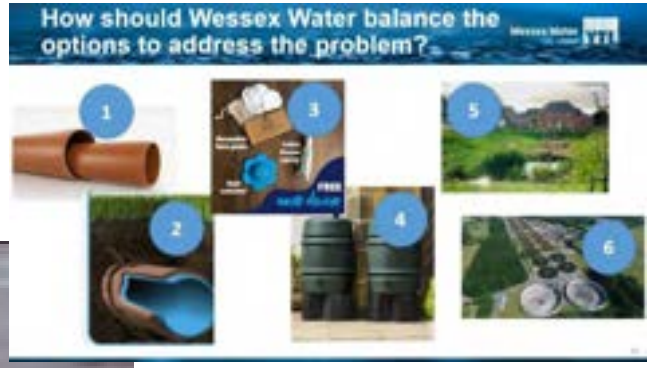
Long term Drainage and Wastewater Management Plans

DWMP: briefing process

Panellists were briefed in a number of ways on the issue of river pollution and specifically CSOs

- Interactive quiz, introducing new language and concepts
- A video explaining CSOs
- A briefing on 6 different solutions



Group discussions focused on the 6 solutions and how future customers would like to see Wessex balance investment

They used a tool to consider carbon, financial and impact of each solution

Activities to reduce sewer flooding	Your investment choices	Minimum spend for each investment	Stars per unit	Impact in reducing sewer flooding	Environmental impact e.g Carbon emissions per unit	Carbon emissions
1. Increase capacity of existing sewer networks	5	5 units	3	15	4	20
2. Seal sewer pipes to reduce infiltration	0	5 units	2	0	4	0
3. Customer engagement to prevent 'sewer misuse'	18	1 unit	3	54	1	18
4. Household level rainwater separation from sewers	2	2 units	2	4	3	6
5. Community level sustainable drainage e.g. attenuation ponds, rainwater gardens	10	3 units	2	20	2	20
6. Increase treatment capacity at water recycling centre	15	10 units	5	75	5	75
	50			168		139
	Max = 50					

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Future customers were unaware of the problem of CSOs

- Although some future customers recalled flooding in the news recently, no one knew about the use of combined sewer overflows and the impact it would have on flood water
- Some awareness of media articles about water companies "dumping waste into rivers". In response, future customers want to see water companies taking responsibility
- Also some awareness of "unflushables" campaigns and future customers feel they are aware of what not to flush
- Some mixed views about their role in informing solutions as they are not responsible for the bills. However, most did feel they had a role as they are impacted by the effects and wider issues such as flooding
- Overall consensus that Wessex Water need to communicate more to customers about this issue – as future customers they hadn't heard about the problem before, they suspected most people wouldn't be aware
- Spontaneously, they felt a mix of solutions would be required to tackle the problem – large and small scale, sustainable and long-term, infra-structure and customer-based solutions

"They need to raise more awareness, it's something people wouldn't be aware of otherwise… people aren't aware of what's happening and how much needs to be done."

"Trying to find a solution that has maximum efficiency but whilst not disruptive"

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Photo by Andy Newton on Unsplash

Increasing sewer capacity is supported despite cost (environmental and financial)

- A reliable solution
- Does not require change in customer behaviour)
- Some felt the priority to increase capacity was more important than concern for the environmental and financial cost, which they thought could be short-term

- Not good for the environment simply to increase processing
- It comes with a high cost and high environmental impact

"You'll learn to live with the disruption if it's only short-term."

"That makes sense"

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Future customers don't support renovation of pipes

- There was no support for renovating pipes
- Flawed logic: if pipe capacity already a problem, adding an insert would exacerbate this
- Perceive this to be a disruptive option
- Investment not well spent: a patch rather than a long term fix
- Anticipate ongoing maintenance costs
- Carbon costs look high

"If pipes are already too small, sealing them from the inside would just reduce the diameter and could increase the problem."

"In theory, you'd have to replace the lining over and over again."

"Bin that one! It's less effective [than increasing capacity of existing sewer network] for the same thing, same carbon, same cost."

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Customer engagement should be part of the mix of solutions

- Customer engagement a popular – and low risk – option: relatively cheap with a good impact rating
- See the need to engage people in the topic (future customers were largely unaware of the issue)
- Communication to convey the idea: 'you do your bit, we'll do our bit'
- Needed to explain why large, disruptive projects are going on so it doesn't feel out of context.
- Long term investment: some speculate whether once awareness raised the cost could reduce again
- In a mix of solutions, this can offset other high carbon options

- But relies on changing behaviour which they acknowledge is difficult

"75% of blockages are caused by wet wipes, if you introduce reusable face pads that's taking away wipes – people think you can flush them but you can't!"

"Education is a good investment it's relatively cheap but with the second best impact."

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Future customers tended to prioritise other solutions above rainwater management

- Very low interest in household-level separation
- Lacked the scale (and perceived impact) of community-level SUDs
- When balancing the options, lacked the reliability of 'concrete' solutions; the aesthetic/amenity of community SUDs and carbon emissions looked high

"It's easy and makes people feel involved."

- Relatively impactful solution with additional benefits of improving aesthetics
- Community SUDS was something they would like to see in their own area, and would be a community resource

- But often sacrificed for other solutions once cost in the equation
- One example of negative experience of SUDs (smell)

"It's relatively impactful whilst also being aesthetically pleasing!"

"We have a lot of those (SUDS) and they absolutely reek!"

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Increasing treatment capacity seen as the best long term solution

- Increasing the capacity of the existing sewer network perceived as dealing with the problem properly in the long-term
- Permanent solution (whilst other options could be temporary e.g. education)
- High impact in reducing flooding

- It comes with a high cost and high environmental impact

"You've got to think about the environment as well – doing wrong cancels out the good – if you spent loads of money on it someone is going to turn around and say look at how much damage you're doing"

"Surely that [carbon emissions] doesn't really matter because of the benefit you get!"

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Future customers prioritise increased treatment capacity as a solution

Increasing treatment capacity was viewed as the most reliable solution to the problem which could be supported with other investments

	Spend (50 points max)	Impact on reducing sewer flooding	Carbon emissions
Increase treatment capacity at water recycling centre	18	92	92
Customer engagement to prevent 'sewer misuse'	13	38	13
Increase capacity of existing sewer networks	8	25	33
Community level **sustainable drainage** e.g. attenuation ponds, rainwater gardens	8	15	15
Household level **rainwater separation** from sewers	3	6	9
Seal sewer pipes to reduce infiltration	0	0	0

The rules:

- Future customers were asked to decide how they wanted Wessex Water to deploy the six options with their associated investment, impact and carbon emissions
- The groups were told they could 'spend' a total of 50 points across as many of the investments as they wished
  - Initially, they made their decisions based on the 'points'
  - Once each group had reached a decision on 'points' the financial impact was revealed and the group was able to change their choices if they wished

- Future customers felt the need to spread their risk and invest in several options rather than focus on a few
- Reflecting the importance of the issue, they elected to spend all 50 points
- When money is no object, future customers favour the reliability of increasing treatment capacity and educating people on 'good' flushing behaviours
- Solutions seen as less reliable are down-weighted

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On hearing the cost impact, most suggest curbing investment in treatment capacity

Future customers want to balance the cost and investment for customers; they are sensitive to the impact of increasing customer bills on those in financial hardship and in light of the current environment

Pre cost Spend		Post cost Spend	Impact on reducing sewer flooding	Carbon emissions
18	**Increase treatment capacity** at water recycling centre	10	50	50
13	**Customer engagement** to prevent 'sewer misuse'	11	32	11
8	**Increase capacity** of existing sewer networks	8	25	33
8	Community level **sustainable drainage** e.g. attenuation ponds, rainwater gardens	5	11	11
3	Household level **rainwater separation** from sewers	2	4	6
0	Seal sewer pipes to reduce infiltration	0	0	0

- Future customers were then informed the minimum bill will be £500 on average, which assumed no additional investments made. The maximum investment would increase the bill to £650

- With cost in the equation, most wanted to reduce their investments from the maximum £650 to under £600 (between £599 and £575)
  - In recognition of the cost of living crisis
  - Reflecting concern for customers on lower incomes (specifically those on the boundary, ineligible for support)
- For most, investment reduced across the board but in particular slowing investment in treatment capacity and community level sustainable drainage
  - This would enable short-term relief to bill payers as well as long-term improvement
- While some worried that prices will continue to rise and not investing now will mean greater increases in future

"If we make it any less, in the future we'll have to do more"

"I don't think you'd do it all at once"

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Conclusions

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Key headlines

Future customers are showing an increased pessimism related to the cost of living and a poor economic outlook. Specifically they appear more conscious of the pressure on bills and feel ill-prepared for what this will mean for them.

The heatwave might have brought home some of the environmental impacts of a drought period but for this age group, it feels more normal than worrying. The energy crisis is much more pressing than concerns about water resources.

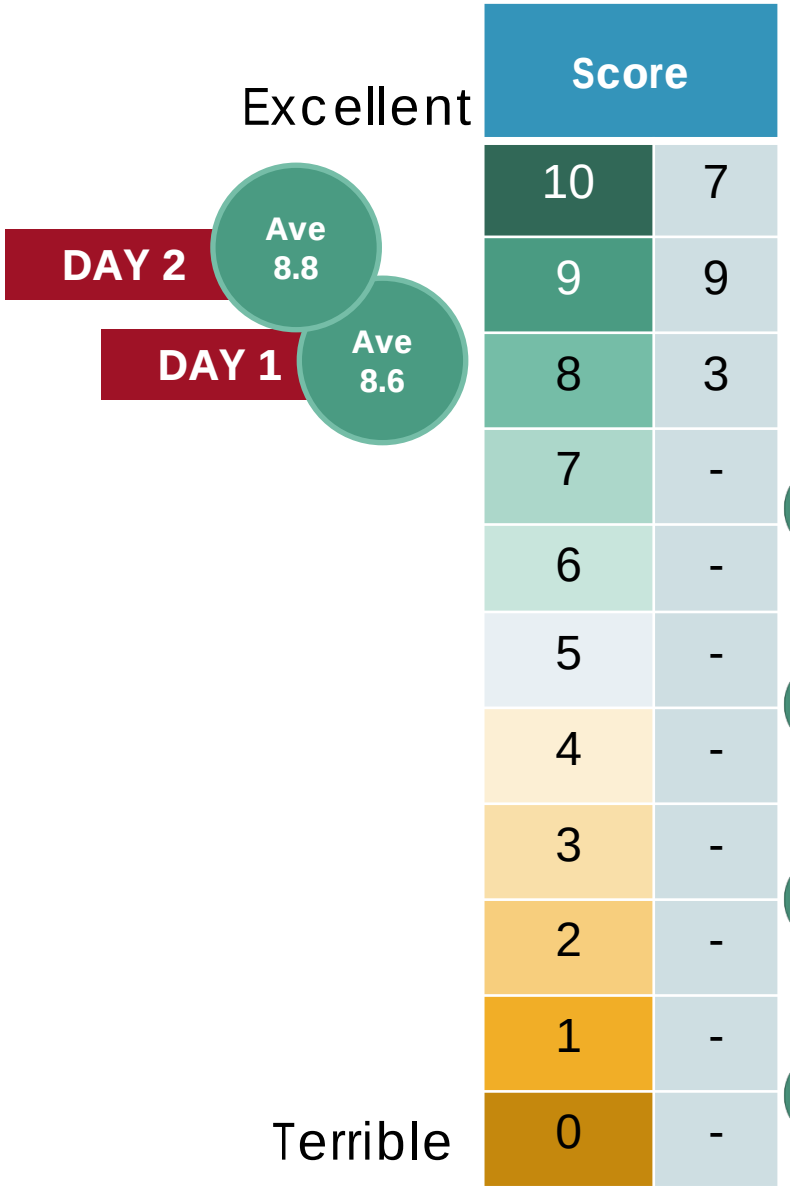
We see evidence of behaviour change during the heatwave – both using more water and saving water. However Future customers lack the (financial) motivation to be more water-conscious. Behaviour change needs to be driven by a better understanding of the impact and consequences of climate change on water resources.

Their own campaign ideas demonstrate the importance of better communications about *why* saving water is necessary. Get Water Fit is a useful tool but the interface needs improving. Future customers also want to see Wessex Water create a human connection via characters or real personalities to convey the seriousness of the message in an engaging way.

Future customers see the sewer flooding challenges as really important: they prioritise increasing capacity at treatment works and educating the public over sustainable drainage options. They are cost conscious on behalf of bill payers and want to see investment balanced with affordable bills.

Feedback scores for the YPP continue to be very high

- The YPP 2022 was enjoyed and its value recognised by panellists
- As in previous years, future customers were positive about the experience: learning about the water sector (which was previously hidden to them), meeting people across the business and collaborating with a group of students they hadn't met before to develop creative solutions to the challenges we set
- In terms of areas to improve: some felt there was a bit too much talking from the front and more time could be allowed for more team / interactive working



- Informative & interactive
- Fun and learnt a lot
- Opp. to work with others
- Engaging & inclusive
- Enjoyable experience
- Useful for Uni application
- Great business experience
- Talks too long vs. interaction

"Really good opportunity to broaden experience and skill. Good look at corporate environment."

"Engaging and informative - made us think. Welcoming staff and group of people."

"Make more time for socialising/split into groups more, but apart from that well set out."

"Good opportunity and a good thing if you want to apply to university. Amazing experience and chance to challenge yourself."

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Appendix: addressing Ofwat's research principles

Ofwat standards for high-quality research:	How addressed in this project:
Useful and contextualised	This research is part of Wessex Water's BAU engagement with Future Customers. ±30 students (aged 16-18) apply to participate in a process that involves in depth immersion in the workings of a water company and co-creative tasks that relate to either the business operation or long term planning. The students spend 2 full days in Wessex Water offices and complete a core task that focuses on a real business problem. The activities also include group discussions, team challenges and a survey distributed across a wide range of schools and colleges in the region.
Fit for purpose	This initiative encompasses community engagement with pure research. The methodology enables Wessex Water to learn about the lives and attitudes of Future customers – and how their views differ from bill payers. Both qualitative and quantitative data is gathered within the approach. Traditional methods of researching young people about water services are problematic as this cohort are very distant from the topic of water services. This co-creative approach is highly engaging for the young people who value the work experience it also offers, and means they become informed and able to give their views on e.g. their priorities for investment.
Neutrally designed	Our team's extensive experience in designing research stimulus and discussion guides ensures our lines of questioning are neutral and not leading. Information is provided about the performance of Wessex Water against other water companies as part of the briefing sessions.
Inclusive	We engage with over 50 schools in the region offering the opportunity for pupils to participate in this initiative. Whilst the process is self selecting, we ensure that schools and colleges understand that we are looking for applicants from all sectors of society and we make it clear that academic performance is not a criteria for selecting applicants. The scheme is over subscribed therefore we are able to chose candidates from a wide geography and a range of schools and colleges.
Continual	The Young People's panel is in its 7th year and is part of Wessex Water's ongoing research and engagement
Shared in full with others	The research findings are included in this full report for Wessex Water to share as required.
Ethical	Blue Marble is a company partner of the MRS. All of its employees abide by the MRS code of conduct and as such all of our research is in line with their ethical standards.
Independently assured	Wessex Water to advise

https://www.ofwat.gov.uk/wp-content/uploads/2022/02/PR24-customer-engagement-policy.pdf

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