

Appendix 1.1.0 - Acceptability testing

Wessex Water

September 2018



Wessex Water

YTL GROUP

Business plan section	Supporting document
Board vision and executive summary	
1 Engaging customers	1.1 Summary of research findings
	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	

Contents

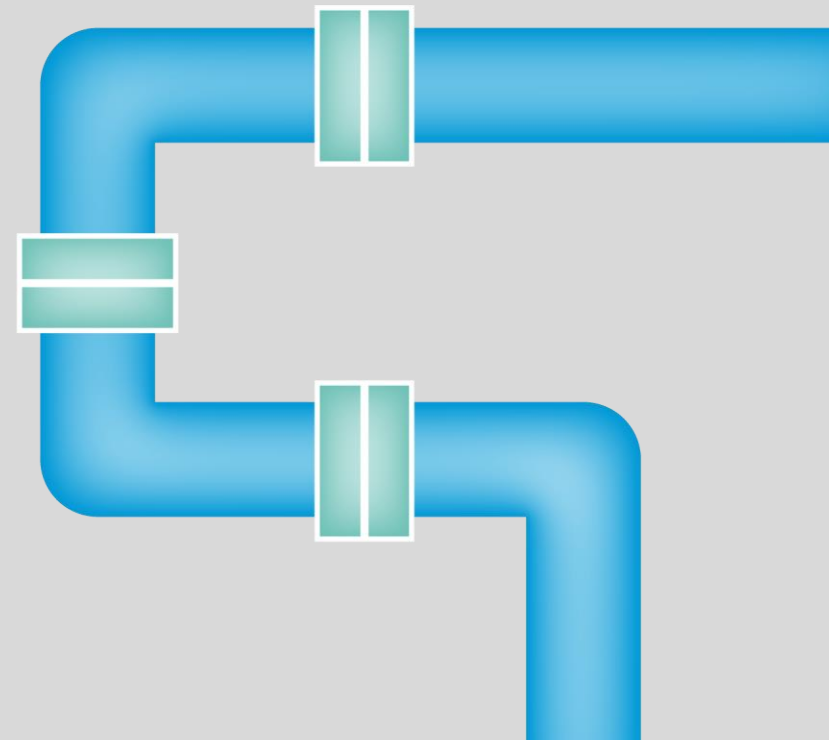
Phase 1 and 2 research findings.....	4
Phase 1 qualitative discussion guides (customers, customers with vulnerabilities, stakeholders, retailers)	120
Phase 1 qualitative stimulus	135
Phase 1 quantitative questionnaires (household, non household, customers with vulnerabilities).....	160
Phase 1 quantitative stimulus	201
Phase 2 quantitative questionnaire	235
Phase 2 quantitative stimulus	251
Proposal	268

Wessex Water

PR19 Final Acceptability Testing

AUGUST 2018

Populus



Contents

1. Background

- Objectives and methodology
- Recap of stimulus
- Ensuring a representative sample
- Overview of qualitative phase
- Overview of quantitative phase

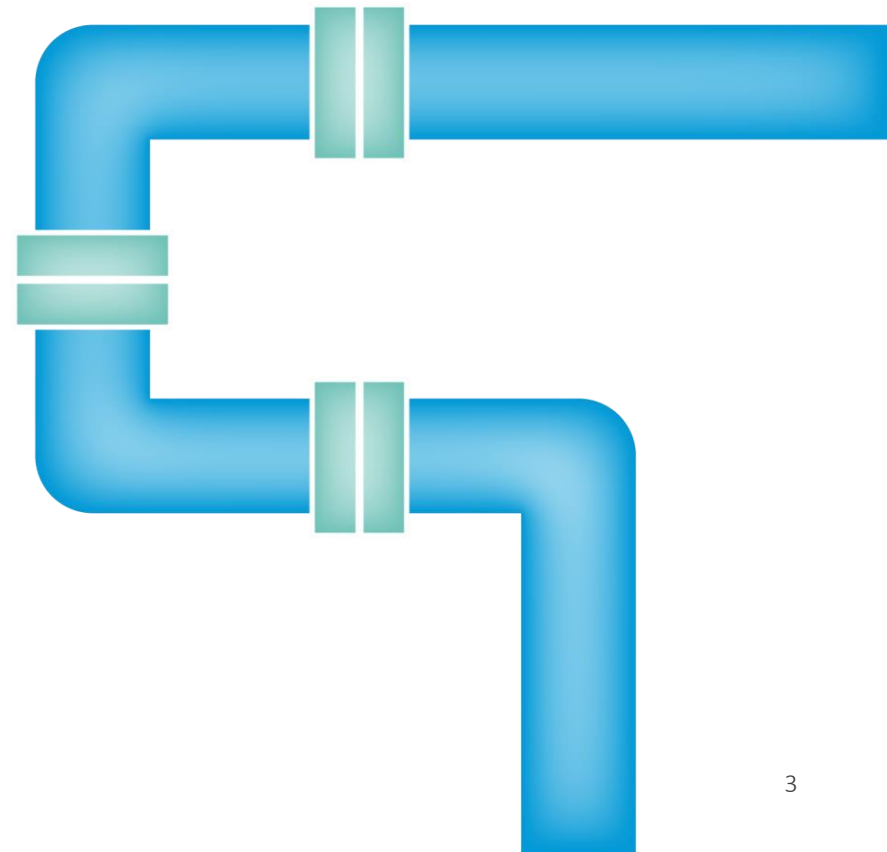
2. Summary of key findings

3. Response to the plan

- Overall response to the plan
- Uninformed response to the plan
- Informed response to the plan
- Response to each area of the plan

4. Recap of key findings

Objectives and methodology



Objectives

This innovative programme of research forms one discrete component of Wessex Water's customer engagement programme, identifying the acceptability and affordability of Wessex Water's proposed business plan among customers and key stakeholders.

BUSINESS OBJECTIVE

To identify whether Wessex Water's business plan for 2020-2025 is accepted by both customers and stakeholders

RESEARCH OBJECTIVES

- 1 Explore customer and stakeholder reactions to Wessex Water's business plan for each of the 8 priority areas
- 2 Test acceptability and affordability of the proposed performance commitments among Wessex Water customers
- 3 Test acceptability and affordability of the proposed overall business plan among Wessex Water customers

OTHER KEY AIMS OF THE RESEARCH

- Ensure research techniques are innovative and optimise customer experience
- Within stimulus, utilise comparative information from other water companies to provide appropriate context
- Build actionable insight through a variety of approaches from each phase of Populus' research programme

Methodology (1)

Two phases of research were conducted to determine acceptability and affordability of Wessex Water's final business plan. The first phase explored acceptability and affordability of Wessex Water's near final business plan. Based on these findings, Wessex Water made slight adjustments to the business plan. The second phase then tested acceptability and affordability of the final business plan, once all adjustments had been made.

Changes made to the business plan between Phase 1 and Phase 2

Within Phase 1, the majority of household customers found the plan acceptable (97% informed household, 98% informed business) and affordable (93% informed household, 96% informed business). This sentiment was also consistent across business customers and stakeholders.

Although acceptability and affordability levels were high for the near final business plan, some customers and stakeholders did raise concerns around the proposed cut to leakage levels (3%) feeling the target was too low.

As part of the Phase 1 survey, additional variations of the plan were also tested. One of these increased the proposed cut to leakage levels from 3% to 15% (and added £6 extra to the additional bill). Acceptability and affordability levels for this variation were still very high (at 89% and 85% respectively).

It was therefore recommended that Wessex Water should consider increasing the target leakage cut within the 2020-2025 business plan to 15%.

Within the final business plan Wessex Water increased the target leakage cut to 15% and this increased costs slightly (the average annual bill for 2025 increased from £503 in the near final business plan to £516 within the final business plan). This final business plan (with 15% leakage cut, and an average annual bill of £516) was then tested within Phase 2 of this research.

Methodology (2)

To explore customer and stakeholder sentiment plus test acceptability and affordability of the final business plan among a representative sample of Wessex Water’s customer and stakeholder base we adopted the following sampling approach across the two research phases.

PHASE ONE

Aim: To explore customer and stakeholder reactions to the near final business plan, determine acceptability/affordability of the near final business plan, and test further possible adaptations to the business plan

Qualitative research	‘Engagement Events’	48 household and 16 business customers
	In-home depth interviews	6 ‘Main Stream Vulnerable’ customers (those with less severe disabilities or experiencing debt) and 6 ‘Super Vulnerable’ customers (those with more significant vulnerabilities)
	Depth interviews	12 stakeholders (category and audience experts from interested external organisations)
Quantitative research	Face to face central location test	997 household customers, including 170 vulnerable customers
	Online survey (via Populus’ panel)	407 household customers, including 95 vulnerable customers
	In-home face to face survey	50 vulnerable household customers (boost interviews to capture customers with more significant vulnerabilities via quantitative research)
	In-premises face to face survey	100 business customers

PHASE TWO

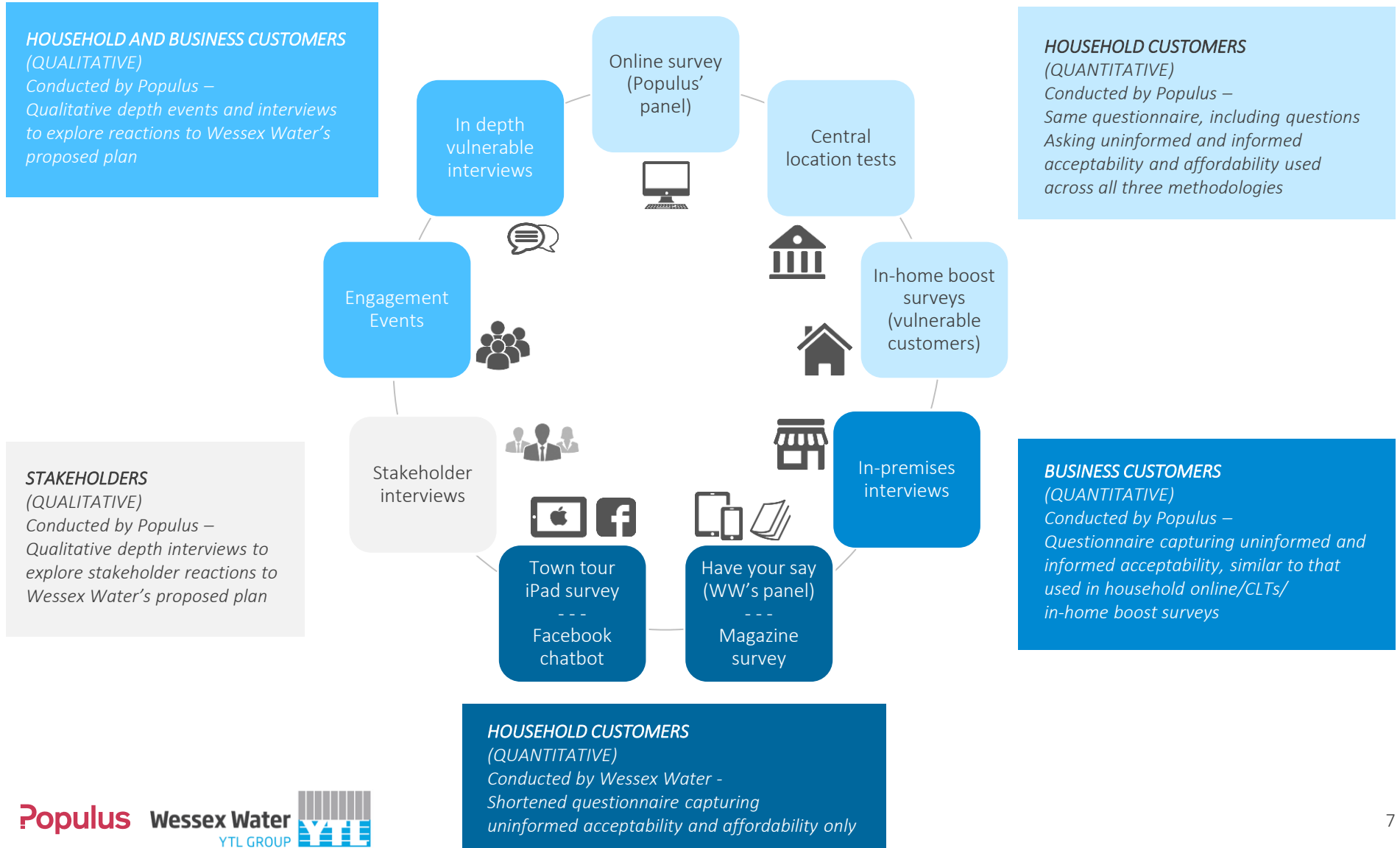
Aim: Determine acceptability/affordability of the **final** business plan among household customers

Quantitative research	Face to face central location test	791 household customers, including 144 vulnerable customers
	Online survey (via Populus’ panel)	307 household customers, including 55 vulnerable customers

Based on the findings in Phase One there was no statistical difference between the results for vulnerable customers captured via the CLTs/online and those captured via in-home face to face surveys. Therefore, it was not necessary to repeat the in-home face to face survey.

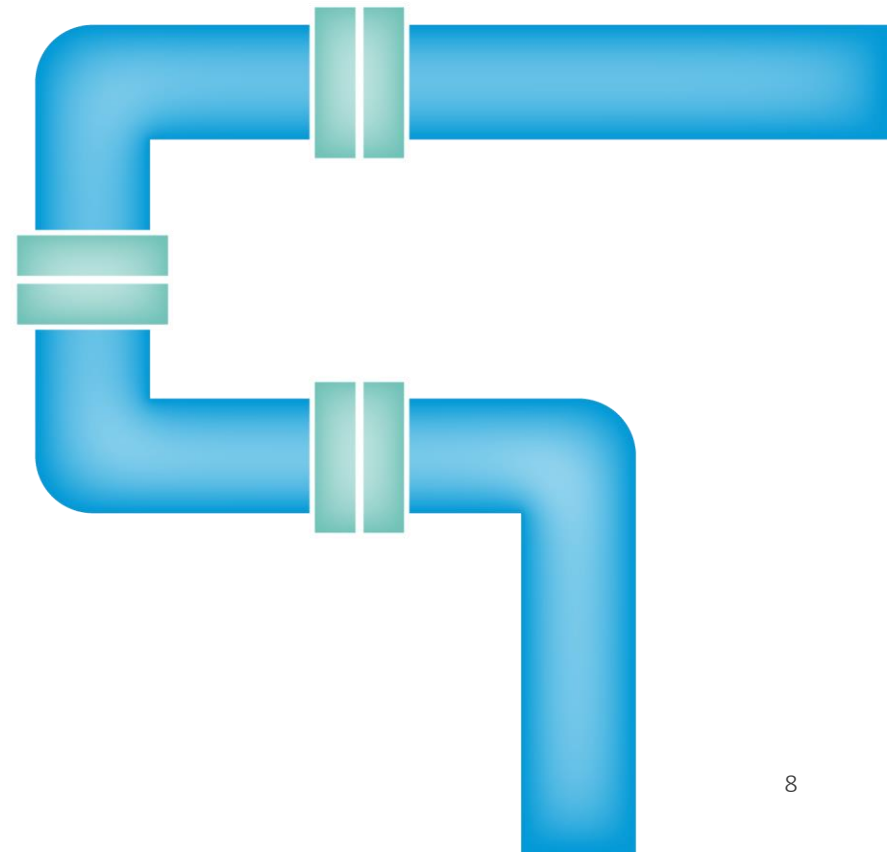
Due to time constraints it was not feasible to rerun the non-household element of acceptability testing.

We utilised a variety of methodologies across both quantitative and qualitative approaches to maximise the robustness of the research programme



Recap of Stimulus

The following slides show the stimulus we used to demonstrate Wessex Water's Final Business Plan to respondents within Phase Two – please note, the order the areas were shown in was rotated per respondent



Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intends to make over the coming years. It is really important that you understand the business plan and all changes Wessex Water intend to make so please read the plan carefully.



To help develop this plan Wessex Water has already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Some areas of this plan may seem less relevant to you as Wessex Water does not supply your water (they only take your waste water away). However, Wessex Water still values your opinion so please take your time to read through the plan and answer the questions carefully.

Overall, Wessex Water's ambition is to be the best water company in the UK but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on eight specific areas. These eight areas are:



Delivering excellent customer service



Future proofing our services



Minimising sewer flooding



Using water in our region more efficiently



Ensuring bills are affordable for all



Protecting and enhancing the environment



Providing excellent drinking water quality

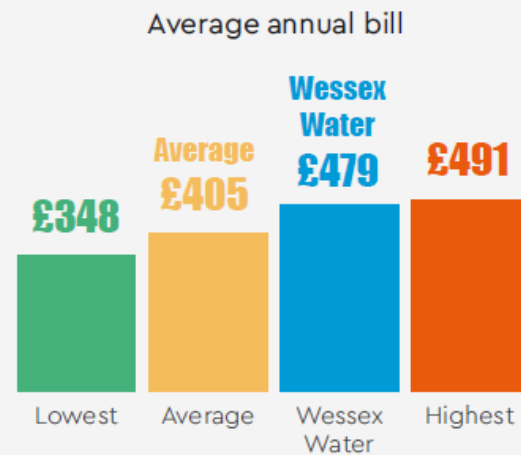


Developing better relationships with the communities we serve



Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.





Wessex Water wants water bills to be affordable for all households.

The table below shows how your bill will change if Wessex Water adopts this plan.

This includes improvements within all eight areas of the business plan.

At present the average household bill	£40 per month	£479 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£45 per month	£539 per year
Under the plan we propose the average bill would be	£39 per month in 2020, rising to £43 per month by 2025	£469 per year in 2020, rising to £516 per year by 2025

Please note, bill figures have been rounded to the nearest whole number



Wessex Water wants water bills to be affordable for all businesses.

The table below shows how your bill will change if Wessex Water adopts this plan.

This includes improvements within all eight areas of the business plan.

At present the average business bill	£166 per month	£2,000 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£188 per month	£2,252 per year
Under the plan we propose the average bill would be	£163 per month in 2020, rising to £177 per month by 2025	£1,957 per year in 2020, rising to £2,102 per year by 2025

Please note, bill figures have been rounded to the nearest whole number

Over the following screens you will be shown more information about Wessex Water's proposed plans for each of these eight areas.

For each area you will be asked two questions

- 1 How important you think the area is
- 2 How Wessex Water's proposed approach makes you feel

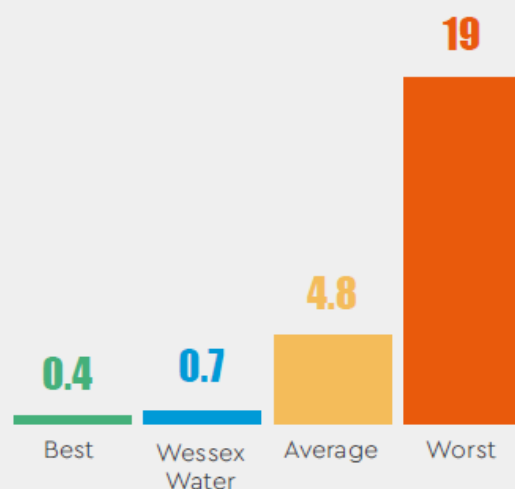
Once you have reviewed all eight areas you will then be asked a few further questions about **Wessex Water's business plan as a whole**



Providing excellent drinking water quality

Here is how our current performance compares with other water companies:

Water quality measure (from Chief Inspector of Drinking Water)



Source: Discover Water, the official water company comparison site

We want to be the best water company for the quality of our drinking water.

We will do this by...

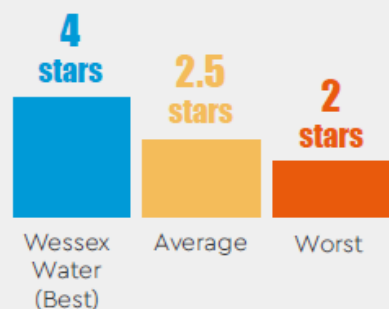
- 1 Protecting the sources of our water from contamination (e.g. working with farmers to reduce fertiliser contamination)
- 2 Promoting the use of approved plumbers and fittings inside people's homes
- 3 Proactively maintaining our water treatment works and supply network, not just fixing problems after they happen
- 4 Improving the appearance of water, aiming to reduce the number of customers who need to contact us about the appearance of their water by 20%
- 5 Replacing three times as many lead pipes as we have in the past



Protecting and enhancing the environment

Here is how our current performance compares with other water companies:

Environmental Performance Assessment



Source: Discover Water, the official water company comparison site

We will invest in our biggest environmental improvement ever.

We will be investing in...

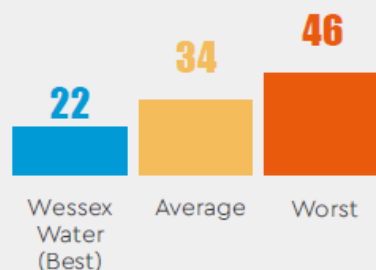
- 1 Protecting wildlife by improving the water quality of 480 miles of river
- 2 Carefully recycling "sludge" – the waste that's left after sewage is treated
- 3 Reducing overflows from our sewers after heavy rain
- 4 Improving the quality of sea water through improved treatment of sewage
- 5 Minimising water taken from rivers especially in sensitive areas
- 6 Working with local communities / partners to improve habitats for plants and wildlife and reduce risk of flooding at our sites and water sources
- 7 Reducing greenhouse gas emissions to be carbon neutral by 2040
- 8 Improving the condition of Sites of Special Scientific Interest on our land



Protecting and enhancing
the environment

Here is how our current performance
compares with other water companies:

Number of pollution incidents
per 10,000km of sewer



Source: Discover Water, the official
water company comparison site

We plan to reduce pollution incidents by at least a further 25% by 2025.

We will do this by...

- 1 Installing the latest technology to provide advance warning of potential polluting discharges
- 2 Cleaning sewers more often to stop problems before they occur
- 3 Doing more to help customers not cause blockages in our sewers, especially in hot spot areas
- 4 Improving our sewage treatment works to continue to be amongst the best in the industry



Using water in our region more efficiently

We want to leak less water per kilometre than other UK water companies

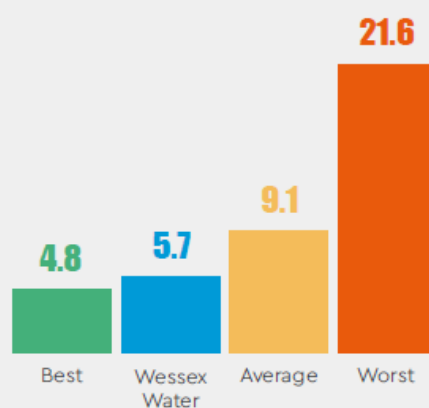
Here is how our current performance compares with other water companies:

Leakage from Wessex Water's pipe network is

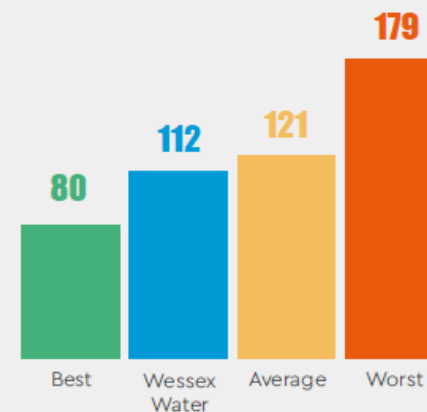
less than

half what it was 20 years ago

Leakage (litres per km of pipe per day)



Leakage (litres per household per year)



Source: Discover Water, the official water company comparison site

However the population is growing, climate change is happening and demand for water increasing. Therefore, using water efficiently is crucial. To keep the amount of water taken from the environment the same as it is now, we pledge to reduce leakage and do more to help customers use water wisely.



Using water in our region more efficiently

Specifically we pledge to...

1

Reduce leaks by a further 15% by 2025

2

Fix reported leaks on our network of pipes quickly (aiming for 90% within a day – up from 70% now)



3

Provide 40,000 free in-home checks for customers to help them save water

4

Educate 120,000 school children about using water efficiently

These changes mean...

-  You are very unlikely to have a water restriction (e.g. hosepipe ban)
-  You can be confident that essential water supplies will continue even in extreme droughts



Ensuring bills are
affordable for all

We want to make sure bills are affordable for all...

We currently help...

31,000

households by
applying a discount
where people need
one. By 2025 we
want to help

86,000

households

We'll continue to support...

Customers who are struggling to
pay their bills due to severe
financial hardship or debt:

- 1 We lower their bills. On average we reduce annual water bills by £220
- 2 We can help with our debt write-off scheme

Customers on Pension Credit or
who have a state pension as
their only income:

- 1 We give a 20% reduction on their annual water bill (around £90)

We will also...

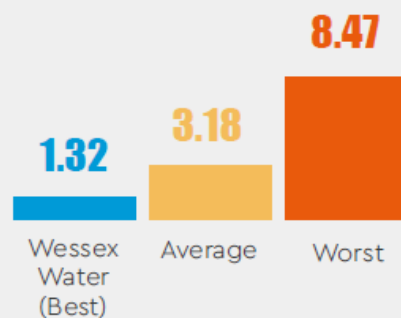
Work with independent debt advice agencies to help us reach eligible customers who may not know about our schemes. We are aiming to receive at least 2,300 applications from agencies per year up to 2025.

Continue to help all customers to save water (and therefore money) by providing information and advice and free water saving devices.

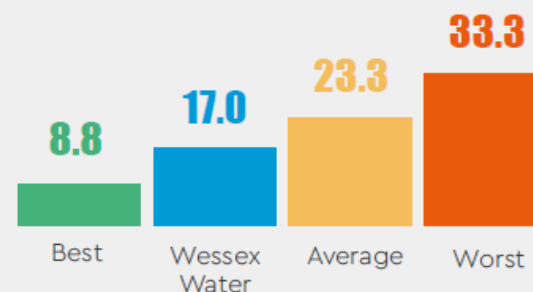
Minimising sewer flooding

We want to be the best UK water company for sewer flooding. Here is how our current performance compares with other water companies:

Sewage flooding inside property
(per 10,000 connections)



Sewage flooding outside property (per 10,000 connections to sewers)



Source: Discover Water, the official water company comparison site

We will...

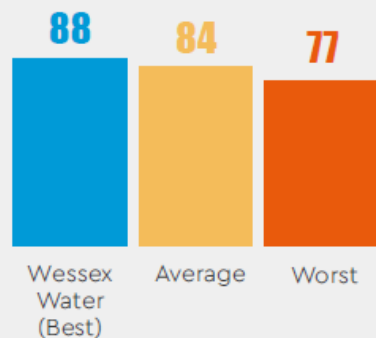
- 1 Reduce the number of properties flooded by 1250 by 2025
- 2 Invest in new and/or larger sewer capacity where there is new building/housing
- 3 Work with developers to provide the right capacity in our sewerage network
- 4 Continue to work with customers to raise awareness about what you can and can't flush down the toilet
- 5 Work with local councils to stop takeaways/cafes putting fat, oil, grease, and food waste down the sewers



Delivering excellent customer service

Here is how our current performance compares with other water companies:

Customer Service Score
(out of 100)



Source: Discover Water, the official water company comparison site

We want to be in the top 20 of all UK companies for customer service.

We pledge to...

- 1 Always get the basics right by delivering reliable services and being there 24/7 for you
- 2 Continue to answer the phone with a person plus offering alternative ways to contact us
- 3 Improve and expand our online services, including opportunities to track and compare your water usage
- 4 Increase the number of people added to our Priority Services register because of disability or additional needs
- 5 Make our services more accessible to ensure no-one is excluded from contacting us



Future proofing our services

To future proof our service (and ensure sufficient water is available for at least the next 25 years) we are investing:



1

To minimise short (less than 3 hours) planned breaks to your supply



2

To reduce the risk of longer breaks in water supply (more than 12 hours)



3

To make sure the number of mains water bursts and sewer collapses doesn't increase



4

In cyber security to prevent hacking



5

To protect against the impact of drought or flooding in the future



Developing better relationships
with the communities we serve

We pledge to work our hardest to protect the water environment and invest in the future, but we will be asking our customers for their help. Here are some examples:

We will...

Provide the best services and protect the environment

Keep bills affordable to all and help you lower your bills by helping you to use less water

Future proof, ensuring a sustainable water supply for years to come

Give extra help to those who need it

We want you to help by...

- Only ever flushing pee, poo and paper down the toilet
- Never pouring fat or oil down the sink
- Telling us if you see any leaks

- Paying your bills on time
- Telling us if you are struggling so we can help you

- Using water efficiently so we take less water from the environment
- Telling us what's important to you and your community

- Making the most of our support schemes
- Working with us to improve water quality inside your home/business

To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:



Delivering excellent customer service



Future proofing our services



Minimising sewer flooding



Using water in our region more efficiently



Ensuring bills are affordable for all



Protecting and enhancing the environment



Providing excellent drinking water quality



Developing better relationships with the communities we serve



You have now seen all improvements Wessex Water plans to make by 2025

This is how your bill will change if Wessex Water adopts this plan

This includes all improvements outlined within the eight areas of the business plan

At present the average household bill	£40 per month	£479 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£45 per month	£539 per year
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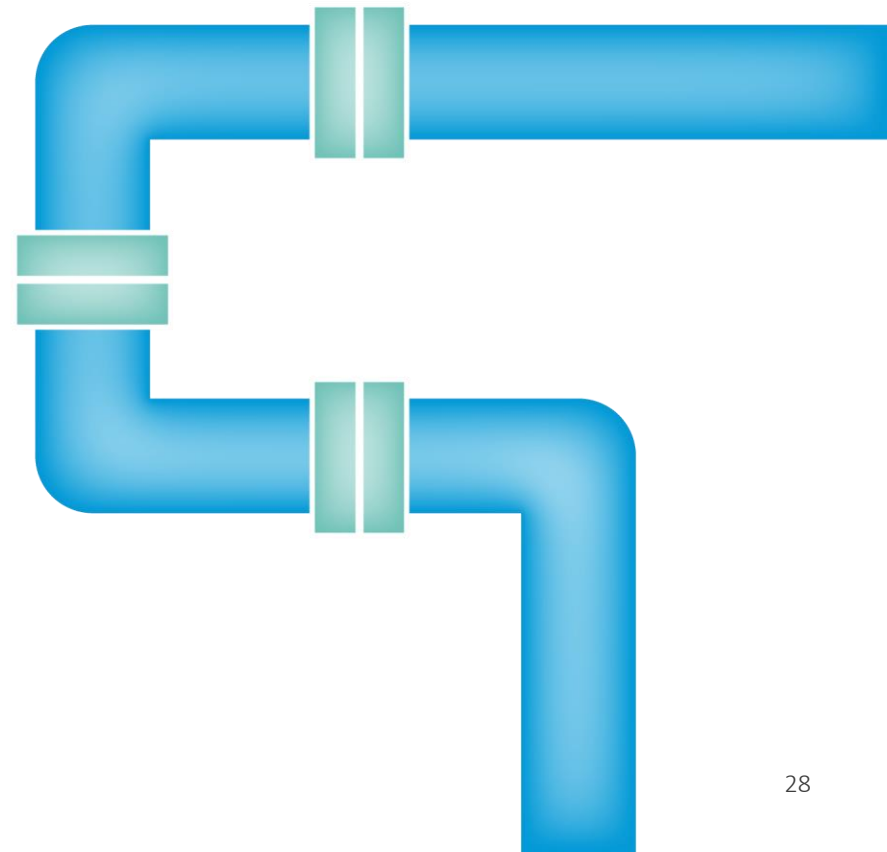
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Ensuring a representative sample



Ensuring a representative sample

This research project was designed specifically to reach all relevant audiences and provide a holistic view of the Wessex Water customer base

<i>Sample type</i>	<i>Who they are</i>	<i>How we reached them</i>
Household Customers	<ul style="list-style-type: none"> Wessex Water’s domestic customer base 	<ul style="list-style-type: none"> ‘Engagement Events’, hosted in the following towns across the Wessex Water region: Taunton, Poole, Bath Face to face central location tests, hosted in the following towns across the Wessex Water region: Poole, Salisbury, Chippenham, Taunton, Street, Dorchester, and Yeovil Online survey via Populus’ panel
Vulnerable Household Customers	<ul style="list-style-type: none"> Customers who are in temporary or permanently vulnerable circumstances (e.g. financial, social, physical, mental) 	<ul style="list-style-type: none"> Depth interviews, with a mix of ‘main stream’ and ‘super’ vulnerable customers Face to face central location tests, hosted in the following towns across the Wessex Water region: Poole, Salisbury, Chippenham, Taunton, Street, Dorchester, and Yeovil Face to face in-home survey, to capture customers with more significant vulnerabilities Online survey via Populus’ panel
Business Customers	<ul style="list-style-type: none"> Wessex Water’s business customer base 	<ul style="list-style-type: none"> ‘Engagement Events’, hosted in the following towns across the Wessex Water region: Taunton, Poole, Bath Face to face in-premises survey, across the Wessex Water region with a good spread of business types and sizes
Stakeholders	<ul style="list-style-type: none"> Wessex Water stakeholders Category and audience experts 	<ul style="list-style-type: none"> Depth interviews, with the following stakeholders: Bournemouth Council, Highways England, Citizens Advice, Age UK, Joseph Rowntree Foundation, Money & Mental Health, Business Stream, Somerset Water Partnership, Canal & River Trust, Water2Business, Home Builders Federation, Chartered Institute for Water & Environmental Management

Respondent profile

Qualitative research

Household Customers ("Engagement Events")

- 50/50 mix of female and male
- 50/50 mix of metered and unmetered
- 4 key life stages:
 - 21-35 years old, pre-children
 - 31-45 years old, young family
 - 41-55 years old, older family
 - 56+ years old, empty nesters/retired
 - All social grades covered

Business Customers ("Engagement Events")

- Mix of smaller and larger water bill size
- 50/50 mix of metered and unmetered
- 4 companies operate across multiple sites, 12 operate in one location
- Mix of water importance (i.e. how critical water is to their company)

Vulnerable respondent profile

Qualitative research

Struggling with debt *3 interviews*

- Have missed bills
- Have borrowed money short term from loan companies or friends/family
- Self-define as often struggling to cover their everyday outgoings
- Low household income
- Temporarily out of work

Moderate disability *3 interviews*

- Have a physical or mental disability which affects daily life but not severely
- Self-define as “slightly” affected by their disability
- Have support, family, friends, services, and do not feel very isolated/in need

More severe disability *3 interviews*

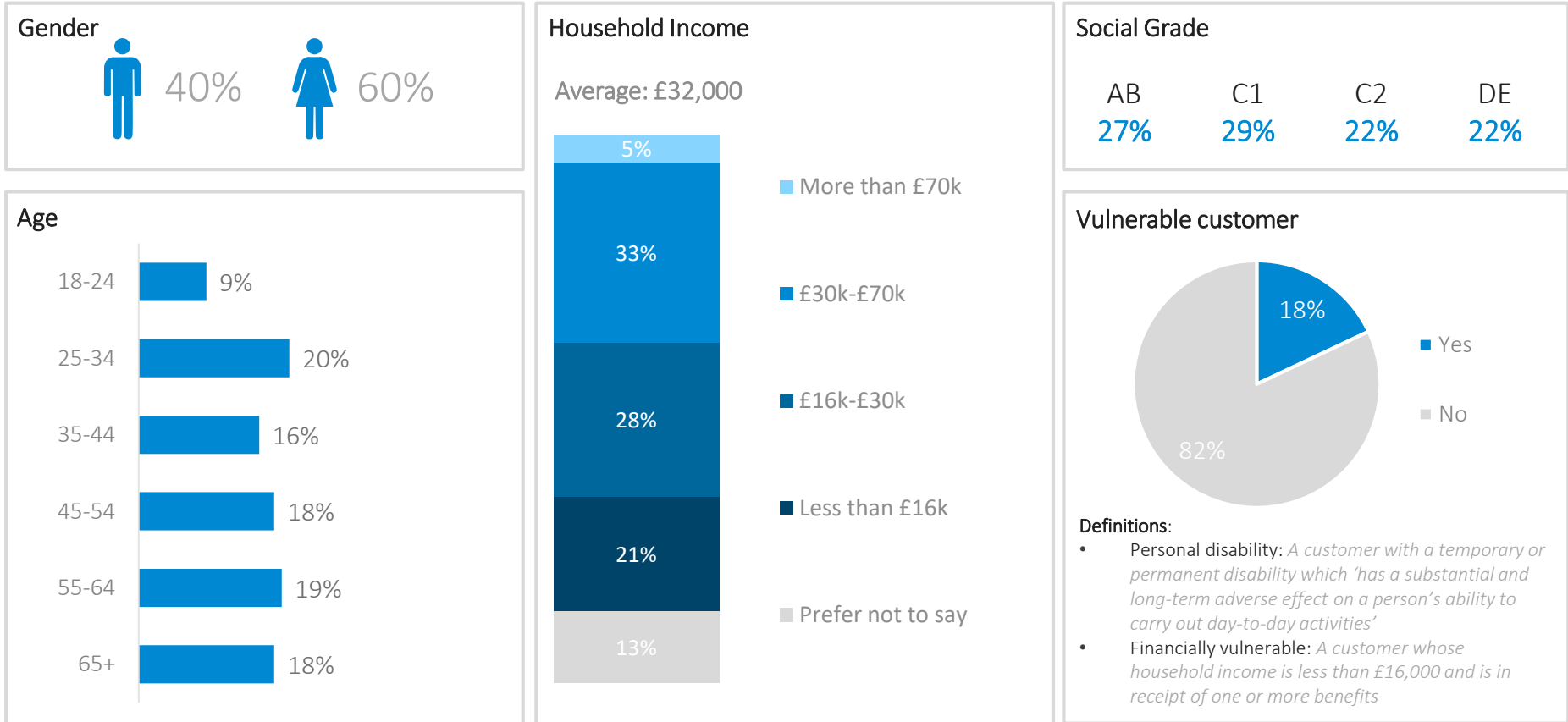
- Have a severe physical or mental disability which significantly affects daily life
- Self-define as “significantly” affected by their disability
- Have support but still feel isolated and in need of ongoing support in everyday life
- Might have a carer (family member or professional)

Socially isolated *3 interviews*

- Feel isolated from the mainstream by lack of technology, location, lack of social support network (family, friends)
- Feel isolated by language (e.g. poor English)

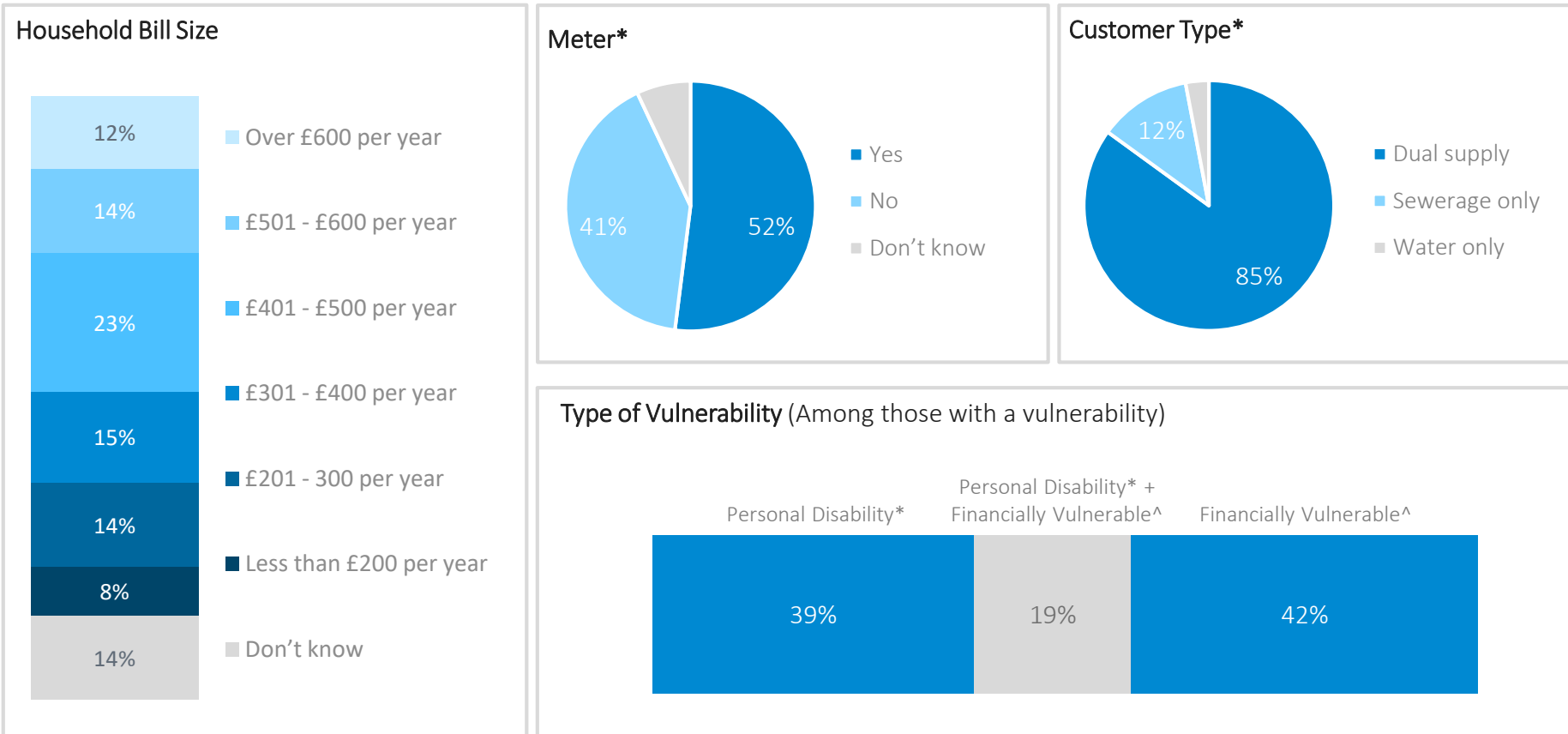
Respondent profile

Phase 2 – Household respondents (captured via CLTs and Populus' panel)



Respondent profile (2)

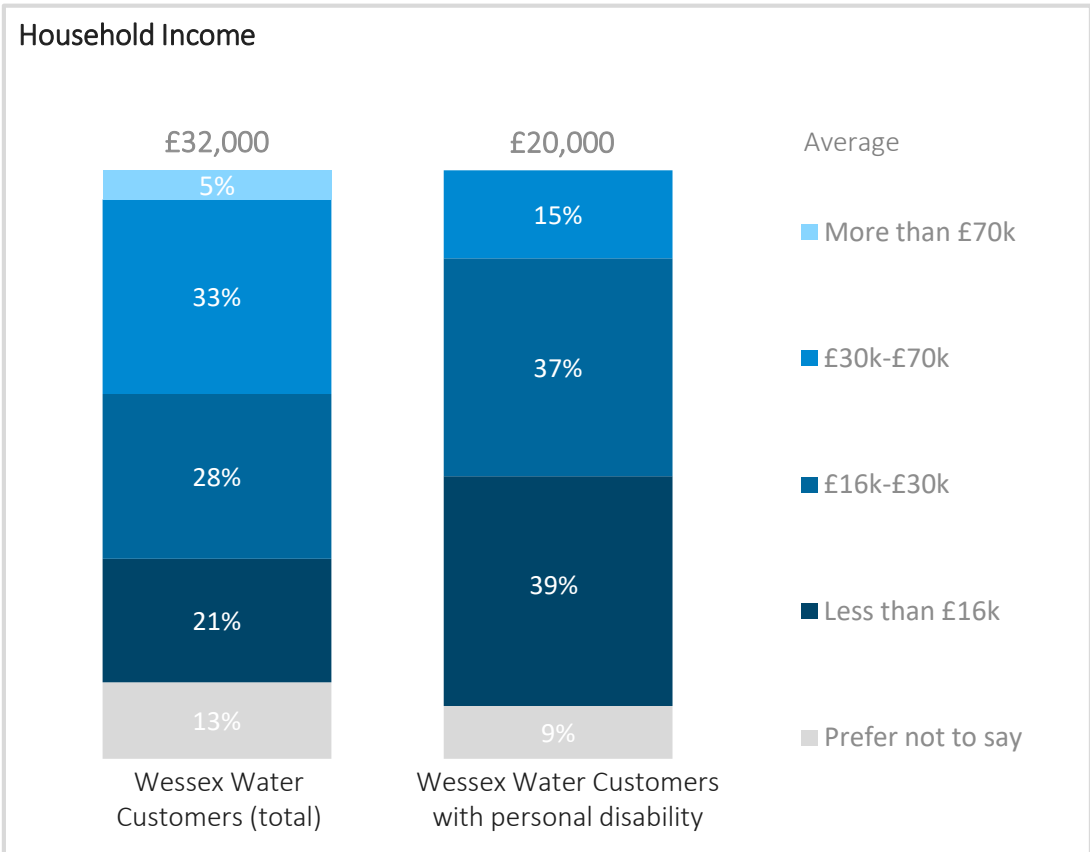
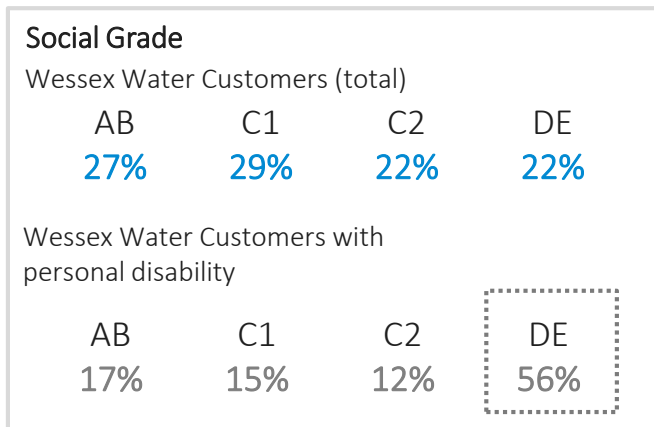
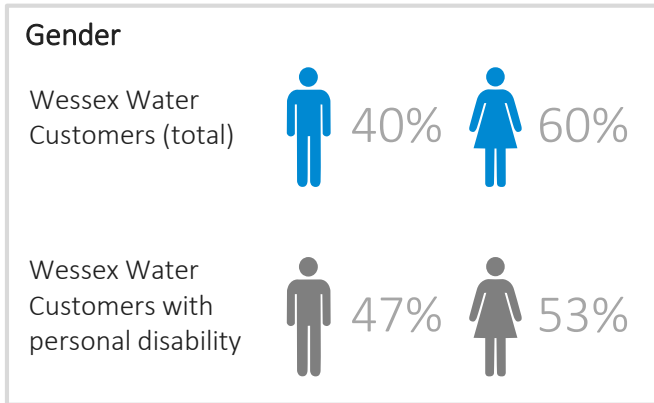
Phase 2 – Household respondents (captured via CLTs and Populus’ panel)



*Customer type and meter usage are all based on a respondent's selection (rather than assignment based on postcode)

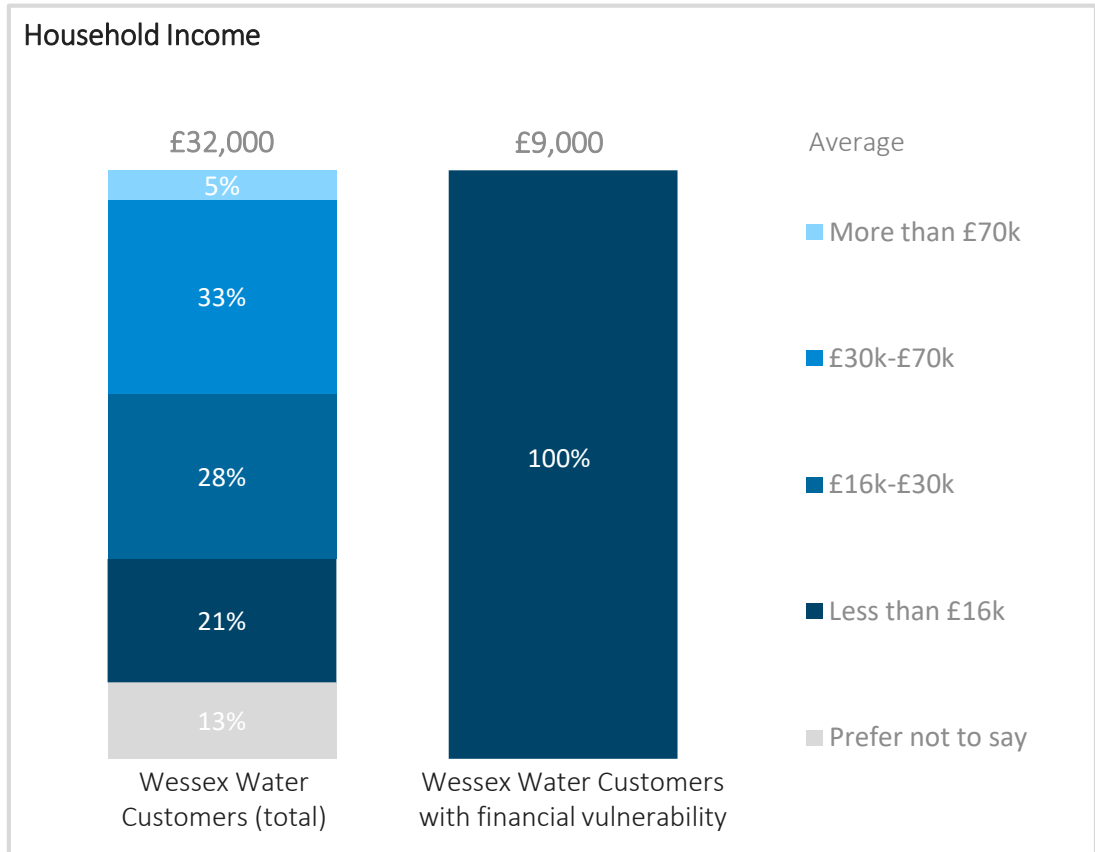
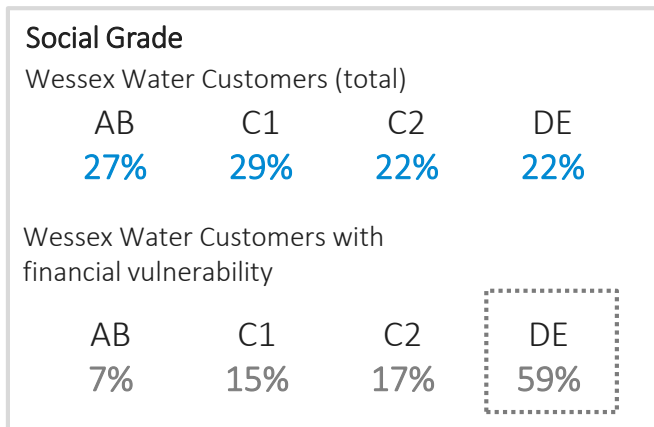
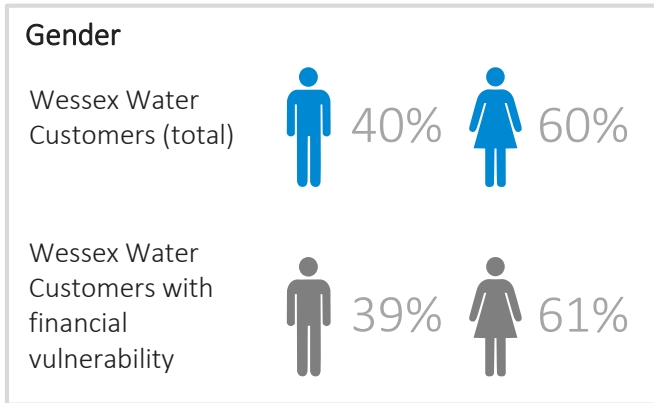
Personal disability respondent profile

Phase 2 – Household respondents (captured via CLTs and Populus' panel)



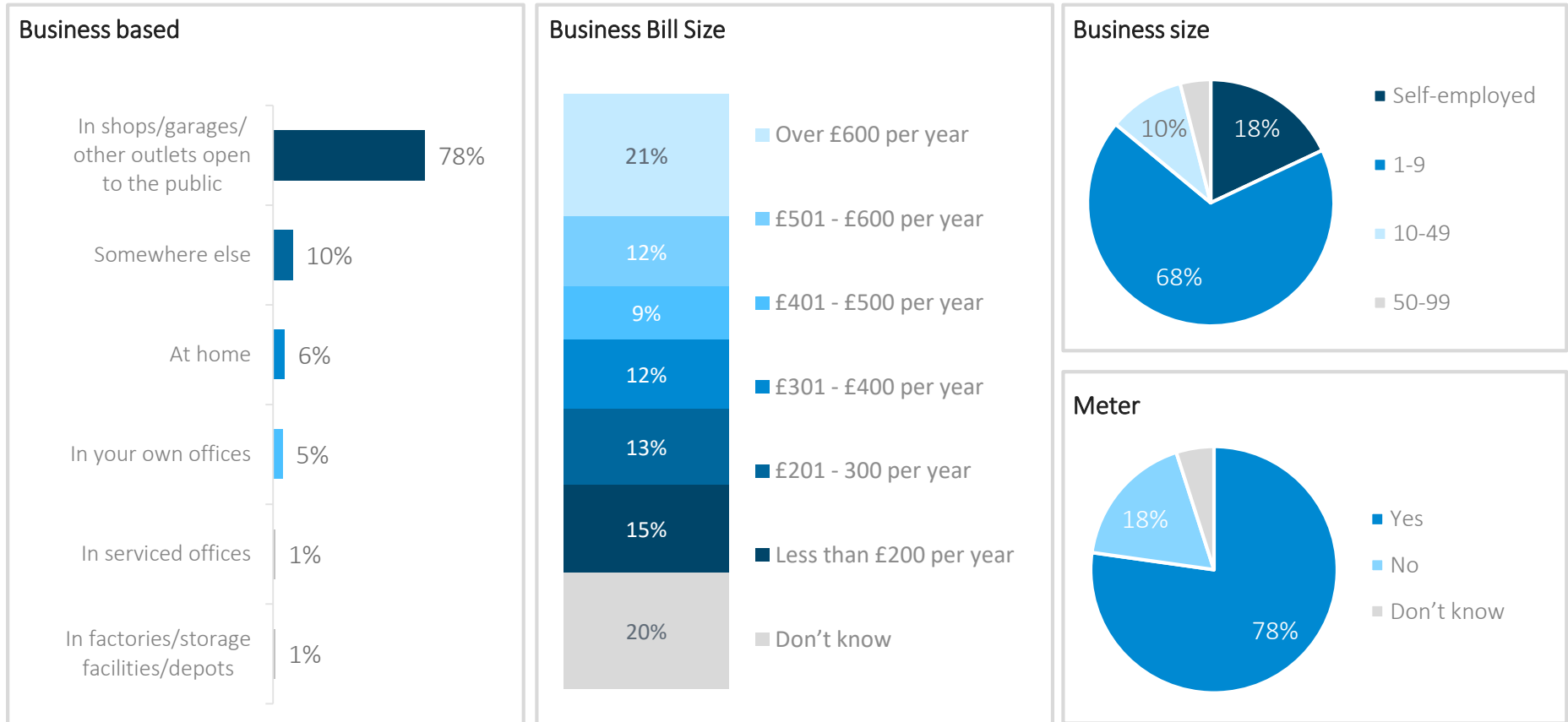
Financially vulnerable respondent profile

Phase 2 – Household respondents (captured via CLTs and Populus' panel)

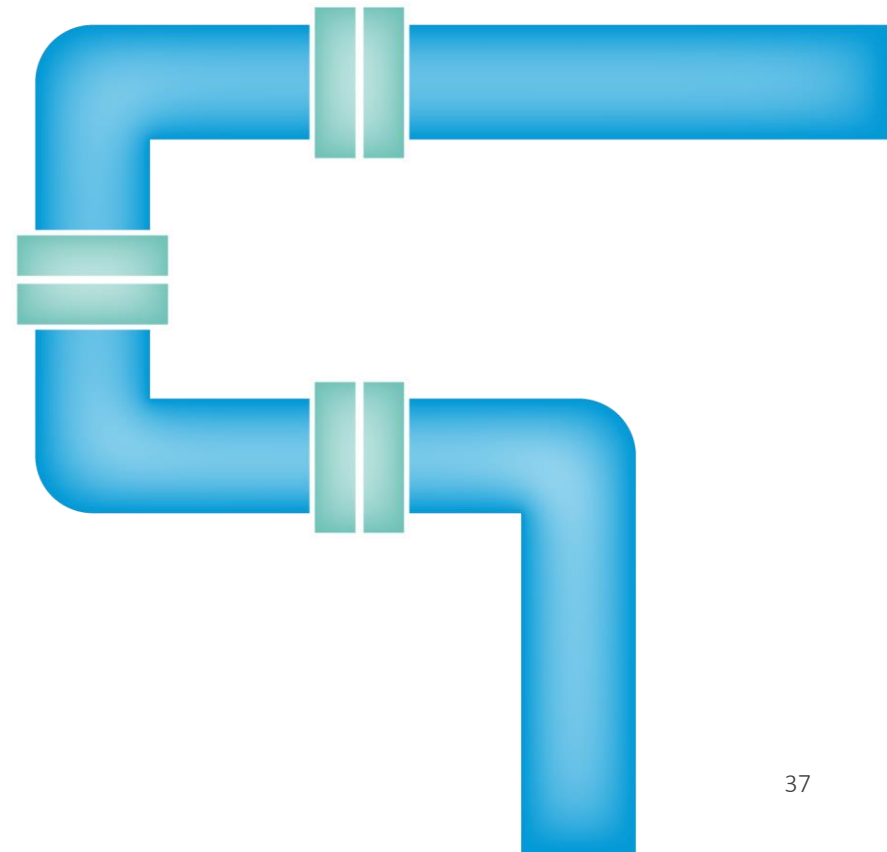


Business respondent profile

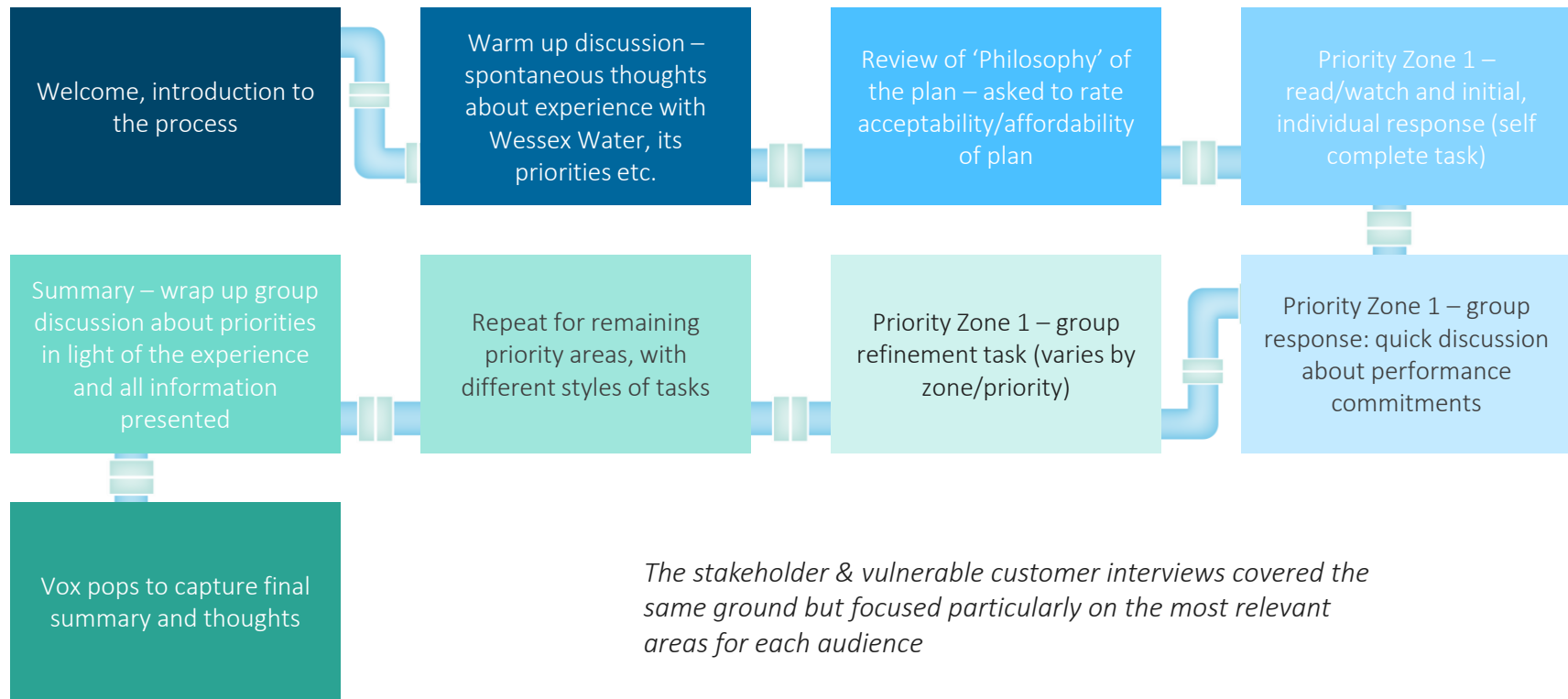
Phase 1 – Business respondents (captured via in-premises interviews)



Overview of qualitative phase



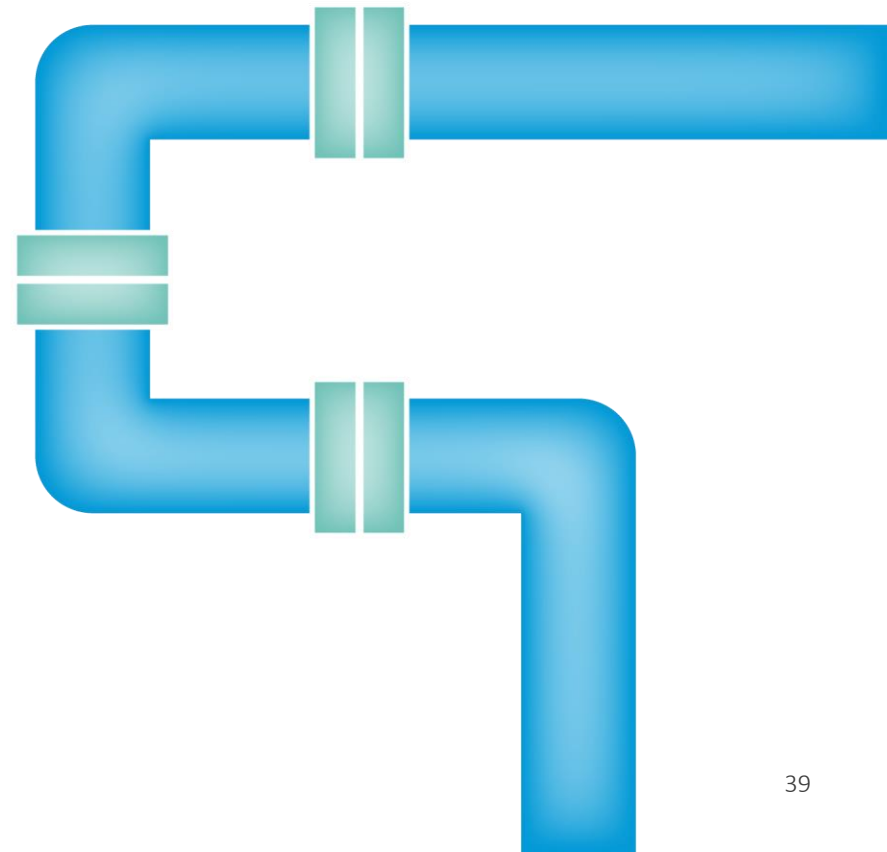
Respondents were taken through each area of the plan in detail and asked to discuss their thoughts on Wessex Water's proposed approach



The stakeholder & vulnerable customer interviews covered the same ground but focused particularly on the most relevant areas for each audience

Participants were also asked to rate how acceptable and affordable they now find the plan having reviewed all information relating to the plan

Overview of quantitative phase



There were three key sections to the survey. After each section we asked the same acceptability and affordability questions

1. Respondents were first shown an overview of Wessex Water's proposed plan and the impact it will have on their bill

At present the average household bill	£80 per month	£970 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£85 per month	£970 per year
Under the plan we propose the average bill would be	£38 per month in 2025, rising to £42 per month by 2025	£465 per year in 2025, rising to £502 per year by 2025

Please note, bill figures have been rounded to the nearest whole number

Acceptability and affordability questions asked to gain the customer's **uninformed** view of proposed business plan

2. Respondents were then shown each area of the plan in more detail, including comparative information and explaining Wessex Water's proposed plan. They were then shown the impact it will have on their bill once again

1	Reduce leaks by a further 2% by 2025
2	Fit reported leaks on our network of pipes quickly, giving for each additional 2% up from 20% now
3	Provide 200,000 free in-home checks for customers to help them save water
4	Reduce 200,000 without charges about using water efficiently

These changes mean:

- You are very unlikely to have a water restriction (eg, hosepipe ban)
- You can be confident that essential water supplies will continue even in extreme droughts

Acceptability and affordability questions asked to gain the customer's **informed** view of proposed business plan

3. The sample was then split into three equal groups. Each group was exposed to a change Wessex Water could make to the proposed plan. This outlined what the change would involve and how it would impact their bill

£507 per year	£507 per year
£408 per year	£408 per year

If you would like to see the current proposed plan again, please click [here](#)

Acceptability and affordability questions asked to gain the customer's **informed** view of the changes Wessex Water could make

A four-point scale was used to test acceptability and affordability throughout the survey

Acceptability question

How acceptable or unacceptable do you consider this alternative option to be for you?

a. Very acceptable

b. Somewhat acceptable

c. Somewhat unacceptable

d. Very unacceptable

e. Don't know

To identify the proportion of customers who find the plan **acceptable** we combined 'very acceptable' and 'somewhat acceptable'

To identify the proportion of customers who find the plan **unacceptable** we combined 'very unacceptable' and 'somewhat unacceptable'

Those who selected 'don't know' were removed from analysis. At all acceptability questions, the proportion selecting 'don't know' was less than 5%

Affordability question

How affordable or unaffordable do you consider this alternative option to be for you?

a. Very affordable

b. Somewhat affordable

c. Somewhat unaffordable

d. Very unaffordable

e. Don't know

To identify the proportion of customers who find the plan **affordable** we combined 'very affordable' and 'somewhat affordable'

To identify the proportion of customers who find the plan **unaffordable** we combined 'very unaffordable' and 'somewhat unaffordable'

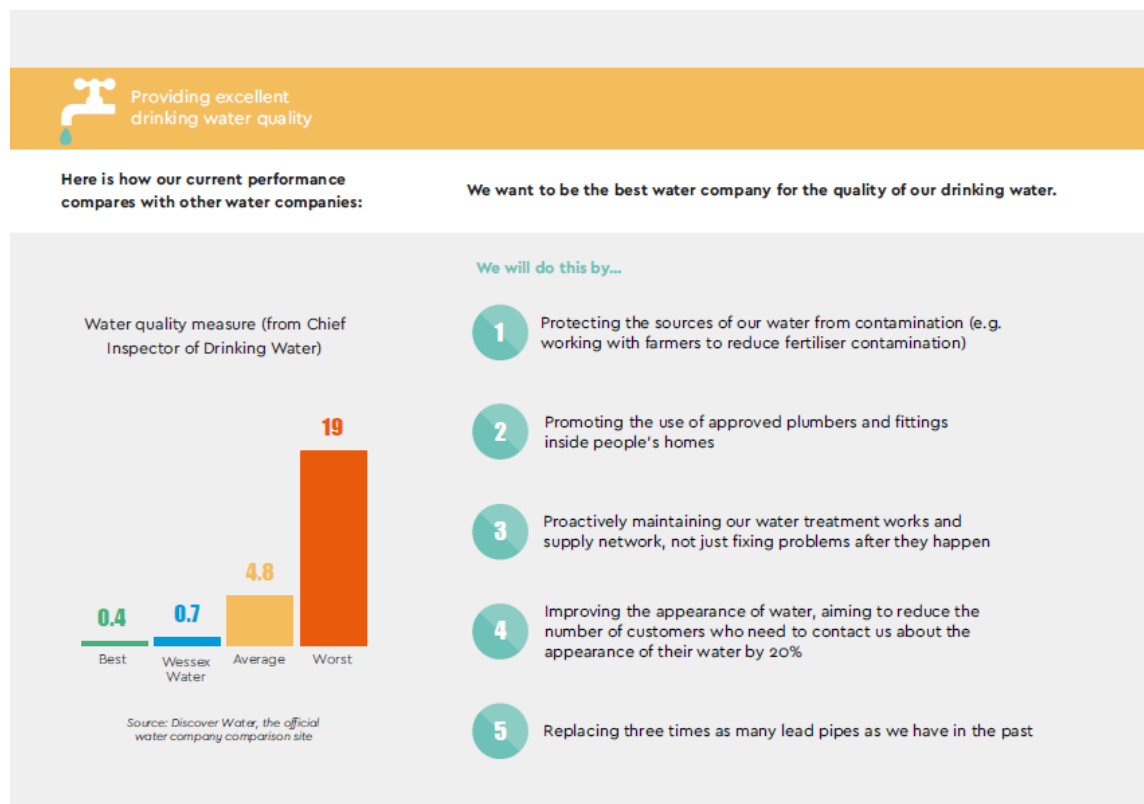
Those who selected 'don't know' were removed from analysis. At all affordability questions, the proportion selecting 'don't know' was less than 5%

The plan was presented in an objective and impartial manner. Comparative information helped contextualise Wessex Water's proposed changes

Our approach to comparative information

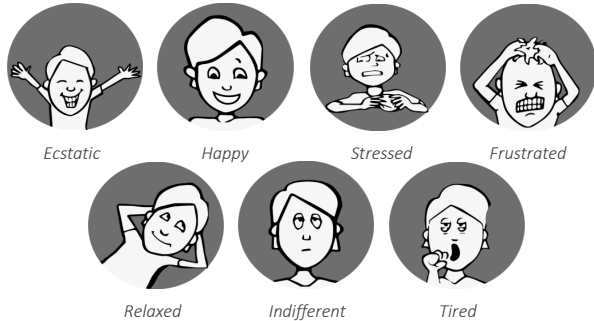
- To avoid overloading respondents, we showed a maximum of two charts for comparative information per area of the plan
- We kept all comparisons and explanations simple, avoiding technical language or jargon
- While we included the unit of measurement, we wanted respondents to focus primarily on the relative rank position of Wessex Water as this is easier to comprehend
- All comparative information either came from Discover Water or Ofwat. Both sources were clearly referenced within the stimulus to ensure respondents knew the data shown was from an objective and impartial source

An example of how we presented comparative information



We integrated innovative techniques to keep respondents engaged with the business plan and the survey

Non-verbal scales



In previous research we have seen that emotional questions asking a respondent how they feel using explicit prompted lists do not always capture the true response. Therefore, to understand how respondents felt about Wessex Water's proposed plan, we showed respondents images of emotions (see above), without labelling or explaining what they represent. This gave respondents the freedom to interpret and attribute their reaction to a softer, more nuanced response.

The emotions were based off Paul Ekman's work at deriving the base emotions all humans feel. This was combined with the Geneva Emotion Wheel and other non-verbal frameworks, and modified for use in a market research context. The images we used have been validated among 1,000 representative UK respondents. We showed each image and asked what emotion they thought it represents, both spontaneously and prompted. Any that were unclear were discarded.

Implicit testing

In psychology and behavioural economics the term 'implicit research' describes research approaches that are able to bypass people's rational, conscious thoughts and assess their automatic attitudes and reactions. Relying solely on explicit research approaches equates to the tip of the iceberg in terms of the entire multitude of emotional and motivational processes (most of which are subconscious) that ultimately determine our attitudes and beliefs.

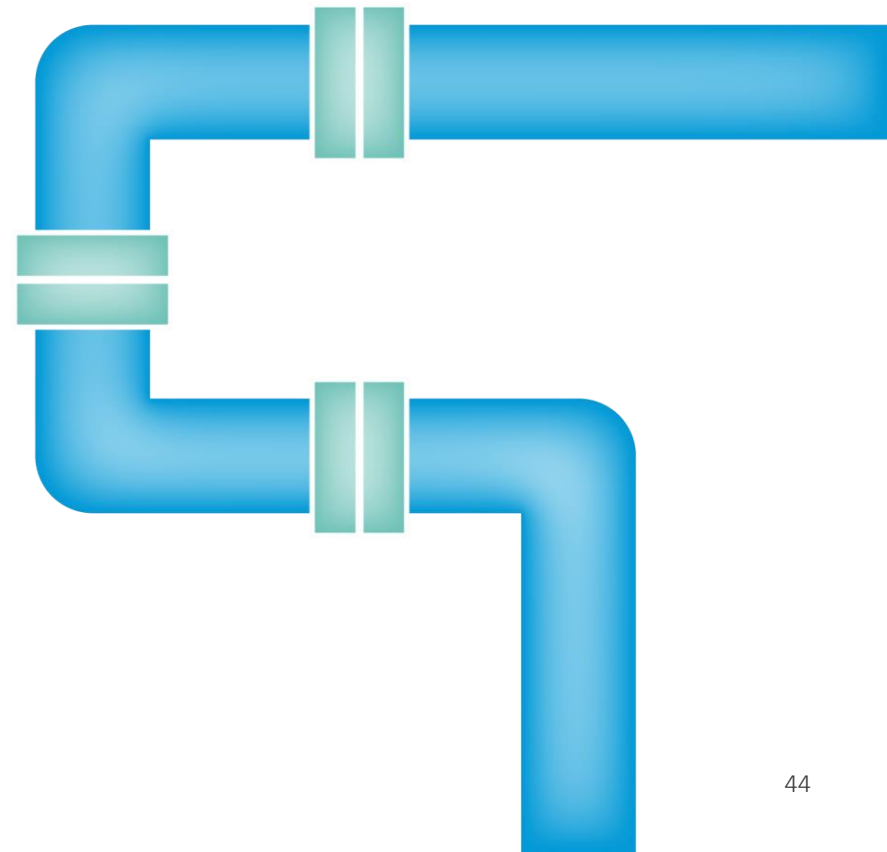
To better understand customers' implicit responses to the business plan, we used our proprietary implicit testing tool. This tool showed respondents several sets of words, and asked them to select the most appropriate attribute to describe the business plan. By identifying which word they selected we can identify the rational response to the business plan. However, looking to the speed at which respondents selected each attribute we can go beyond the rational response to explore implicit, more automatic responses to the business plan. This tool therefore goes beyond the conscious to fully identify how consumers truly perceive Wessex Water's business plan.

1. Respondents are first shown a question **Q. I think Wessex Water's business plan is...** relating to the plan
2. Series of attributes are then shown
3. Respondent selects which word fits best when describing the plan by pressing Z or M as quickly as possible
4. Timed response indicates certainty – a fast response shows stronger implicit association between the plan and attributes

INNOVATIVE TRADITIONAL



Summary of key findings



Summary

Household customers, businesses and stakeholders find the plan acceptable and affordable

- A large majority of Wessex Water customers find Wessex Water's proposed plan acceptable (96% informed household, 98% informed business) and affordable (92% informed household, 96% informed business)
- Levels of uninformed and informed acceptability and affordability exceed 80% across all key customer types
- Vulnerable household customers are slightly less likely to find the plan affordable than typical Wessex Water customers due to their personal financial circumstances, but still exceed 80% acceptability and affordability
- Stakeholders approved of the plan and found it both acceptable and affordable

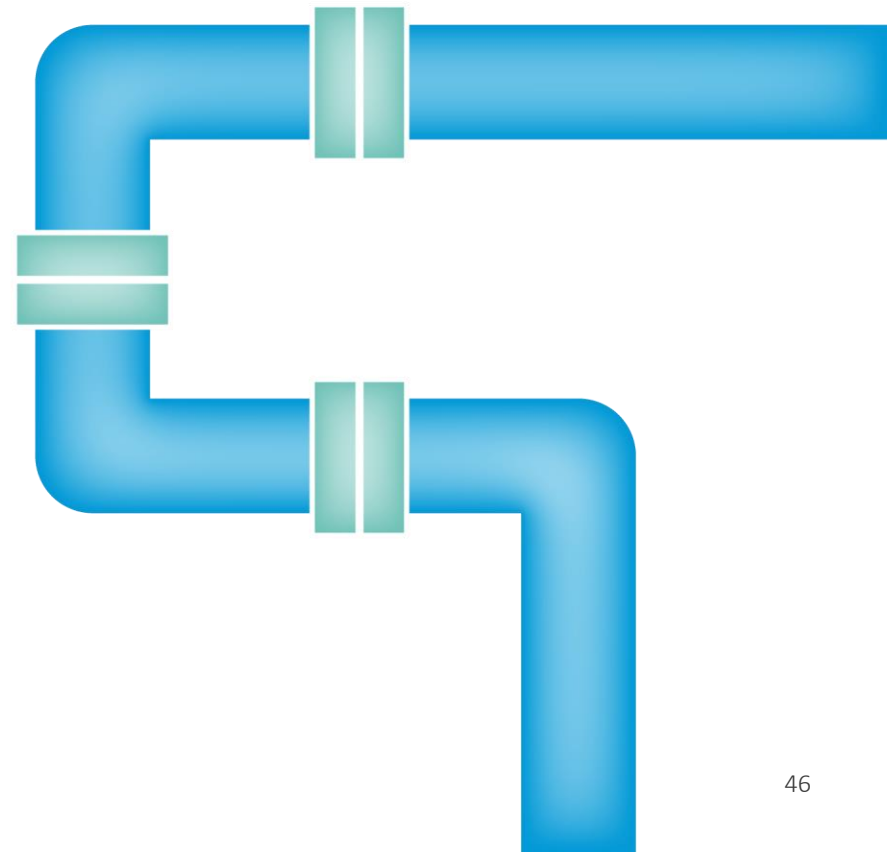
Wessex Water customers believe all areas of the plan are important

- Providing clean drinking water, protecting the environment and utilising water in the region efficiently are *most* important to Wessex Water household customers
- Ensuring bills are affordable for all and developing relationships with the community are considered more important among vulnerable customers and those with lower household incomes than other household customers
- Providing excellent customer service is less important for sewerage only customers than dual/water only customers because they have less need to call upon it
- Stakeholders largely agree with customers on what is most important, though they focused on areas of particular interest to them

Very few display negativity towards the plan. Those that are negative...

- Feel the plan is too good to be true, and are sceptical Wessex Water can actually implement it
- Currently have difficulty paying for their water bill, meaning any increase will pose a financial challenge
- Are reluctant to subsidise other customers who cannot afford their water bill
- Some stakeholders felt the plan was in line with, rather than exceeding expectations

Overall response to the plan

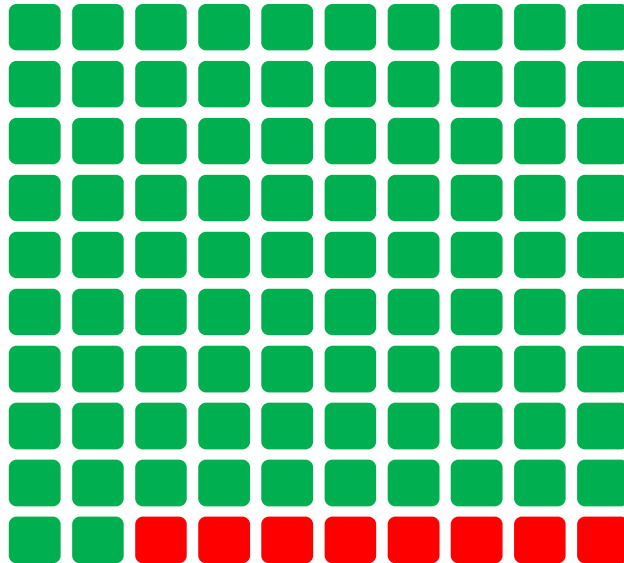


A large majority of household customers find the proposed plan acceptable. Acceptability significantly increases as customers learn more about the plan

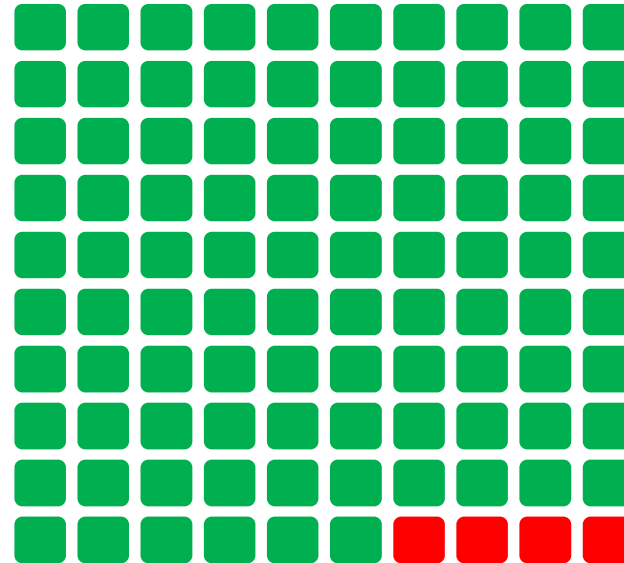
Phase 2 – Proposed Plan – Acceptability



92% of uninformed customers
find the plan acceptable



96% of informed customers
find the plan acceptable*



Green Acceptable Red Unacceptable

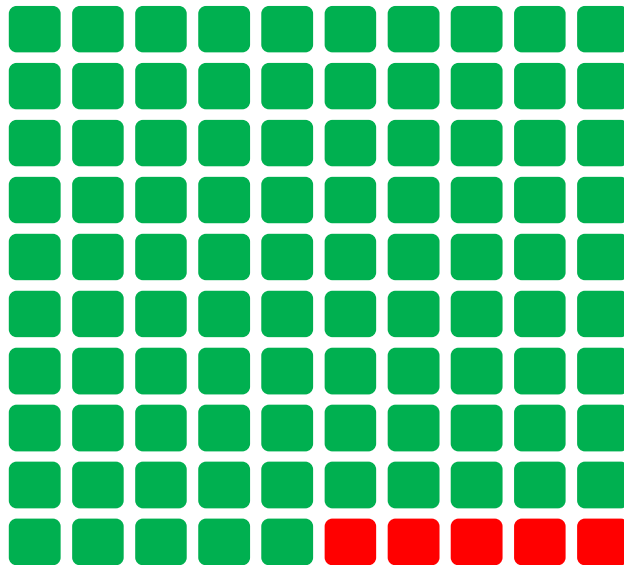
*Significantly higher than uninformed acceptability at 95% confidence level

Acceptability is high among uninformed businesses, and rises further as they learn more about Wessex Water's plans

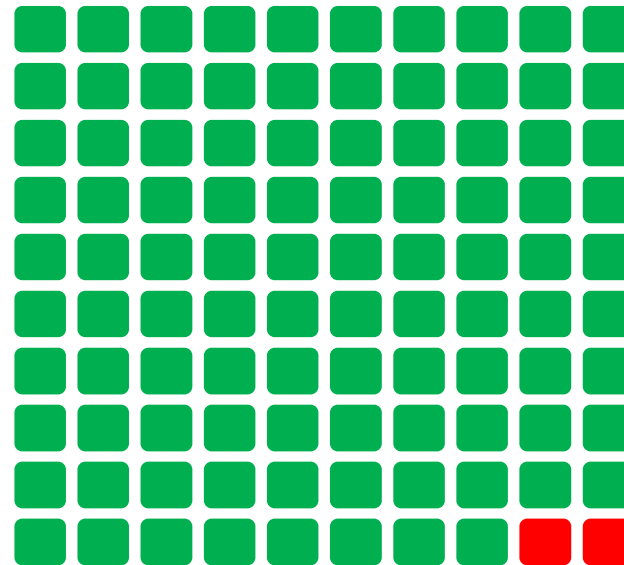
Phase 1 – Proposed Plan – Acceptability



95% of uninformed businesses
find the plan acceptable



98% of informed businesses
find the plan acceptable



■ Acceptable ■ Unacceptable

Customers and stakeholders in the qualitative interviews found the proposed plan to be largely acceptable

Phase 1 – Proposed Plan – Acceptability

Household & Non Household Customer Reactions (Engagement Events)



- ✓ Overall customers thought that the plan as a whole was acceptable, with many feeling it was comprehensive and extensive
- ✓ Many were pleasantly surprised about Wessex Water's activity and felt that they should communicate with customers more about the variety of work they do on behalf of the customer

Vulnerable Customer Reactions (Individual Depth Interviews)



- ✓ Vulnerable customers found the plan acceptable. They agreed it is a positive thing to help vulnerable customers like themselves
- ? However many had low awareness about the support currently offered and so welcomed proactive promotion/outreach

Stakeholder Reactions (Individual Depth Interviews)



- ✓ Overall stakeholders found the plan acceptable
- ✓ They appreciated its comprehensiveness, value, educational dimension and inclusiveness
- ? Some felt that, whilst positive, the plan was largely what they would expect any water company to do

I didn't realise how much Wessex did so that was an eye opener for me (Customer)

This is only what they should be doing (Stakeholder)

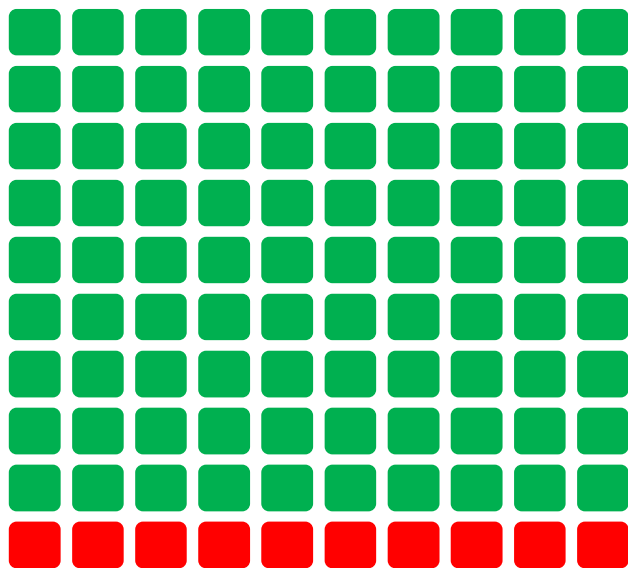
I really liked how they plan to help the environment and to educate children (Customer)

Affordability among businesses is also high, increasing further after education on the individual elements of the plan

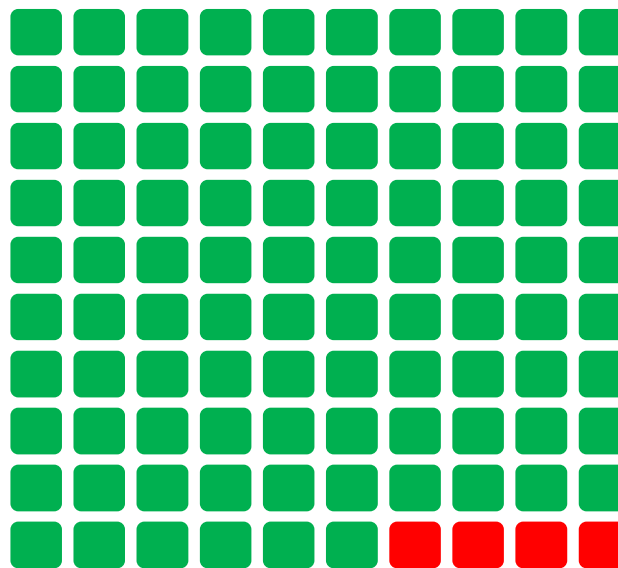
Phase 1 – Proposed Plan – Affordability



90% of uninformed businesses find the plan affordable



96% of informed businesses find the plan affordable



Green Affordable Red Unaffordable

Customers and stakeholders felt the plan was affordable

Phase 1 – Proposed Plan – Affordability

Household & Non Household Customer Reactions (Engagement Events)



- ✓ Most felt that the price increase was not only acceptable but would have little impact on them personally
- ✓ And once customers had seen each part of the plan in detail many felt that if Wessex Water delivered on its promises they would be getting good value for money

Vulnerable Customer Reactions (Individual Depth Interviews)



- ✓ Vulnerable customers felt the plan was largely affordable, especially financially vulnerable customers who would (continue to) benefit
- ? However, the personal circumstances (particularly those in debt) means that perceived affordability is highly dependent on individual circumstances and changes in other household bills

Stakeholder Reactions (Individual Depth Interviews)



- ✓ Stakeholders felt the plan was affordable
- ✓ They endorsed the idea of a below inflation increase in bills and did not feel that this compromised investment in key areas of the plan
- ✓ They appreciated the proactivity in identifying financially vulnerable customers and education/partnership to deliver customer affordability

I assumed it would go up, the impact on my bill is minimal
(Customer)

At the end of the day the price matters
(Stakeholder)

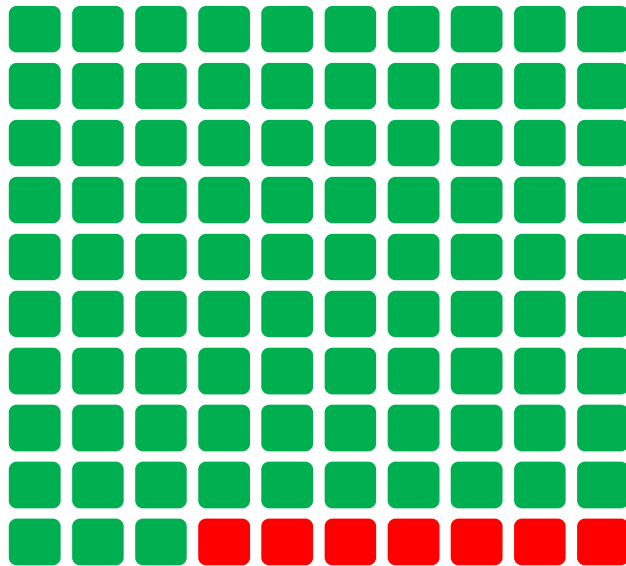
It's reasonable, the price increase, it's not drastic
(Customer)

After learning more about the plan, both household and business customers feel that the plan offers good value for money

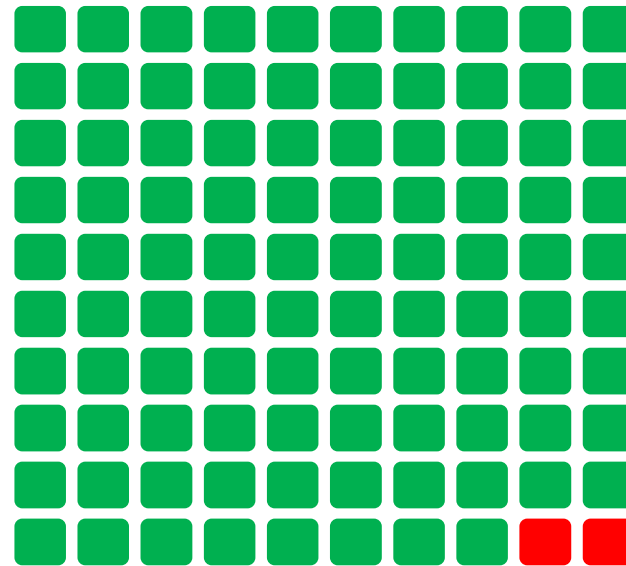
Phase 1 (Business customers) & 2 (Household customers) – Proposed Plan – Informed Value for Money



93% of informed customers believe
the plan offers good value for money



98% of informed businesses believe
the plan offers good value for money



Green Affordable Red Unaffordable

The large majority of customers believe the plan offers good value for money

Phase 1 – Proposed Plan – Informed Value for Money



Household & Non Household Customer Reactions (Engagement Events)

- ✓ Value for money was largely seen as a fusion of acceptability and affordability – the comprehensive nature of the plan coupled with perceived affordability meant respondents felt the plan offered good value

*Providing what appears to be much higher than average water quality services, and at a projected bill which will be less than what we are paying now, sounds brilliant
(Customer)*

*The bill is not rising as much as inflation so it appears a very good deal
(Customer)*

*It all seems very affordable. Now that I know the mechanics of the plan, I'd say it is more than reasonable
(Business Customer)*

The combination of words used within the implicit test were informed by respondent responses to the plan at the qualitative ‘Engagement Events’

Implicit test – word combinations tested in questionnaire

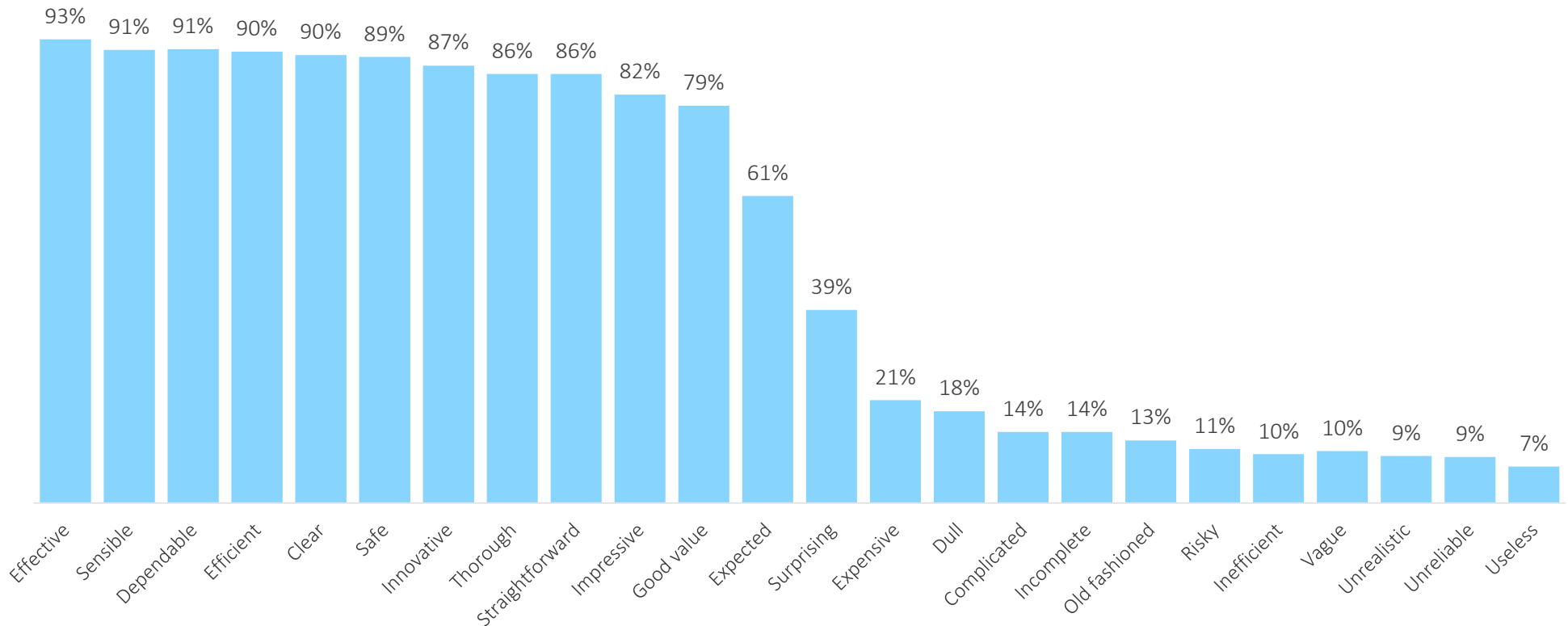
I think Wessex Water’s business plan is...

- a. Dependable | Unreliable
- b. Clear | Vague
- c. Straightforward | Complicated
- d. Innovative | Old-fashioned
- e. Efficient | Inefficient
- f. Effective | Useless
- g. Good-value | Expensive
- h. Safe | Risky
- i. Sensible | Unrealistic
- j. Thorough | Incomplete
- k. Impressive | Dull
- l. Expected | Surprising



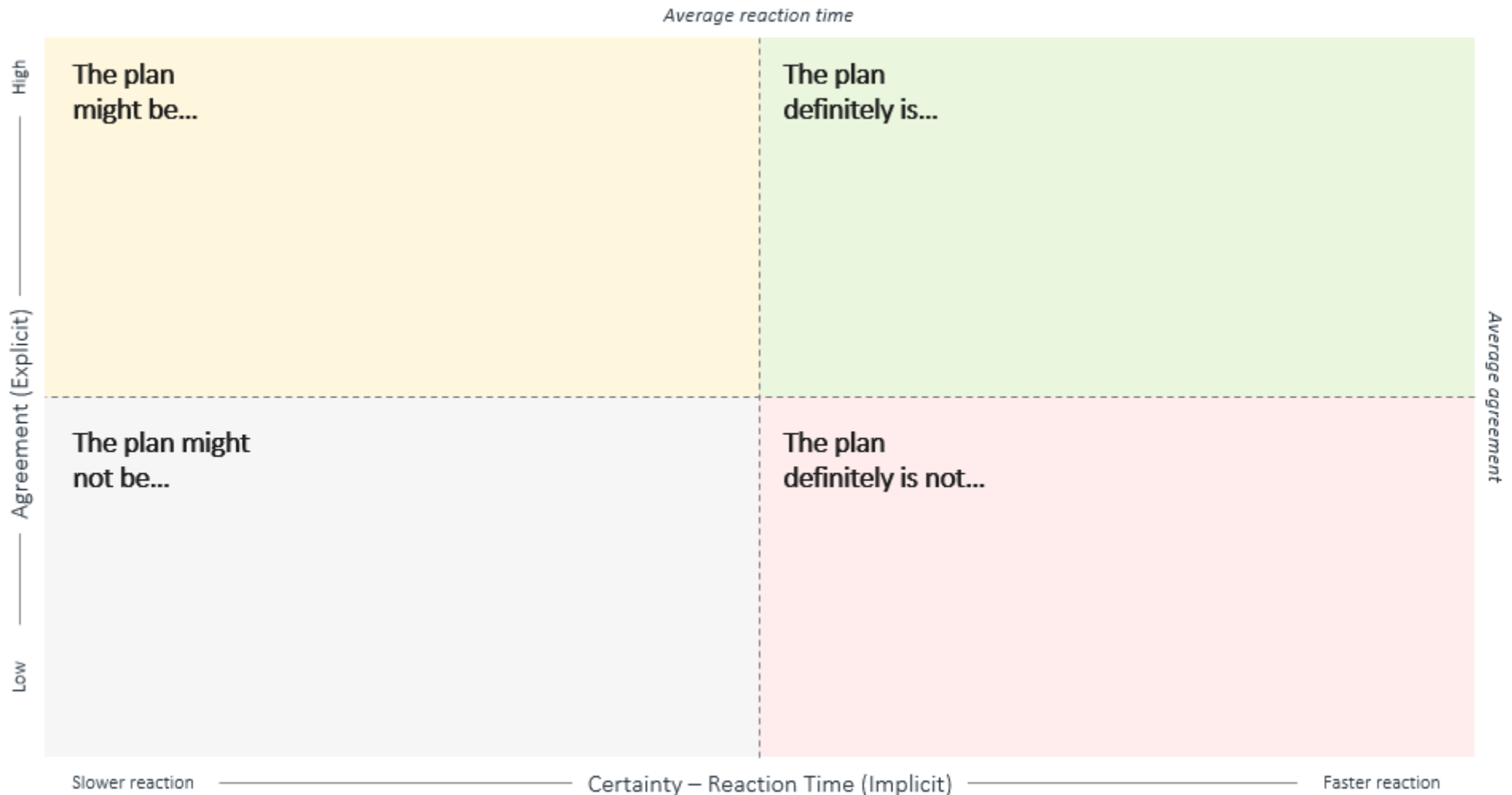
Perceptions of Wessex Water's business plan are positive, with most finding it effective, sensible, and dependable

Phase 2 – Explicit Agreement (%)



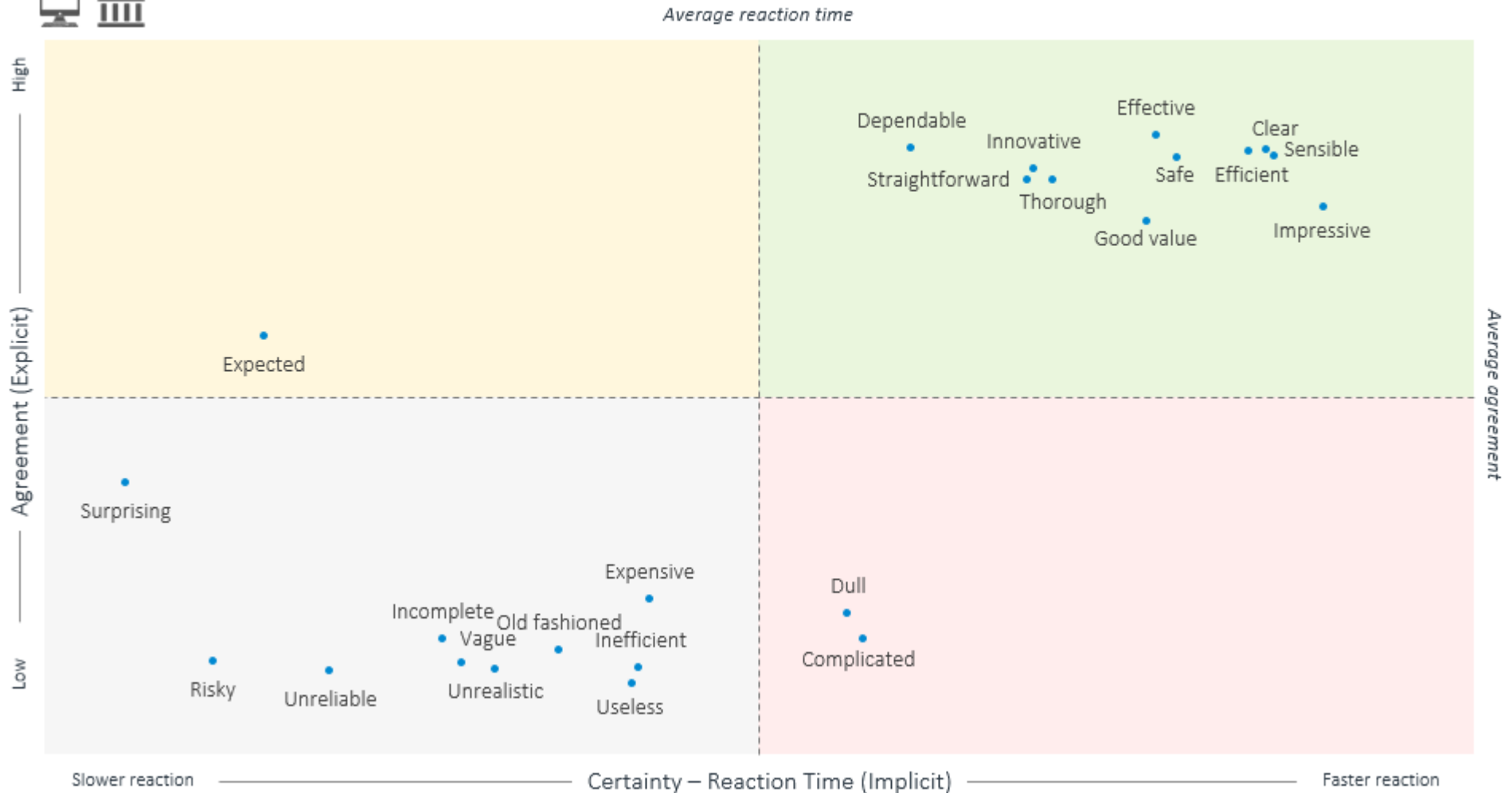
Implicit Response Test – Wessex Water’s Business Plan

Implicit Response to the Plan



Most customers are very positive about the business plan at both an explicit and implicit level. A minority are negative, though feel less sure of this response

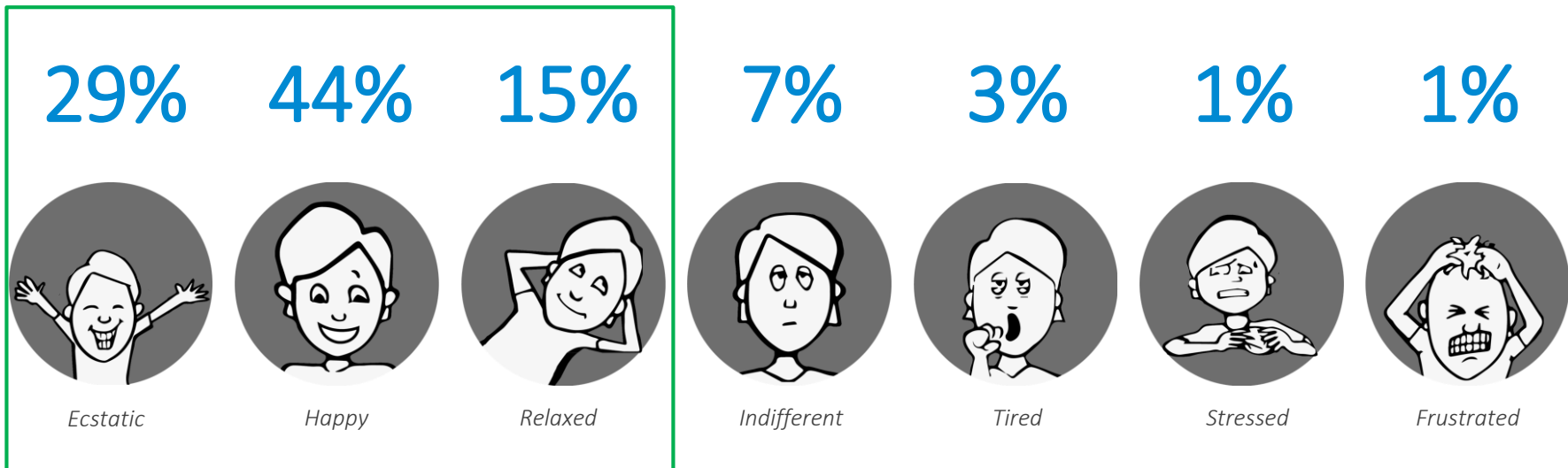
Phase 2 – Implicit response to the plan



Most customers say they feel either ecstatic, happy or relaxed with Wessex Water's proposed approach

Phase 2 – Emotional response to the proposed plan

Which face best represents how you feel about Wessex Water's proposed approach?



Note: These are composite scores of all 8 areas of the business plan

Few vulnerable customers interviewed in depth were experiencing or aware of financial support or PSR; there are barriers to seeking help

Phase 1 – Vulnerable customers response to the plan

Vulnerable Customer Reactions (Individual Depth Interviews)



- ✓ Broadly they all found the proposed plan acceptable and felt positive about offering help to vulnerable customers like themselves (although they did not necessarily define themselves as needing help)
- ? However, most were not aware of any schemes to help them
- ? Those that were experiencing some help were uncertain as to what “scheme” they were on
- ? Disengagement might be for a number of reasons:
 - ? Indirect relationship with Wessex Water (e.g. visually impaired respondent’s partner dealt with written communication)
 - ? Do not want to get “on the radar” of a company who might then demand instant payment
 - ? Perceived hassle of finding out whether they are eligible for help

(These doubts support the plan to be more proactive and use partners to improve reach)

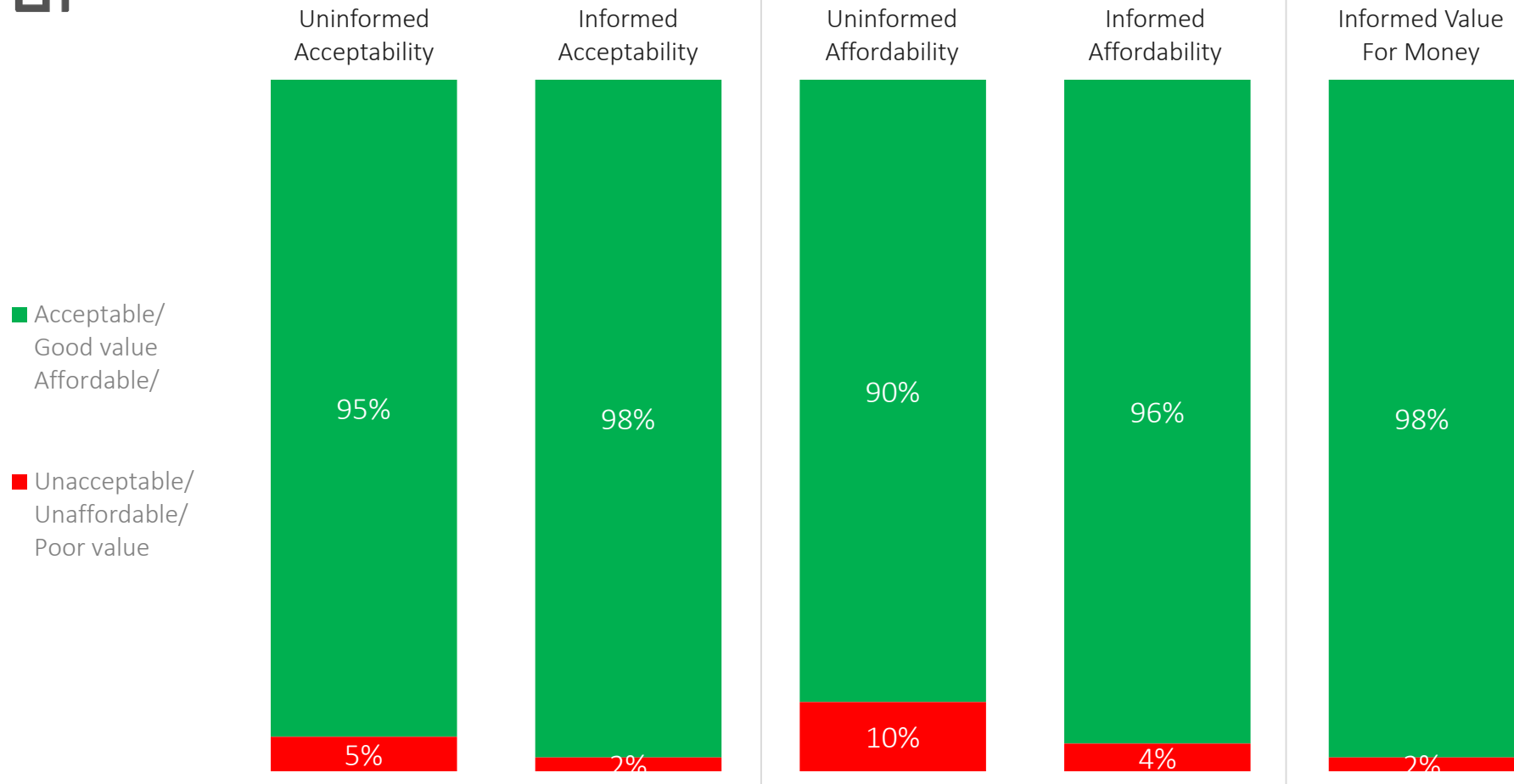
Vulnerable customers recommend several ways that Wessex Water could improve communication rather than service provision, which few actively experience:

- Make vulnerable information more visible on bills
- Use other communication channels (e.g. GP surgery, specific disease/disability clinics (e.g. Multiple Sclerosis, Diabetes, Vision Clinics etc..))
- ‘Mythbust’ fears around what will happen if they do get in touch
- Provide a dedicated ‘case manager’ who will explain everything to them clearly
- Simplify the process as much as possible – can feel overwhelmed

Sky can cut you off if you don't have money or the TV licence, and can take you to court. Also gas and electric, if you don't pay they can cut you off!
(Vulnerable Customer)

Acceptability and affordability among business customers is high at an uninformed level, and rises further following education

Phase 1 – Business Customers – Uninformed/Informed Acceptability/Affordability and Value for Money



Retailers' view of business market conditions

Retailers felt that the business market had opened up successfully but that it had yet to mature both in terms of effective competition and also systems and processes between retailers and wholesalers – in short, a modest market opening with a lot of fragmentation

Modest market opening with low awareness & engagement amongst businesses

Retailer-wholesaler relationships working but systems inconsistent and inefficient

Low margins and customer savings mean market is sluggish

There is nothing in Wessex Water's plan that will negatively impact on the market; promises around wholesale service improvements will help business customers, which is good for retailers

What lessons can Wessex Water learn from NHH Retailers experience of the market

Overall, retailers felt that the NHH market was too new to draw firm conclusions to apply to service improvement and cost reduction in the business more generally. However we can draw some learnings which could be applied

Lessons Wessex Water can learn from NHH Retailers experience of the market to improve services or reduce costs

- The experience of inefficiencies of poor problem reporting & service requests systems with some wholesalers point to a need for better use of technology/automation in problem reporting – this could result in a better service and reduced costs from automation
- Event push notifications, even tailored to specific audiences, is an innovation from some wholesalers that could be applied more widely to how Wessex Water communicates around events to its customers in terms of speed & targeting; this could improve service/experience particularly around unplanned events
- Retailers did discuss the way that, to manage costs especially, they need to be very transparent and firm about service level agreements/service commitments to customers, compared with wholesalers who are perhaps more “lenient”. Firming up and being transparent around what customers can and can’t expect in terms of service and responsibility could reduce costs (and even potentially improve service perception by increasing clarity)
- Finally, there were some reports that the switch of businesses to new retailers identified poor data (some households were switched) which underlines the potential to improve data accuracy again resulting in improved service and, in the longer term, reduced costs

Current NHH retailer relationship and satisfaction with Wessex Water

How happy are NHH retailers overall with Wessex Water wholesale services?

- Both retailers interviewed were happy with the wholesale service they get from Wessex Water and have good working relationships

Ways NHH Retailers would like Wessex Water wholesale services to be improved?

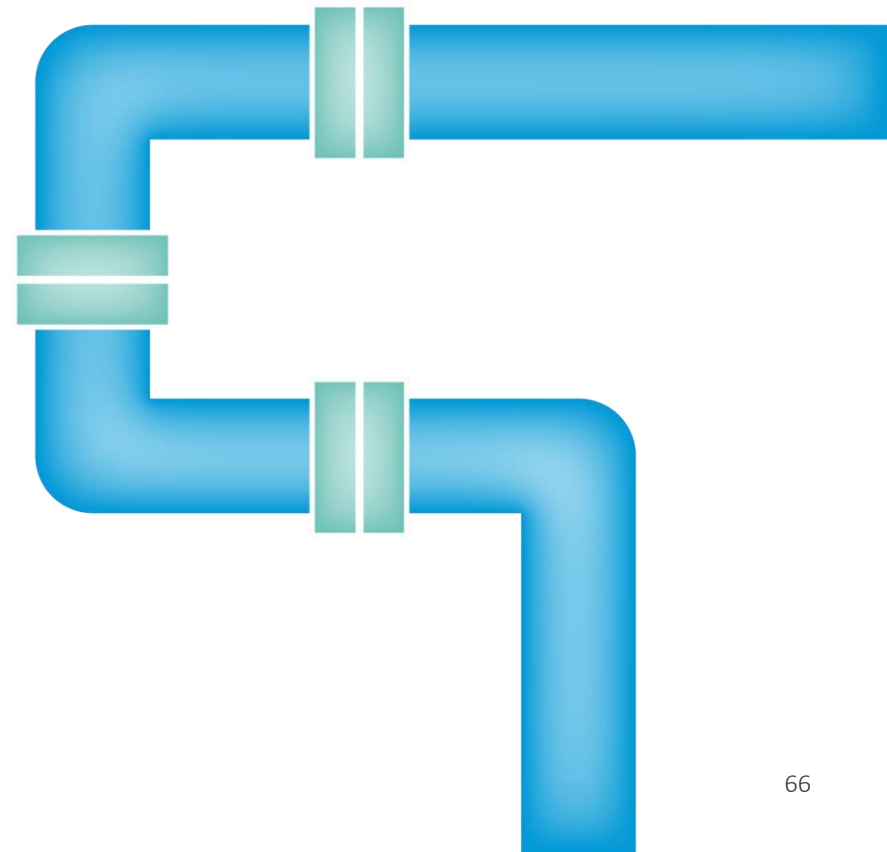
- Most of the issues retailers experience tend to be at the market level rather than at the Wessex Water level. E.g. complexity of different working relationships and arrangements for communication/bilaterals amongst different wholesalers
- A constant need is for clear and timely communication on problems and events so that any issue, works and compensation arrangements can be easily and promptly dealt with.

Reflecting on the proposed plan

The extent to which Wessex Water's plans will impact on the NHH water retail market

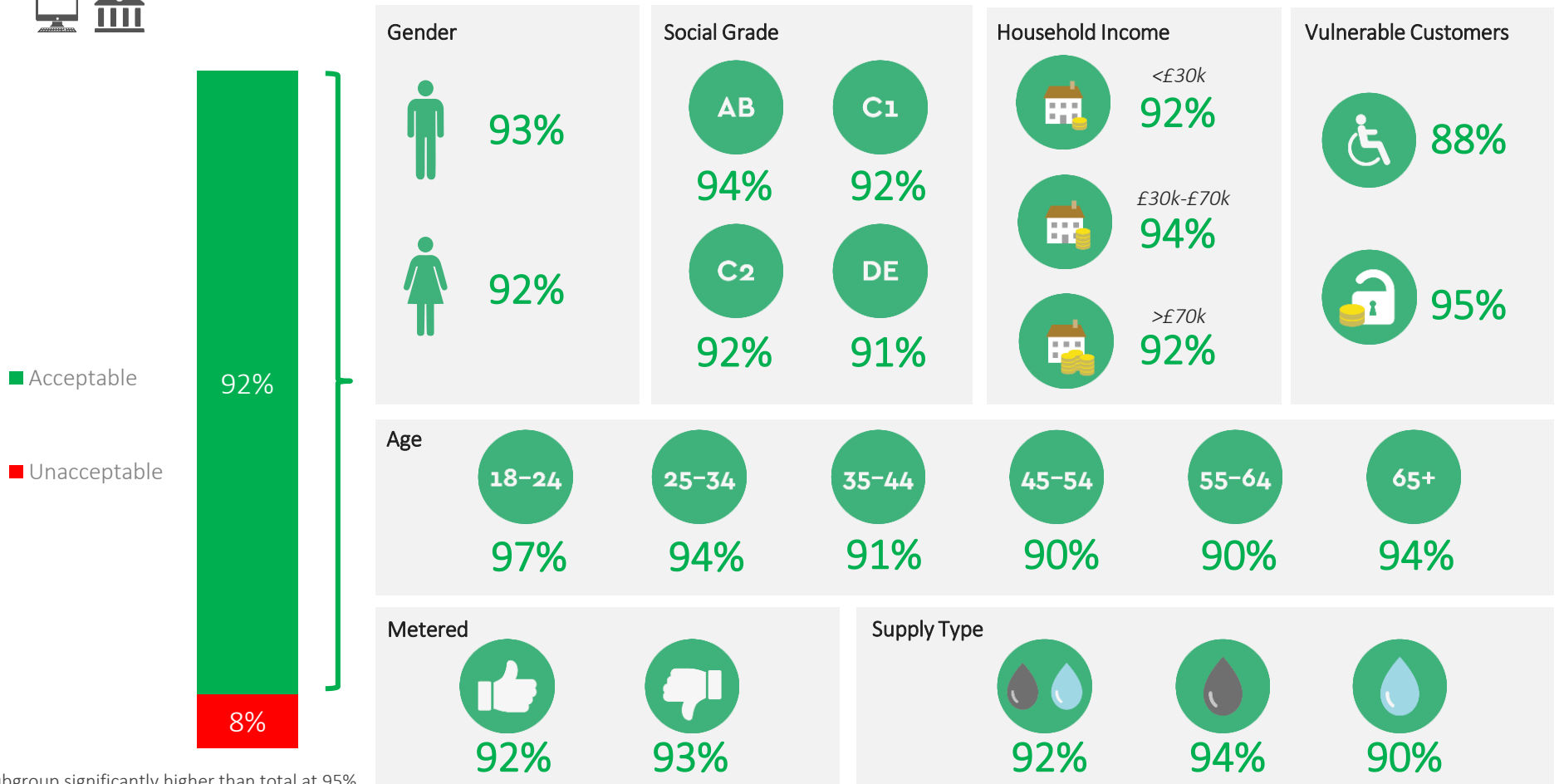
- Retailers tend to view the plans as largely market neutral
- The NHH market is all about price and if retail prices are not increasing then wholesale charges might be staying mainly the same and thus there will be no carry through to NHH price changes which would potentially affect the market
- Insofar as service will be maintained or improved this will mean that NHH customers are more satisfied but this does not directly impact on their activity in the market, but would make them more cost effective to service for the retailer which could improve their margins/allow more leeway in how they deal with customers

Uninformed response to the plan (Acceptability): Subgroup analysis



All key customer subgroups find the plan acceptable, although those with a personal disability are slightly less likely to find the plan acceptable

Phase 2 – Proposed Plan – Uninformed Acceptability (Net: Very/Somewhat Acceptable)



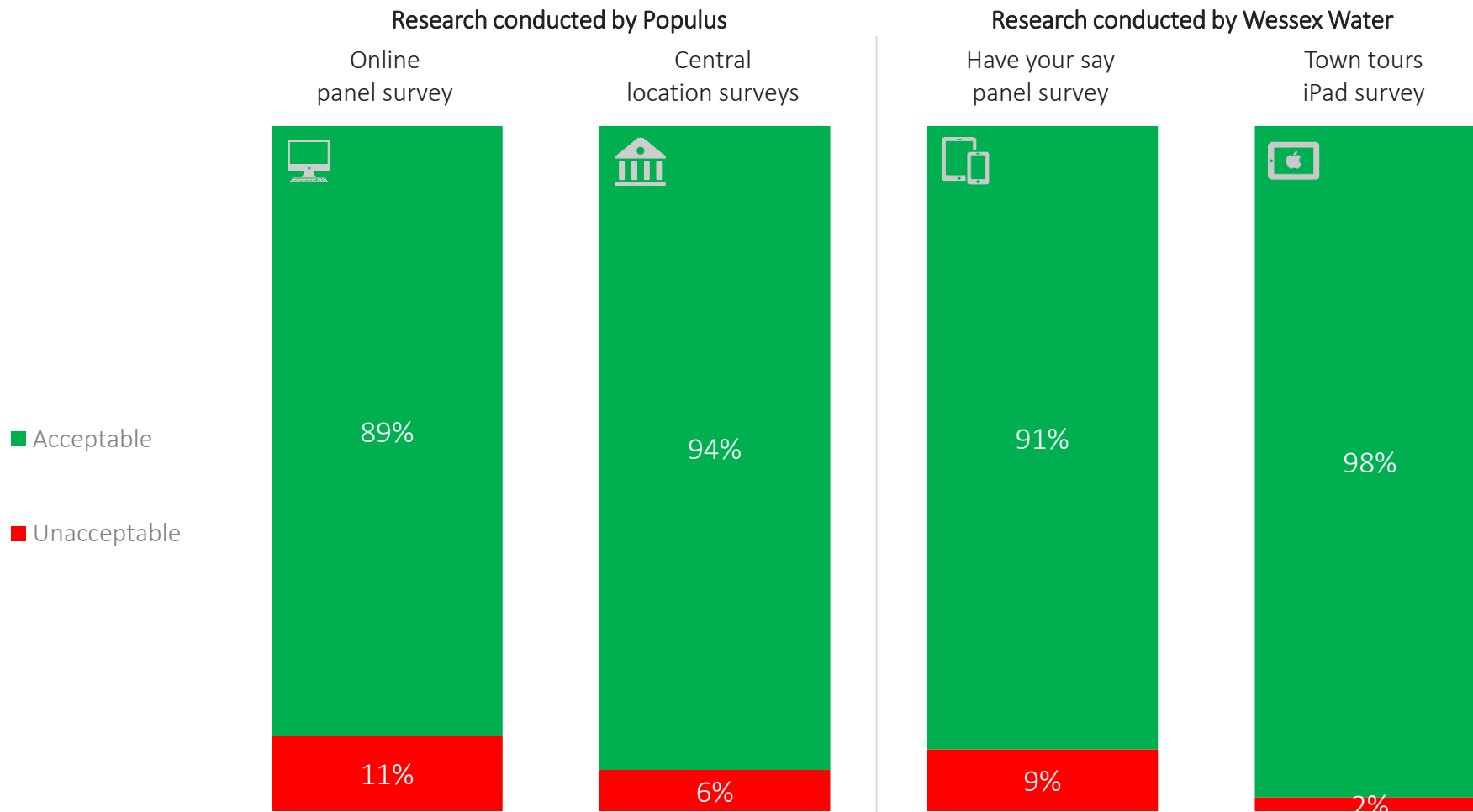
↑ Subgroup significantly higher than total at 95%
 ↓ Subgroup significantly lower than total at 95%

Q9: How acceptable or unacceptable do you consider Wessex Water's proposed plan to be for you?

Base: Household bill payers (1,098), Male (450), Female (648), 18-24 (100), 25-34 (210), 35-44 (180), 45-54 (188), 55-64 (203), 65+ (217), AB (372), C1 (253), C2 (153), DE (317), <£30k (535), £30k-£70k (351), >£70k (61), Personal disability (130), Financially vulnerable (143), Metered (591), Unmetered (435), Dual Supply (925), Sewerage only (136), Supply only (37)

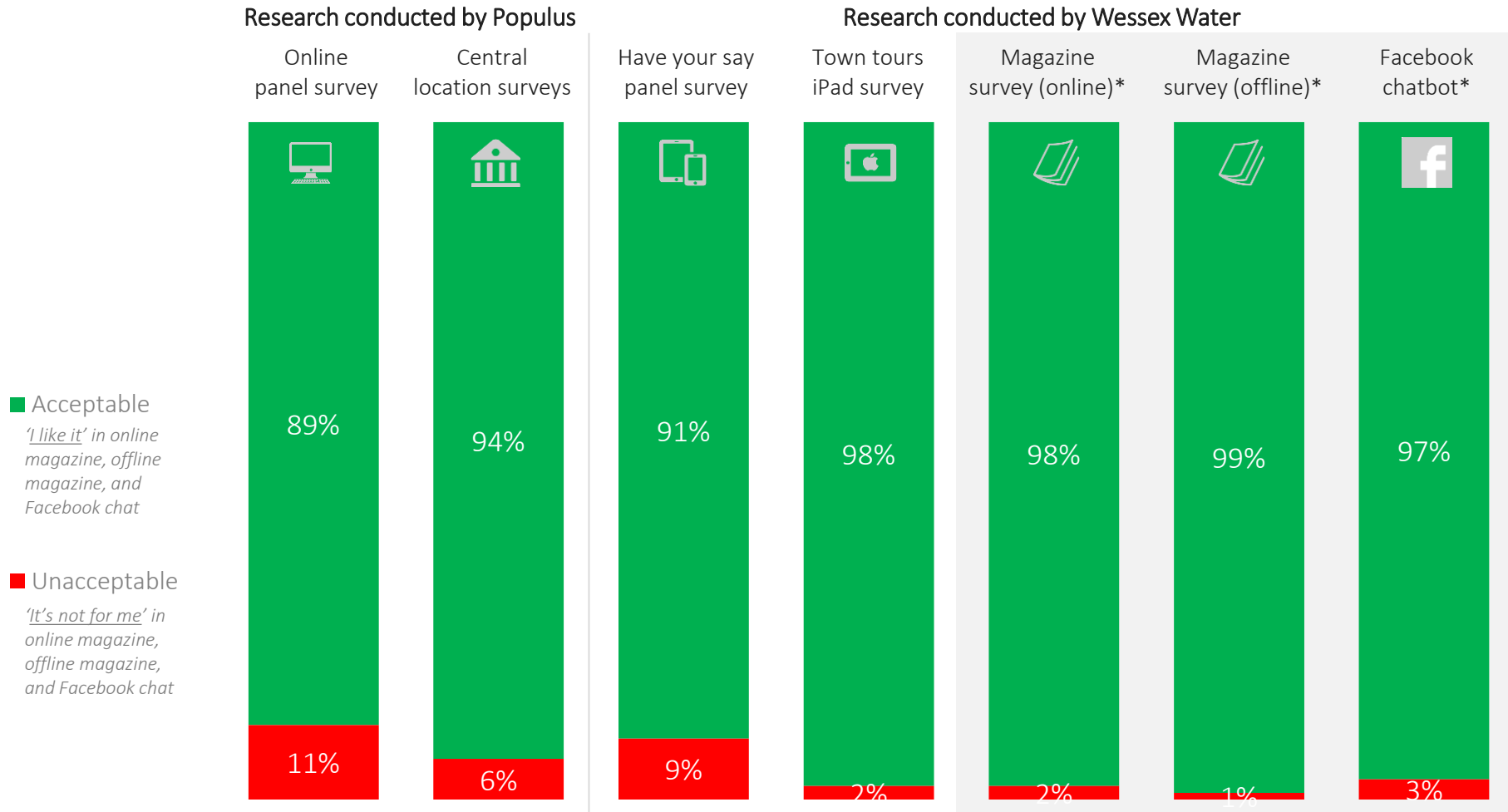
Levels of acceptability are high across household customers, regardless of research methodology

Phase 2 – Proposed Plan – Uninformed Acceptability (Net: Very/Somewhat Acceptable)

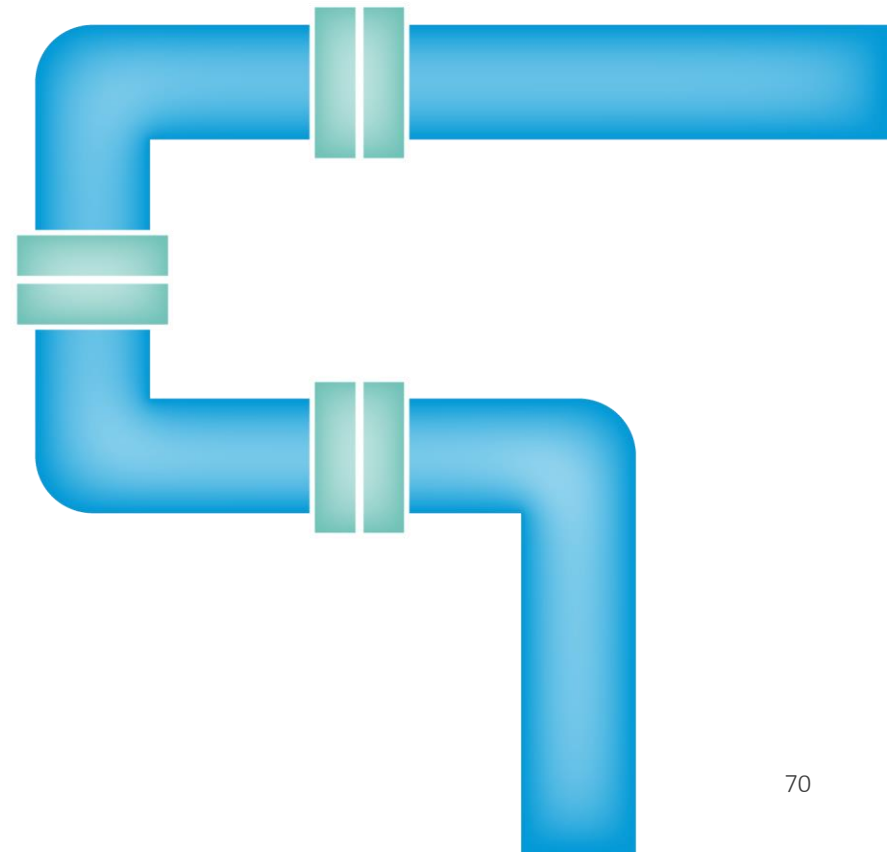


Levels of acceptability are high across household customers, regardless of research methodology

Phase 2 – Proposed Plan – Uninformed Acceptability (Net: Very/Somewhat Acceptable)

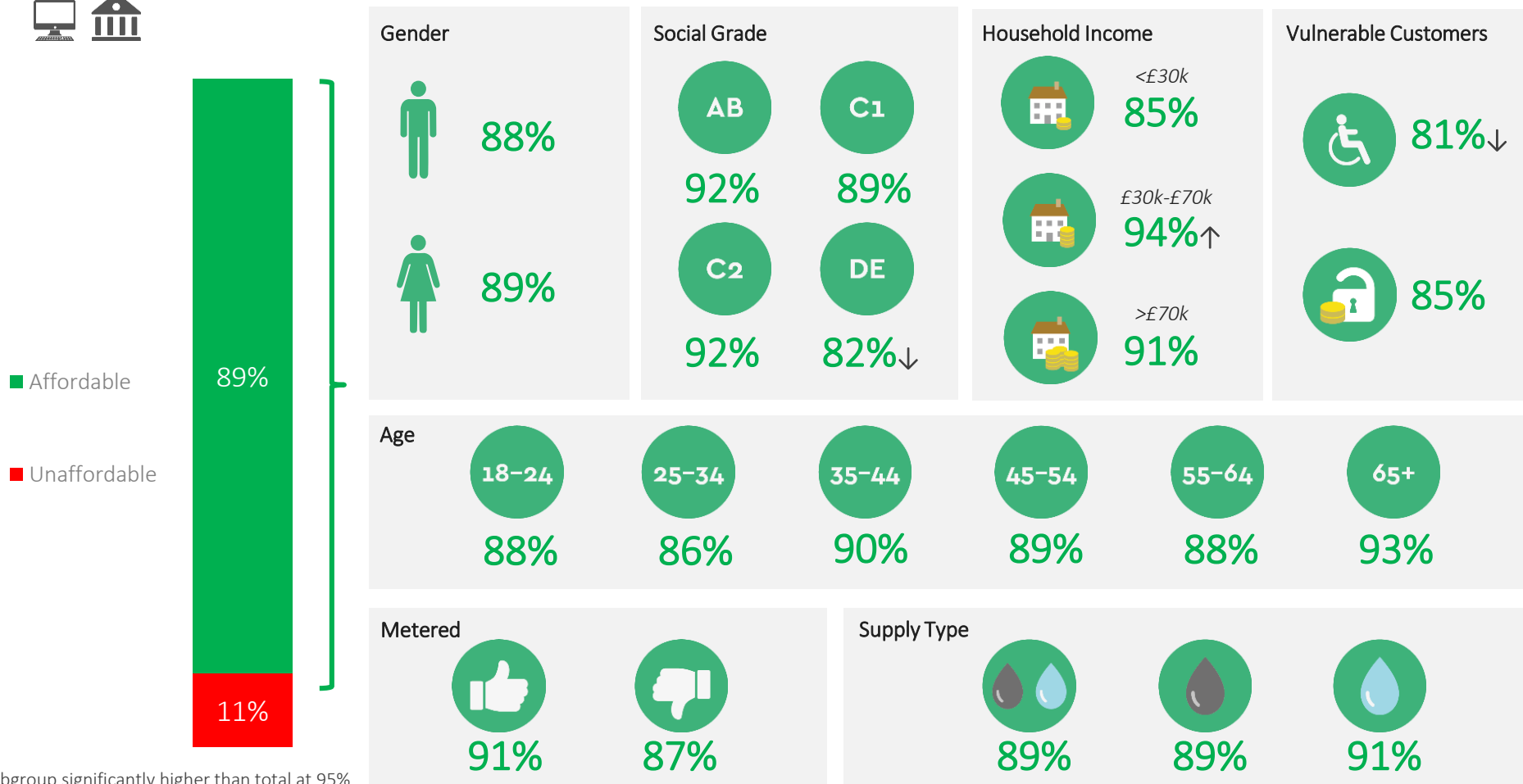


Uninformed response to the plan (Affordability): Subgroup analysis



Vulnerable customers and those with lower household incomes are less likely to find the plan affordable, however 8 in 10 still find it affordable

Phase 2 – Proposed Plan – Uninformed Affordability (Net: Very/Somewhat Affordable)



↑ Subgroup significantly higher than total at 95%
 ↓ Subgroup significantly lower than total at 95%

Q10: How affordable or unaffordable do you consider Wessex Water's proposed plan to be for you?

Base: Household bill payers (1,098), Male (450), Female (648), 18-24 (100), 25-34 (210), 35-44 (180), 45-54 (188), 55-64 (203), 65+ (217), AB (372), C1 (253), C2 (153), DE (317), <£30k (535), £30k-£70k (351), >£70k (61), Personal disability (130), Financially vulnerable (143), Metered (591), Unmetered (435), Dual Supply (925), Sewerage only (136), Supply only (37)

Vulnerable customers are more likely to say that they already struggle to afford their bill. For these customers an increase of any amount is seen as too much

Phase 1 – Reasons vulnerable customers are less likely to find the plan affordable



Vulnerable Customer Reactions (Individual Depth Interviews & CLTs/Online/in-home boosts)

- Vulnerable customers (both financially vulnerable and those with personal disability) are more likely to be DEs and from low income households than the typical Wessex Water customer
- Vulnerable customers who already benefit from support on offer from Wessex Water find the plan affordable
- Those who do not yet benefit, or feel they are still struggling with their current water bill, find any increase in bill 'unaffordable'

Living on the amount I get at the moment it is already hard to cover all bills... After 2025 will they put it up again and go to £50 per month? Will they ever stop the bill creeping up?

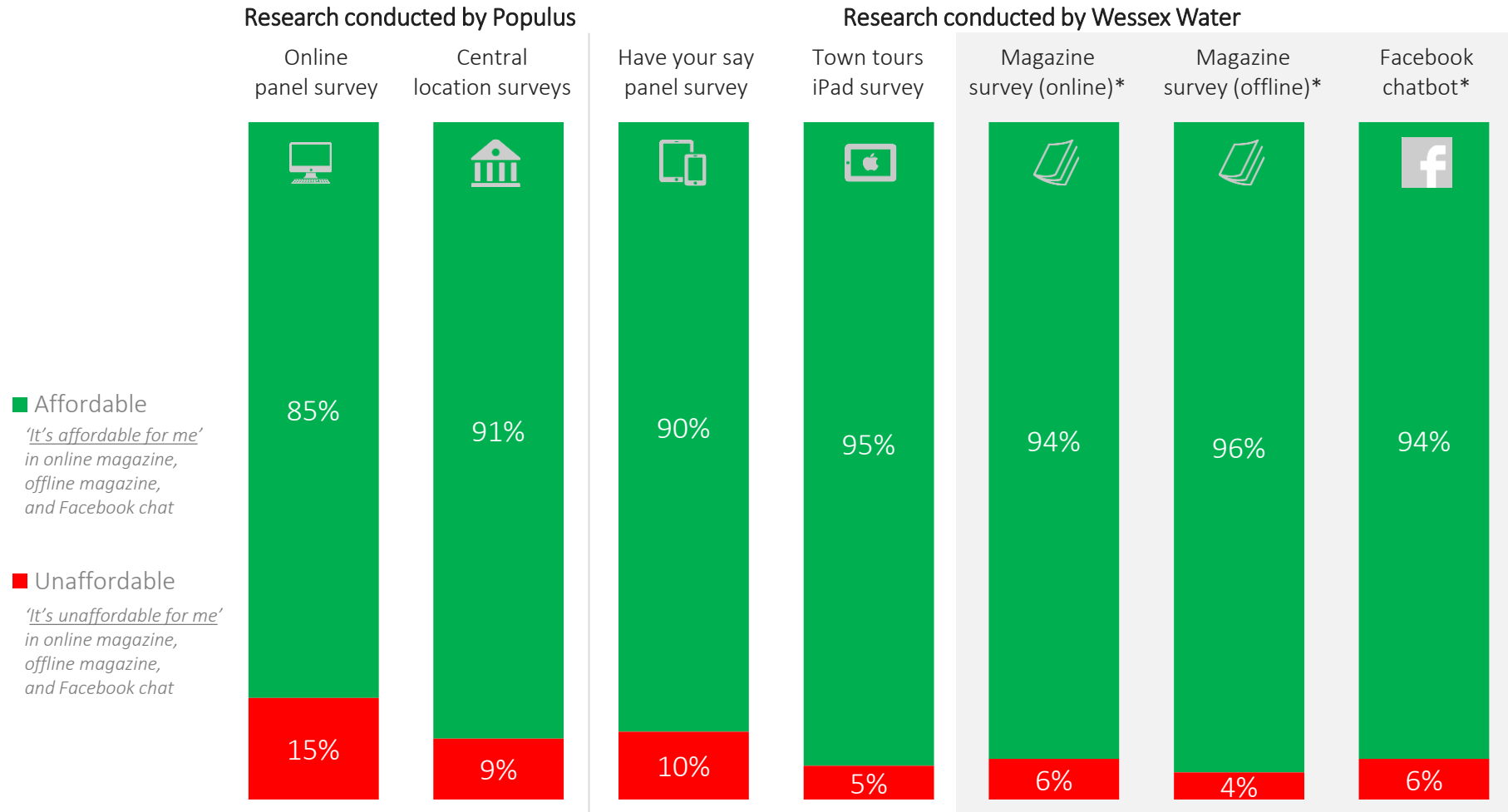
Levels of perceived affordability are consistent across household customers, regardless of research methodology

Phase 2 – Proposed Plan – Uninformed Affordability (Net: Very/Somewhat Affordable)

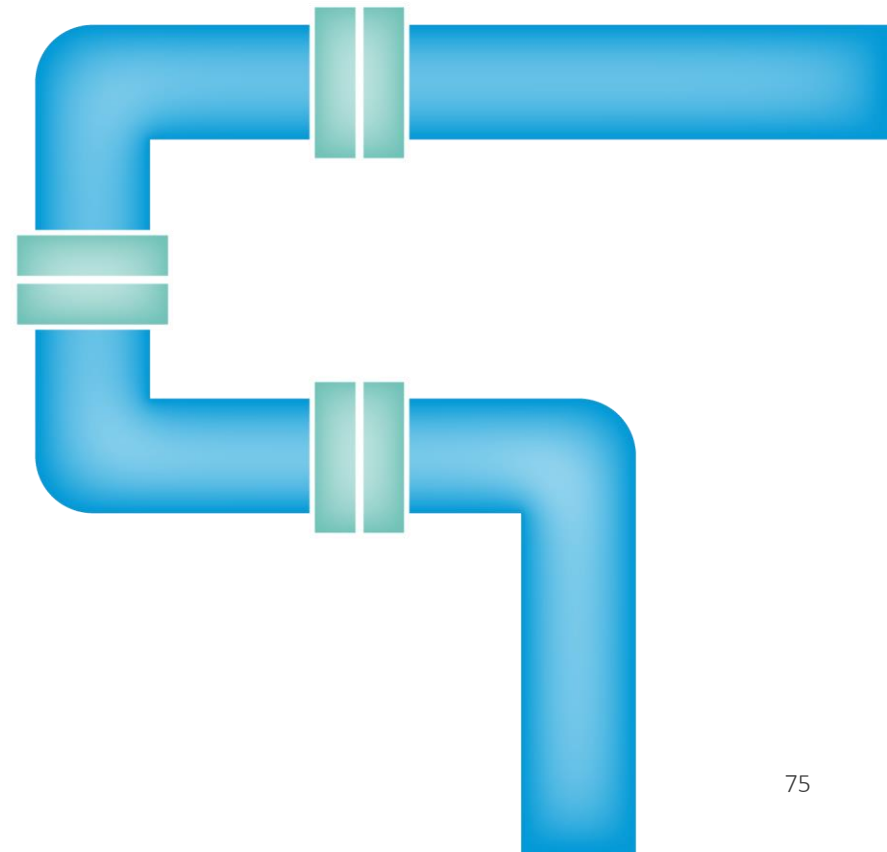


Levels of perceived affordability are consistent across household customers, regardless of research methodology

Phase 2 – Proposed Plan – Uninformed Affordability (Net: Very/Somewhat Affordable)

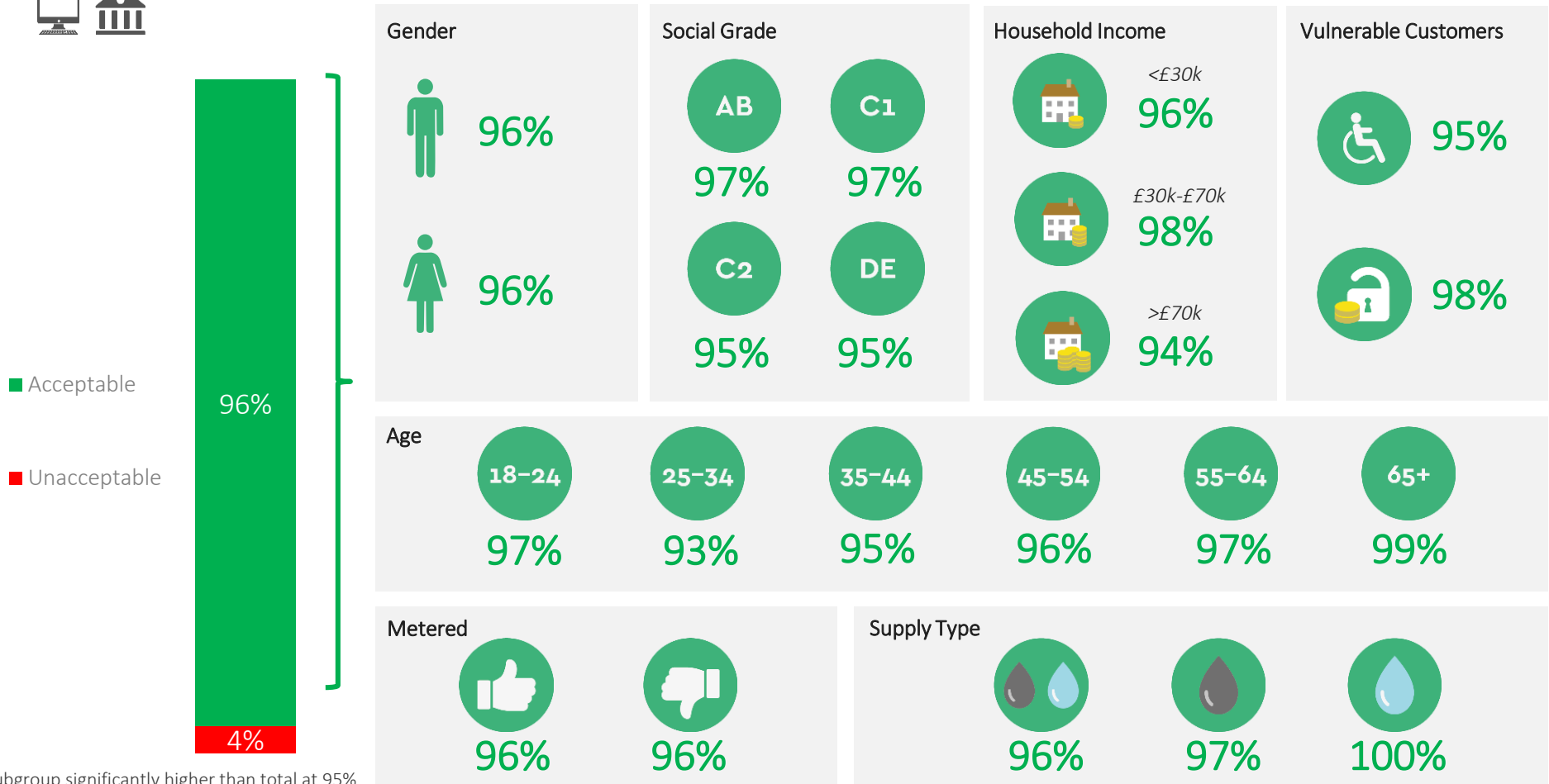


Informed response to the plan (Acceptability): Subgroup analysis



Acceptability of the proposed plan following education is very high across all types of customer

Phase 2 – Proposed Plan – Informed Acceptability (Net: Very/Somewhat Acceptable)

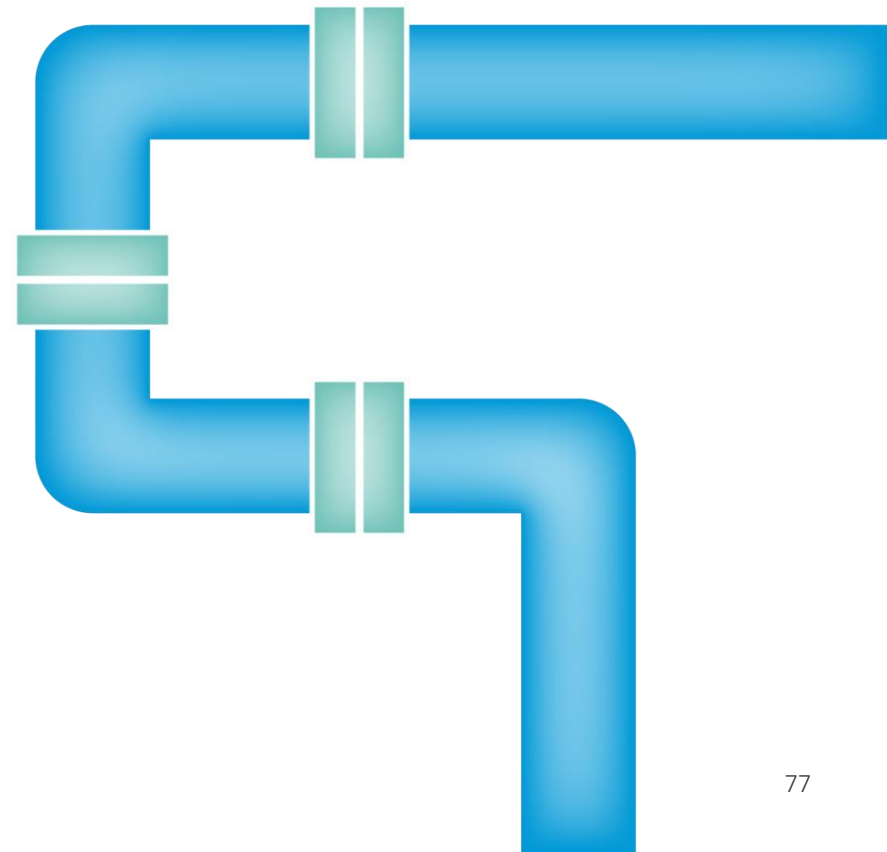


↑ Subgroup significantly higher than total at 95%
 ↓ Subgroup significantly lower than total at 95%

Q11: How acceptable or unacceptable do you consider Wessex Water's proposed plan to be for you?

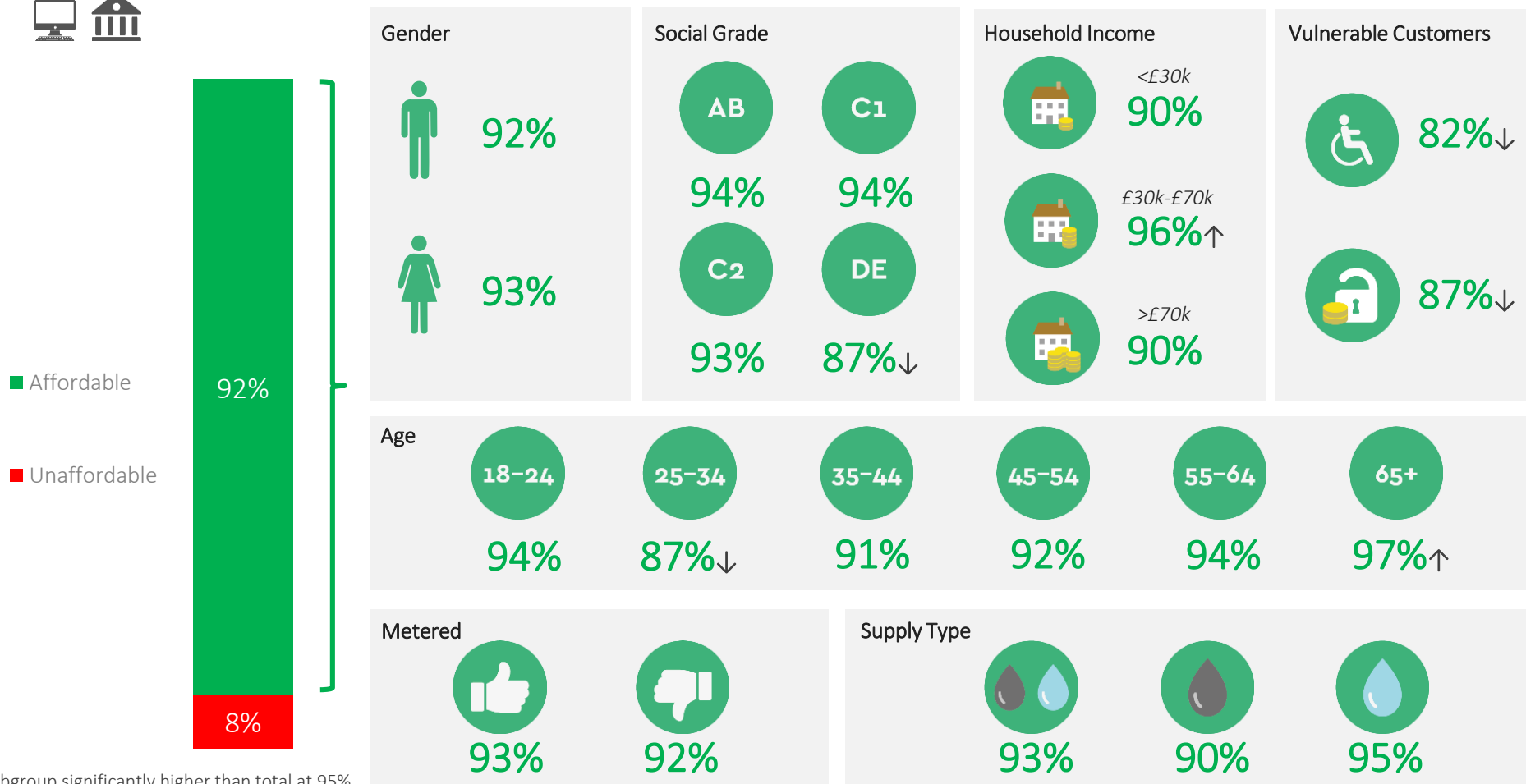
Base: Household bill payers (1,098), Male (450), Female (648), 18-24 (100), 25-34 (210), 35-44 (180), 45-54 (188), 55-64 (203), 65+ (217), AB (372), C1 (253), C2 (153), DE (317), <£30k (535), £30k-£70k (351), >£70k (61), Personal disability (130), Financially vulnerable (143), Metered (591), Unmetered (435), Dual Supply (925), Sewerage only (136), Supply only (37)

Informed response to the plan (Affordability): Subgroup analysis



Perceived affordability is high across all customer types, although it is slightly lower among vulnerable customers

Phase 2 – Proposed Plan – Informed Affordability (Net: Very/Somewhat Affordable)

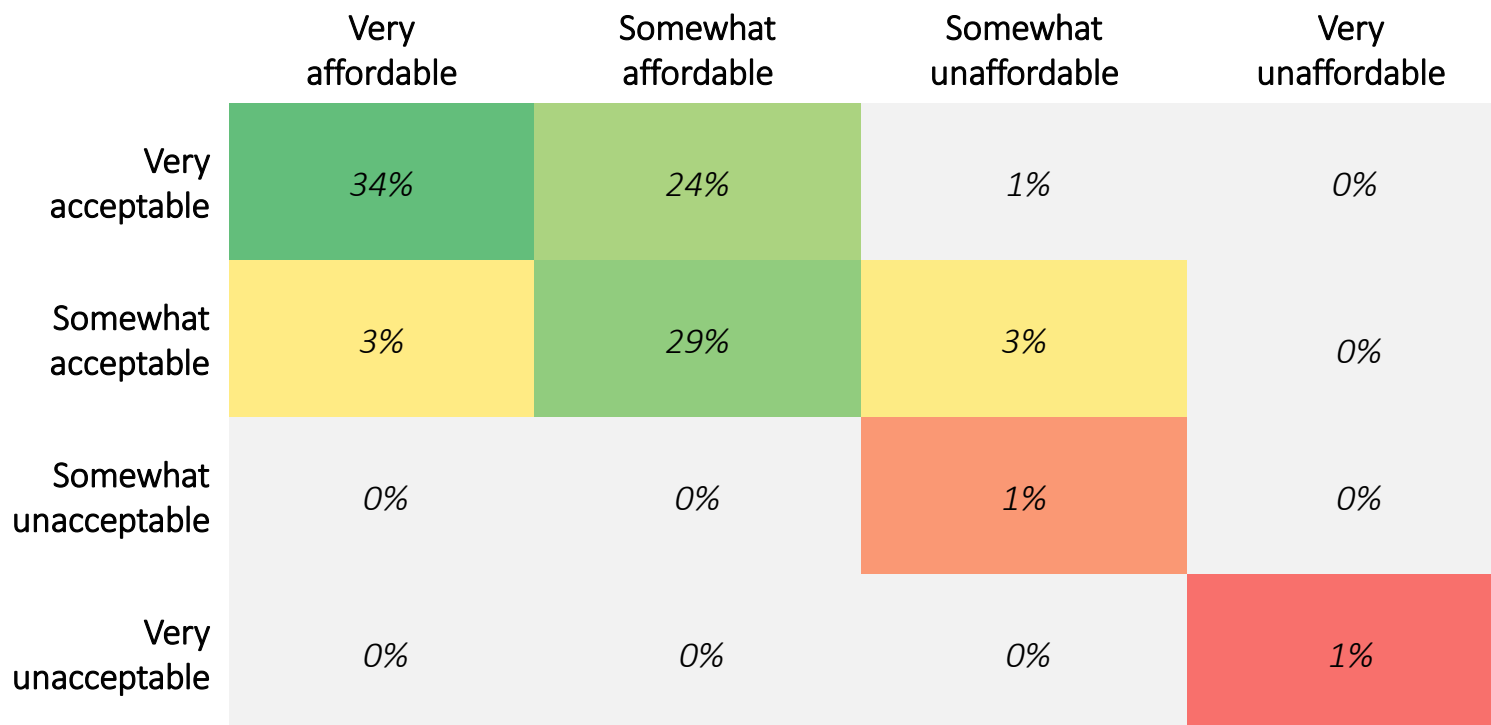


↑ Subgroup significantly higher than total at 95%
 ↓ Subgroup significantly lower than total at 95%

Q13: How affordable or unaffordable do you consider Wessex Water's proposed plan to be for you?
 Base: Household bill payers (1,098), Male (450), Female (648), 18-24 (100), 25-34 (210), 35-44 (180), 45-54 (188), 55-64 (203), 65+ (217), AB (372), C1 (253), C2 (153), DE (317), <£30k (535), £30k-£70k (351), >£70k (61), Personal disability (130), Financially vulnerable (143), Metered (591), Unmetered (435), Dual Supply (925), Sewerage only (136), Supply only (37)

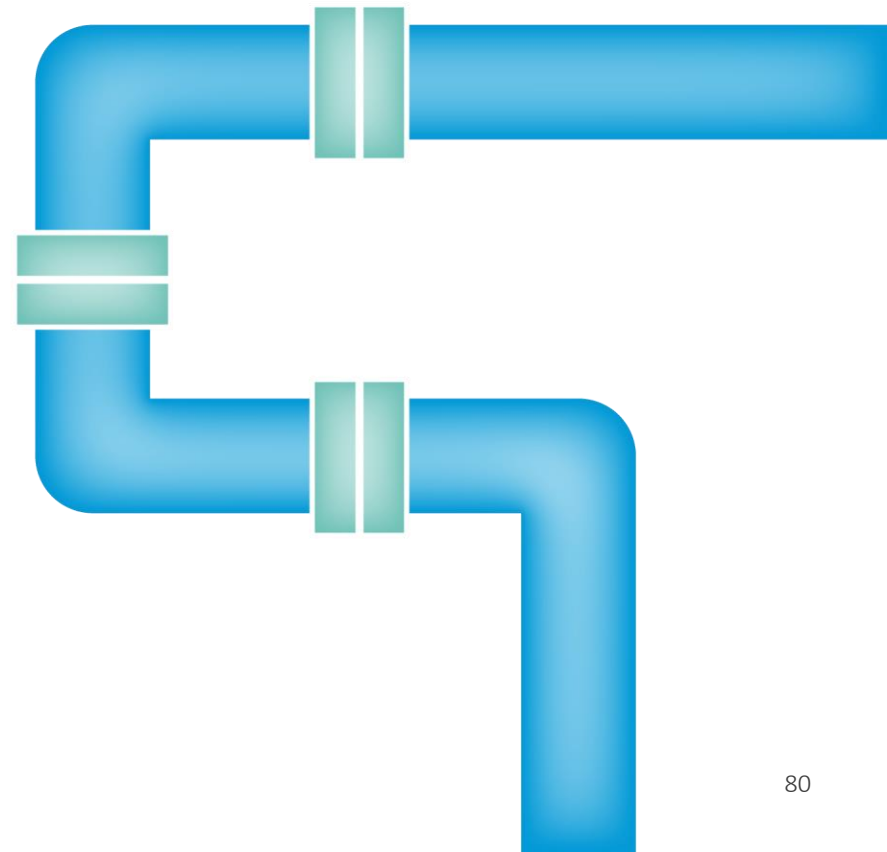
Perceived affordability and acceptability are interlinked – if a customer finds the plan affordable, they will likely find it acceptable (and vice versa)

Phase 2 – Proposed Plan – Informed Acceptability and Affordability



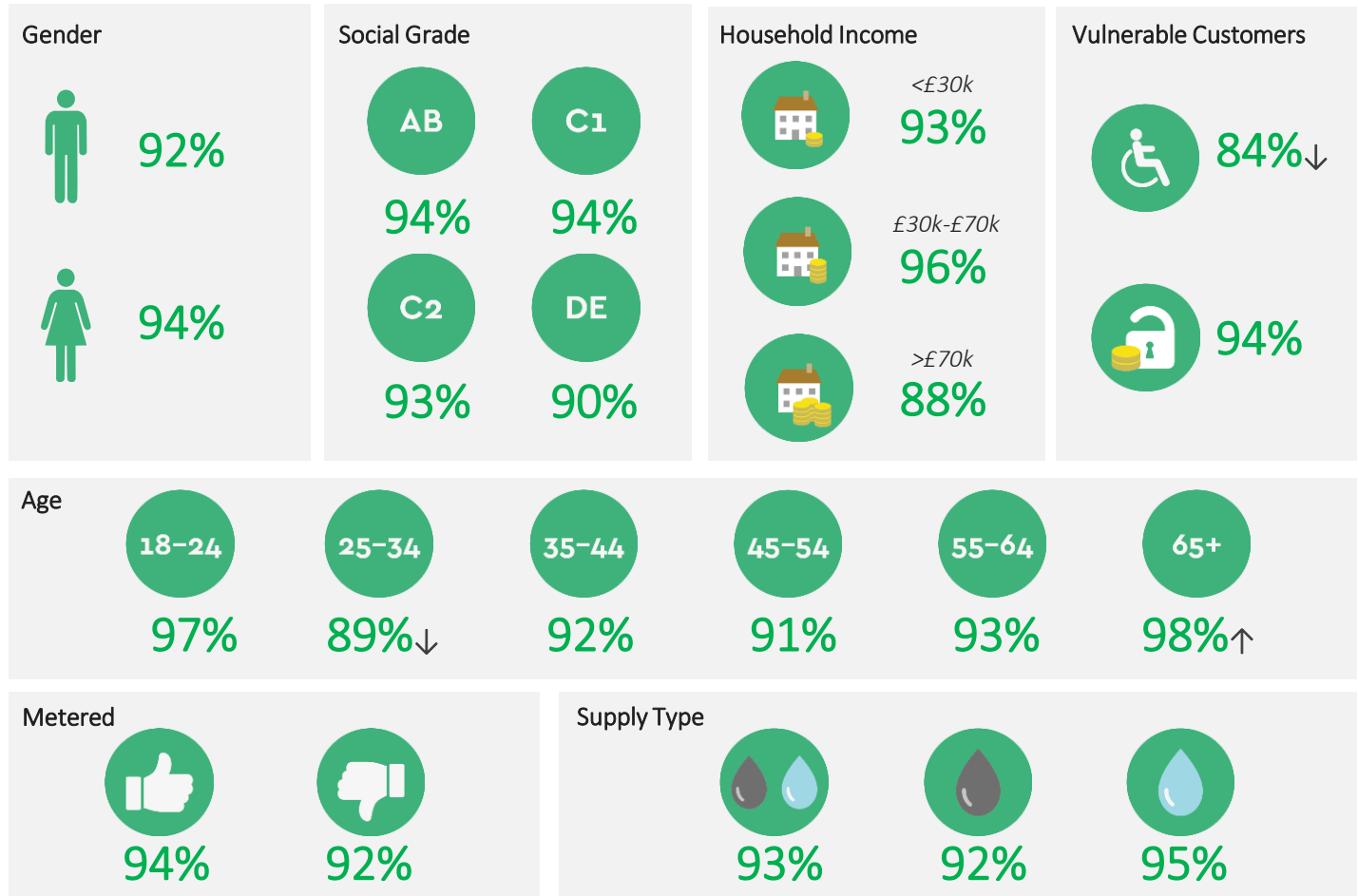
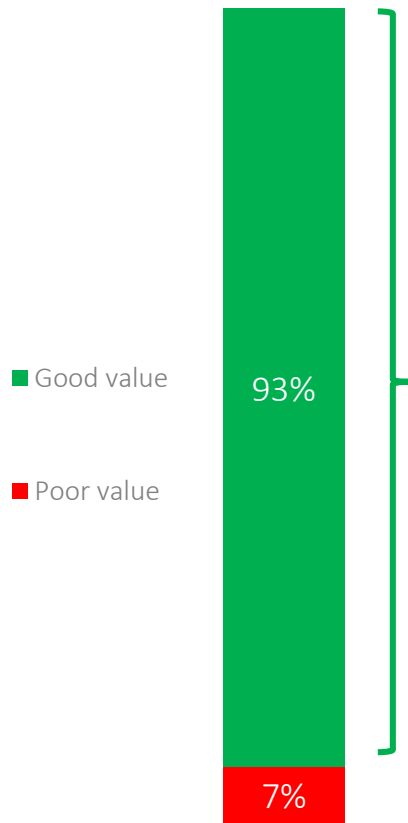
Response to the plan (Value for money): Subgroup analysis

Value for money was only asked of respondents once they had been introduced to each area of Wessex Water's proposed plan in detail.



Customers generally think the plan offers good value for money

Phase 2 – Proposed Plan – Informed Value for Money (Net: Very Good/Good)



↑ Subgroup significantly higher than total at 95%
 ↓ Subgroup significantly lower than total at 95%

Q15: How would you rate Wessex Water's proposed plan in terms of value for money?

Base: Household bill payers (1,098), Male (450), Female (648), 18-24 (100), 25-34 (210), 35-44 (180), 45-54 (188), 55-64 (203), 65+ (217), AB (372), C1 (253), C2 (153), DE (317), <£30k (535), £30k-£70k (351), >£70k (61), Personal disability (130), Financially vulnerable (143), Metered (591), Unmetered (435), Dual Supply (925), Sewerage only (136), Supply only (37)

Perceived affordability and value are also interlinked – if a customer finds the plan affordable, they will likely find it good value (and vice versa)

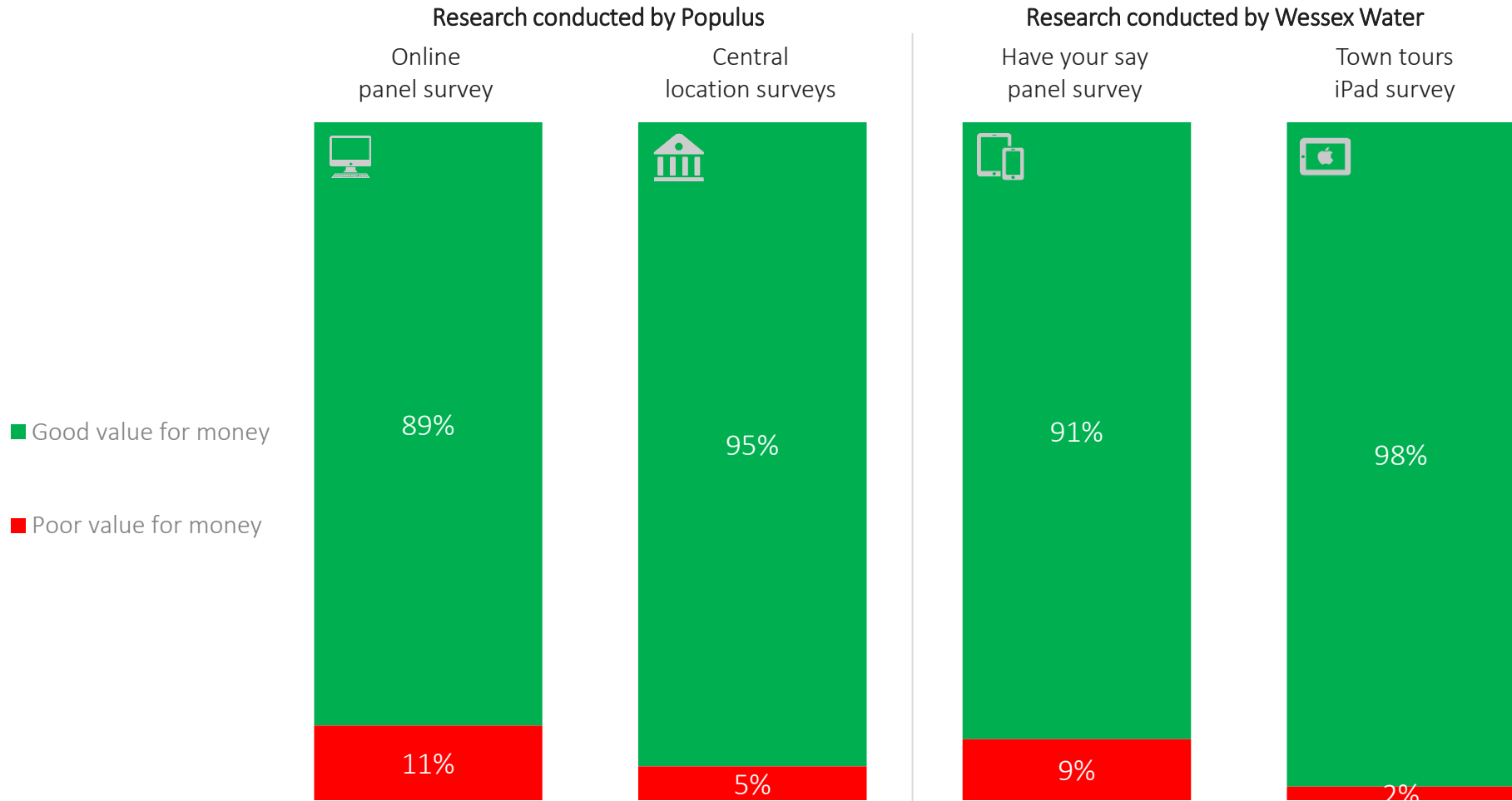
Phase 2 – Proposed Plan – Informed Affordability and Value for Money



	Very good value	Good value	Poor value	Very poor value
Very affordable	24%	13%	0%	0%
Somewhat affordable	6%	42%	2%	0%
Somewhat unaffordable	0%	2%	2%	0%
Very unaffordable	0%	0%	1%	1%

Value perceptions are consistent across household customers, regardless of research methodology

Phase 2 – Proposed Plan – Informed Value for Money (Net: Very Good/Good)



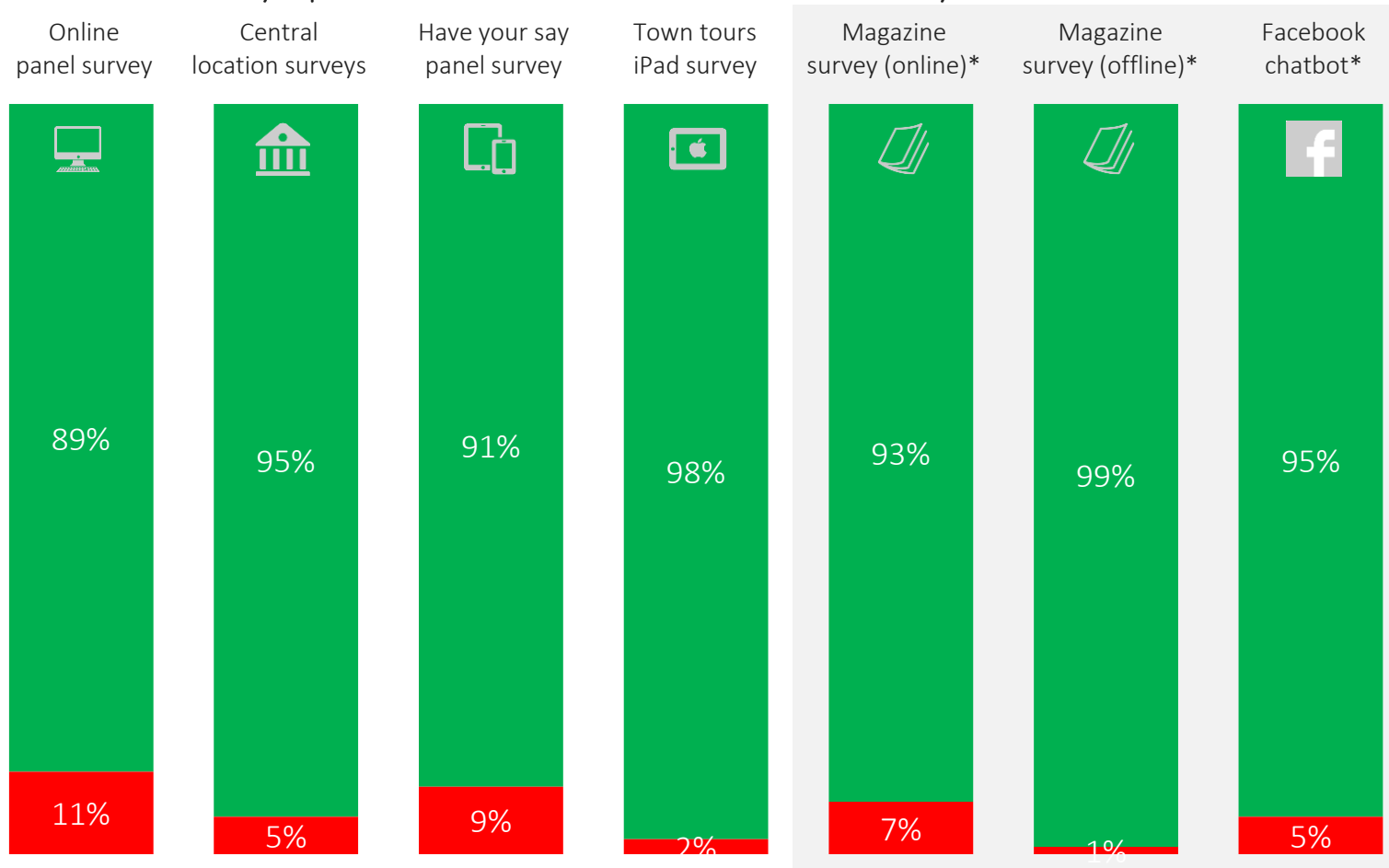
Value perceptions are consistent across household customers, regardless of research methodology

Phase 2 – Proposed Plan – Informed Value for Money (Net: Very Good/Good)

Research conducted by Populus

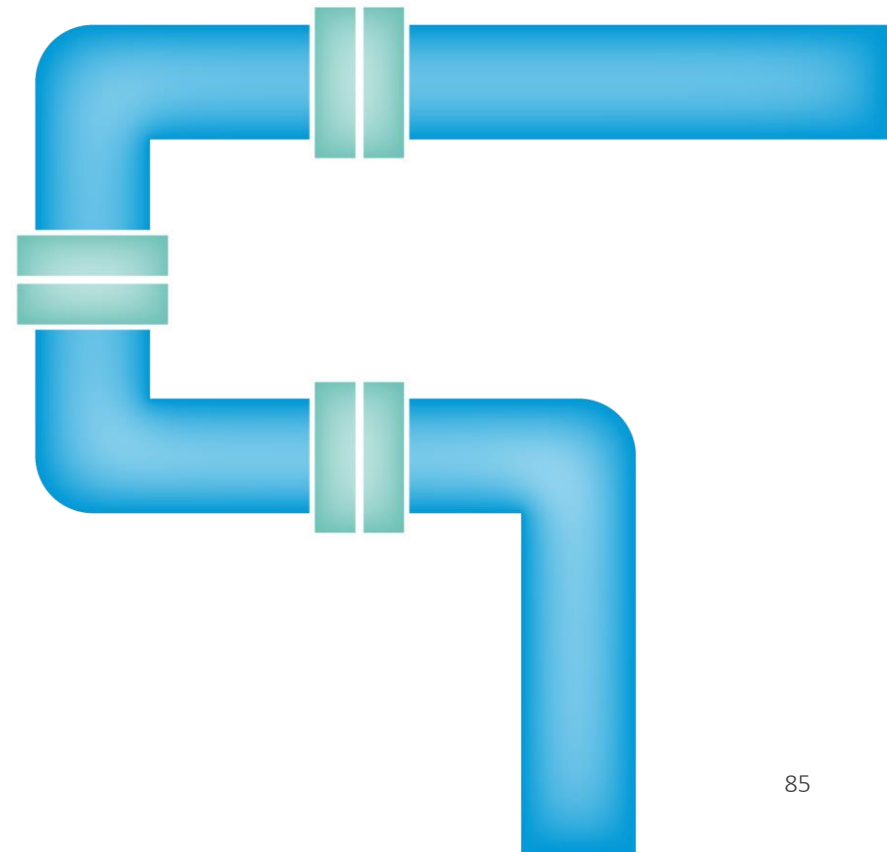
Research conducted by Wessex Water

- Good value for money
'Yes, I think it offers value for money' in online magazine, offline magazine, and Facebook chat
- Poor value for money
'No, I don't think it offers value for money' in online magazine, offline magazine, and Facebook chat



*Data within grey box not directly comparable with other methodologies due to variations in question wording
 Q15: How would you rate Wessex Water's proposed plan in terms of value for money? Base: Online panel survey (307), CLT (791), Have your say panel (760), Town tours iPad survey (202), Online magazine survey (887), Offline magazine survey (1,241), Facebook chatbot (316)

Response to each area of the plan



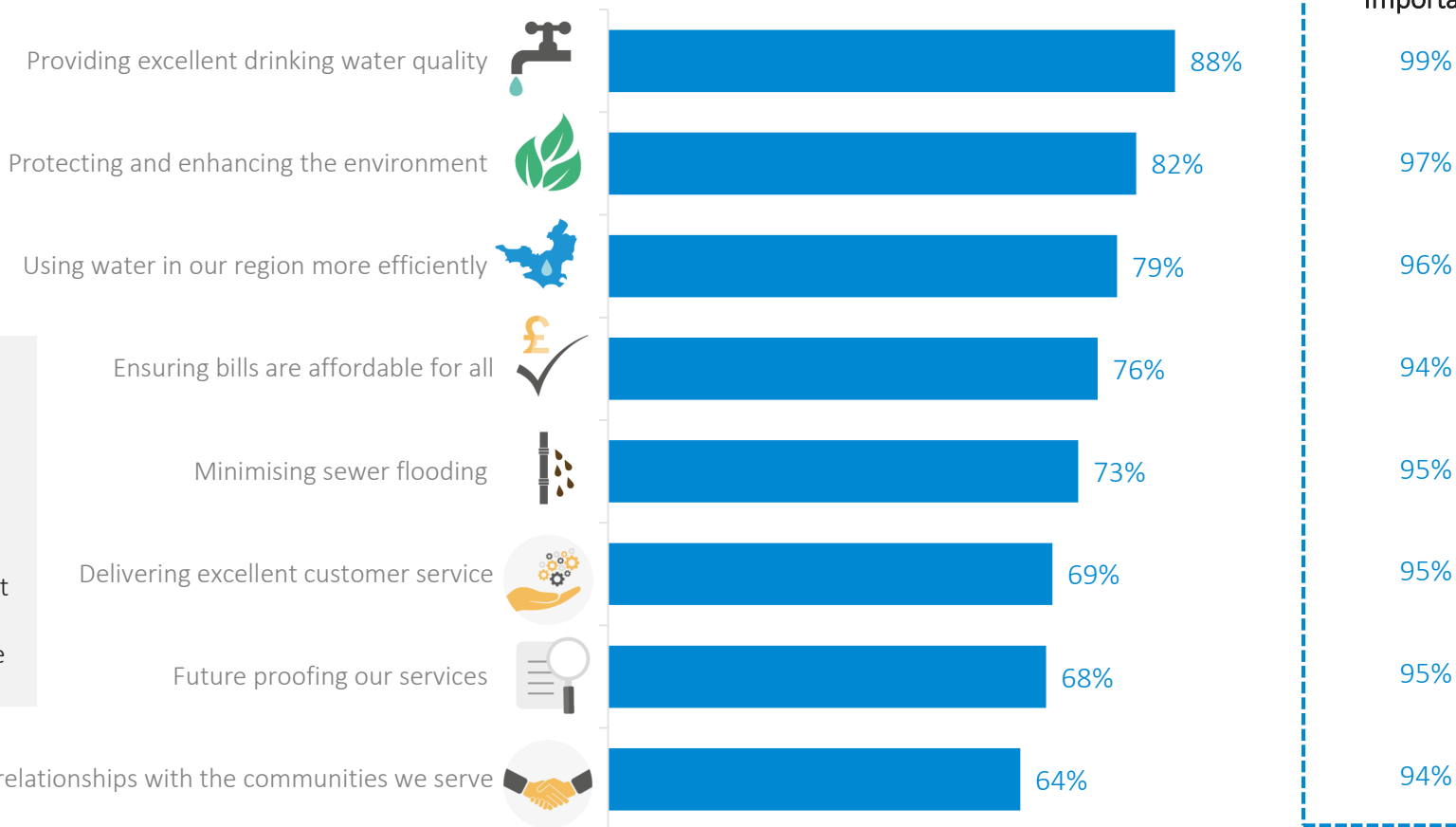
Household customers think providing excellent drinking water, protecting/enhancing the environment, and using water efficiently are *most* important

Phase 2 – Importance of each area

How important is this area to you? (Very important)



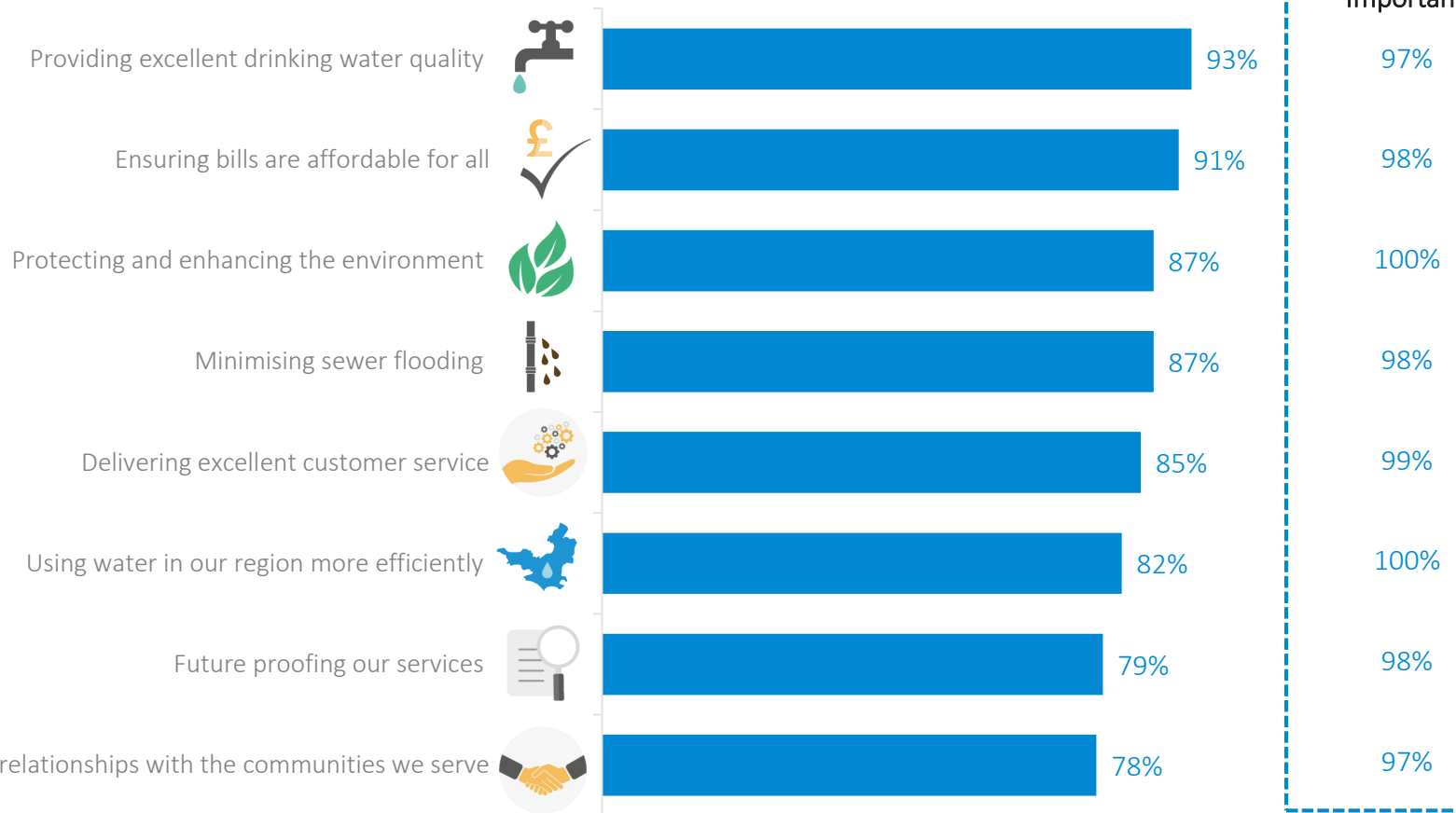
The majority of customers think all areas of the plan are 'very or quite important'. Throughout this section we will therefore only report 'very important' as there is slightly more differentiation.



Business customers think providing excellent drinking water and ensuring bills are affordable for all are *most* important

Phase 1 – Importance of each area

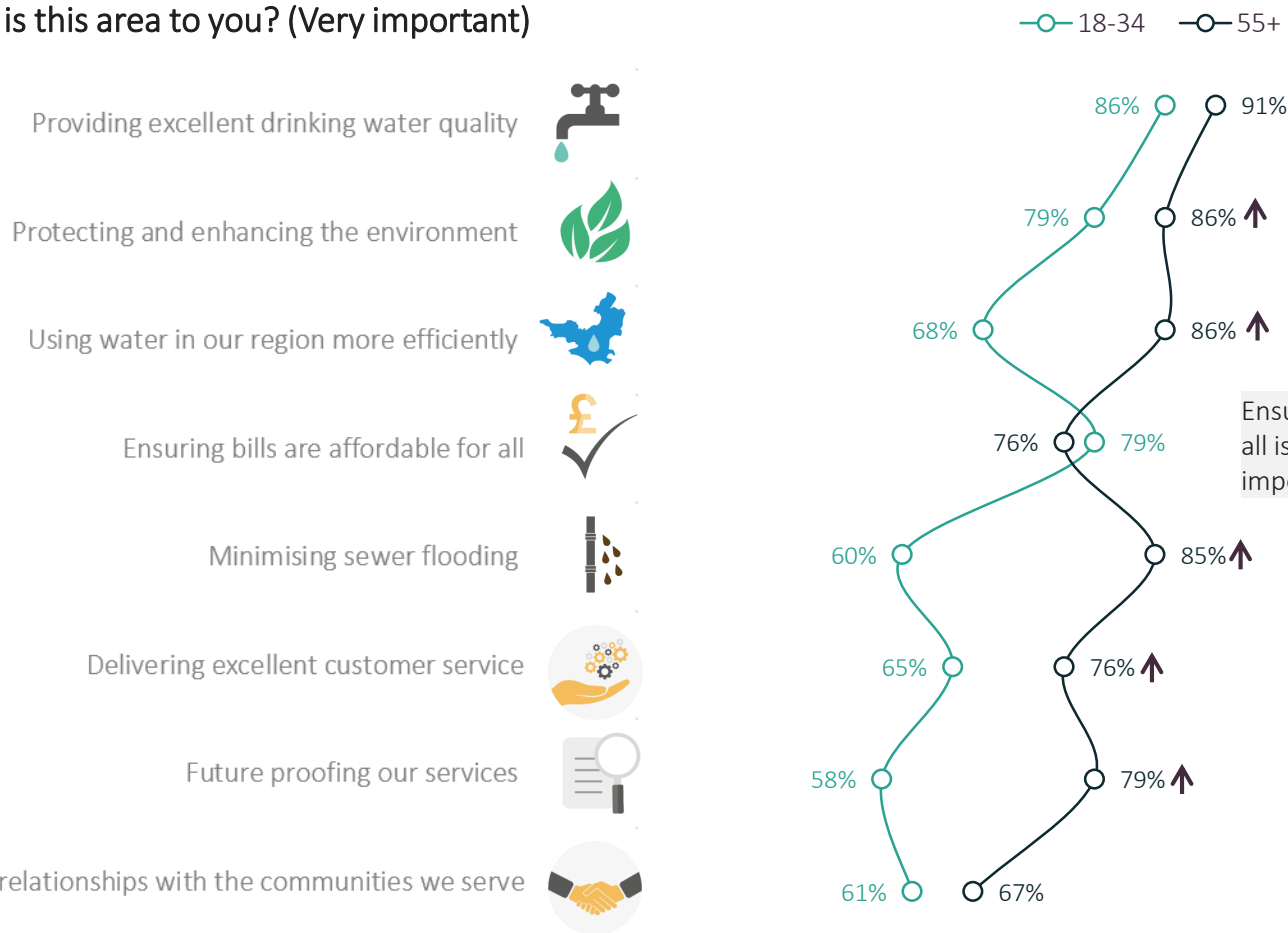
How important is this area to you? (Very important)



Older customers find most areas of the plan more important than younger customers

Phase 2 – Importance of each area

How important is this area to you? (Very important)



Ensuring bills are affordable for all is the only area of similar importance to all age groups

↑ Subgroup significantly higher than other subgroup at 95% confidence

Younger customers are less likely to be involved in the local community, such as reporting overflowing drains or leaking pipes

Phase 1 – Involvement in local community



	18-34	55+
NET: Any	64%	78%
I often pick up litter near where I live	34%	49%
I report overflowing drains or leaking pipes in my neighbourhood	19%	38%
I choose to use or recommend companies because they do things for the local community, like sponsoring a local team or donating to a local charity	25%	25%
I'm a member of an online group (like Facebook) for people living in my area	24%	17%
I volunteer for a local organisation or a local charity	11%	27%
I'm a member of a local action group like Neighbourhood Watch, Floodwatch, a conservation group, or the Parish Council	4%	11%
None of these	36%	22%

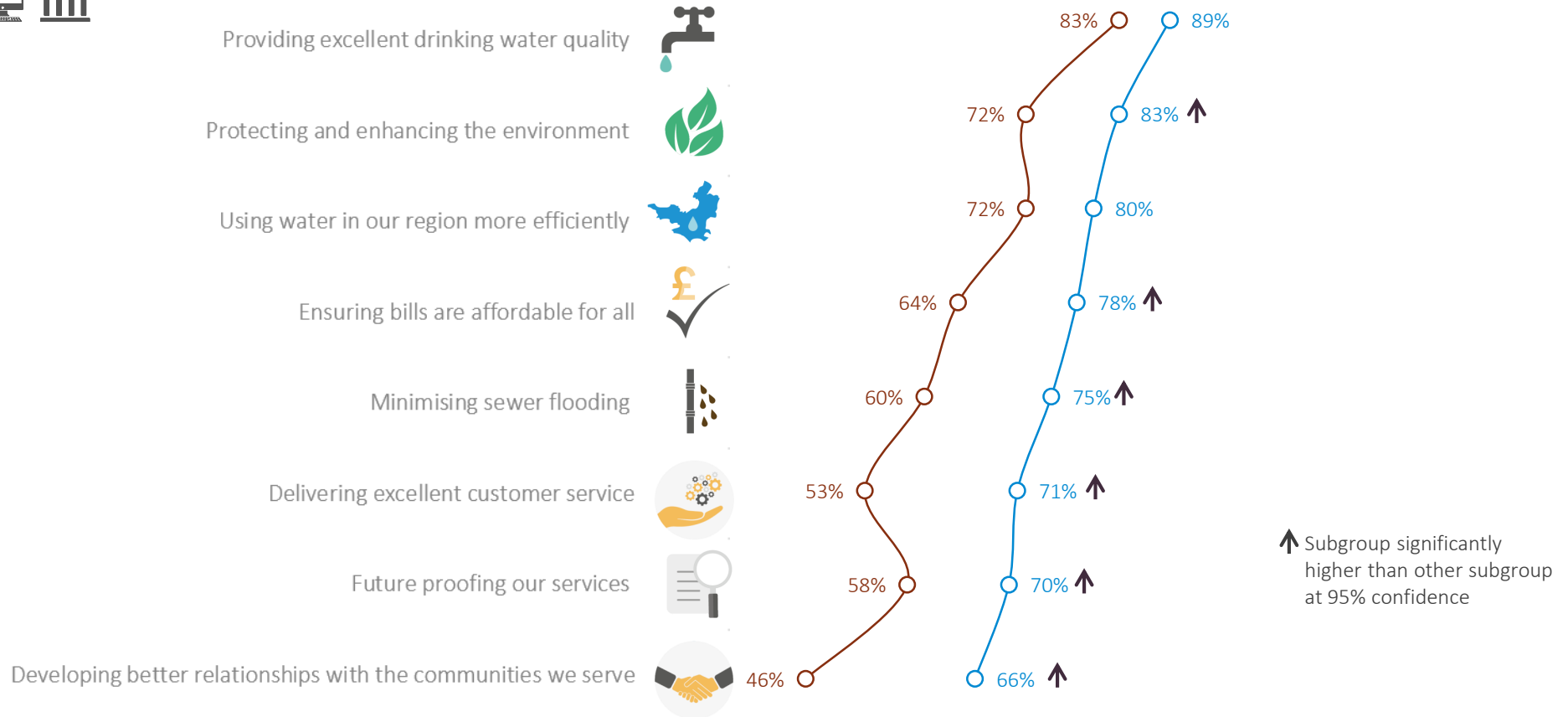
Dual supply customer find all eight areas of the plan more important than sewerage only customers

Phase 2 – Importance of each area

How important is this area to you? (Very important)



○ Sewerage Only ○ Dual Supply




Delivering excellent drinking water is important for all key customer types, although slightly less important for sewerage only customers

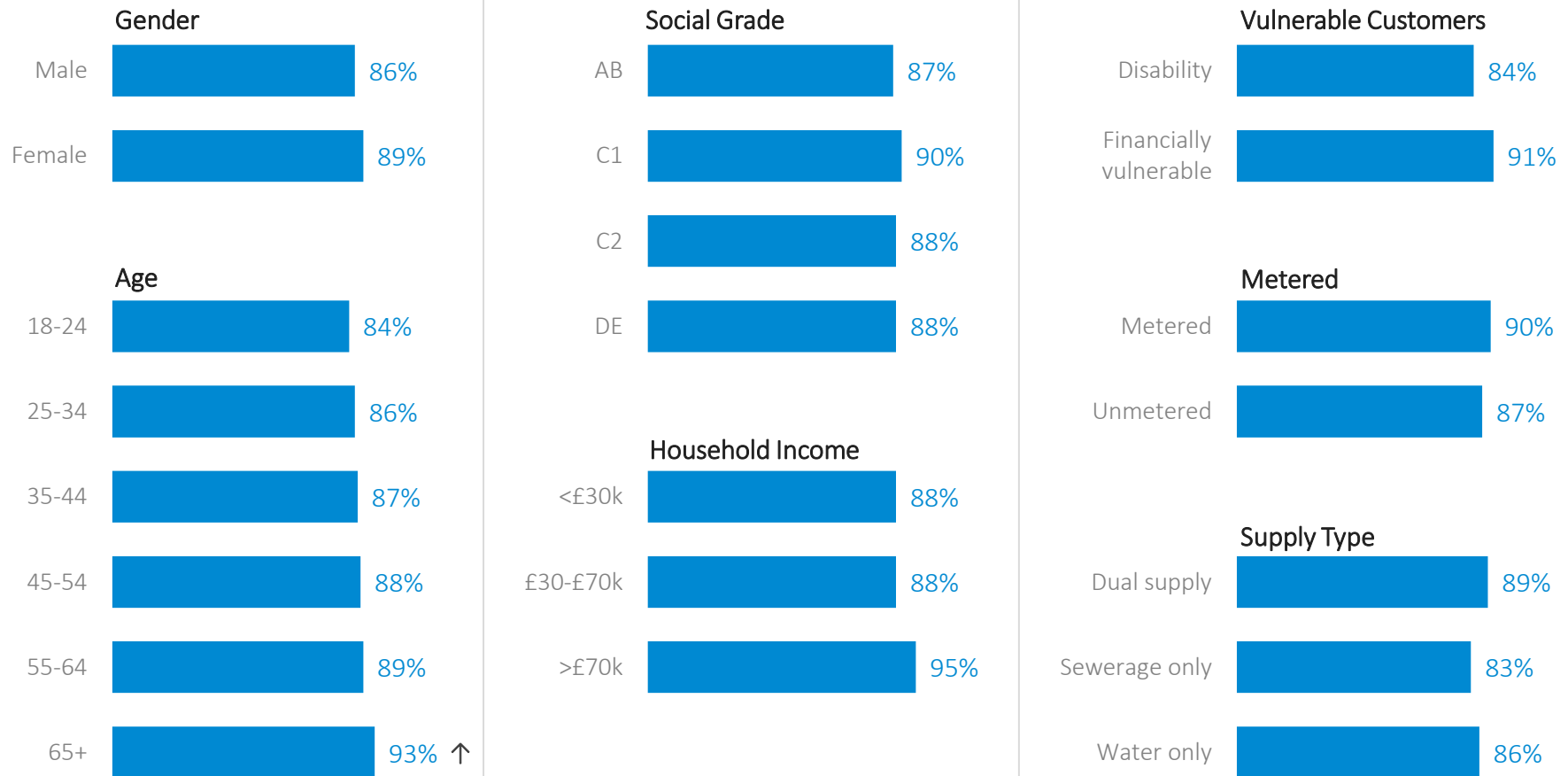


Total: 88%

Phase 2 – Deep dive – Providing excellent drinking water quality

How important is this area to you? (Very important)  

↑ Subgroup significantly higher than total at 95% confidence
↓ Subgroup significantly lower than total at 95% confidence



Customers appreciate Wessex Water's approach to providing excellent drinking water, particularly the focus on lead pipes



Phase 2 – Deep dive – Providing excellent drinking water quality



"I did not think there were any lead pipes still in the network so a priority on this is needed"

38%



Ecstatic

42%



Happy

13%



Relaxed

5%



Indifferent

1%



Tired

1%



Stressed

0%



Frustrated

"Cheaper, higher quality water in the long term is good for everyone and if it's also done more efficiently then we as a population get better value for the money"

Delivering excellent drinking water is basic but critical. Water hardness was flagged by some customers, while stakeholders are generally satisfied with the plan



Phase 1 – Deep dive – Providing excellent drinking water quality

Household Customer Reactions (Engagement Events)



- ✓ Majority happy with the current quality of their drinking water
- ✓ Felt positive about Wessex Water working with farmers and other land users
- ✓ Some were shocked that lead pipes still exist, but they appreciate Wessex Water's efforts to reduce this
- ? Some felt that promoting the use of approved plumbers is a positive step, but will be hard to enforce
- ? Others questioned how water quality is measured by the Chief inspector (e.g. safety, drinking experience)
- ? A minority expected Wessex Water to mention reducing water hardness

Stakeholder Reactions




- ✓ Stakeholders agree that water quality is fundamental
- ✓ They also feel it is hard to make major improvements as standards are very high
- ✓ Felt it is a win-win to work with farmers as they are regulated by same bodies (e.g. Environmental Agency) and will welcome sympathetic partnership vs being told what to do
- ? One stakeholder felt the lead replacement commitment should be/specify customer side not just Wessex Water's network
- ? One stakeholder made a link with leakage (he believed that leakage is an under-reported cause of fresh water contamination)

Protecting and enhancing the environment is seen as very important by all key customer types, although this decreases slightly among those with a personal disability or sewerage only supply

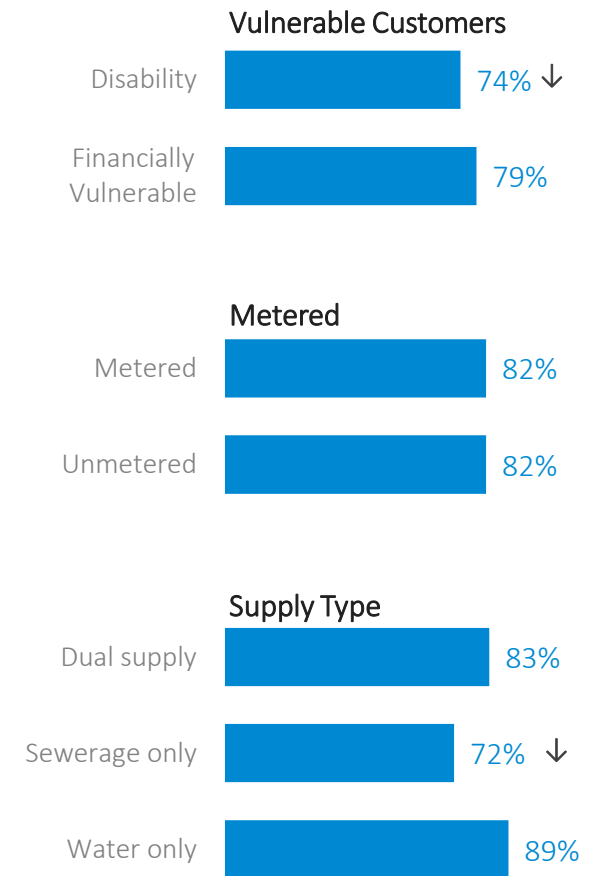
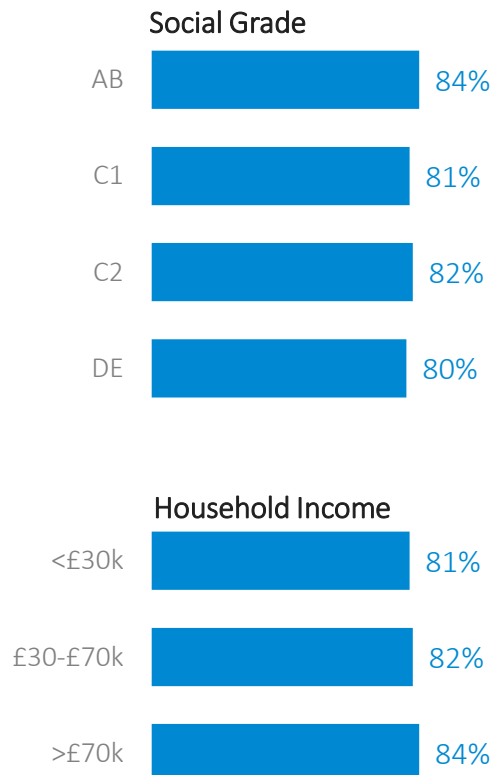
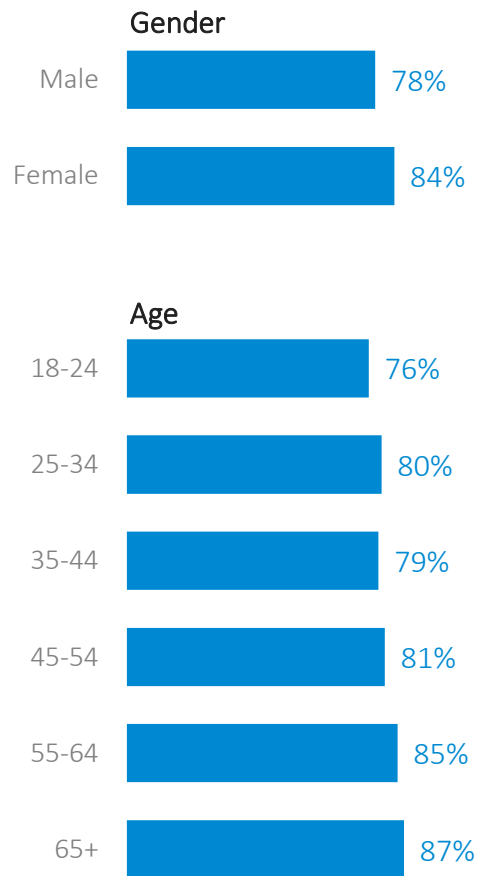


Total: 82%

Phase 2 – Deep dive – Protecting and enhancing the environment

How important is this area to you? (Very important)  

↑ Subgroup significantly higher than total at 95% confidence
↓ Subgroup significantly lower than total at 95% confidence





Most customers are ecstatic or happy with Wessex Water’s focus on the environment and the proposed approach

Phase 2 – Deep dive – Protecting and enhancing the environment



“It will improve all the areas that people are most worried about. i.e. where water comes from and the impact it has on the environment”

39%



Ecstatic

39%



Happy

13%



Relaxed

5%



Indifferent

2%



Tired

1%



Stressed

1%



Frustrated

“I am very passionate about the environment, so big thumbs up to any company doing extra to help the environment”

Customers value the environment and like the list of actions Wessex Water propose. Stakeholders are a little more sceptical about how new this is



Phase 1 – Deep dive – Protecting and enhancing the environment

Household Customer Reactions (Engagement Events)



- ✓ Impressed to see how well Wessex Water perform on pollution incidents
- ✓ Customers very positive about the proposed plan
- ✓ Clear that Wessex Water want to positively impact environment, and many surprised at how much Wessex Water is prepared to do to make it a reality
- ? Being environmentally responsible is a common aim for companies, so it is hard for Wessex Water to 'overachieve'
- ? Impressed but general view is that more can always be done
- ? Most customers had not considered Wessex Water environmental impact before and think more should be done to communicate improvement efforts

Stakeholder Reactions



- ✓ Stakeholders from all backgrounds believe environmental protection should be front and centre of Wessex Water's activities
- ? But several felt that this programme was more business-as-usual than new commitments (i.e. what water companies already have to do)
- ? A number would like to see specifics before being unreservedly positive:
 - ? How will Wessex Water deliver the proposals
 - ? How will the measures help the environment
- ? Some wanted to see a link made between leakage and environmental protection

Using water more efficiently is seen as less important by sewerage only customers, younger customers and those with a personal disability than other subgroups

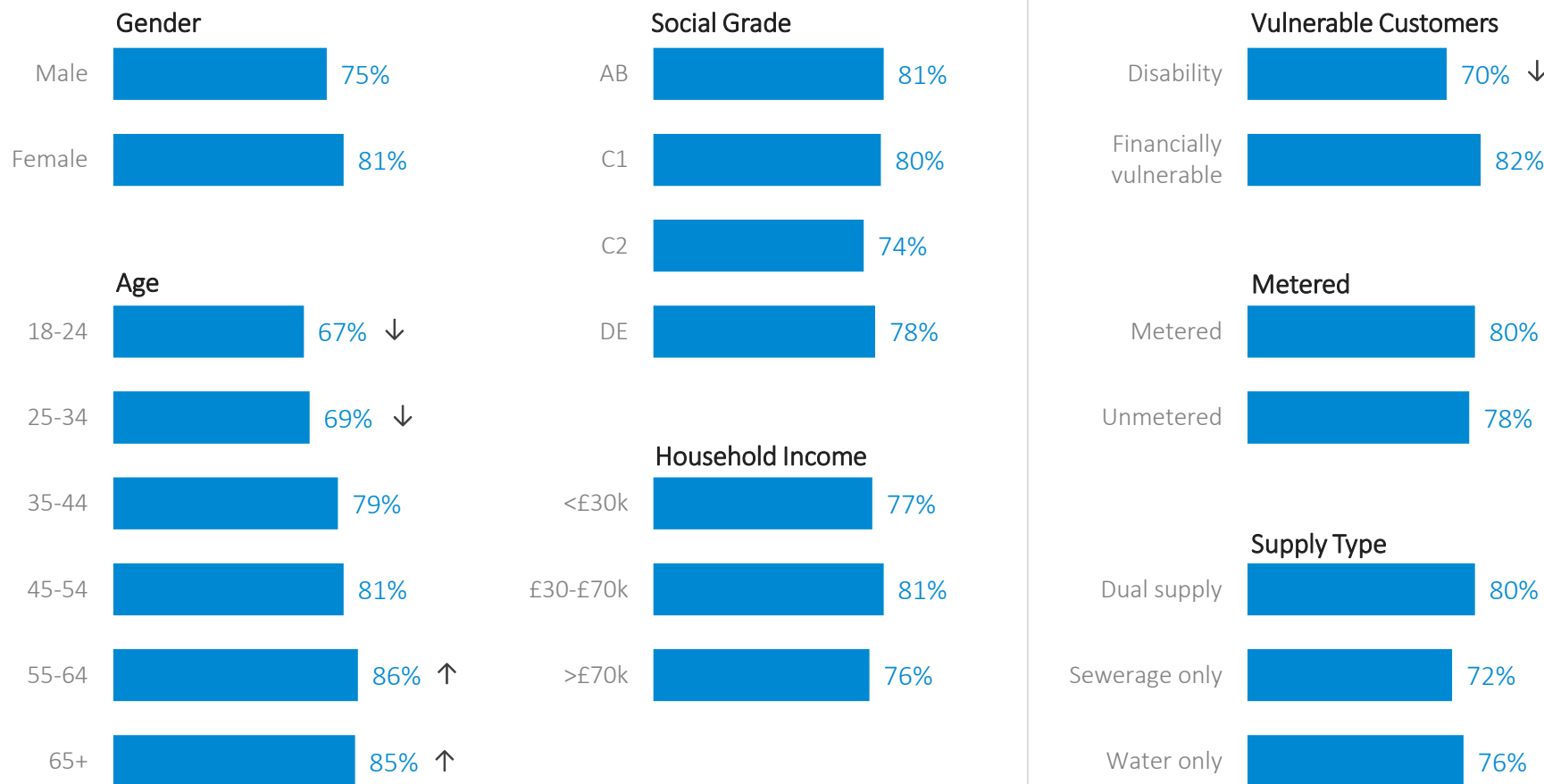


Total: 79%

Phase 2 – Deep dive – Using water in our region more efficiently

How important is this area to you? (Very important)  

↑ Subgroup significantly higher than total at 95% confidence
↓ Subgroup significantly lower than total at 95% confidence





Customers like Wessex Water's approach to improving efficiency

Phase 2 – Deep dive – Using water in our region more efficiently



29%



Ecstatic

47%



Happy

12%



Relaxed

6%



Indifferent

4%



Tired

2%



Stressed

0%



Frustrated

"It is good that at the first sign of a warm summer you are not planning to introduce a hose pipe ban. You are committed to providing an efficient service to when there is a leak, sewerage or water"

Customers intuitively feel that leakage needs to be reduced, but understand the challenges Wessex Water faces



Phase 1 – Deep dive – Using water in our region more efficiently

Household Customer Reactions (Engagement Events)



- ✓ Rationally understood that it would cost more to reduce leakage than the cost of processing water
- ✓ Appreciate that Wessex Water is trying to do more, even if it makes sense financially to do less
- ✓ Felt an increase of £8 to further reduce leakage was acceptable

- ? Struggle to balance how any amount of leakage could be justified
- ? Ideally would like leakage to be much lower than 20%, but most unsure of what would be required to achieve this

Stakeholder Reactions



- ✓ Stakeholders with an environmental role understand the issues surrounding leakage and understand water companies' position
- ✓ Most accept highlighting the link between leakage and reduced usage
- ✓ Most also accept that much progress has been made

- ? Some felt there were more hidden costs/issues associated with leakage (e.g. contamination of fresh water supply, pressure reduction causing problems for businesses)
- ? A minority reject the Economic Level of Leakage argument

Leakage = most contentious area of the plan

Ensuring bills remain affordable for all is particularly important for vulnerable customers and those with a lower household income

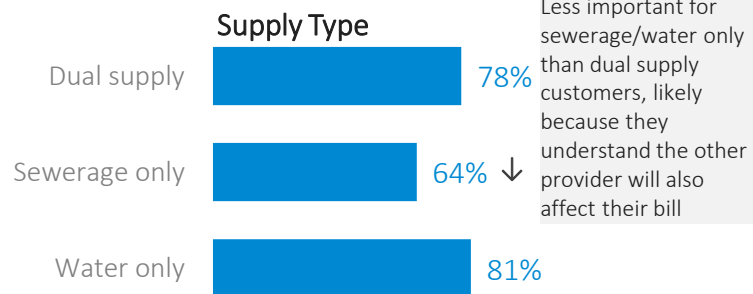
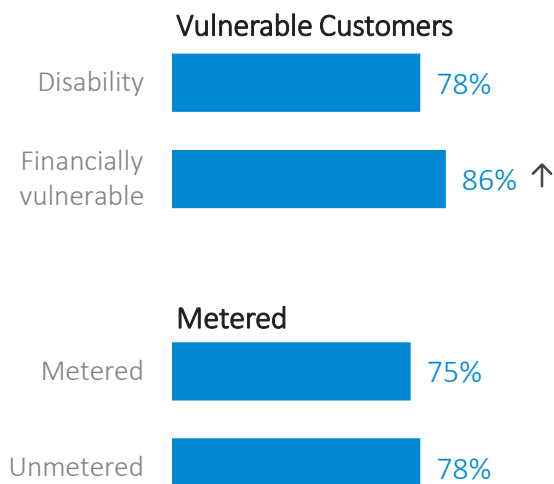
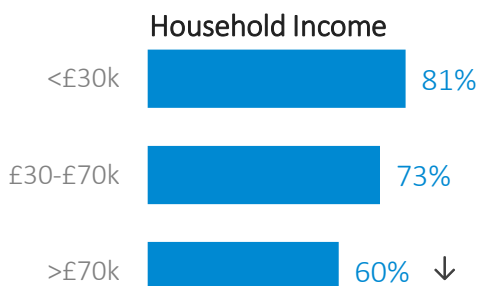
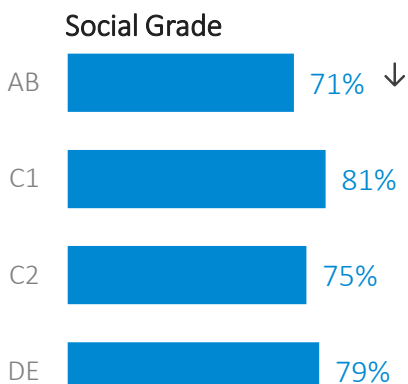
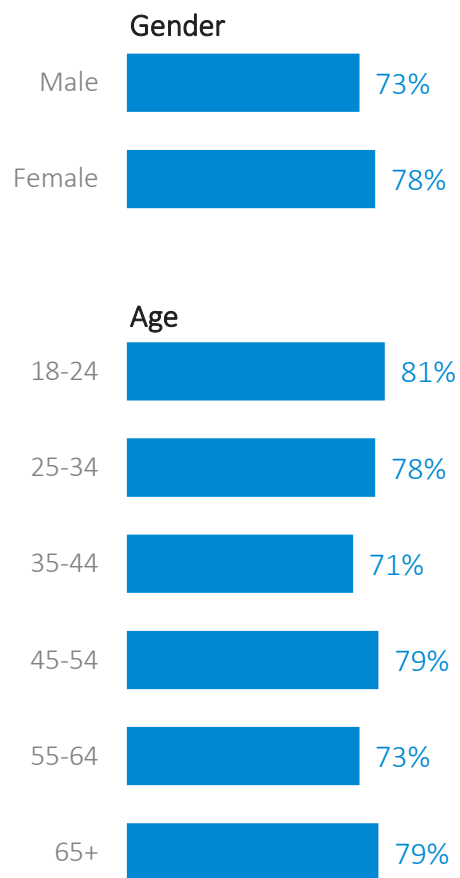


Total: 76%

Phase 2 – Deep dive – Ensuring bills are affordable for all

How important is this area to you? (Very important)  

↑ Subgroup significantly higher than total at 95% confidence
 ↓ Subgroup significantly lower than total at 95% confidence



Less important for sewerage/water only than dual supply customers, likely because they understand the other provider will also affect their bill



Most customers are happy with Wessex Water's proposed approach. A small minority are frustrated with the approach

Phase 2 – Deep dive – Ensuring bills are affordable for all



30%



Ecstatic

41%



Happy

14%



Relaxed

9%



Indifferent

3%



Tired

2%



Stressed

1%



Frustrated

"I like how you are focusing on helping customers that cannot afford it."

"I don't really agree with giving discounts to pensioners who only have the state pension as their only income. It penalises people who made sacrifices and saved money to ensure they have more money to live on when they retire"

A small minority of customers did not want to “subsidise” people struggling with bills. Most (including all stakeholders) agree this is a good thing to do

Phase 1 – Deep dive – Ensuring bills are affordable for all

Household Customer Reactions (Engagement Events)

- ✓ Majority happy that Wessex Water supports and will continue to support its most vulnerable customers
- ✓ Most unaware of current schemes. They felt Wessex Water should communicate its work in this area more as it would enhance brand perceptions
- ? Small minority unhappy that they may have to subsidise others
- ? Some felt that proactively identifying customers could be controversial as some eligible for the scheme may not self-classify as needing extra support

Stakeholder Reactions

- ✓ Stakeholders are reasonably unanimous in endorsing any improvement in provision for struggling customers (including those stakeholders with other professional interests)
- ✓ The proposed increase in provision is significant
- ✓ Empowering people to use less is also a good thing and a more holistic approach
- ✓ Working with partners was also endorsed as an effective way to reach customers in need
- ? A minority of stakeholders felt that the specific provision featured was “standard” even if the target was aspirational
- ? Some stakeholders felt that vulnerability should be holistic rather than splitting financial and situational/Priority Services Register as they overlap

Minimising sewer flooding is important for all key subgroups, though slightly less important for younger customers and sewerage only customers



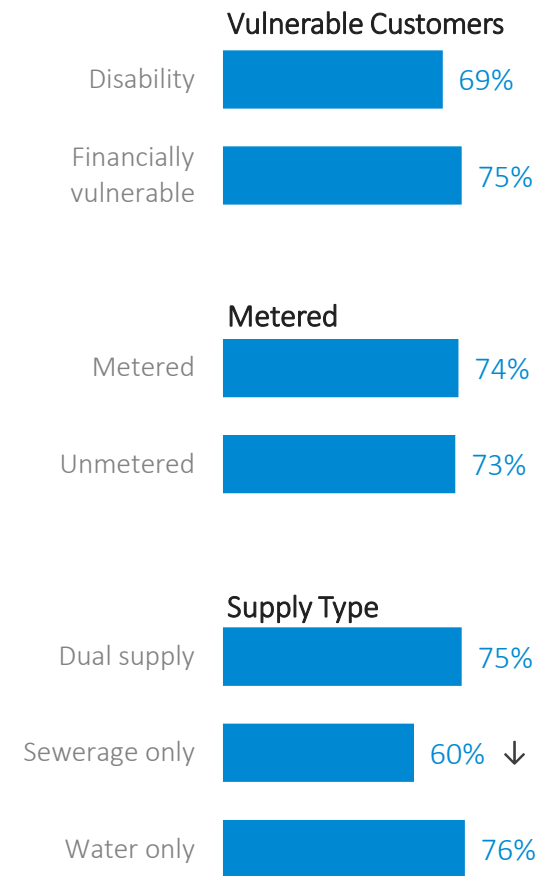
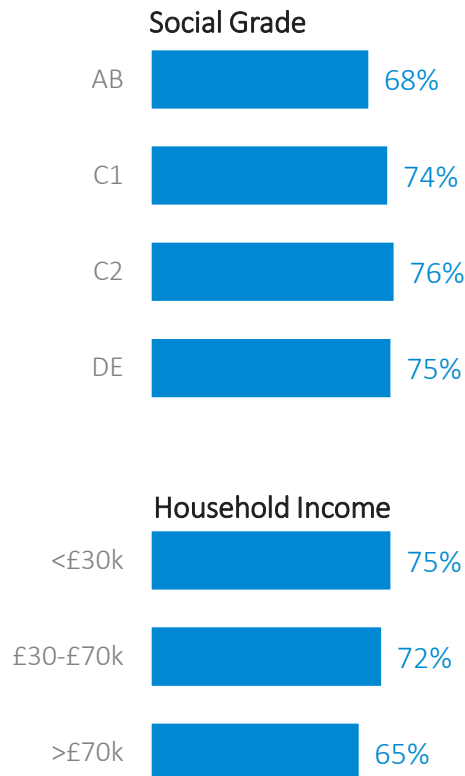
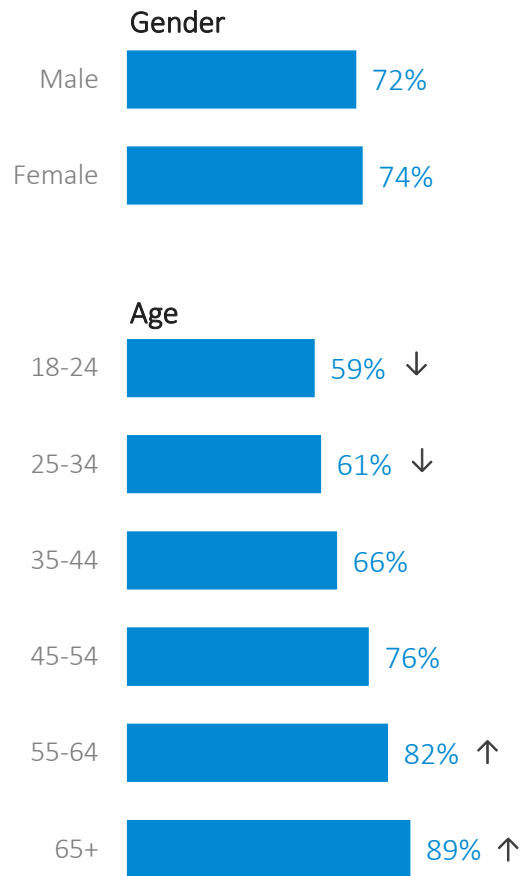
Total: 73%

Phase 2 – Deep dive – Minimising sewer flooding

How important is this area to you? (Very important)



↑ Subgroup significantly higher than total at 95% confidence
↓ Subgroup significantly lower than total at 95% confidence



Customers are pleased with Wessex Water's proposed approach, particularly if they have experienced sewer flooding before



Phase 2 – Deep dive – Minimising sewer flooding



"[It's acceptable] because they will also be stopping the sewers from flooding and protecting the public from nasty floods or breakdowns to their water supply"

26%



Ecstatic

46%



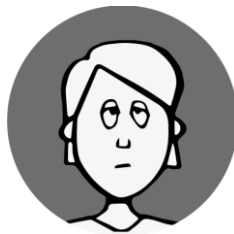
Happy

16%



Relaxed

7%



Indifferent

3%



Tired

2%



Stressed

1%



Frustrated

"I have always found Wessex Water very quick to respond but have had three outside sewer floods in 8 years so I am happy to hear that the problem will be addressed"

Customers appreciated targeting this issue and agree that customers need to do their bit. Stakeholders agree on plan & partnership but feel this issue is far less prevalent than other issues



Phase 1 – Deep dive – Minimising sewer flooding

Household Customer Reactions (Engagement Events)



- ✓ Pleased to see Wessex Water know how important it is to address this but also felt it is important customers 'do their bit' to help
- ✓ Felt that if more people were educated about what not to put in the system, the number of sewer blockages would decrease
- ? Felt that it will be hard to change customer behaviour while many manufacturers market their products as 'flushable' (e.g. wet wipes)
- ? Some admitted they flush wet wipes so will be personally challenged

Stakeholder Reactions





- ✓ Stakeholders agree that a partnership approach is important to deal with sewer flooding
- ✓ They also like the idea of working with developers (although some feel this is easier said than done)
- ✓ While a severe problem when it happens, some felt that sewer flooding is uncommon and so less of a priority than other issues
- ? Retailers would also like to see comms included in the plans, although they acknowledge that responsibility can be ambiguous

Excellent customer service is more important for dual supply than water/sewerage only customers

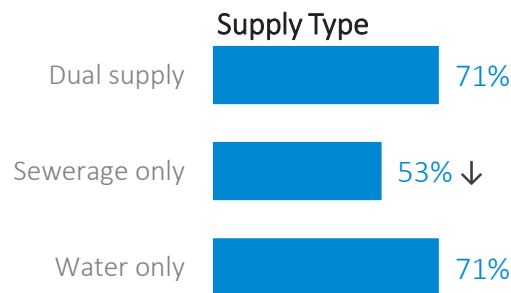
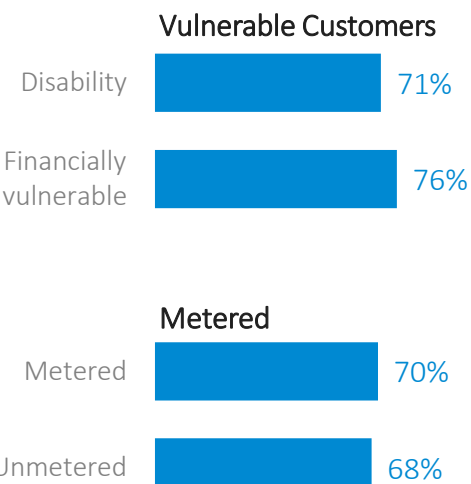
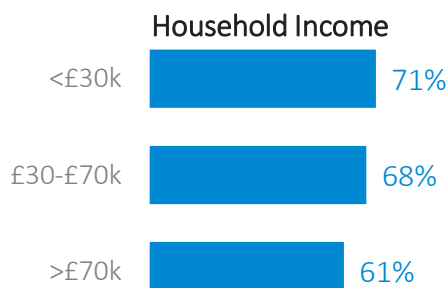
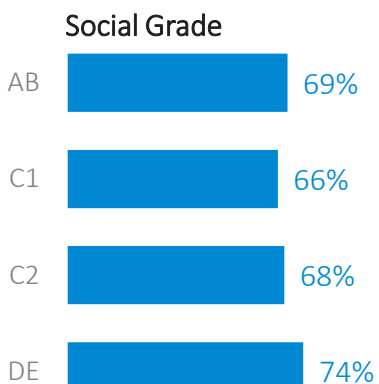
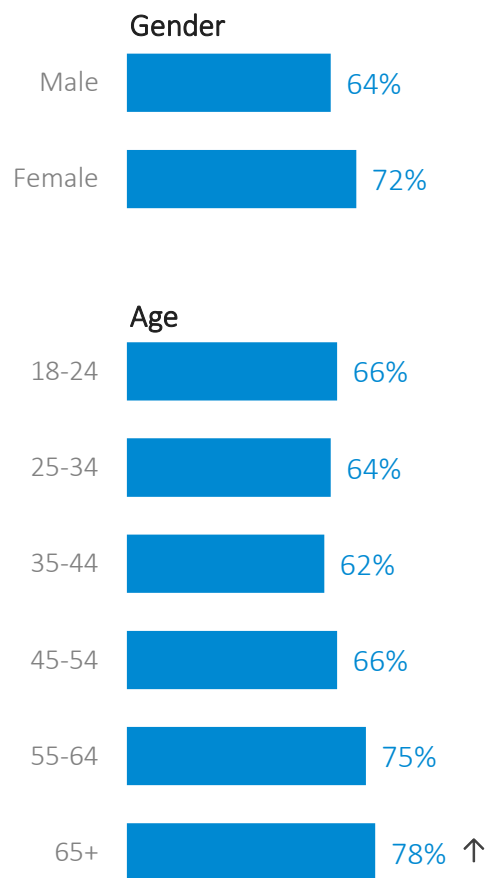


Total: 69%

Phase 2 – Deep dive – Delivering excellent customer service

How important is this area to you? (Very important)  

↑ Subgroup significantly higher than total at 95% confidence
 ↓ Subgroup significantly lower than total at 95% confidence



Significantly less important for sewerage only than dual supply customers, likely because their water provider is their main point of contact with customer services

Customers like Wessex Water's focus on improving customer service, particularly always answering the phone with a person



Phase 2 – Deep dive – Delivering excellent customer service



"To see better customer service and customer support would be great"

24%

46%

17%

7%

3%

1%

1%



Ecstatic



Happy



Relaxed



Indifferent



Tired



Stressed



Frustrated

"I like the fact that if a customer contacts you they will be connected to a person rather than a recording which can be frustrating"

Improving customer service is always welcome, even when rarely directly experienced. Delivering a more personal, accessible service is key.

Stakeholders value service commitments for “their” audiences



Phase 1 – Deep dive – Delivering excellent customer service (and customer support in qual)

Household Customer Reactions (Engagement Events)



- ✓ Really impressed with Wessex Water’s ambition, especially as the industry is a monopoly and so customers felt that Wessex Water don’t necessarily need to focus on this area as a bad experience won’t lead a customer to leave
- ✓ Particularly liked the promise to *always answer the phone with a person* – saw this as a standout feature of the plan
- ? Appreciated Wessex Water’s aim to be one of the Top 20 UK companies for customer service, however felt that there wasn’t any specific aim in the plan that would propel them into this arena
- ? Felt the proposed plan will offer ‘good’ rather than ‘excellent’ service

Stakeholder Reactions




- ✓ Stakeholders feel that all good companies should aspire to offer the best service and they broadly like what they see
- ✓ Those representing vulnerable audiences appreciate expansion of Priority Services Register, proactivity and especially partnering
- ? Hard to assess proposed increase in Priority Services Register numbers (e.g. what was it before?)
- ? Some caution being too proactive – need to balance proactivity with rights of customer to be left alone

All key customer types believe future proofing the service is important, although it is less important among younger and sewerage only customers

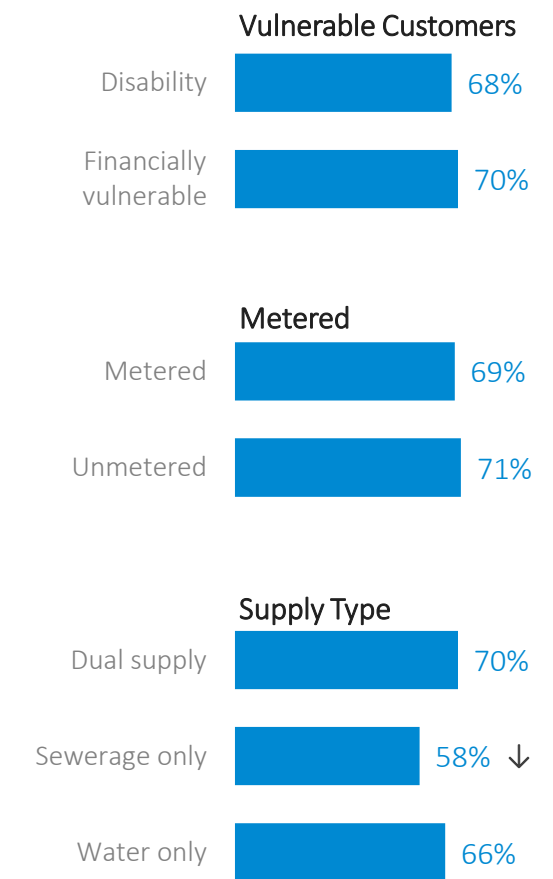
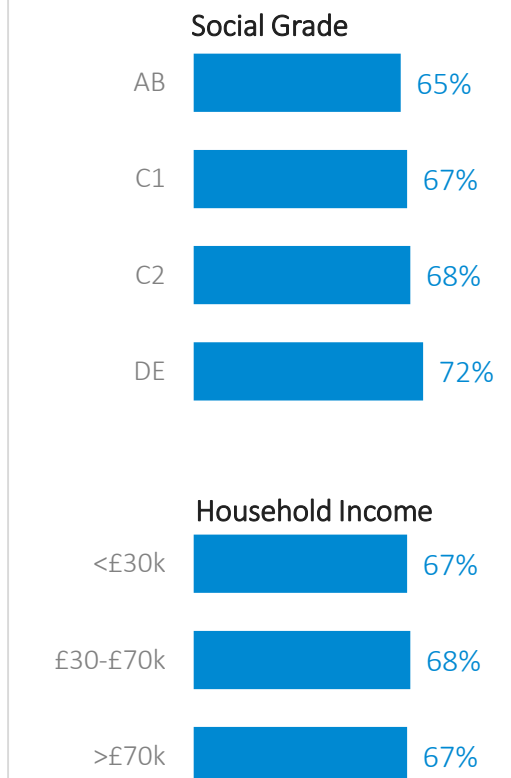
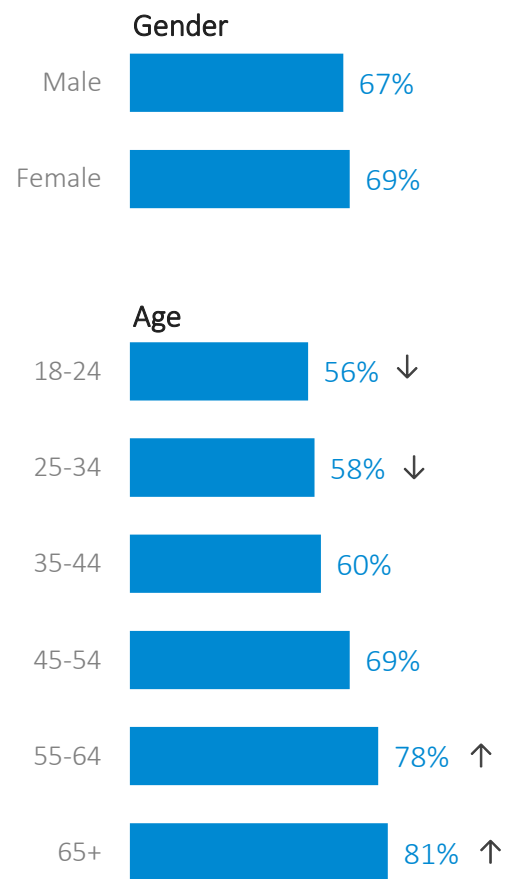


Total: 68%

Phase 2 – Deep dive – Future proofing our service

How important is this area to you? (Very important)  

↑ Subgroup significantly higher than total at 95% confidence
 ↓ Subgroup significantly lower than total at 95% confidence



Customers are pleased to see Wessex Water is planning for the future, although some are unclear how feasible the proposed improvements are



Phase 2 – Deep dive – Future proofing our service



"If the plan goes ahead as proposed in full I feel it could be fully acceptable to me and at a price I would be prepared to pay, but I am sceptical about how fully the plan will be implemented despite best intentions"

19%



Ecstatic

47%



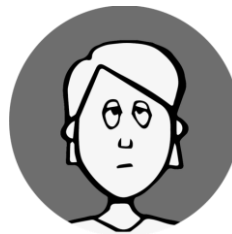
Happy

19%



Relaxed

8%



Indifferent

4%



Tired

2%



Stressed

1%



Frustrated

"I like the idea that Wessex Water is looking towards the future, and is aiming on not just maintaining their network, but upgrading and expanding it"

While not a top priority for customers, resilience of supply is a concern for some stakeholders. This part of the plan is largely acceptable for both audiences



Phase 1 – Deep dive – Future proofing our service (included additional commitments in qual)

Household Customer Reactions (Engagement Events)



- ✓ Felt Wessex Water had considered and covered several important areas, although they tended not to experience them directly
- ✓ Pleased to see Wessex Water has enough water to cope with the region's needs for the next 25 years
- ? Some thought the commitments were too ambitious, in particular *having no planned interruptions lasting longer than 3 hours and no more than 50 customers a year to have a break in supply of more than 12 hours*. They would have liked to see an explanation of how Wessex Water plans to do this

Stakeholder Reactions



- ✓ Those more involved in the water industry understand robustness of long range resilience planning and broadly accept the argument
- ✓ Maintaining supply is key – especially for some vulnerable audiences and Non Household customers, and so commitments welcome
- ✓ Greater commitment to zero 3 hour plus planned breaks was appreciated as a strong, concrete commitment
- ✓ Cyber security stands out as unexpected – on balance a welcome addition
- ? However a minority felt that this was business-as-usual rather than a significant improvement (generally those with a background in the industry)

Developing relationships is more important for vulnerable customers and those with lower household incomes



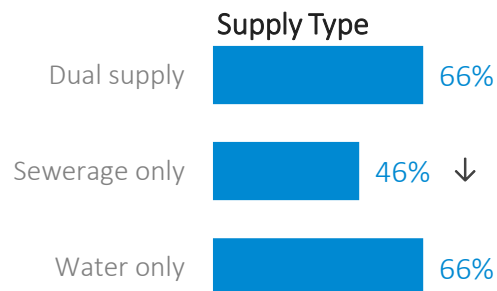
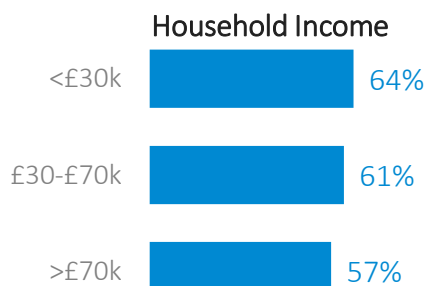
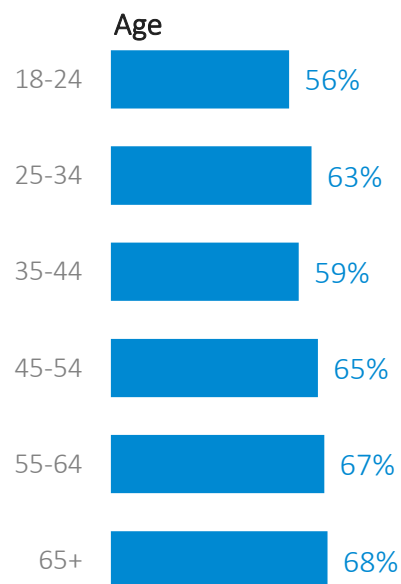
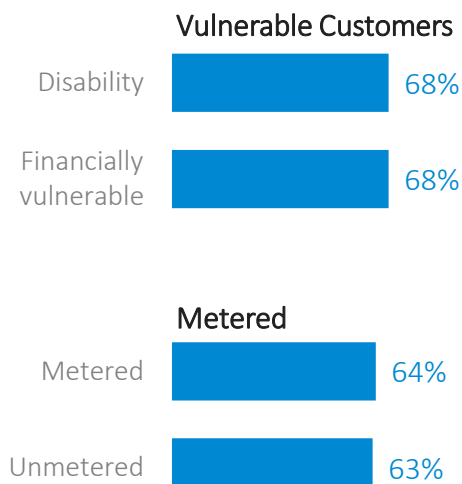
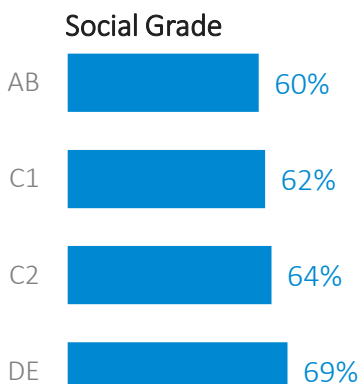
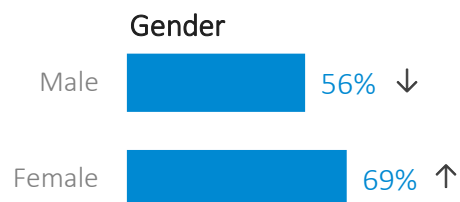
Total: 64%

Phase 2 – Deep dive – Developing better relationships with the communities we serve

How important is this area to you? (Very important)



↑ Subgroup significantly higher than total at 95% confidence
 ↓ Subgroup significantly lower than total at 95% confidence



Customers are happy to enter into a partnership and understand the important role they play in ensuring a working water system



Phase 2 – Deep dive – Developing better relationships with the communities we serve



23%



Ecstatic

45%



Happy

17%



Relaxed

10%



Indifferent

4%



Tired

1%



Stressed

1%



Frustrated

"I'm glad to see that some of the responsibility is also being passed to customers to use water wisely and deal with waste properly"

Customers find the partnership between Wessex Water and themselves very acceptable, with stakeholders also finding it a sensible approach



Phase 1 – Deep dive – Developing better relationships with the communities we serve

Household Customer Reactions (Engagement Events)



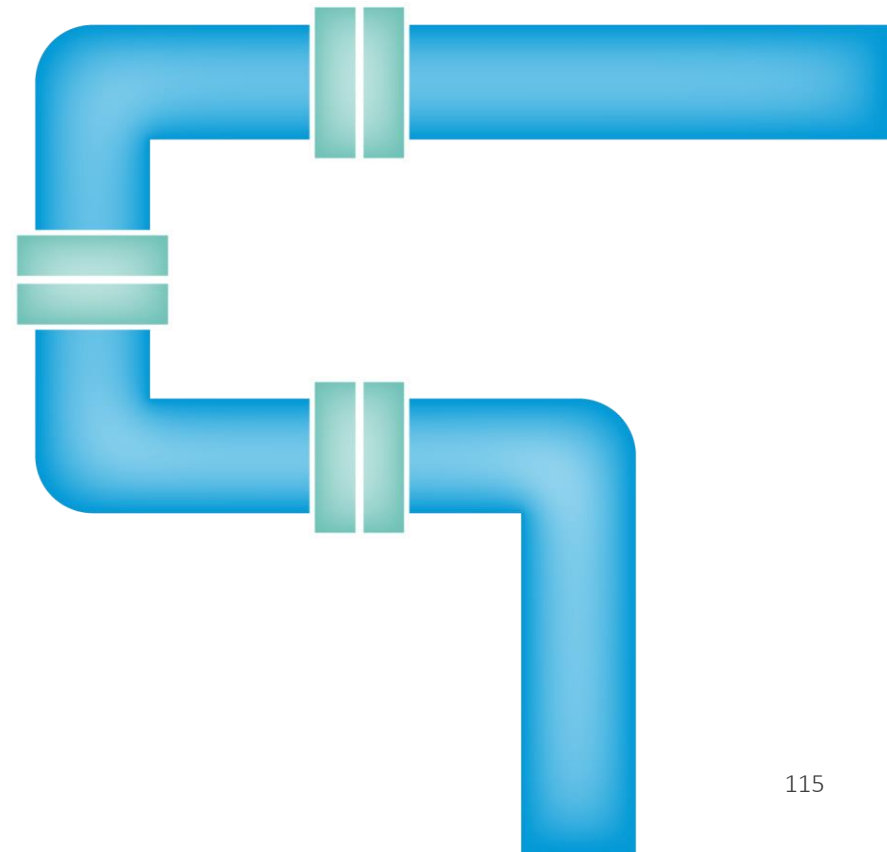
- ✓ Majority understood benefits of a 'partnership' between Wessex Water and customers and most felt customers should play a part (where they can) to ensure the successful working of the water system
- ✓ Most found all the ways in which customers could help Wessex Water as appropriate and acceptable
- ? Some customers felt that they would not want to actively participate in a partnership with Wessex Water

Stakeholder Reactions



- ✓ The elements of partnership were well received
- ✓ Both those areas where the problem requires active customer engagement (e.g. sewer flooding) and those where customers can be empowered (e.g. reducing bills by reducing water use)

Recap of key findings



Summary

Household customers, businesses and stakeholders find the plan acceptable and affordable

- A large majority of Wessex Water customers find Wessex Water's proposed plan acceptable (96% informed household, 98% informed business) and affordable (92% informed household, 96% informed business)
- Levels of uninformed and informed acceptability and affordability exceed 80% across all key customer types
- Vulnerable household customers are slightly less likely to find the plan affordable than typical Wessex Water customers due to their personal financial circumstances, but still exceed 80% acceptability and affordability
- Stakeholders approved of the plan and found it both acceptable and affordable

Wessex Water customers believe all areas of the plan are important

- Providing clean drinking water, protecting the environment and utilising water in the region efficiently are *most* important to Wessex Water household customers
- Ensuring bills are affordable for all and developing relationships with the community are considered more important among vulnerable customers and those with lower household incomes than other household customers
- Providing excellent customer service is less important for sewerage only customers than dual/water only customers because they have less need to call upon it
- Stakeholders largely agree with customers on what is most important, though they focused on areas of particular interest to them

Very few display negativity towards the plan. Those that are negative...

- Feel the plan is too good to be true, and are sceptical Wessex Water can actually implement it
- Currently have difficulty paying for their water bill, meaning any increase will pose a financial challenge
- Are reluctant to subsidise other customers who cannot afford their water bill
- Some stakeholders felt the plan was in line with, rather than exceeding expectations

Acceptability Events - Guide

February 2018 v4 (180218)

Overview of the process

- Respondents arrive and are welcomed in the “warm welcome” zone
- They are told that as well as them and Populus, we might be joined by observers/visitors who would like to listen in to a few of the conversations
 - This is all about introducing them to the session, making introductions between respondents, asking them a few “warm up” behavioural questions such as water use, ever had an issue etc.
 - Each mini group has a moderator who remains with them throughout, although other moderators will be on hand to support with each zone
 - Their choices will be captured on a summary sheet to refer to in the summary section
- They then proceed to the “Philosophy” zone
 - Here they respond to the overall philosophy of the plan, its general promise etc.
- Next they are rotated through the individual priority zones, where they do different tasks, respond to stimulus individually and as a small group, in a range of different ways from simple Q&A, discussion to hands-on & gamified tasks; they will always finish on the Partnership zone
- The zones will be rotated between mini groups of 4 and across locations so that all Priority areas receive roughly equal early consideration
- After proceeding through the zones, customers then summarise their group and personal response to the whole plan and make any further “tweaks” to different priorities. This is captured in a video vox pop

Task & Stimulus Overview

- There will be different types of stimulus, rotated for variety and engagement, but appropriate for the subject/priority area
 - Infographic/infographic and photos on 1-3 large (A1/A2) boards per zone displayed as posters
 - Infographic/infographic and photos on individual A3 board, 1 per respondent
 - PPT turned into an animated movie (including some video footage) on a loop

Guide

- There will be different types of task, again rotated for variety and engagement, but appropriate for the subject/Priority area
 - Group discussion
 - Individual self-completion sheet plus group discussion
 - “Spending” or “building” activities plus discussion

Warm Welcome (5-10 minutes – respondents arrive 15 minutes early for welcome, warm up and “Philosophy” stimulus pre-browse)

- Thank you for coming to the session
- Explain the process
- Explain recording (and gain permission for photo/video to be used internally)
- Explain confidentiality
- Tell us about your water use/waste water experience
- What do you associate with Wessex Water
- Ever had any issues with your water/waste water/billing/service etc.
- Now we are going to move around the room looking at information and talking about it/doing a few tasks!

Philosophy Zone (10-15 minutes)

- AIM: To get an overall response to the general promise and premise of the plan as well as the commitment on customer bill impact
- STIMULUS: Large Infographic Posters
- TASK: Individual journal self-completion and follow up group discussion

- First of all we would like to introduce you to Wessex Water’s 5 year plan (explain, in simple terms, Ofwat and planning cycle)
- These posters give you an overview of the plan and what Wessex are promising to do between 2020 and 2025
- First of all in your journal please could you circle the icon which says how you feel about this (we will have “emotion” icons to ring/click if use electronic version), give it a score out of 10 for how acceptable the plan is and also how affordable you find it; and write in your journal 3 words that come to mind after you have read this
- Then write what you like about it and anything you don’t like and we’ll briefly discuss
 - So what did you think of that
 - Do you think the plan represents value for money?
 - How would you summarise what WW are promising
 - And how do you feel about that
 - What do you like most and why
 - And what do you like least and why
 - Was anything confusing, discuss how to clarify
- If everyone is clear about the overall philosophy we will move on

Guide

Environment Zone (10-15 minutes)

- AIM: To explore customers' response to the environmental commitments and gauge opinion on variable levels for certain performance commitments
- STIMULUS: Poster
- TASK: Individual journal self-completion and follow up group discussion

- The first area we want to ask you about is the environment
- First of all what would you say are Wessex Water's responsibilities when it comes to the environment
- And what should its priorities be and why
- First of all give the environmental plans a score out of 10 in your booklet and ring the icon that best describes how you feel about it
- So what do you like about this, why
- And is there anything you don't like, why
- What, briefly, if anything would you change
- Wessex Water have a couple of choices on how much they invest in this area we'd like your feedback on
- Present choices, along with bill implications, on flash cards and discuss

Future Proofing Zone (10 minutes)

- AIM: To explore customers' response to the resilience plans
- STIMULUS: PPT animated, playing on a loop
- TASK: Individual journal self-completion, brief hands on task

- Now we would like to ask you about how Wessex Water plans to keep its infrastructure "resilient"
- Watch this short presentation
- Give their plans a personal score out of 10 in your booklet and ring the icon that best describes how you feel about it
- Now, as a group, you have 3 pipes and some balls. Pipe 1 = Great, Pipe 2 = Indifferent and Pipe 1 = Poor – please fill the pipes according to how you feel about this part of their plan
- (Briefly) discuss why

Efficient Water Use Zone (15 minutes)

- AIM: To explore customers' response to the efficient water use plans and to express a preference around leakage in particular
- STIMULUS: 1-2 Large Infographic Posters
- TASK: Individual journal self-completion, discussion & hands on task

Guide

- Now we would like to ask you about how Wessex Water plans to be efficient in its supply of water
- Have a look at these posters
- Give their plans a personal score out of 10 in your booklet and ring the icon that best describes how you feel about it
- How do you feel about the Wessex's proposals on cutting leakage by 3%. Does that seem reasonable; what % would you want/expect
- There are some choices that they can make in this part of their plan – on fixing leaks and promoting water efficiency, let's talk about those
- You are going to get 3 x cards with different "performance" levels that WW could commit to and the implications for your bill, we would like you as a group to come up the best package that you would like to see them commit to
- Discuss choices

Water Quality Zone (10 minutes)

- AIM: To explore customers' response to the water quality plans
- STIMULUS: Sample of (confirmed Wessex Water, water, check venue water supply type) to remind people of drinking water quality and accompanying individual hand outs
- TASK: Individual journal self-completion & discussion

- Now we would like to ask you about Wessex Water's plans on water quality
- Have a drink of water to remind you of the product and then take a hand out each to see WW's plans
- Give their plans a personal score out of 10 in your booklet and ring the icon that best describes how you feel about it
- Now let's discuss why you felt that way
- What did you like about the plan
- What, if anything did you dislike and why

Sewerage Zone (10-15 minutes)

- AIM: To explore customers' response to the sewer flooding plans
- STIMULUS: PPT with video clip on wipes
- TASK: Individual journal self-completion & discussion

- Now we would like to ask you about Wessex Water's plans on sewer flooding
- Watch this short video
- Give their plans a personal score out of 10 in your booklet and ring the icon that best describes how you feel about it
- Now let's discuss why you felt that way
- What did you like about the plan
- What, if anything did you dislike and why

Excellent Service Zone (5-10 minutes)

- AIM: To explore customers' response to the excellent service plans/commitments
- STIMULUS: Large infographic poster
- TASK: Individual journal self-completion & brief discussion

- Now we would like to ask you about Wessex Water's plans on service
- Please look at this poster
- Give their plans a personal score out of 10 in your booklet and ring the icon that best describes how you feel about it
- Discuss rating as a group

Customer Support Zone (10-15 minutes)

- AIM: To explore customers' response to the affordability plans around supporting customers (e.g. PSR, affordability and education)
- STIMULUS: PPT movie on loop
- TASK: Individual journal self-completion & projective discussion

- Now we would like to ask you about how Wessex Water relates to the community, in particular customers who have specific needs or who struggle with affording bills
- Watch this short presentation
- Give their plans a personal score out of 10 in your booklet and ring the icon that best describes how you feel
- How did you feel about what WW are planning
 - For you and your bill i.e. how affordable are these plans for you
 - How do you feel about Wessex Water helping people who are struggling with their bills (would you say that includes you?)
 - Who do you think they should be helping most in this area and who least, why
 - What does excellent customer service look like?
 - What level of service do you want - eg Lidl, Tesco or Waitrose?

Partnership Zone (10 minutes)

- AIM: To explore customers' response to the commitments to actively partner with customers – including co-creation of customer responsibilities
- STIMULUS: Individual A3 boards
- TASK: Individual journal self-completion, discussion and hands on task

- Now we would like to ask you about how Wessex Water proposes to partner with customers to achieve a range of common goals
- Please read this hand out (individual A3 board) about Wessex Water's plans in this area
 - How do you feel you could partner with Wessex in each of these areas – what could you as customer do

Guide

- Now look at Wessex Water's proposals for what you could do
- First of all give their plans a score out of 10 in your booklet and ring the icon that best describes how you feel about it
- How do you feel about their ideas compared with your perception of how you could partner/what you as a customer could do
- So what do you like about this, why
- And is there anything you don't like, why
- What, briefly, if anything would you change

Summary zone (10 minutes)

- AIM: To explore customers' response to the overall plan and summarise any choices they expressed
- STIMULUS: Summary sheet of 2 x choices made on way round + summary A4
- TASK: Discussion and vox pop

- Finally, tell us how you now feel about the WW plan having considered it in detail
- What do you like most
- What would you like to change
- Do you think the plan represents value for money?
- Are there any of the choices you made as you went round that you would now like to change in the light of a fuller picture – REFER TO CHOICES SHEET – and why is that
- Final vox pop to summarise individual response
 - Taking the plan overall, now that you have considered it in more detail – how acceptable is it to you personally (on a scale of 0-10)
 - And how affordable is it for you personally, considering what you now know about the impact on your bill, again using a score of 0-10

Acceptability - VA Guide

February 2018 v2

Note on the interview process:

- *We will tailor the interviews for the specific audience*
- *This will be in terms of tone and content emphasis*
 - *E.g. interviews with people experiencing affordability issues might naturally focus more on affordability/bill related issues*
- *In all the interviews we will ensure we spend enough time on the Customer Support commitments as these are most relevant to vulnerable audiences specifically*

Introduction

- Thank you for taking part
- Explain the process
- Reassure on confidentiality, recording
- Could you tell me a little about yourself and your situation (probe carefully around specific vulnerability)

Perceptions of & Relationship with Wessex Water

- How much do you know about Wessex Water
- Do you have much to do with them at the moment – have you had any contact recently, what was that about
- Are you on their “priority Services Register”

Spontaneous View of Priorities

- Wessex Water are making their plans for 2020-2025 at the moment so what do you think it is most important that Wessex Water should focus on over the next 5 years or so
- What is most important to you personally

Vulnerable Audiences Guide

Overview of Plan Philosophy

- This is a broadly what Wessex Water are planning (SHOW/READ OUT PHILOSOPHY & BILLS STIMULUS)
 - How do you feel about this
 - What stands out
 - What do you like about it
 - What don't you like about it
 - How acceptable do you find it - please give it marks out of 10
 - And from what you know so far how affordable do you think this plan will be, again please score it out of 10

Response to Specific Areas

- We'd like to ask you about some specific areas in the plan

- THE ENVIRONMENT
- This is what Wessex Water plans to do in relation to the environment (SHOW/READ/PLAY ENVIRONMENT STIMULUS)
 - How do you feel about their plan
 - What do you like about it
 - What don't you like
 - How much will this benefit you, in your situation
 - Which aspects of this part of the plan do you think will be most helpful for you personally and why
 - *Response to specific choices as relevant to the Priority area*

PARTNERSHIP

- Ask similar questions as above
- Specifically probe:
 - How able do you feel in your situation to play your part in this partnership, does the plan take into account your particular needs – how could this be improved

FUTURE PROOFING

- Ask similar questions as above
- Specifically probe:
 - Do you feel you need a priority service when it comes to e.g. supply interruptions; to what extent does this plan offer that

Efficient Water Use

- Ask similar questions as above
- Specifically probe:
 - (e.g. if medical need to use more water) Do you feel that the need to save water applies to you in your situation; does the plan need changing to take account of that, how

Vulnerable Audiences Guide

WATER QUALITY

- Ask similar questions as above

SEWERAGE

- Ask similar questions as above

EXCELLENT SERVICE

- Ask similar questions as above

CUSTOMER SUPPORT

- Focus on this area particularly
- How do you feel about their plan
- What do you like about it
- What don't you like
- How much will this benefit you, in your situation
- Which aspects of this part of the plan do you think will be most helpful for you personally and why
- Probe specifically, for different audiences
 - Commitment to specific help on offer
 - Contact WW to talk about any problems with real people

Summary

- Having seen the whole plan, what stands out for you personally in your situation
- Do you think it takes into account your specific circumstances, why
- Finally give the whole plan a score out of 10 for...
 - For how acceptable it is to you
 - For how affordable it is
- Is there anything else you would like to raise with regard to Wessex Water
- Thank you for your time today

Acceptability – SI Guide (Non Retailers)

February 2018 v2

Note on the interview process

- *We will undertake c60min face to face depth interviews with stakeholders.*
- *Stakeholders will be exposed to similar material shown to consumers and in a similar order but rotated by stakeholder (as done in the Events)*
- *Stimulus will include any infographics/posters, and ideally the videos and photos (as shown to consumers) but exclude any practical exercises conducted during the events.*
- *For each section, stakeholders will be asked the following set of standard questions:*
 - Initial opinion – what do you think about this
 - How would you summarise what WW are promising
 - And how do you feel about that
 - What do you like most and why
 - And what do you like least and why
 - Was anything confusing, discuss how to clarify
 - How, if at all, do you expect this will impact on your organization?
 - What would you do to change/ improve it and why?
 - Probe on choice/flex as appropriate to priority area

Introduction

- Thank you for taking part
- Explain the process
- Explain recording (and gain permission for recording/quotes to be used internally)
- Explain confidentiality in light of above
- What's your/your organisation's interest in/relationship with water companies' activities/ Wessex water?
- Water companies are putting together their plans for 2020-25, What do you think Wessex Water should do or include as part of their 5 year plan and why?
- What do you think they should prioritize and why?

Stakeholder Guide

Overall Philosophy & Bills

- First of all we would like to introduce you to Wessex Water's 5 year plan
- Ask the standard questions (please see overview)
- Is there anything missing from the plan? Is there anything you're surprised about?
- How does it compare to other plans that you may have seen or experienced?
- How acceptable do you feel the plan is, please score it out of 10, why do you say that
- And how affordable would you say this plan is, please score it again out of 10, why do you say that

Environment

- Let's look at key elements of their plan and then we'll discuss
- Then ask the standard questions
- Discuss specifics that relate to the particular stakeholder in more detail

Partnership

- Now we would like to ask you about how Wessex Water proposes to partner with customers and communities to achieve a range of common goals
- Please read this hand out about Wessex Water's plans in this area
- Ask the standard questions
- Additionally:
 - How do you think Wessex Water should build these partnerships? What can they do to get customers and communities more involved?
 - What challenges do you think they will face?

Future Proofing

- Now we would like to ask you about how Wessex Water plans to keep its infrastructure resilient
- Watch this short presentation
- Ask the standard questions

Efficient Water Use

- Now we would like to ask you about how Wessex Water plans to be efficient in its supply of water
- Have a look at these posters
- Ask standard questions
- Additionally:
 - How do you feel about Wessex Water's plan to cut leakage by 3%. Does that seem reasonable; what % would you want/expect

Stakeholder Guide

Water Quality

- Now we would like to ask you about Wessex Water's plans on water quality
- Ask standard questions.

Sewerage

- Now we would like to ask you about Wessex Water's plans on sewer flooding
- Watch this short video
- Ask standard questions

Excellent Service

- Now we would like to ask you about Wessex Water's plans on service
- Please look at this poster
- Standard questions asked
- Additionally:
 - Wessex Water are aiming to be rated in the top 25th of all consumer facing companies in the UK. How do you feel about this aspiration beyond the water industry. What do you think they should do to achieve this? Which companies can they learn from and why?

Customer Support

- Now we would like to ask you about how Wessex Water relates to the community, in particular customers who have specific needs or who struggle with affordability
- Watch this short presentation
- Ask the standard questions

Summary

- Finally, tell us how you now feel about the WW plan having considered it in detail
- What do you like most and why
- What do you like the least and why?
- How, if at all, do you envisage this impacting on you/your organization?
- What would you like to change and improve?
- Thinking back to the score you gave at the start, now what would you score out of 10 for acceptable this plan is to you? Please tell us why.
- And the same for your score of affordability
- Any final comments on the plan
- Thank you

Acceptability – SI Guide (Retailers)

February 2018 v2

Note on the interview process

- We will undertake c60min face to face depth interviews with retailers.
- Retailers will be exposed to similar material shown to consumers and in a similar order but rotated by stakeholder
- Stimulus will include any infographics/posters, and ideally any videos and photos (as shown to consumers) but exclude any practical exercises conducted during the events.
- For each section, stakeholders will be asked the following set of standard questions:
 - Initial opinion – what do you think about this
 - How would you summarise what WW are promising
 - And how do you feel about that
 - What do you like most and why
 - And what do you like least and why
 - Was anything confusing, discuss how to clarify
 - How, if at all, do you expect this will impact on your company/your relationship with Wessex Water and the service you receive from them, as well as:
 - How do you feel your customers would feel about the proposals, why
 - What would you do to change/ improve it and why
 - Probe on choice/flex as appropriate to priority area

Introduction

- Thank you for taking part
- Explain the process
- Explain recording (and gain permission for recording/quotes to be used internally)
- Explain confidentiality in light of above
- Describe your current relationship with Wessex Water and NHH customers in the Wessex area
- As you will know, water companies are putting together their plans for 2020-25, What do you think Wessex Water should do or include as part of their 5 year plan and why?
- What do you think they should prioritise and why?
- What would you say are your (Wessex area) retail customers' priorities when it comes to water and sewerage

Stakeholder Guide

Overall Philosophy & Bills

- First of all we would like to introduce you to Wessex Water's 5 year plan
- Ask the standard questions (please see overview)
- Is there anything missing from the plan? Is there anything you're surprised about?
- How does it compare to other plans that you may have seen or experienced?
- How acceptable do you feel the plan is, for NHH customers in particular, please score it out of 10, why do you say that
- And how affordable would you say this plan is, again for NHH customers in particular, please score it again out of 10, why do you say that

Environment

- Let's look at key elements of their plan and then we'll discuss
- Then ask the standard questions
- Discuss specifics that relate to the particular stakeholder in more detail

Future Proofing

- Now we would like to ask you about how Wessex Water plans to keep its infrastructure resilient
- Watch this short presentation
- Ask the standard questions

Efficient Water Use

- Now we would like to ask you about how Wessex Water plans to be efficient in its supply of water
- Have a look at these posters
- Ask standard questions
- Additionally:
- How do you feel about Wessex Water's aim to cut leakage to 3%. Does that seem reasonable; what % would you want/expect; what do you think your Wessex area retail customers' view of this would be

Water Quality

- Now we would like to ask you about Wessex Water's plans on water quality
- Ask standard questions.

Sewerage

- Now we would like to ask you about Wessex Water's plans on sewer flooding
- Ask standard questions

Excellent Service

Stakeholder Guide

- Now we would like to ask you about Wessex Water’s plans on service
- Please look at this poster
- Standard questions asked
- Additionally:
 - Wessex Water are aiming to be rated in the top 25 of all consumer facing companies in the UK. How do you feel about this aspiration beyond the water industry. What do you think they should do to achieve this? Which companies can they learn from and why?

Customer Support

- Now we would like to ask you about how Wessex Water relates to the community, in particular customers who have specific needs or who struggle with affordability
- Watch this short presentation
- Ask the standard questions

Partnership

- Now we would like to ask you about how Wessex Water proposes to partner with customers and communities to achieve a range of common goals
- Please read this hand out about Wessex Water’s plans in this area
- Ask the standard questions

Competitive Retail Market

- Finally, could you tell us how you feel about the extent to which Wessex Water’s plans will impact on the NHH water retail market
 - How will their plans enhance a competitive market
 - How might they detract from a competitive market
 - What else would you like to see them address in their plans in order to facilitate a “healthy” NHH water market

Summary

- Finally, tell us how you now feel about the WW plan having considered it in detail
- What do you like most and why
- What do you like the least and why?
- What would you like to change and improve?
- Thinking back to the score you gave at the start, now what would you score out of 10 for acceptable this plan is to you? Please tell us why.
- And the same for your score of affordability
- Thank you

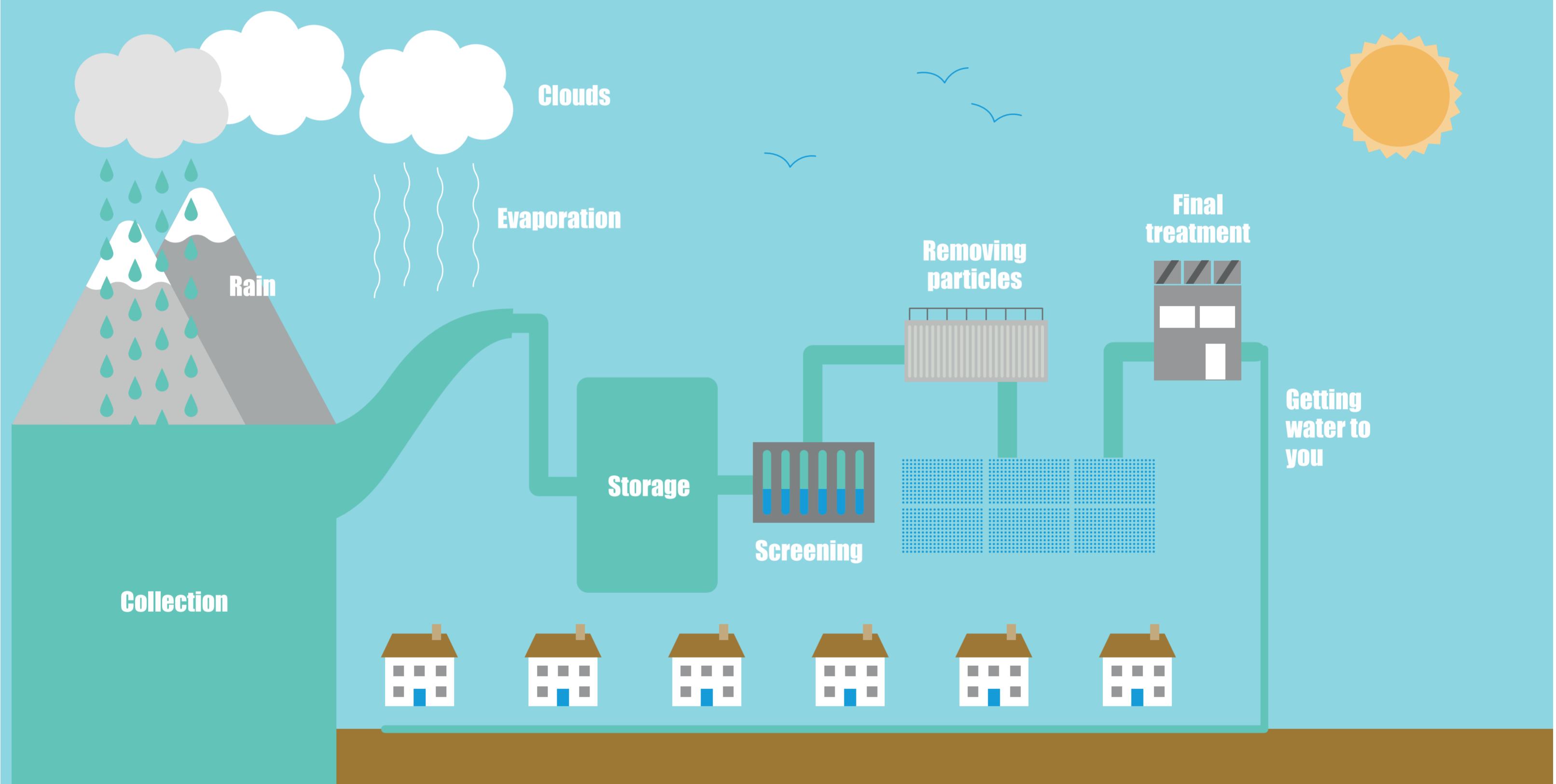
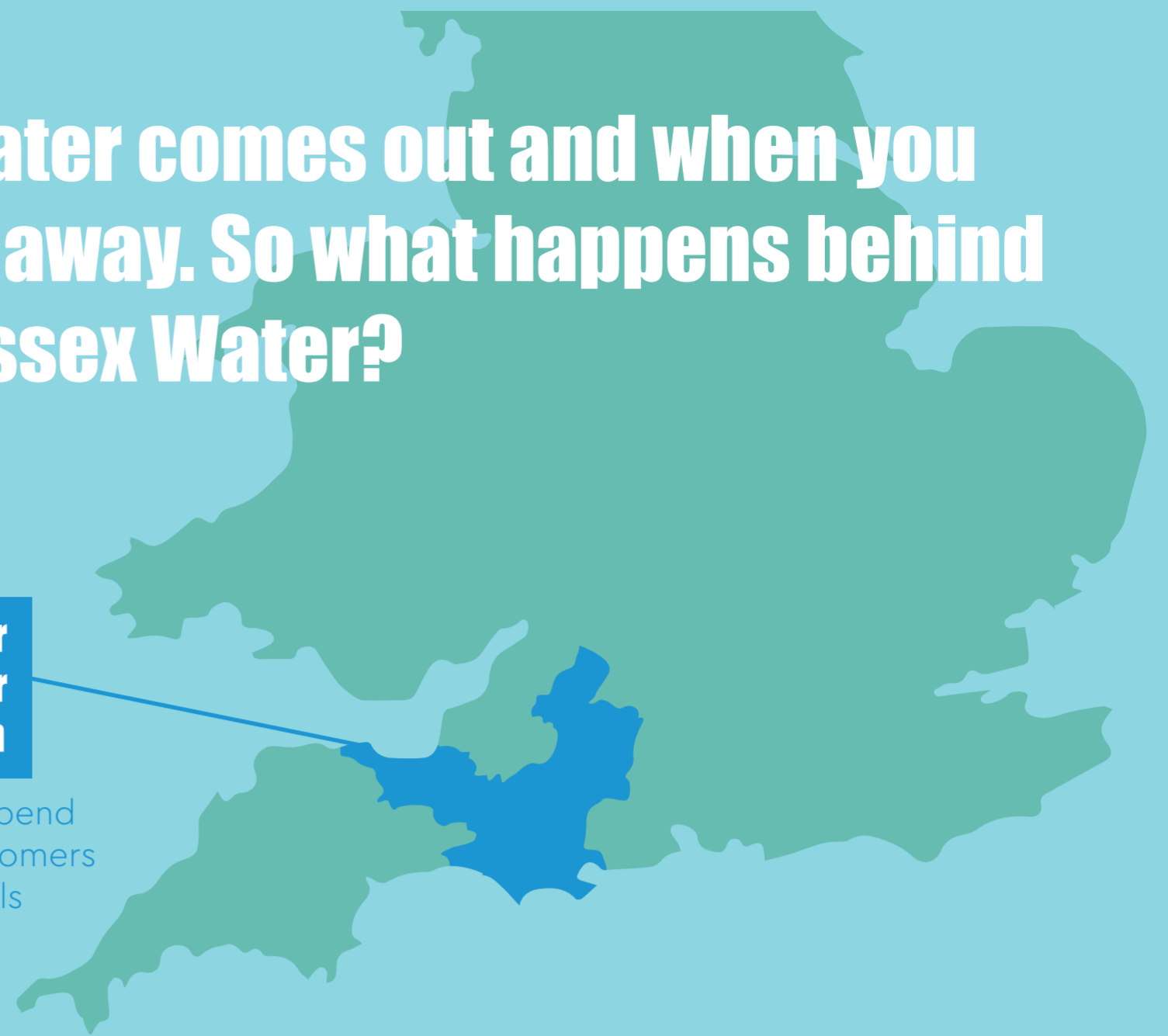
When you turn on the tap, clean water comes out and when you flush the toilet, the waste is taken away. So what happens behind the scenes? What do we do at Wessex Water?

Supplies water to
1.3
million
customers

Provides sewerage services to
2.8
million
customers

Wessex Water is the supplier for this region

All the money we spend comes from our customers through their bills

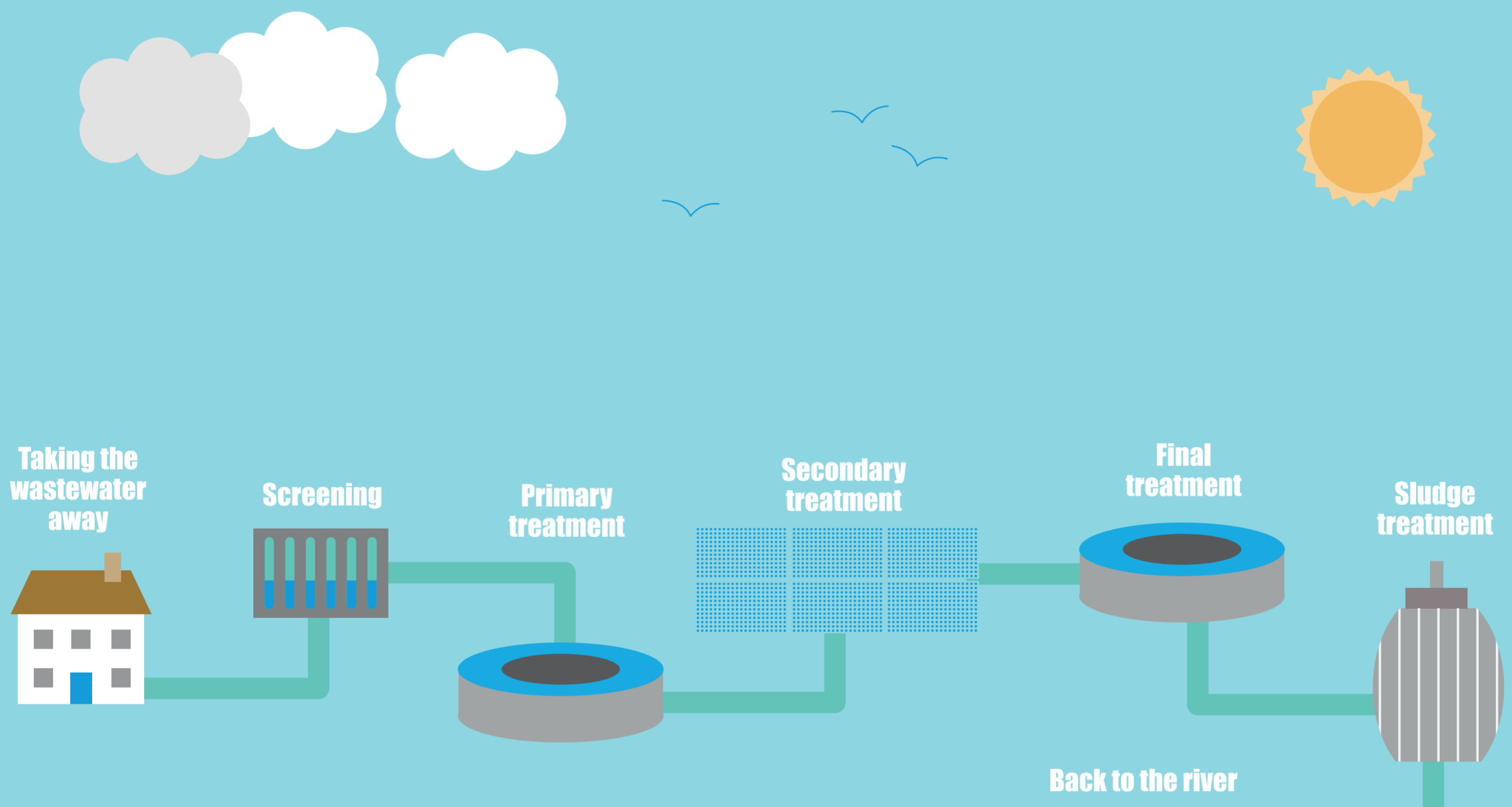


Each water company faces different challenges:

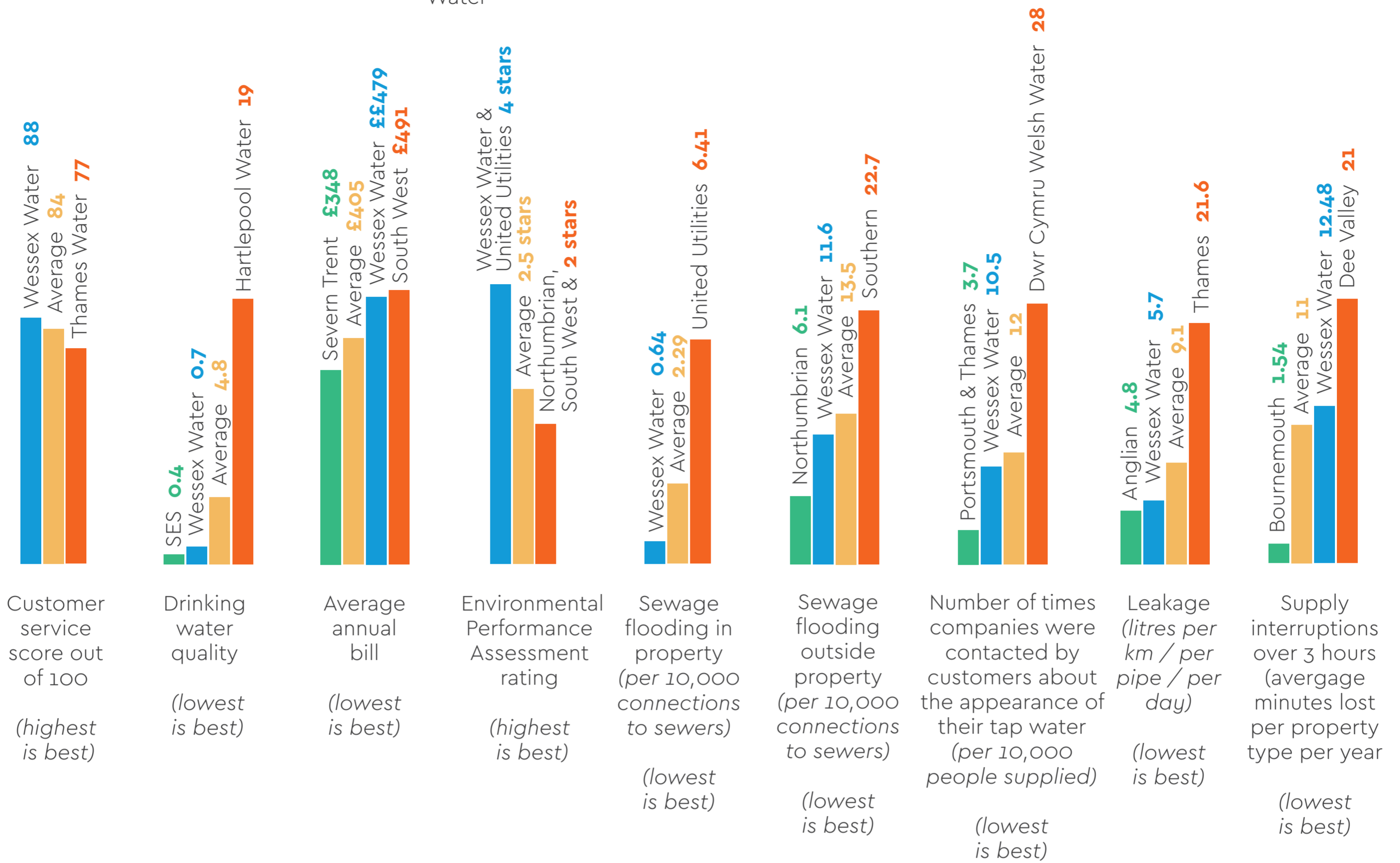


- 1 Everyone gets their water from their regional water company.
- 2 Each water region is different, for example the size and population of the area, whether it is mainly urban or rural, how much coastline it has and even the underlying geology and weather.
- 3 This can affect overall bills and customer service levels in each region.

Waste Water Cycle



■ Wessex Water
 ■ Best
 ■ Average
 ■ Worst



We've asked many customers about what they want their water services to look like in the future. We have turned this into our Business Plan. We want to show this to you to see what you think of our plans

- We always aim to be the best water company in the UK, but we must improve to remain at the top
- Our ambition is to be in the top 20 of all UK companies for customer service
- We have created a 5 year plan (for 2020–2025)
- We need to submit this to Ofwat (the Government's water regulator)
- These are the areas of our plan that we want to talk to you about:



Delivering excellent customer service



Ensuring bills are affordable for all



Future proofing our services



Protecting and enhancing the environment



Using water in our region more efficiently



Providing excellent drinking water quality



Minimising sewer flooding

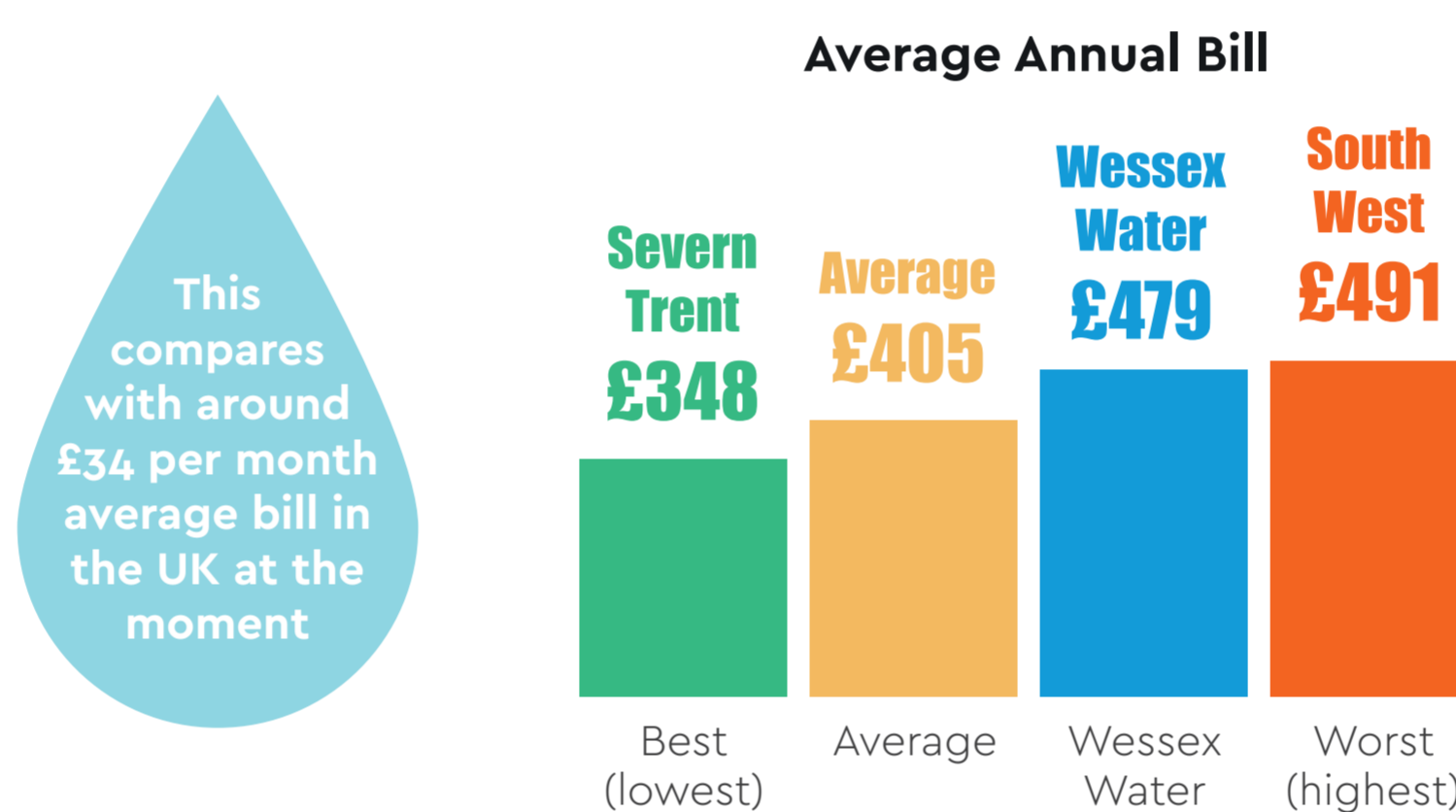


Developing better relationships with the communities we serve

We want to make sure bills are affordable for all

It's important that we keep water bills affordable for all households in our communities
This is an example of how a monthly bill will change if Wessex Water adopts this plan:

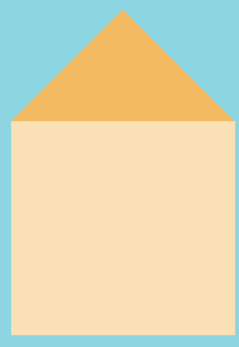
At present the average household bill	£40 per month	£479 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£45 per month	£539 per year
Under the plan we propose, the average bill would be	£39 per month, rising to £43 per month by 2025	£473 per year, rising to £512 per year by 2025



SUPPORTING INFO

- 1 At present the average household bill is £40 per month (£479 per year)
- 2 On average, if bills were to go up each year by inflation, by 2025 the average bill would be £45 per month (£539 per year)
- 3 Bills will go up with inflation, but we want to minimise the amount you pay
- 4 We expect a 3% cut in household bills in 2020 compared with 2019
- 5 There will then just be an increase for inflation, which we expect to be 2% in each year

We want to make sure bills are affordable for all



We currently help

31,000

households by applying a discount where people need one. By 2025 we want

86,000

households (one in every fifteen to benefit)



Independent debt advice agencies help us reach eligible customers who may not know about our schemes. We are aiming to receive at least 2,300 applications per year up to 2025

We'll continue to support

Customers who are struggling to pay their bills due to severe financial hardship or debt:

- 1 We'll lower your bills, on average we reduce annual water bills by £220.
- 2 We can help with our debt write-off scheme.

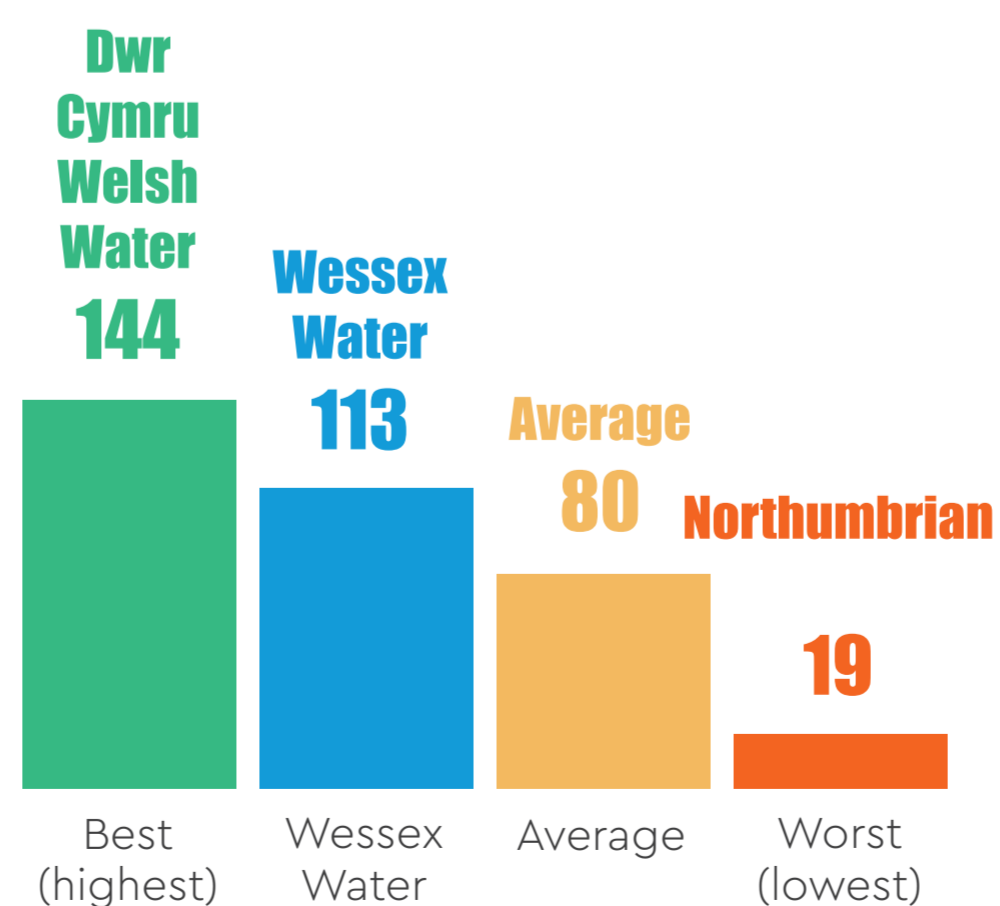
Customers on Pension Credit or who have a state pension as their only income:

- 1 We'll give a 20% reduction on your annual water bill (around £90).



We'll continue to help all customers to reduce their water use through providing information and advice and free water saving devices. By reducing hot water use (e.g. showering) you can save money on your energy bills too.

Number of people on social tariff, per 10,000 customers:



We will be investing in our biggest environmental improvement programme ever. We aim to remain the best in the industry for environmental performance but we need to improve to do this

We will work with our communities and partners, use innovative solutions where possible and invest in our assets to improve our environmental performance. We will have targets to measure our performance against the following:

Protect wildlife in rivers and streams, by removing phosphorus and nitrogen. And we'll use more natural, environmental methods

Upgrade the capacity of our sewage treatment works where required (and carefully recycle the "sludge" – the waste that's left after sewage is treated)

Reduce overflows from our sewers that happen after heavy rain

Improve river and sea water quality (by increasing the level of treatment at our sewage treatment works)

Minimise how much water we take from rivers, especially at sensitive sites

Work with local communities and partners to enhance the environment at our sites and water sources (to improve habitats for plants and wildlife and reduce the risk of flooding)

Continue to reduce greenhouse gas emissions to be carbon neutral by 2040

Improving the condition of Sites of Special Scientific Interest (SSSIs) on our land

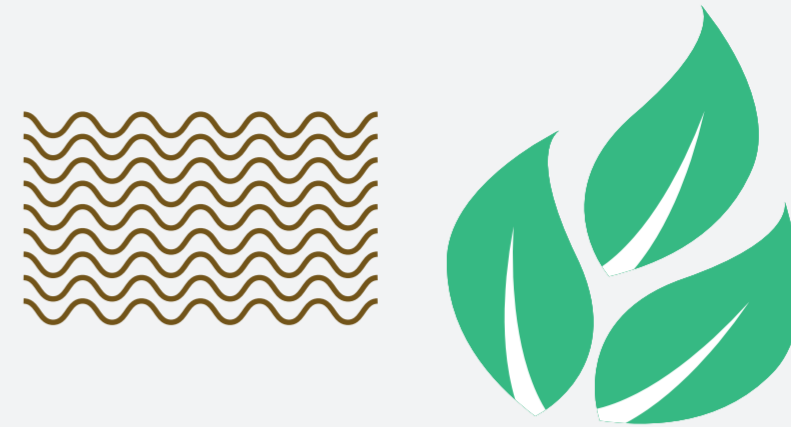
Our investment will also help to generate economic growth and accommodate new development in the region.

Polluted river



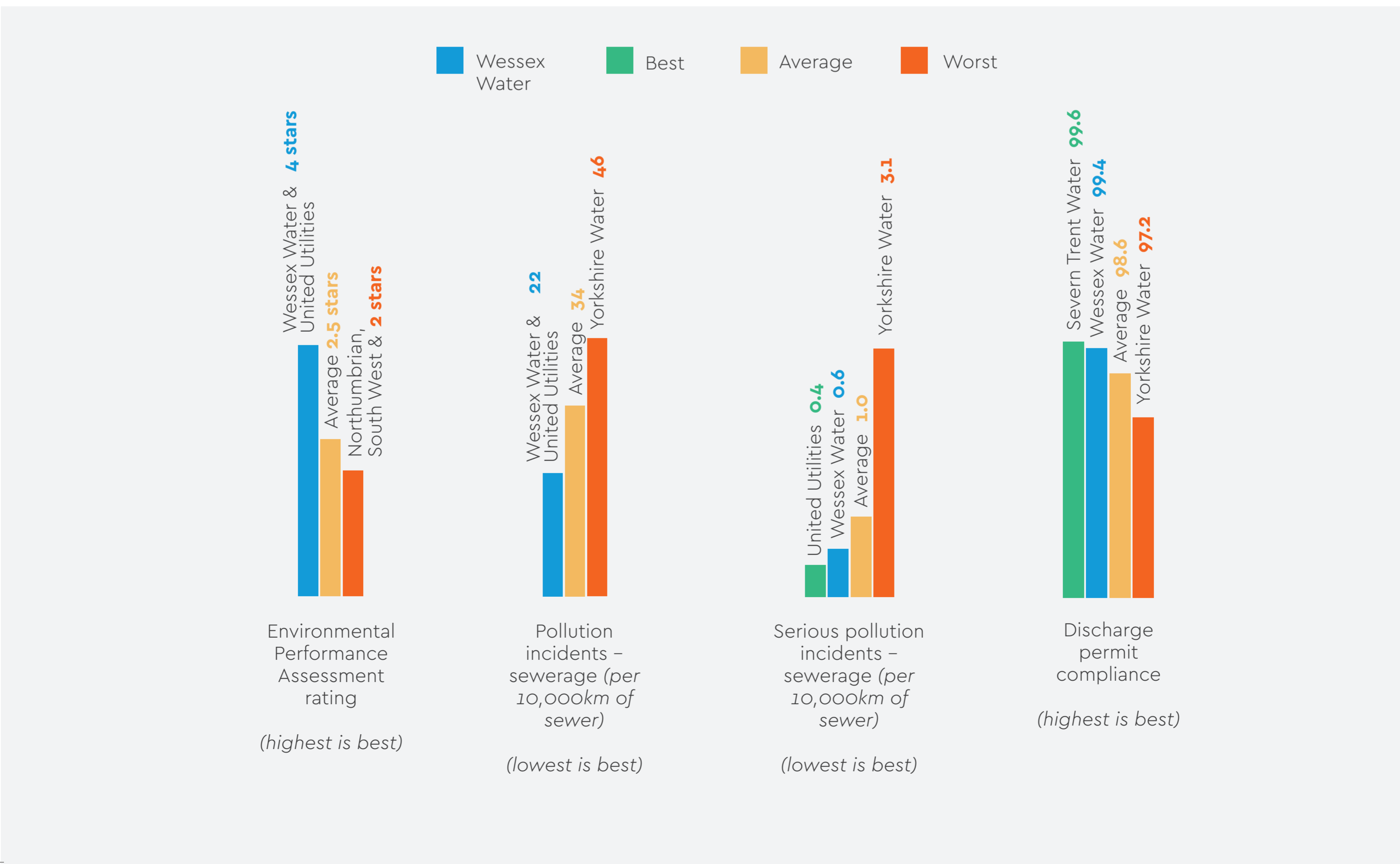
We aim to reduce pollution incidents even further

Much of what Wessex Water does is to ensure that the environment is not damaged by the sewage we are required to treat. Sometimes, this sewage does get into the environment above the limits set by the Environment Agency – these are called pollution incidents.



We are already the **best in the industry** as we have the fewest number of wastewater pollution incidents. We want to reduce the number by a further **25% by 2025**, and avoid the most serious incidents altogether. We'll do this by:

- 1 Installing monitors to provide advance warning of potential polluting discharges
- 2 Extra preventative maintenance and sewer cleaning in areas of risk
- 3 Do more to avoid blockages in our sewers, helping customers not to cause problems especially in hot spot areas
- 4 We will also improve our sewage treatment works to continue to be amongst the best in the industry





We are future proofing our water and sewerage services

We have sufficient water resources to cope with likely water needs in the region, now and for at least the next **25 years**, even allowing for an additional **200,000** people living in our region and the effects of climate change



We are investing:

1

To minimise short (less than 3 hours), planned breaks to your water supply

2

To reduce the risk of longer breaks in water supply (i.e. more than 12 hours)

3

To make sure the number of water mains bursts and sewer collapses doesn't increase

4

In cyber security to prevent hacking

5

To protect against the impact of drought or flooding in the future



**Our target is to match the best company
in the water industry for breaks in supply.
We plan to reduce them by 75% by:**

1

Having no planned interruptions lasting longer than 3 hours

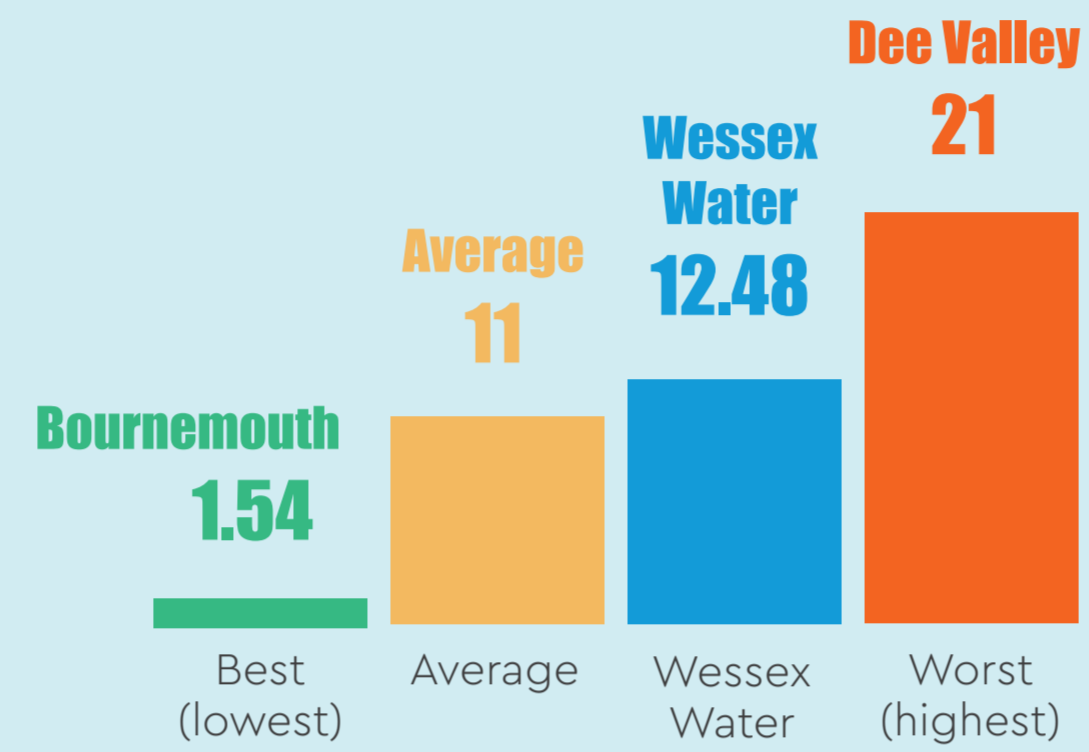
2

Using innovative approaches e.g. investing in more live data monitors and an early warning system

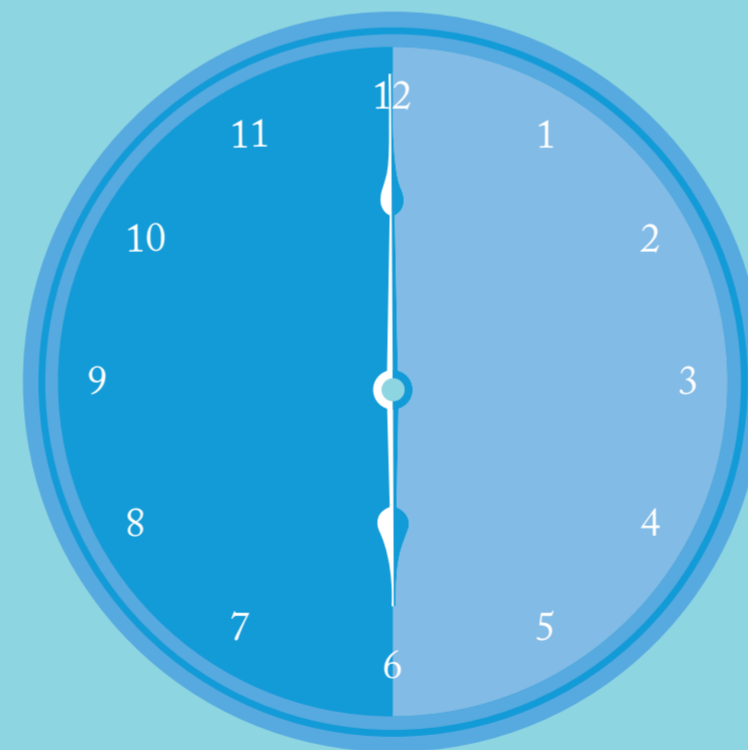
3

Having teams available to reduce the impact of supply interruptions 24-7, 365 days of the year

Supply interruptions over 3 hours
(average minutes lost per property)



Footnote: Mains bursts which cause breaks in supply are caused by lots of things, most often cold weather but also prolonged dry weather, corrosion of the pipes, the age of the pipes, traffic driving over the pipes



We also want no more than 50 customers a year to have a break in supply of more than 12 hours

We will continue to reduce leakage and increase the help we give to customers to use water wisely. By doing so, the total amount of water we take from the environment won't increase despite a growing population

Leakage
in the Wessex Water area is **less than half what it was 20 years ago.**

Water travels 35 miles, on average, through our pipe network, to get to your home from our treatment works.

20%

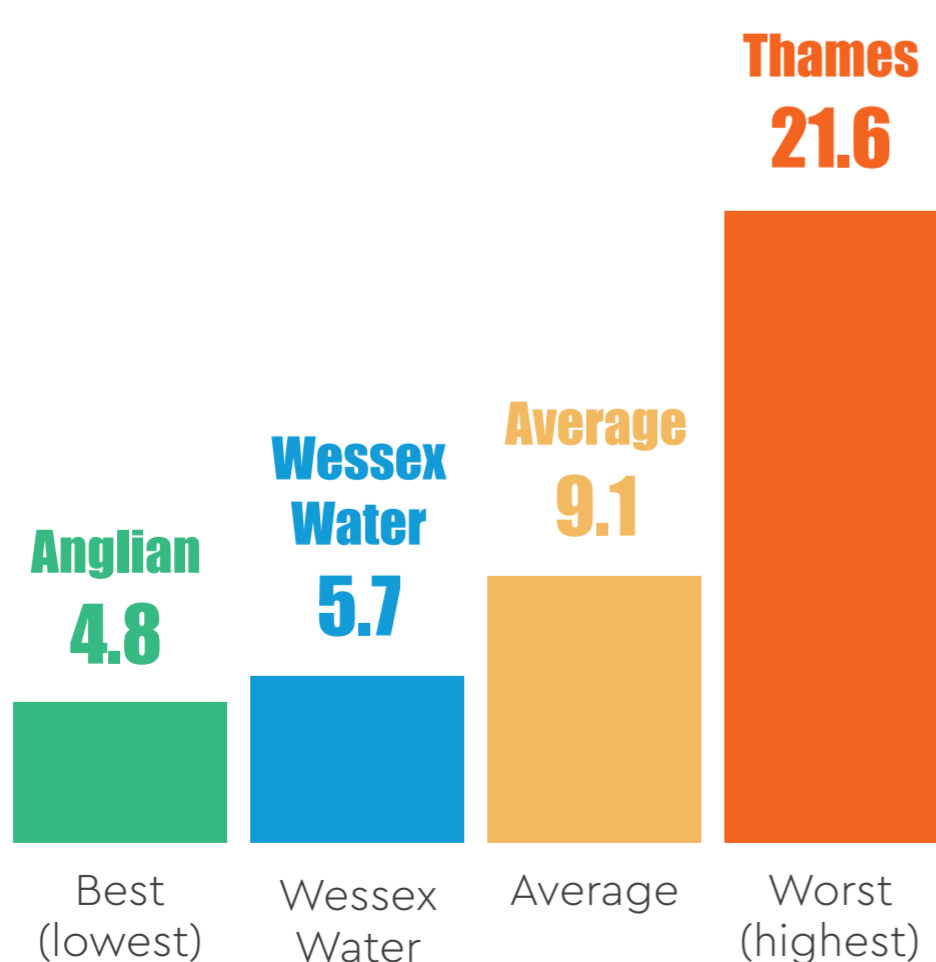
of water we transport from our treatment works is lost through leaks.

The company has fixed, and will continue to fix the major leaks, but it's getting harder and more expensive to find the smaller leaks.

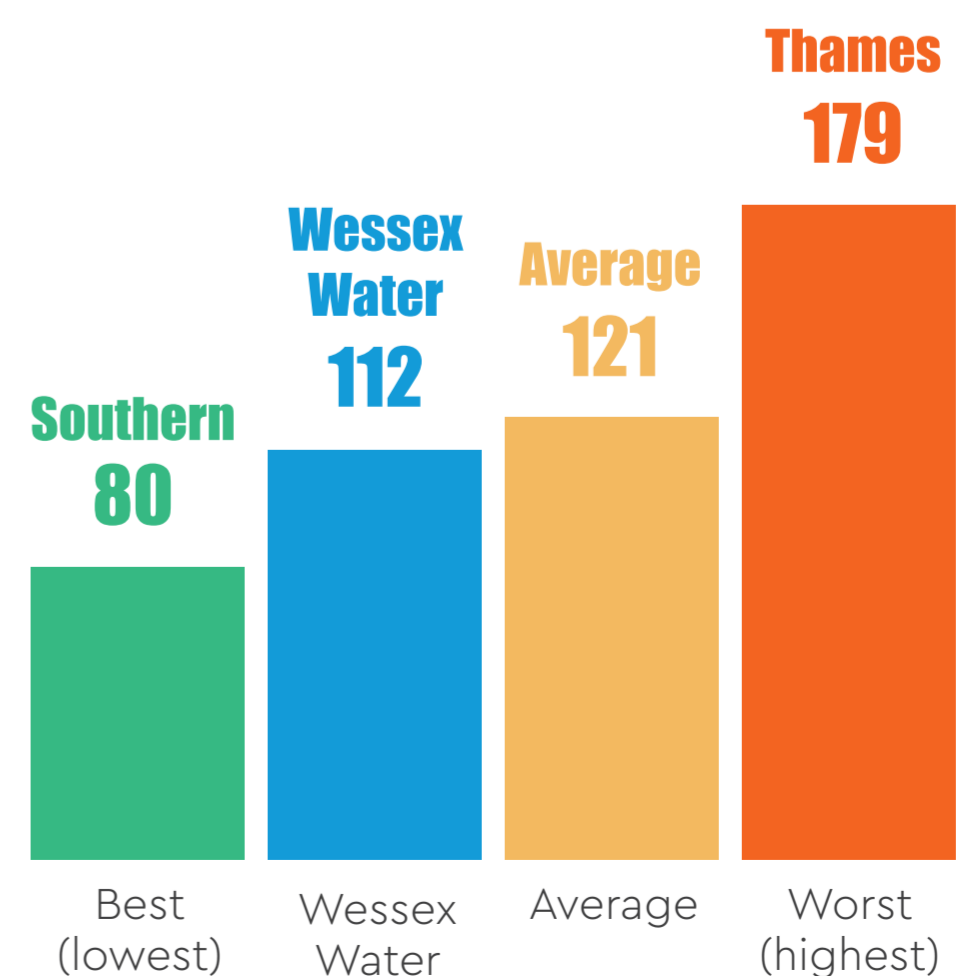
You are very **unlikely to have a water restriction** (e.g. hosepipe ban) in the Wessex area. There hasn't been a hosepipe ban for over 40 years, this is better than most other water companies.

You can be confident that **essential water supplies will continue** even in extreme droughts.

Leakage (litres per km / per pipe / per day)



Leakage (per annum per household)



Specifically we pledge to:

Keep the amount of water taken from the environment the same as now, by:

Reducing the volume of water leaked by

3%



Helping customers to use less water each day (currently WW customers use average of **133 litres per person per day**, by 2025 we will help them to reduce this to 128 litres per person per day)

We will do this by:



Fixing leaks on our network of pipes we are told about **quickly** (aiming for 90% within a day – up from 70% now)



Providing **40,000** free in-home checks for customers



Making it easy for you to compare your water use with similar homes

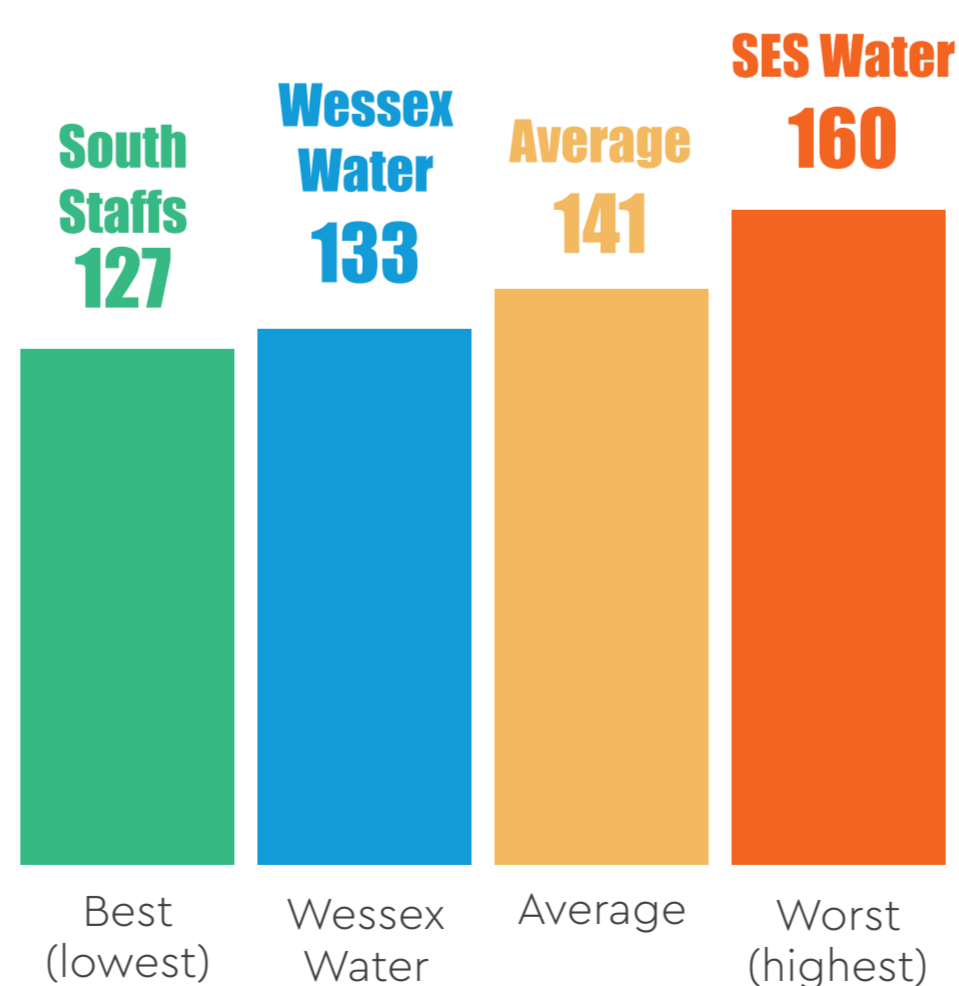


Educating **150,000** school children about how to use water efficiently



Fitting water meters for **free** so customers only pay for what they use

Water used by each person in a day (litres)



Leakage per km of **our pipe network compares well** with our peers. It would cost more to reduce leakage further than the cost of processing the water

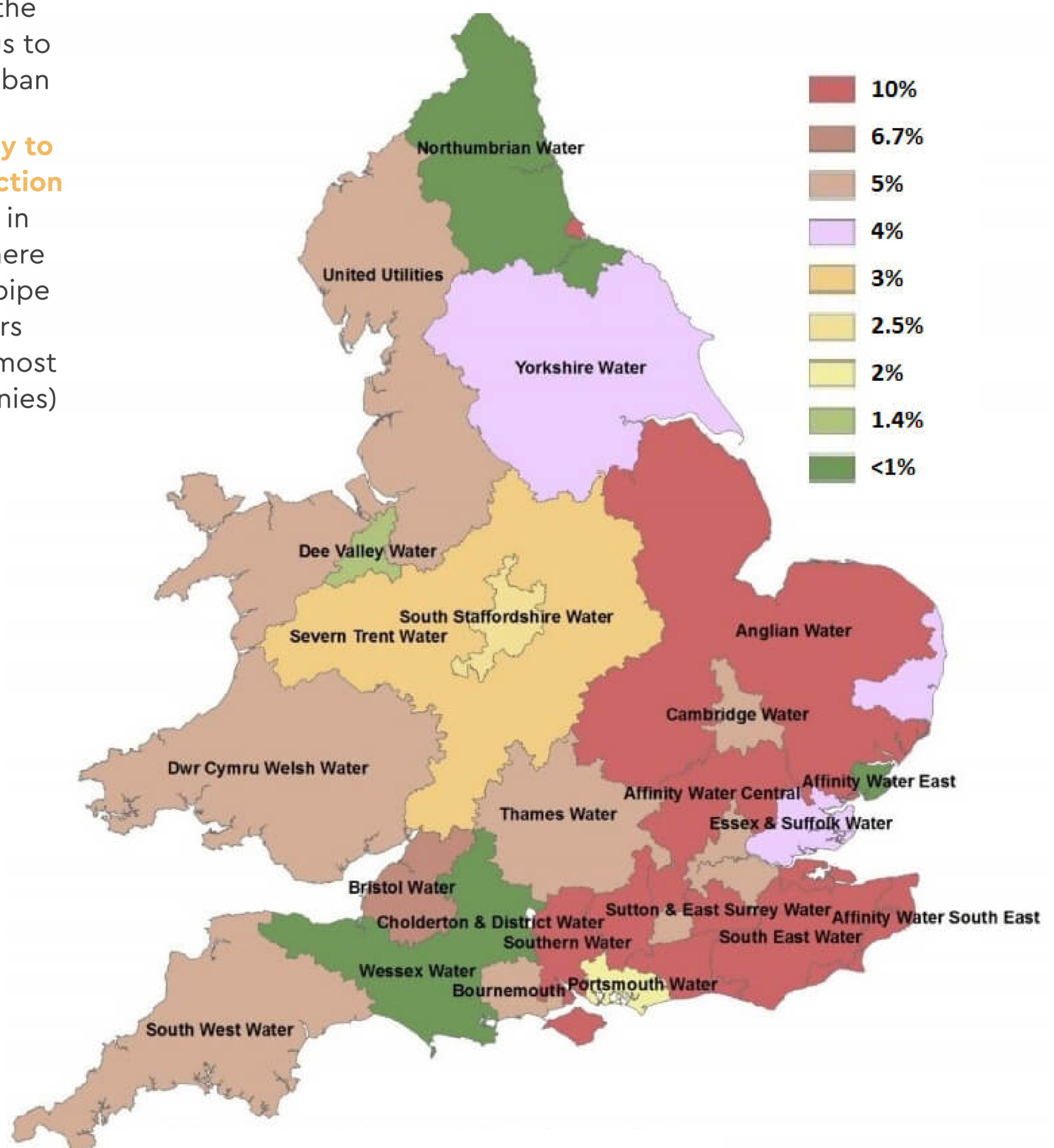
On the other hand lower leakage levels would mean

- **Abstraction** from the environment would be **reduced**
- There would be a **small energy saving** from having to treat and pump less water

Percentage chance of a hosepipe ban for each water company

It would have to be drier than it has been in the last 100 years, for us to impose a hosepipe ban

You are very **unlikely to have a water restriction** (e.g. hosepipe ban) in the Wessex area (there hasn't been a hosepipe ban for over 40 years (this is better than most other water companies))



We are one of the leading water companies for the quality of your drinking water, but we want to be the best

We are already the second best performing water company (as measured by the independent water quality regulator)

We want to be the best. We will achieve this by:



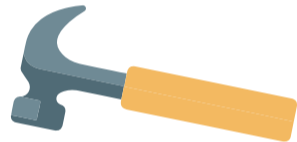
Protecting the sources of our water from contamination, e.g. from fertilisers, by working with farmers and other land users



Promoting the use of approved plumbers and fittings inside people's homes



Proactively maintaining our water treatment works and supply network, not just fixing problems after they happen

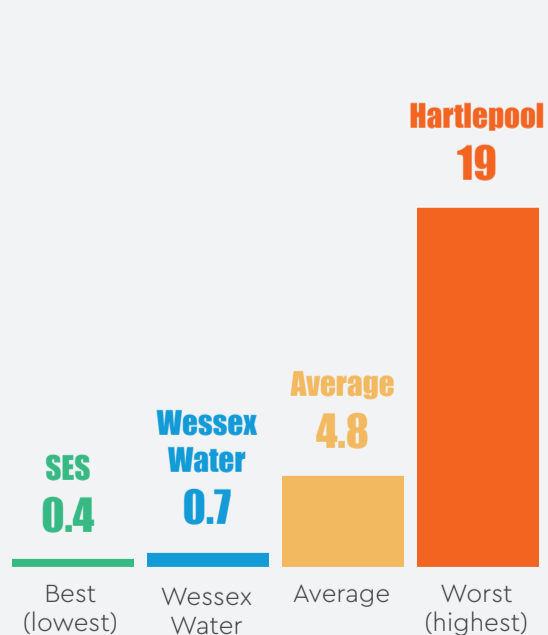


Replacing three times as many lead pipes as we have in the past

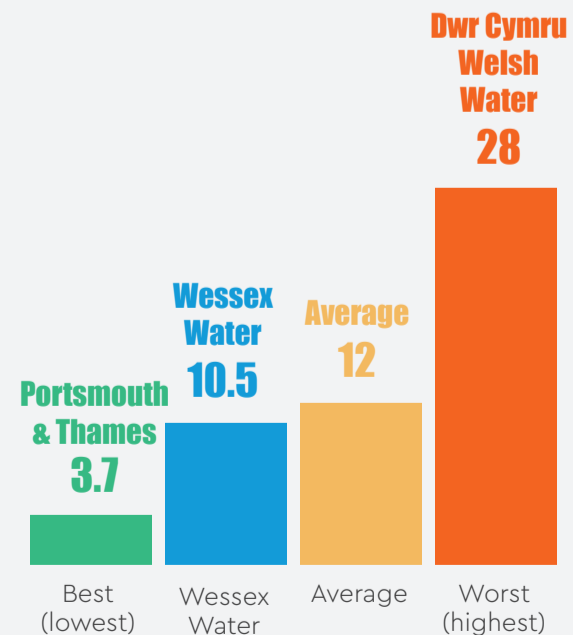


Improving the appearance of water, aiming to reduce the number of people who need to contact us about the appearance of their water, by 20%

Water quality measure from Chief Inspector of Drinking Water



Number of times companies were contacted by customers about the appearance of their tap water (per 10,000 people supplied):



Sewage flooding is one of the worst things that can affect customers. We will continue to reduce internal and external sewer flooding.

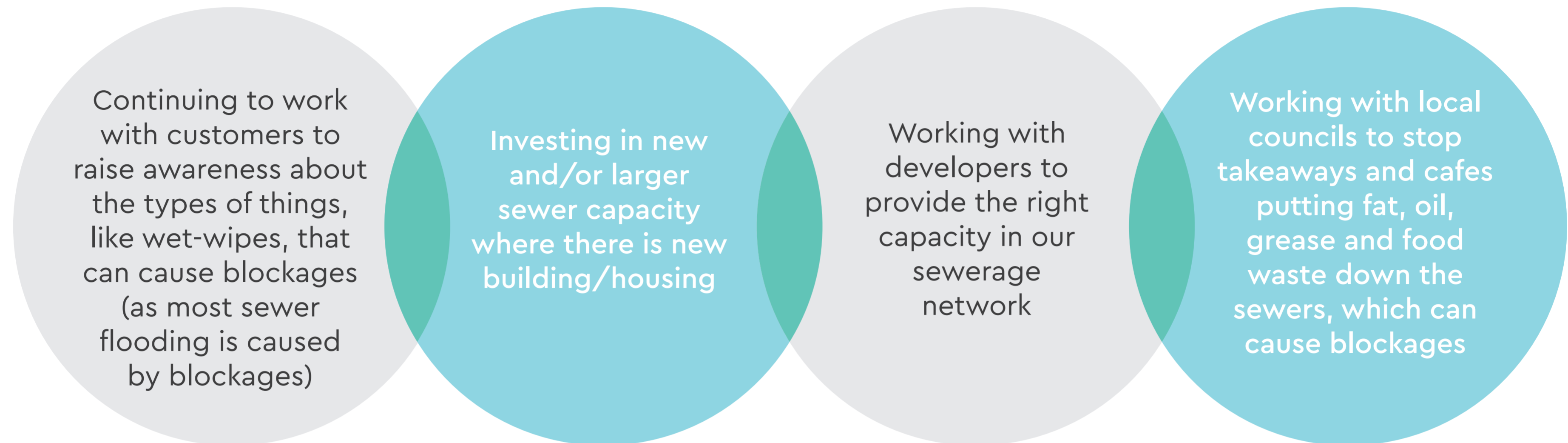


For sewer flooding within your home or business premises, we already provide the **best service in the industry, but we want to get better.**

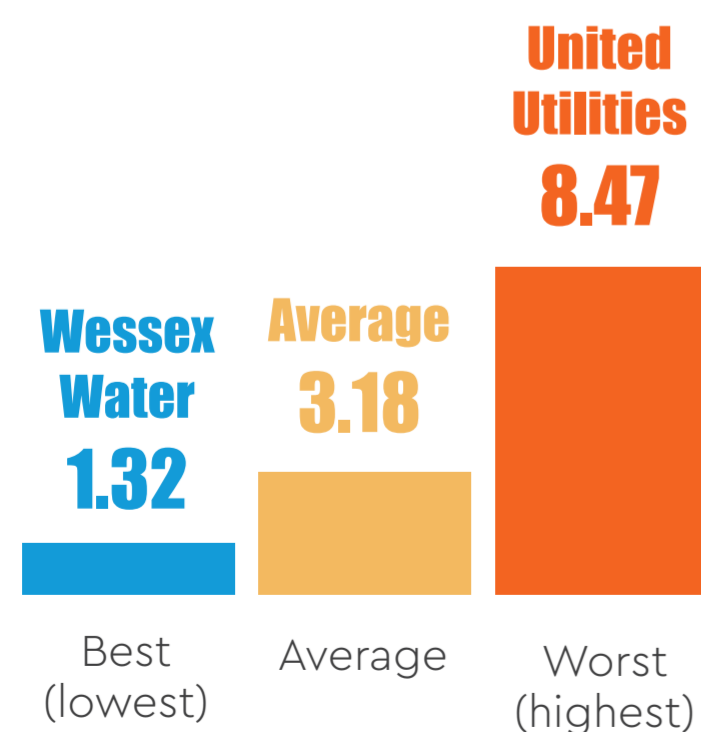
Our performance is better than average for external sewer flooding i.e. flooding from our network not within properties.



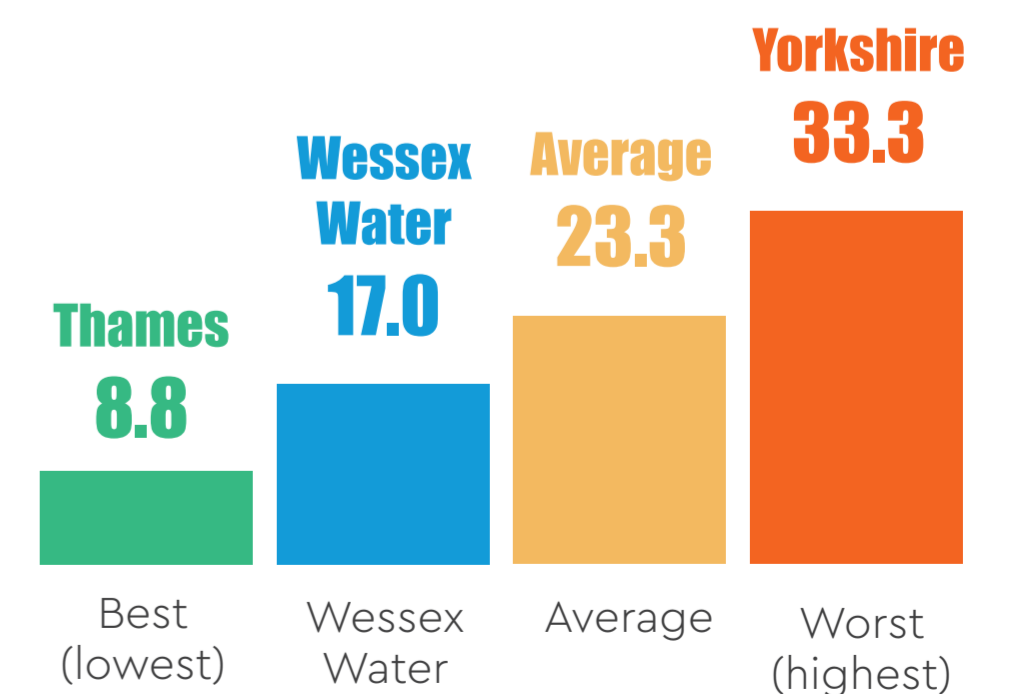
We aim to stay at the top of the table for internal sewer flooding incidents and to reduce external flooding further by:



Sewage flooding in property (per 10,000 connections to sewers):



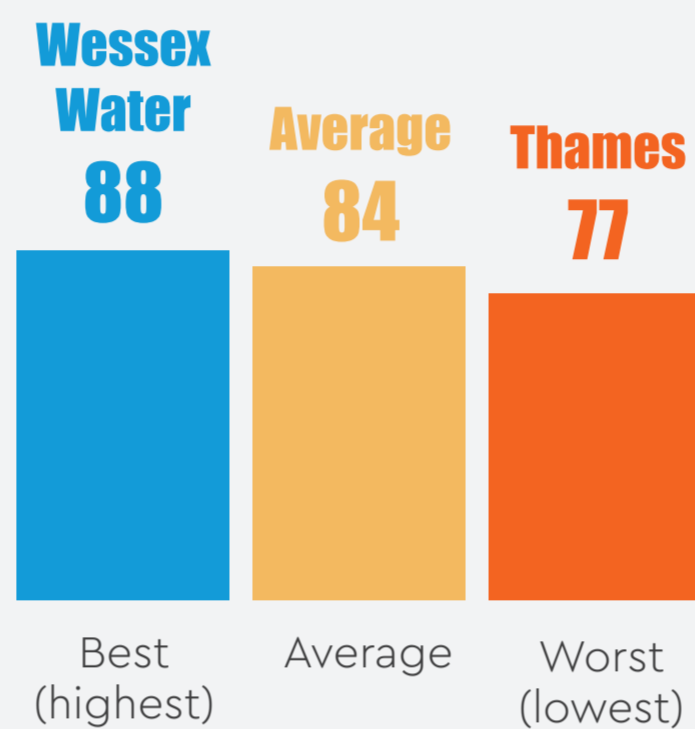
Sewage flooding outside property (per 10,000 connections to sewers)



We want to be in the top 20 of all UK companies for customer service

We are already the best water company for customer service (as measured independently by Ofwat). This isn't enough and we want to match other UK organisations that are most admired for their customer service, ethics and values.

Customer Service Score (out of 100)



This is how we will achieve this:

- ✓ Always getting the basics right and delivering reliable services both for you and the environment
- ✓ Being there 24/7 for you (not just for emergencies)
- ✓ Always answering the phone with a person, not a machine. As well as giving you alternative ways to contact us if you'd prefer
- ✓ Improving and expanding our online services, for instance to help you understand how your water use compares with similar properties. You will be able to report and track any problems you have online.
- ✓ We will also work with interested people in local communities to include them in decision making, for instance by promoting local agreements about how much water we take from rivers



**We want to give all
our customers
the best service,
including those who
have different needs
or who are finding
life more difficult**



Some people need more direct help from us when they find themselves in vulnerable circumstances – this could be making sure they get priority treatment when there is an emergency.

We will make sure all our customers get the best service by:

1

Increasing the number of people added to the register for "priority services" because of disability or additional needs. We aim to grow this number by 1100 per year

2

Making sure no-one is excluded from contacting us or understanding the information we send them. We'll give you a choice about how we get in touch with each other and design services that are easy to use for all our customers

3

Making sure our colleagues are highly trained in customer care and will always go the extra mile



We will also:

1

Proactively identify customers who need extra help and approach them rather than waiting for them to contact us

2

Work with trusted partners to help people such as Citizens Advice Bureau

3

We hold the British Standard for inclusive services and will ensure we always meet best practice

We really want to work with you to protect the water environment and invest in the future so that everyone benefits



Wessex Water will:

We would like you to help us by:

<p>We'll provide the best services</p>	<ul style="list-style-type: none"> • Give you the best overall service • Protect the environment 	<ul style="list-style-type: none"> • Only ever flushing pee, poo and paper down the toilet • Never pouring fat or oil down the sink • Telling us if you see any leaks
<p>We'll keep them affordable</p>	<ul style="list-style-type: none"> • Make bills affordable to all • Help you lower your bills • Help you use less water and energy 	<ul style="list-style-type: none"> • Paying your bills on time • Telling us if you are struggling so we can help you
<p>We'll keep them sustainable</p>	<ul style="list-style-type: none"> • Future proof for the long term • Find new ways to deliver what's important to you 	<ul style="list-style-type: none"> • Using water efficiently so we take less water from the environment • Telling us what's important to you and your community
<p>We'll give extra help to those who need it</p>	<ul style="list-style-type: none"> • Help you if you are finding life tough • Work with you to improve water quality at home/in workplace • Be accountable and transparent 	<ul style="list-style-type: none"> • Accepting the help we can offer you • Working with us to improve water quality inside your home/business

We really want to work with you to protect the water environment and invest in the future so that everyone benefits



Wessex Water will:

We would like you to help us by:

<p>We'll provide the best services</p>	<ul style="list-style-type: none"> • Give you the best overall service • Protect the environment 	
<p>We'll keep them affordable</p>	<ul style="list-style-type: none"> • Make bills affordable to all • Help you lower your bills • Help you use less water and energy 	
<p>We'll keep them sustainable</p>	<ul style="list-style-type: none"> • Future proof for the long term • Find new ways to deliver what's important to you 	
<p>We'll give extra help to those who need it</p>	<ul style="list-style-type: none"> • Help you if you are finding life tough • Work with you to improve water quality at home/in workplace • Be accountable and transparent 	

Stimulus Summary



Priority area	Choice 1	Choice 2	Choice 3
Environment	Make all the environmental improvements that are required over the next seven years. This would improve 1,450 km of river by 2025 (the total length of rivers in our region is c3,900 km). Your bill would not increase as a result.	Do all the work over five years (rather than seven). This would improve a further 680 km of river by 2025, but this might mean the solutions we use aren't as "green". This would add a further £15 per year to an average bill.	N/A
Efficiency	Stick with our plans to cut leakage by 3%, invest more in helping you save water and reduce bills and keep total water taken from the environment the same (despite a growing population).	Prioritise a 15% leakage cut instead of 3% - you are happy to pay £8 per year on your water bill to achieve this.	Prioritise a 15% leakage cut - but make changes in our other plans (e.g. fewer improvements to the environment) so you don't have to pay more on your bill.

PR19 Plan Acceptability Testing

MARCH 2018

Sample:

- CLTs: 1,000 respondents
- Online: 400 Populus panel, ~400 Wessex Water panel
- In home vulnerable: 50 respondents
- In premise business: 100 respondents

25 min survey

Mobile and tablet optimized

HIDDEN QS

These are hidden questions (for internal use) to capture how and where respondents are taking the survey.

Capture whether interview is:

- Pilot test
- Online via WW panel
- Online via Populus
- CLT
- In-home vulnerable
- In-premises business

If CLT, capture location:

- TBD

INTRODUCTION, DEMOGS & QUOTAS

These questions are to ensure we are talking to the right people.

For household customers we will achieve a good spread of age and gender to ensure the sample is reflective of Wessex Water customers. We will then weight the data to ensure it is representative of the Wessex Water customer profile.

For non-household customers we will set targets on business size to ensure a good spread of Wessex Water business customers.

While the surveys will be administered separately for household and business customers, this questionnaire contains all the questions we will ask to both household (HH) and business (Non-HH) customers.

Thank you for agreeing to take part in this survey. First we have just a few questions about (you / your business).

ASK HH CUSTOMERS

1. Are you...?
 - a. Male
 - b. Female
 - c. Other
 - d. Prefer not to say

ASK HH CUSTOMERS

2. How old are you?
[Close if 17 or younger]
 - a. Under 18
 - b. 18 – 24
 - c. 25 – 34
 - d. 35 – 44
 - e. 45 – 54
 - f. 55 – 64
 - g. 65+

ASK ALL

3. Please enter (your / your business') full postcode in the text box below. **For non-HH add:** If your business or organisation is based in several locations, please enter the post code for the main administrative base.

This will be used for research purposes only.

[Close if not Wessex Water postcode]

ASK HH CUSTOMERS

4. Are you the person responsible for paying your water and sewerage bill (this may be included in your rent)?
 - a. Yes, I am solely responsible
 - b. Yes, I am jointly responsible
 - c. No, I am not responsible [Close]

- d. Don't know [Close]

ASK NON-HH CUSTOMERS

- 5. Do you have financial decision making responsibilities for Utilities (e.g. water) at your business or organisation?
 - a. Yes, I am the person with sole or ultimate responsibility
 - b. Yes, I am one of a group of people who make these decisions
 - c. Yes, I have some influence on such decisions
 - d. No, I am not involved at all in decisions about these services [Close]
 - e. Don't know [Close]

ASK ALL

- 6. Does Wessex Water provide either your water supply or sewerage services?
Please refer to this map to help you if you are unsure
 - a. Yes, Wessex Water supplies both my water supply and sewerage services
 - b. Yes, Wessex Water supplies only my sewerage services (but not my water supply)
 - c. Yes, Wessex Water supplies my water only (but not my sewerage services)
 - d. No [Close]
 - e. Don't know [Close]

ASK NON-HH CUSTOMERS

- 7. Where is your business or organisation primarily based?
 - a. At home
 - b. In serviced offices
 - c. In your own offices
 - d. In shops / garages / other outlets open to the public
 - e. In factories / storage facilities / depots
 - f. Not based anywhere as such (mainly out and about with customers or suppliers)
 - g. Somewhere else [Please specify]

ASK NON-HH CUSTOMERS

- 8. What is the principal activity of your organisation?
 - PUBLIC SECTOR**
 - a. Defence
 - b. Education
 - c. Central Government & Police
 - d. Local Government & Health
 - e. Other
 - PRIVATE SECTOR / THIRD SECTOR**
 - f. Agriculture, Forestry and Fishing
 - g. Mining and Quarrying
 - h. Manufacturing
 - i. Electricity, Gas, Steam and Air Conditioning Supply
 - j. Water Supply, Sewerage, waste management and remediation activities
 - k. Construction
 - l. Wholesale and Retail Trade, Repairs of motor vehicles & motor cycles
 - m. Transport & Storage
 - n. Accommodation & food services activities

- o. Information & Communication
- p. Financial and insurance activities
- q. Real Estate Activities
- r. Professional, Scientific and Technical activities
- s. Administrative and Support Services
- t. Public administration and defence
- u. Education
- v. Human health and Social Work
- w. Arts, entertainment & recreation

- x. Other service activities
- y. Other **[PLEASE SPECIFY]**

ASK NON-HH CUSTOMERS

9. How many workers (both permanent and temporary) are there at your company or organisation? If you work in a multi-national organisation please just think about those workers based in the UK.
- a. 0 – only you / self-employed
 - b. 1-9 workers
 - c. 10-49 workers
 - d. 50-99 workers
 - e. 100-249 workers
 - f. 250-499 workers
 - g. 500+ workers
 - h. Don't know

THE BUSINESS PLAN

These questions are to familiarise respondents with the business plan.

We will first show the respondent an overview of the plan and impact on bill before asking affordability and acceptability. This is to get an initial read on response to the plan overall (including the eight areas WW have chosen to focus on and perceptions of the bill increase).

We will then show the business plan in more detail over several screens using infographic imagery. This is a cut down, simplified version of the qual stimulus (which still includes all performance commitments). We will randomise the order areas 1-7 of the plan is shown to respondents to avoid bias. However, building relationships with communities will be fixed last. Findings from the qual suggest this works best as the final area as it switches focus from what WW will be doing to what they will be asking customers to help with. To avoid confusing respondents it's therefore best to show everything WW plan to do, and then switch focus at end.

After each area of the plan has been shown we will ask two questions: How important they think the area is to them and how Wessex Water's proposed approach makes them feel (using non-verbal scales). While these will provide some useful data, the primary purpose of these questions is keep respondents engaged when faced with so much information.

Once all eight areas of the plan have been shown, we will then show respondents the overview of the plan and impact on bill once again. This is so respondents consider the plan as a whole when answering the second round of affordability/acceptability questions.

(Screen 1 for HH – Sewerage only, Screen 2 for Non-HH, Screen 3 for HH – Sewerage and Supply water)

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intend to make over the coming years.

To help develop this plan Wessex Water have already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Show Non-HH customers: Some areas of this plan may seem less relevant to you as a business customer, however Wessex Water still value your opinion so please take your time to read through the plan and answer the questions carefully.

Show Sewerage only customers: Some areas of this plan may seem less relevant to you as Wessex Water do not supply your water (they only take your waste water away). However, Wessex Water still value your opinion so please take your time to read through the plan and answer the questions carefully.

(Screen 4 and 5 for all)

Overall, **Wessex Water's ambition is to be the best water company in the UK** but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on the following eight areas:

(Screens 6, 7 and 8 for HH, Screens 6, 7 and 9 for Non-HH)

Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.

Wessex Water wants water bills to be **affordable** for all (households / businesses).

The table below shows how your bill will change if Wessex Water adopts this plan. **This includes improvements within all eight areas of the business plan.**

You have now seen the overview of Wessex Water's proposed five year business plan and how the average (household / business) bill will change by 2025.

Rotate order of acceptable / affordable questions

10. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

11. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

(Screens 10, 11 and 12 for all)

Over the following screens you will be shown more information around Wessex Water's proposed plans for each of these eight areas. For each area you will be asked two questions; **how important the area is to you** and **how Wessex Water's proposed approach makes you feel**. Once you have reviewed all eight areas you will then be asked a **few further questions about Wessex Water's business plan as a whole**.

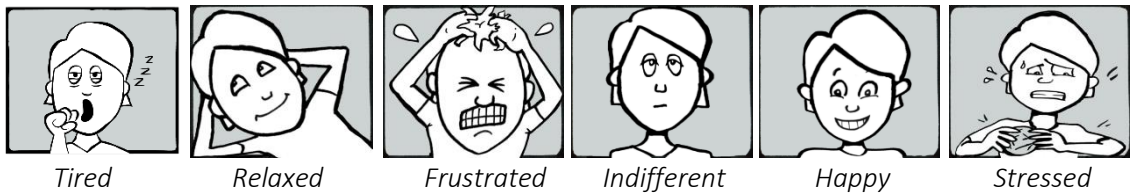
SHOW ALL 8 AREAS. RANDOMISE ORDER 1-7

1. Protecting and enhancing the environment **(Screen 13 and 14 for all)**
2. Delivering excellent customer service **(Screen 15 for all)**
3. Future proofing our services **(Screen 16 for all)**
4. Ensuring bills are affordable for all **(Screen 17 for all)**
5. Using water in our region more efficiently **(Screen 18 and 19 for all)**
6. Providing excellent drinking water quality **(Screen 20 for all)**
7. Minimising sewer flooding **(Screen 21 for all)**
8. Developing better relationships with the communities we serve **(Screen 22 for all) [FIXED]**

OVER NEXT 8 SCREENS:

Show relevant stimulus for each area. Following every other area (following the relevant stimulus) ask respondents these two questions:

- How important is it to you that Wessex Water's five year business plan (**insert based on area being reviewed**: delivers excellent customer service | ensures bills are affordable for all | future proofs their services | protects and enhances the environment | uses water in the region more efficiently | provides excellent drinking water quality | minimises sewer flooding | develops better relationships with the communities they serve)?
 - a. Very important
 - b. Fairly important
 - c. Important
 - d. Slightly important
 - e. Not at all important
 - f. No opinion
- Below are 6 faces. Please select the face which best represents how you feel about Wessex Water's proposed approach to (**insert area being reviewed e.g. delivering excellent customer service**)



ONCE ALL 8 AREAS HAVE BEEN REVIEWED INDIVIDUALLY:

(Screen 23 and 24 for all)

To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:

(Screen 25 and 26 for HH, Screen 25 and 27 for NHH)

You have now seen all improvements Wessex Water plans to make by 2025.

The example below shows how your bill will change if Wessex Water adopts this plan. This takes into account all improvements outlined within the eight areas of the business plan.

These next questions address how acceptable and affordable respondents believe the plan is. We have included two open ends to understand why people think it's affordable/unaffordable and acceptable/unacceptable here in more detail.

You have now seen and reviewed all eight areas of Wessex Water's proposed five year business plan and how the average (household / business) bill will change by 2025. For the next few questions please think about the proposed plan as a whole.

Rotate order of acceptable / affordable questions

12. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

13. Why do you say that?
Open end

14. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

15. How would you rate Wessex Water's proposed plan in terms of value for money?
 - a. Very good value for money
 - b. Good value for money
 - c. Poor value for money
 - d. Very poor value for money
 - e. Don't know

IMPLICIT TESTING

This question will test implicit perceptions of the plan. We have included a recommend list of words here based on the qual findings.

Implicit testing is an opportunity for us to go beyond respondents rational responses to understand what they implicitly think of the plan. Respondents are shown two words on screen, one on the left hand side and one on the right hand side. Each pair of words must be antonyms (e.g. Clear and Vague). Using the M or Z keys they must select which word they think best describes the plan (M=right word, Z=left word). The word they select shows their rational response. However by analysing the speed with which they select the word we can explore the implicit, more automatic responses to the plan.

16. Now you will see a series of words appear on the screen at the same time. For each combination of words please use the **M or Z keys** to quickly indicate which word you think best describes Wessex Water's proposed plan.

There is no right or wrong answer, we would just like to get your first impressions.

We would like you to do the test quickly, but accurately.

Randomise order codes shown

I think Wessex Water's business plan is...

- a. Dependable | Unreliable
- b. Clear | Vague
- c. Straightforward | Complicated
- d. Innovative | Old-fashioned
- e. Efficient | Inefficient
- f. Effective | Useless
- g. Good-value | Expensive
- h. Safe | Risky
- i. Sensible | Unrealistic
- j. Thorough | Incomplete
- k. Impressive | Dull
- l. Expected | Surprising

FLEX AROUND WATER EFFICIENCY & ENVIRONMENTAL IMPROVEMENTS

This section will then test those areas where there is flex within the plan. It is too difficult for respondents to read all alternatives and differentiate between the different price increases. Instead we will split the sample in to 3 cells. Each cell will see one of the possible adjustments that could be made to the plan. Through analysis we will then be able to compare the proposed plan vs. all alternatives to decide which option is preferred (see PPT called ‘Example analysis’)

Based on qual findings we have not included the additional option for water efficiency (‘prioritise a 15% leakage cut but make changes in our other plans so you don’t have to pay more on your bill’). Without a tangible implication as to what specific area of the plan would change respondents found it very hard to understand what this meant and many felt it would be foolish to select it when they don’t know what else would change.

Split sample in 3 (min 333 per cell). Each cell will see one of the following options through the next section:

Cell 1 - Leakage	Cell 2 – Sewer Flooding	Cell 3 – Leakage and sewer flooding
<p>Screen 28 and 29 for HH</p> <p>Screen 28 and 30 for Non-HH</p> <ul style="list-style-type: none"> In our plan we propose to cut leakage by 3% by 2025 However, we could cut leakage by 15% by 2025 If we did this, the average annual household/business bill would increase by (£8 / £33) 	<p>Screen 28 and 31 for HH</p> <p>Screen 28 and 32 for Non-HH</p> <ul style="list-style-type: none"> We know sewage flooding is one of the service failures that has the biggest impact on customers when it happens. In our plan, we will increase our investment in this area and reduce the number of properties flooded by 1250 However, we could keep the level of investment the same as it is now, and reduce the number of properties flooded by 950 If we did this, the average annual household/business bill would decrease by (£5 / £22) 	<p>Screen 28 and 33 for HH</p> <p>Screen 28 and 34 for Non-HH</p> <ul style="list-style-type: none"> In our plan, we propose to cut leakage by 3% by 2025, and reduce the number of properties flooded by 1250 However, we could cut leakage by 15% by 2025, and reduce the number of properties flooded by 950 If we did this, the average annual household/business bill would increase by (£1 / £3)

As mentioned previously, Wessex Water’s plan is not yet finalised and there are some areas where Wessex Water could still adjust the plan. However, any changes would have an impact on the average water bill for Wessex Water customers.

Below is a possible change to the area (insert depending on cell being shown: 'Using water in our region more efficiently' / 'minimising sewer flooding')

If you would like to see the current proposed plan again, please click [here](#) (insert depending on cell being shown: cell 1 screen 18, cell 2 screen 21, cell 3 screens 18/21)

Rotate order of acceptable / affordable questions

18. How acceptable or unacceptable do you consider this alternative option to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

19. How affordable or unaffordable do you consider this alternative option to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

FINAL DEMOGS & CLASSIFICATION QS

These final questions are further classification questions.

Thanks for your answers so far. Only a few more questions to go.

ASK ALL

20. Approximately how much (do you / does your business) pay for your water and sewerage bill?
Please do not include any arrears or debt repayments you may be making to your water and sewerage company.
- Less than £12.99 per month / Less than £150 per year
 - £13 - £16.99 per month / £151 - £200 per year
 - £17 - £20.99 per month / £201 - £250 per year
 - £21 - £24.99 per month / £251 - £300 per year
 - £25 - £28.99 per month / £301 - £350 per year
 - £29 - £32.99 per month / £351 - £400 per year
 - £33 - £37.99 per month / £401 - £450 per year
 - £38 - £41.99 per month / £451 - £500 per year
 - £42 - £45.99 per month / £501 - £550 per year
 - £46 - £49.99 per month / £551 - £600 per year
 - Over £50 per month / Over £600 per year
 - Don't know

ASK ALL

21. How (are you / is your business) charged for the water you use?
- Metered (pay for what we use)
 - Unmetered (pay a fixed amount)
 - Don't know

WW Segmentation questions

ASK HH CUSTOMERS

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

SINGLE CODE

- A great deal
- A fair amount
- Some effort
- Not much effort
- None

ASK HH CUSTOMERS

23. Please tell me which, if any, of these apply to you?

MULTICODE

- a. I volunteer for a local organisation or a local charity
- b. I'm a member of an online group (like Facebook) for people living in my area
- c. I'm a member of a local action group like Neighbourhood Watch, Floodwatch, a conservation group, or the Parish Council
- d. I often pick up litter near where I live
- e. I report overflowing drains or leaking pipes in my neighbourhood
- f. I choose to use or recommend companies because they do things for the local community, like sponsoring a local team or donating to a local charity
- g. None of these [FIXED]

ASK HH CUSTOMERS

24. How strongly do you agree or disagree with the following statements about your water bill?
Please use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree.

Insert scale of 1 (strongly disagree) to 10 (strongly agree)

- a. I worry about being able to afford my water bill

Questions to identify vulnerable customers (for vulnerable interview boost these questions will be moved up to the screener, for CLTs they will remain here). These are the questions we typically use with other water companies to define vulnerabilities. We find respondents are happy to complete these questions, however we include the code 'prefer not to say' at each question so can opt out if they feel uncomfortable.

ASK HH CUSTOMERS

25. What is the occupation of the Chief Income Earner?

Use social grade scale

ASK HH CUSTOMERS

26. What is the combined gross income of your household? By this we mean how much money do all the people in your household have coming in, before Tax and National Insurance deductions. We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit)
- a. Up to £8,000 a year / up to £670 a month / up to £155 a week
 - b. £8,001 - £16,105 a year / £671 - £1,342 a month / £156 - £310 a week
 - c. £16,106 - £30,000 a year / £1,434 - £2,500 a month / £311 - £580 a week
 - d. £30,001 - £40,000 a year / £2,501 - £3,300 a month / £581 - £770 a week
 - e. £40,001 - £50,000 a year / £3,301 - £4,100 a month / £771 - £960 a week
 - f. £50,001 - £70,000 a year / £4,101 - £5,800 a month / £961 - £1,345 a week
 - g. £70,001 - £100,000 a year / £5,801 - £8,300 a month / £1,346 - £1,920 a week
 - h. More than £100,000 a year / more than £8,300 a month / more than £1,920 a week
 - i. Prefer not to say

ASK HH CUSTOMERS

27. Which, if any, of the following benefits or tax credits do you, or someone within your household, receive?
- a. No one in my household receives any benefits **[FIXED]**
 - b. Income support
 - c. Income-based Jobseeker's Allowance
 - d. Housing Benefit
 - e. Pension Credit
 - f. Working Tax Credit
 - g. Child Tax Credit (receiving more than the basic allowance that every family receives)
 - h. Income related Employment & Support Allowance (ESA)
 - i. Disability allowance
 - j. Personal Independence Payment
 - k. Universal Credit
 - l. I / Someone in my household receives another benefit and /or tax credit that is not specified on this list
 - m. Prefer not to say

ASK HH CUSTOMERS

28. Do you consider yourself to be officially disabled defined by the Equality Act 2010 as 'A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out day-to-day activities'?
- a. Yes
 - b. No
 - c. Prefer not to say

ASK HH CUSTOMERS WHO SAY 'YES' AT Q28

29. Which of the following disabilities do you consider yourself to have? Please select all that apply, and whether this is permanent or temporary

Row

- a. Yes – permanent
- b. Yes – temporary
- c. Yes – unsure whether permanent or temporary
- d. No
- e. Prefer not to say

Columns

- f. Visual disability
- g. Hearing disability
- h. Mobility disability
- i. Learning disability
- j. Mental health condition
- k. Disability requiring the use of at-home medical equipment (e.g. dialysis machines)
- l. Other **[Please specify]**

ASK HH CUSTOMERS WHO SAY 'YES' AT Q28

30. How would you best describe the extent of your disability?

Row

- a. Severe
- b. Moderate
- c. Mild
- d. Prefer not to say

Columns (pull through 'yes')

- e. Visual disability
- f. Hearing disability
- g. Mobility disability
- h. Learning disability
- i. Mental health condition
- j. Disability requiring the use of at-home medical equipment (e.g. dialysis machines)
- k. Other **[Please specify]**

ASK HH CUSTOMERS

31. What is your ethnic group?

White

- a. English/Welsh/Scottish/Northern Irish/British
- b. Irish
- c. Gypsy or Irish Traveller
- d. Any other white background

Mixed/multiple ethnic groups

- e. White and Black Caribbean
- f. White and Black African
- g. White and Asian
- h. Any other Mixed/Multiple ethnic group

Asian/Asian British

- i. Indian
- j. Pakistani
- k. Bangladeshi
- l. Sri Lankan
- m. Any other Asian background

Black/African/Caribbean/Black British

- n. African
- o. Caribbean
- p. Any other Black/African/Caribbean background

Other ethnic group

- q. Arab
- r. Any other ethnic group

- s. Prefer not to say

VULNERABILITY CLASSIFICATION

Disability	
Visual disabilities	Select 'VISUAL' condition
Hearing disabilities	Select 'HEARING' condition
Mobility disabilities	Select 'MOBILITY' condition
Need for medical equipment at home	Select 'NEED FOR MEDICAL EQUIPMENT AT HOME' condition
Mental health conditions	Select 'MENTAL HEALTH' condition
Learning difficulties	Select 'LEARNING DIFFICULTIES'
Financially Vulnerable	
Low incomes/in debt/financial support	Household income below £16,105, receive of one or more benefits

PR19 Plan Acceptability Testing

MARCH 2018

Sample:

- In premise business: 100 respondents

25 min survey

Mobile and tablet optimized

HIDDEN QS

These are hidden questions (for internal use) to capture how and where respondents are taking the survey.

Capture whether interview is:

- Pilot test
- Online via WW panel
- Online via Populus
- CLT
- In-home vulnerable
- In-premises business

If CLT, capture location:

- TBD

INTRODUCTION, DEMOGS & QUOTAS

For non-household customers we will set targets on business size to ensure a good spread of Wessex Water business customers.

Thank you for agreeing to take part in this survey. First we have just a few questions about (you / your business).

1. Please enter your business' full postcode in the text box below. If your business or organisation is based in several locations, please enter the post code for the main administrative base.

This will be used for research purposes only.

[Close if not Wessex Water postcode]

2. Do you have financial decision making responsibilities for Utilities (e.g. water) at your business or organisation?
 - a. Yes, I am the person with sole or ultimate responsibility
 - b. Yes, I am one of a group of people who make these decisions
 - c. Yes, I have some influence on such decisions
 - d. No, I am not involved at all in decisions about these services **[Close]**
 - e. Don't know **[Close]**

3. Does Wessex Water provide either your water supply or sewerage services?
Please refer to this map to help you if you are unsure
 - a. Yes, Wessex Water supplies both my water supply and sewerage services
 - b. Yes, Wessex Water supplies only my sewerage services (but not my water supply)
 - c. Yes, Wessex Water supplies my water only (but not my sewerage services)
 - d. No **[Close]**
 - e. Don't know **[Close]**

4. Where is your business or organisation primarily based?
 - a. At home
 - b. In serviced offices
 - c. In your own offices
 - d. In shops / garages / other outlets open to the public
 - e. In factories / storage facilities / depots
 - f. Not based anywhere as such (mainly out and about with customers or suppliers)
 - g. Somewhere else **[Please specify]**

5. What is the principal activity of your organisation?

PUBLIC SECTOR

- a. Defence
- b. Education
- c. Central Government & Police
- d. Local Government & Health
- e. Other

PRIVATE SECTOR / THIRD SECTOR

- f. Agriculture, Forestry and Fishing
 - g. Mining and Quarrying
 - h. Manufacturing
 - i. Electricity, Gas, Steam and Air Conditioning Supply
 - j. Water Supply, Sewerage, waste management and remediation activities
 - k. Construction
 - l. Wholesale and Retail Trade, Repairs of motor vehicles & motor cycles
 - m. Transport & Storage
 - n. Accommodation & food services activities
 - o. Information & Communication
 - p. Financial and insurance activities
 - q. Real Estate Activities
 - r. Professional, Scientific and Technical activities
 - s. Administrative and Support Services
 - t. Public administration and defence
 - u. Education
 - v. Human health and Social Work
 - w. Arts, entertainment & recreation

 - x. Other service activities
 - y. Other **[PLEASE SPECIFY]**
6. How many workers (both permanent and temporary) are there at your company or organisation? If you work in a multi-national organisation please just think about those workers based in the UK.
- a. 0 – only you / self-employed
 - b. 1-9 workers
 - c. 10-49 workers
 - d. 50-99 workers
 - e. 100-249 workers
 - f. 250-499 workers
 - g. 500+ workers
 - h. Don't know

THE BUSINESS PLAN

These questions are to familiarise respondents with the business plan.

We will first show the respondent an overview of the plan and impact on bill before asking affordability and acceptability. This is to get an initial read on response to the plan overall (including the eight areas WW have chosen to focus on and perceptions of the bill increase).

We will then show the business plan in more detail over several screens using infographic imagery. This is a cut down, simplified version of the qual stimulus (which still includes all performance commitments). We will randomise the order areas 1-7 of the plan is shown to respondents to avoid bias. However, building relationships with communities will be fixed last. Findings from the qual suggest this works best as the final area as it switches focus from what WW will be doing to what they will be asking customers to help with. To avoid confusing respondents it's therefore best to show everything WW plan to do, and then switch focus at end.

After each area of the plan has been shown we will ask two questions: How important they think the area is to them and how Wessex Water's proposed approach makes them feel (using non-verbal scales). While these will provide some useful data, the primary purpose of these questions is keep respondents engaged when faced with so much information.

Once all eight areas of the plan have been shown, we will then show respondents the overview of the plan and impact on bill once again. This is so respondents consider the plan as a whole when answering the second round of affordability/acceptability questions.

(Screen 2)

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intend to make over the coming years.

To help develop this plan Wessex Water have already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Some areas of this plan may seem less relevant to you as a business customer, however Wessex Water still value your opinion so please take your time to read through the plan and answer the questions carefully.

(Screen 4 and 5)

Overall, **Wessex Water's ambition is to be the best water company in the UK** but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on the following eight areas:

(Screens 6, 7 and 9)

Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.

Wessex Water wants water bills to be **affordable** for all businesses.

The table below shows how your bill will change if Wessex Water adopts this plan. **This includes improvements within all eight areas of the business plan.**

You have now seen the overview of Wessex Water's proposed five year business plan and how the average business bill will change by 2025.

Rotate order of acceptable / affordable questions

7. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be for you?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable

- d. Very unacceptable
 - e. Don't know
8. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
- a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

(Screens 10, 11 and 12)

Over the following screens you will be shown more information around Wessex Water's proposed plans for each of these eight areas. For each area you will be asked two questions; **how important the area is to you** and **how Wessex Water's proposed approach makes you feel**. Once you have reviewed all eight areas you will then be asked a **few further questions about Wessex Water's business plan as a whole**.

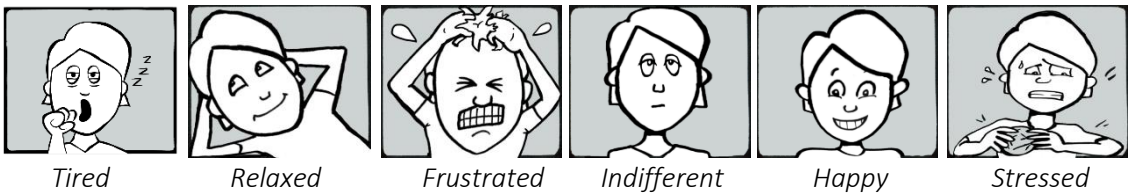
SHOW ALL 8 AREAS. RANDOMISE ORDER 1-7

1. Protecting and enhancing the environment **(Screen 13 and 14)**
2. Delivering excellent customer service **(Screen 15)**
3. Future proofing our services **(Screen 16)**
4. Ensuring bills are affordable for all **(Screen 17)**
5. Using water in our region more efficiently **(Screen 18 and 19)**
6. Providing excellent drinking water quality **(Screen 20)**
7. Minimising sewer flooding **(Screen 21)**
8. Developing better relationships with the communities we serve **(Screen 22) [FIXED]**

OVER NEXT 8 SCREENS:

Show relevant stimulus for each area. Following every other area (following the relevant stimulus) ask respondents these two questions:

- How important is it to you that Wessex Water's five year business plan (**insert based on area being reviewed**: delivers excellent customer service | ensures bills are affordable for all | future proofs their services | protects and enhances the environment | uses water in the region more efficiently | provides excellent drinking water quality | minimises sewer flooding | develops better relationships with the communities they serve)?
 - a. Very important
 - b. Fairly important
 - c. Important
 - d. Slightly important
 - e. Not at all important
 - f. No opinion
- Below are 6 faces. Please select the face which best represents how you feel about Wessex Water's proposed approach to (**insert area being reviewed e.g. delivering excellent customer service**)



ONCE ALL 8 AREAS HAVE BEEN REVIEWED INDIVIDUALLY:

(Screen 23 and 24)

To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:

(Screen 25 and 27)

You have now seen all improvements Wessex Water plans to make by 2025.

The example below shows how your bill will change if Wessex Water adopts this plan. This takes into account all improvements outlined within the eight areas of the business plan.

These next questions address how acceptable and affordable respondents believe the plan is. We have included two open ends to understand why people think it's affordable/unaffordable and acceptable/unacceptable here in more detail.

You have now seen and reviewed all eight areas of Wessex Water's proposed five year business plan and how the average business bill will change by 2025. For the next few questions please think about the proposed plan as a whole.

Rotate order of acceptable / affordable questions

9. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

10. Why do you say that?
Open end

11. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

12. How would you rate Wessex Water's proposed plan in terms of value for money?
 - a. Very good value for money
 - b. Good value for money
 - c. Poor value for money
 - d. Very poor value for money
 - e. Don't know

IMPLICIT TESTING

This question will test implicit perceptions of the plan. We have included a recommend list of words here based on the qual findings.

Implicit testing is an opportunity for us to go beyond respondents rational responses to understand what they implicitly think of the plan. Respondents are shown two words on screen, one on the left hand side and one on the right hand side. Each pair of words must be antonyms (e.g. Clear and Vague). Using the M or Z keys they must select which word they think best describes the plan (M=right word, Z=left word). The word they select shows their rational response. However by analysing the speed with which they select the word we can explore the implicit, more automatic responses to the plan.

13. Now you will see a series of words appear on the screen at the same time. For each combination of words please use the **M or Z keys** to quickly indicate which word you think best describes Wessex Water's proposed plan.

There is no right or wrong answer, we would just like to get your first impressions.

We would like you to do the test quickly, but accurately.

Randomise order codes shown

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- e. Efficient | Inefficient
- f. Effective | Useless
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- h. Safe | Risky
- i. Sensible | Unrealistic
- j. Thorough | Incomplete
- k. Impressive | Dull
- l. Expected | Surprising

FLEX AROUND WATER EFFICIENCY & ENVIRONMENTAL IMPROVEMENTS

This section will then test those areas where there is flex within the plan. It is too difficult for respondents to read all alternatives and differentiate between the different price increases. Instead we will split the sample in to 3 cells. Each cell will see one of the possible adjustments that could be made to the plan. Through analysis we will then be able to compare the proposed plan vs. all alternatives to decide which option is preferred (see PPT called ‘Example analysis’)

Based on qual findings we have not included the additional option for water efficiency (‘prioritise a 15% leakage cut but make changes in our other plans so you don’t have to pay more on your bill’). Without a tangible implication as to what specific area of the plan would change respondents found it very hard to understand what this meant and many felt it would be foolish to select it when they don’t know what else would change.

Split sample in 3 (min 33 per cell). Each cell will see one of the following options through the next section:

Cell 1 - Leakage	Cell 2 – Sewer Flooding	Cell 3 – Leakage and sewer flooding
<p>Screen 28 and 30</p> <ul style="list-style-type: none"> In our plan we propose to cut leakage by 3% by 2025 However, we could cut leakage by 15% by 2025 If we did this, the average annual business bill would increase by £33 	<p>Screen 28 and 32</p> <ul style="list-style-type: none"> We know sewage flooding is one of the service failures that has the biggest impact on customers when it happens. In our plan, we will increase our investment in this area and reduce the number of properties flooded by 1250 However, we could keep the level of investment the same as it is now, and reduce the number of properties flooded by 950 If we did this, the average annual business bill would decrease by £22 	<p>Screen 28 and 34</p> <ul style="list-style-type: none"> In our plan, we propose to cut leakage by 3% by 2025, and reduce the number of properties flooded by 1250 However, we could cut leakage by 15% by 2025, and reduce the number of properties flooded by 950 If we did this, the average annual business bill would increase by £3

As mentioned previously, Wessex Water’s plan is not yet finalised and there are some areas where Wessex Water could still adjust the plan. However, any changes would have an impact on the average water bill for Wessex Water customers.

Below is a possible change to the area (**insert depending on cell being shown:** ‘Using water in our region more efficiently’ / ‘minimising sewer flooding’)

If you would like to see the current proposed plan again, please click [here](#) (**insert depending on cell being shown: cell 1 screen 18, cell 2 screen 21, cell 3 screens 18/21**)

Rotate order of acceptable / affordable questions

14. How acceptable or unacceptable do you consider this alternative option to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

15. How affordable or unaffordable do you consider this alternative option to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

FINAL DEMOGS & CLASSIFICATION QS

These final questions are further classification questions.

Thanks for your answers so far. Only a few more questions to go.

16. Approximately how much does your business pay for your water and sewerage bill? Please do not include any arrears or debt repayments you may be making to your water and sewerage company.
- Less than £12.99 per month / Less than £150 per year
 - £13 - £16.99 per month / £151 - £200 per year
 - £17 - £20.99 per month / £201 - £250 per year
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 - £38 - £41.99 per month / £451 - £500 per year
 - £42 - £45.99 per month / £501 - £550 per year
 - £46 - £49.99 per month / £551 - £600 per year
 - Over £50 per month / Over £600 per year
 - Don't know
17. How is your business charged for the water you use?
- Metered (pay for what we use)
 - Unmetered (pay a fixed amount)
 - Don't know

PR19 Plan Acceptability Testing

MARCH 2018

Sample:

- In home vulnerable: 50 respondents

25 min survey

Mobile and tablet optimized

HIDDEN QS

These are hidden questions (for internal use) to capture how and where respondents are taking the survey.

Capture whether interview is:

- Pilot test
- Online via WW panel
- Online via Populus
- CLT
- In-home vulnerable
- In-premises business

If CLT, capture location:

- TBD

INTRODUCTION, DEMOGS & QUOTAS

These questions are to ensure we are talking to the right people.

For household customers we will achieve a good spread of age and gender to ensure the sample is reflective of Wessex Water customers. We will then weight the data to ensure it is representative of the Wessex Water customer profile.

Thank you for agreeing to take part in this survey. First we have just a few questions about you.

1. Are you...?
 - a. Male
 - b. Female
 - c. Other
 - d. Prefer not to say

2. How old are you?
[Close if 17 or younger]
 - a. Under 18
 - b. 18 – 24
 - c. 25 – 34
 - d. 35 – 44
 - e. 45 – 54
 - f. 55 – 64
 - g. 65+

3. Please enter your full postcode in the text box below.

This will be used for research purposes only.

[Close if not Wessex Water postcode]

4. Are you the person responsible for paying your water and sewerage bill (this may be included in your rent)?
 - a. Yes, I am solely responsible
 - b. Yes, I am jointly responsible
 - c. No, I am not responsible **[Close]**
 - d. Don't know **[Close]**

5. Does Wessex Water provide either your water supply or sewerage services?
Please refer to this map to help you if you are unsure
 - a. Yes, Wessex Water supplies both my water supply and sewerage services
 - b. Yes, Wessex Water supplies only my sewerage services (but not my water supply)
 - c. Yes, Wessex Water supplies my water only (but not my sewerage services)
 - d. No **[Close]**
 - e. Don't know **[Close]**

6. What is the occupation of the Chief Income Earner?
Use social grade scale

7. What is the combined gross income of your household? By this we mean how much money do all the people in your household have coming in, before Tax and National Insurance deductions. We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit)
- Up to £8,000 a year / up to £670 a month / up to £155 a week
 - £8,001 - £16,105 a year / £671 - £1,342 a month / £156 - £310 a week
 - £16,106 - £30,000 a year / £1,434 - £2,500 a month / £311 - £580 a week
 - £30,001 - £40,000 a year / £2,501 - £3,300 a month / £581 - £770 a week
 - £40,001 - £50,000 a year / £3,301 - £4,100 a month / £771 - £960 a week
 - £50,001 - £70,000 a year / £4,101 - £5,800 a month / £961 - £1,345 a week
 - £70,001 - £100,000 a year / £5,801 - £8,300 a month / £1,346 - £1,920 a week
 - More than £100,000 a year / more than £8,300 a month / more than £1,920 a week
 - Prefer not to say
8. Which, if any, of the following benefits or tax credits do you, or someone within your household, receive?
- No one in my household receives any benefits **[FIXED]**
 - Income support
 - Income-based Jobseeker's Allowance
 - Housing Benefit
 - Pension Credit
 - Working Tax Credit
 - Child Tax Credit (receiving more than the basic allowance that every family receives)
 - Income related Employment & Support Allowance (ESA)
 - Disability allowance
 - Personal Independence Payment
 - Universal Credit
 - I / Someone in my household receives another benefit and /or tax credit that is not specified on this list
 - Prefer not to say
9. Do you consider yourself to be officially disabled defined by the Equality Act 2010 as 'A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out day-to-day activities'?
- Yes
 - No
 - Prefer not to say

ASK CUSTOMERS WHO SAY 'YES' AT Q9

10. Which of the following disabilities do you consider yourself to have? Please select all that apply, and whether this is permanent or temporary
- Row**
- Yes – permanent
 - Yes – temporary
 - Yes – unsure whether permanent or temporary
 - No
 - Prefer not to say

Columns

- f. Visual disability
- g. Hearing disability
- h. Mobility disability
- i. Learning disability
- j. Mental health condition
- k. Disability requiring the use of at-home medical equipment (e.g. dialysis machines)
- l. Other **[Please specify]**

ASK CUSTOMERS WHO SAY 'YES' AT Q9

11. How would you best describe the extent of your disability?

Row

- a. Severe
- b. Moderate
- c. Mild
- d. Prefer not to say

Columns (pull through 'yes')

- e. Visual disability
- f. Hearing disability
- g. Mobility disability
- h. Learning disability
- i. Mental health condition
- j. Disability requiring the use of at-home medical equipment (e.g. dialysis machines)
- k. Other **[Please specify]**

12. What is your ethnic group?

White

- a. English/Welsh/Scottish/Northern Irish/British
- b. Irish
- c. Gypsy or Irish Traveller
- d. Any other white background

Mixed/multiple ethnic groups

- e. White and Black Caribbean
- f. White and Black African
- g. White and Asian
- h. Any other Mixed/Multiple ethnic group

Asian/Asian British

- i. Indian
- j. Pakistani
- k. Bangladeshi
- l. Sri Lankan
- m. Any other Asian background

Black/African/Caribbean/Black British

- n. African
- o. Caribbean
- p. Any other Black/African/Caribbean background

Other ethnic group

- q. Arab
- r. Any other ethnic group

- s. Prefer not to say

VULNERABILITY CLASSIFICATION

Disability	
Visual disabilities	Select 'VISUAL' condition
Hearing disabilities	Select 'HEARING' condition
Mobility disabilities	Select 'MOBILITY' condition
Need for medical equipment at home	Select 'NEED FOR MEDICAL EQUIPMENT AT HOME' condition
Mental health conditions	Select 'MENTAL HEALTH' condition
Learning difficulties	Select 'LEARNING DIFFICULTIES'
Financially Vulnerable	
Low incomes/in debt/financial support	Household income below £16,105, receive of one or more benefits

THE BUSINESS PLAN

These questions are to familiarise respondents with the business plan.

We will first show the respondent an overview of the plan and impact on bill before asking affordability and acceptability. This is to get an initial read on response to the plan overall (including the eight areas WW have chosen to focus on and perceptions of the bill increase).

We will then show the business plan in more detail over several screens using infographic imagery. This is a cut down, simplified version of the qual stimulus (which still includes all performance commitments). We will randomise the order areas 1-7 of the plan is shown to respondents to avoid bias. However, building relationships with communities will be fixed last. Findings from the qual suggest this works best as the final area as it switches focus from what WW will be doing to what they will be asking customers to help with. To avoid confusing respondents it's therefore best to show everything WW plan to do, and then switch focus at end.

After each area of the plan has been shown we will ask two questions: How important they think the area is to them and how Wessex Water's proposed approach makes them feel (using non-verbal scales). While these will provide some useful data, the primary purpose of these questions is keep respondents engaged when faced with so much information.

Once all eight areas of the plan have been shown, we will then show respondents the overview of the plan and impact on bill once again. This is so respondents consider the plan as a whole when answering the second round of affordability/acceptability questions.

(Screen 1 – Sewerage only, Screen 3 – Sewerage and Supply water)

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intend to make over the coming years.

To help develop this plan Wessex Water have already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Show Sewerage only customers: Some areas of this plan may seem less relevant to you as Wessex Water do not supply your water (they only take your waste water away). However, Wessex Water still value your opinion so please take your time to read through the plan and answer the questions carefully.

(Screen 4 and 5)

Overall, **Wessex Water's ambition is to be the best water company in the UK** but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on the following eight areas:

(Screens 6, 7 and 8)

Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.

Wessex Water wants water bills to be **affordable** for all households.

The table below shows how your bill will change if Wessex Water adopts this plan. **This includes improvements within all eight areas of the business plan.**

You have now seen the overview of Wessex Water's proposed five year business plan and how the average household bill will change by 2025.

Rotate order of acceptable / affordable questions

13. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
- Very acceptable
 - Somewhat acceptable
 - Somewhat unacceptable
 - Very unacceptable
 - Don't know
14. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
- Very affordable
 - Somewhat affordable
 - Somewhat unaffordable
 - Very unaffordable
 - Don't know

(Screens 10, 11 and 12)

Over the following screens you will be shown more information around Wessex Water's proposed plans for each of these eight areas. For each area you will be asked two questions; **how important the area is to you** and **how Wessex Water's proposed approach makes you feel**. Once you have reviewed all eight areas you will then be asked a **few further questions about Wessex Water's business plan as a whole**.

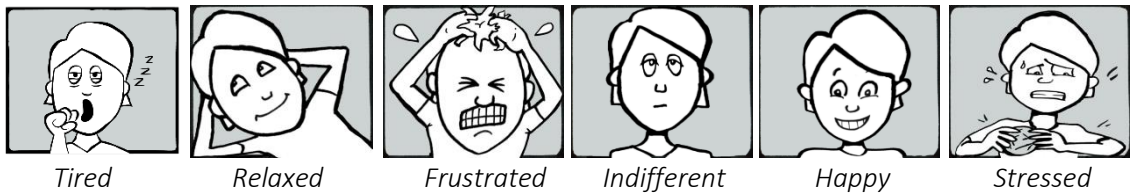
SHOW ALL 8 AREAS. RANDOMISE ORDER 1-7

1. Protecting and enhancing the environment **(Screen 13 and 14)**
2. Delivering excellent customer service **(Screen 15)**
3. Future proofing our services **(Screen 16)**
4. Ensuring bills are affordable for all **(Screen 17)**
5. Using water in our region more efficiently **(Screen 18 and 19)**
6. Providing excellent drinking water quality **(Screen 20)**
7. Minimising sewer flooding **(Screen 21)**
8. Developing better relationships with the communities we serve **(Screen 22) [FIXED]**

OVER NEXT 8 SCREENS:

Show relevant stimulus for each area. Following every other area (following the relevant stimulus) ask respondents these two questions:

- How important is it to you that Wessex Water's five year business plan (**insert based on area being reviewed**: delivers excellent customer service | ensures bills are affordable for all | future proofs their services | protects and enhances the environment | uses water in the region more efficiently | provides excellent drinking water quality | minimises sewer flooding | develops better relationships with the communities they serve)?
 - a. Very important
 - b. Fairly important
 - c. Important
 - d. Slightly important
 - e. Not at all important
 - f. No opinion
- Below are 6 faces. Please select the face which best represents how you feel about Wessex Water's proposed approach to (**insert area being reviewed e.g. delivering excellent customer service**)



ONCE ALL 8 AREAS HAVE BEEN REVIEWED INDIVIDUALLY:

(Screen 23 and 24)

To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:

(Screen 25 and 26)

You have now seen all improvements Wessex Water plans to make by 2025.

The example below shows how your bill will change if Wessex Water adopts this plan. **This takes into account all improvements outlined within the eight areas of the business plan.**

These next questions address how acceptable and affordable respondents believe the plan is. We have included two open ends to understand why people think it's affordable/unaffordable and acceptable/unacceptable here in more detail.

You have now seen and reviewed all eight areas of Wessex Water's proposed five year business plan and how the average household bill will change by 2025. For the next few questions please think about the proposed plan as a whole.

Rotate order of acceptable / affordable questions

15. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

16. Why do you say that?
Open end

17. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

18. How would you rate Wessex Water's proposed plan in terms of value for money?
 - a. Very good value for money
 - b. Good value for money
 - c. Poor value for money
 - d. Very poor value for money
 - e. Don't know

IMPLICIT TESTING

This question will test implicit perceptions of the plan. We have included a recommend list of words here based on the qual findings.

Implicit testing is an opportunity for us to go beyond respondents rational responses to understand what they implicitly think of the plan. Respondents are shown two words on screen, one on the left hand side and one on the right hand side. Each pair of words must be antonyms (e.g. Clear and Vague). Using the M or Z keys they must select which word they think best describes the plan (M=right word, Z=left word). The word they select shows their rational response. However by analysing the speed with which they select the word we can explore the implicit, more automatic responses to the plan.

19. Now you will see a series of words appear on the screen at the same time. For each combination of words please use the **M or Z keys** to quickly indicate which word you think best describes Wessex Water's proposed plan.

There is no right or wrong answer, we would just like to get your first impressions.

We would like you to do the test quickly, but accurately.

Randomise order codes shown

I think Wessex Water's business plan is...

- a. Dependable | Unreliable
- b. Clear | Vague
- c. Straightforward | Complicated
- d. Innovative | Old-fashioned
- e. Efficient | Inefficient
- f. Effective | Useless
- g. Good-value | Expensive
- h. Safe | Risky
- i. Sensible | Unrealistic
- j. Thorough | Incomplete
- k. Impressive | Dull
- l. Expected | Surprising

FLEX AROUND WATER EFFICIENCY & ENVIRONMENTAL IMPROVEMENTS

This section will then test those areas where there is flex within the plan. It is too difficult for respondents to read all alternatives and differentiate between the different price increases. Instead we will split the sample in to 3 cells. Each cell will see one of the possible adjustments that could be made to the plan. Through analysis we will then be able to compare the proposed plan vs. all alternatives to decide which option is preferred (see PPT called ‘Example analysis’)

Based on qual findings we have not included the additional option for water efficiency (‘prioritise a 15% leakage cut but make changes in our other plans so you don’t have to pay more on your bill’). Without a tangible implication as to what specific area of the plan would change respondents found it very hard to understand what this meant and many felt it would be foolish to select it when they don’t know what else would change.

Split sample in 3. Each cell will see one of the following options through the next section:

Cell 1 - Leakage	Cell 2 – Sewer Flooding	Cell 3 – Leakage and sewer flooding
<p>Screen 28 and 29</p> <ul style="list-style-type: none"> In our plan we propose to cut leakage by 3% by 2025 However, we could cut leakage by 15% by 2025 If we did this, the average annual household bill would increase by £8 	<p>Screen 28 and 31</p> <ul style="list-style-type: none"> We know sewage flooding is one of the service failures that has the biggest impact on customers when it happens. In our plan, we will increase our investment in this area and reduce the number of properties flooded by 1250 However, we could keep the level of investment the same as it is now, and reduce the number of properties flooded by 950 If we did this, the average annual household bill would decrease by £5 	<p>Screen 28 and 33</p> <ul style="list-style-type: none"> In our plan, we propose to cut leakage by 3% by 2025, and reduce the number of properties flooded by 1250 However, we could cut leakage by 15% by 2025, and reduce the number of properties flooded by 950 If we did this, the average annual household bill would increase by £1

As mentioned previously, Wessex Water’s plan is not yet finalised and there are some areas where Wessex Water could still adjust the plan. However, any changes would have an impact on the average water bill for Wessex Water customers.

Below is a possible change to the area (insert depending on cell being shown: ‘Using water in our region more efficiently’ / ‘minimising sewer flooding’)

If you would like to see the current proposed plan again, please click [here](#) (insert depending on cell being shown: cell 1 screen 18, cell 2 screen 21, cell 3 screens 18/21)

Rotate order of acceptable / affordable questions

20. How acceptable or unacceptable do you consider this alternative option to be **for you**?
- a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know
21. How affordable or unaffordable do you consider this alternative option to be **for you**?
- a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

FINAL DEMOGS & CLASSIFICATION QS

These final questions are further classification questions.

Thanks for your answers so far. Only a few more questions to go.

ASK ALL

22. Approximately how much do you pay for your water and sewerage bill? Please do not include any arrears or debt repayments you may be making to your water and sewerage company.
- Less than £12.99 per month / Less than £150 per year
 - £13 - £16.99 per month / £151 - £200 per year
 - £17 - £20.99 per month / £201 - £250 per year
 - £21 - £24.99 per month / £251 - £300 per year
 - £25 - £28.99 per month / £301 - £350 per year
 - £29 - £32.99 per month / £351 - £400 per year
 - £33 - £37.99 per month / £401 - £450 per year
 - £38 - £41.99 per month / £451 - £500 per year
 - £42 - £45.99 per month / £501 - £550 per year
 - £46 - £49.99 per month / £551 - £600 per year
 - Over £50 per month / Over £600 per year
 - Don't know
23. How are you charged for the water you use?
- Metered (pay for what we use)
 - Unmetered (pay a fixed amount)
 - Don't know

WW Segmentation questions

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

SINGLE CODE

- A great deal
 - A fair amount
 - Some effort
 - Not much effort
 - None
25. Please tell me which, if any, of these apply to you?

MULTICODE

- I volunteer for a local organisation or a local charity
- I'm a member of an online group (like Facebook) for people living in my area
- I'm a member of a local action group like Neighbourhood Watch, Floodwatch, a conservation group, or the Parish Council
- I often pick up litter near where I live
- I report overflowing drains or leaking pipes in my neighbourhood
- I choose to use or recommend companies because they do things for the local community, like sponsoring a local team or donating to a local charity
- None of these [FIXED]

26. How strongly do you agree or disagree with the following statements about your water bill?
Please use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree.

Insert scale of 1 (strongly disagree) to 10 (strongly agree)

- a. I worry about being able to afford my water bill

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intends to make over the coming years. It is really important that you understand the business plan and all changes Wessex Water intend to make so please read the plan carefully.



To help develop this plan Wessex Water has already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Some areas of this plan may seem less relevant to you as Wessex Water does not supply your water (they only take your waste water away). However, Wessex Water still values your opinion so please take your time to read through the plan and answer the questions carefully.

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intends to make over the coming years. It is really important that you understand the business plan and all changes Wessex Water intend to make so please read the plan carefully.



To help develop this plan Wessex Water has already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Some areas of this plan may seem less relevant to you as a business customer, however Wessex Water still values your opinion so please take your time to read through the plan and answer the questions carefully.

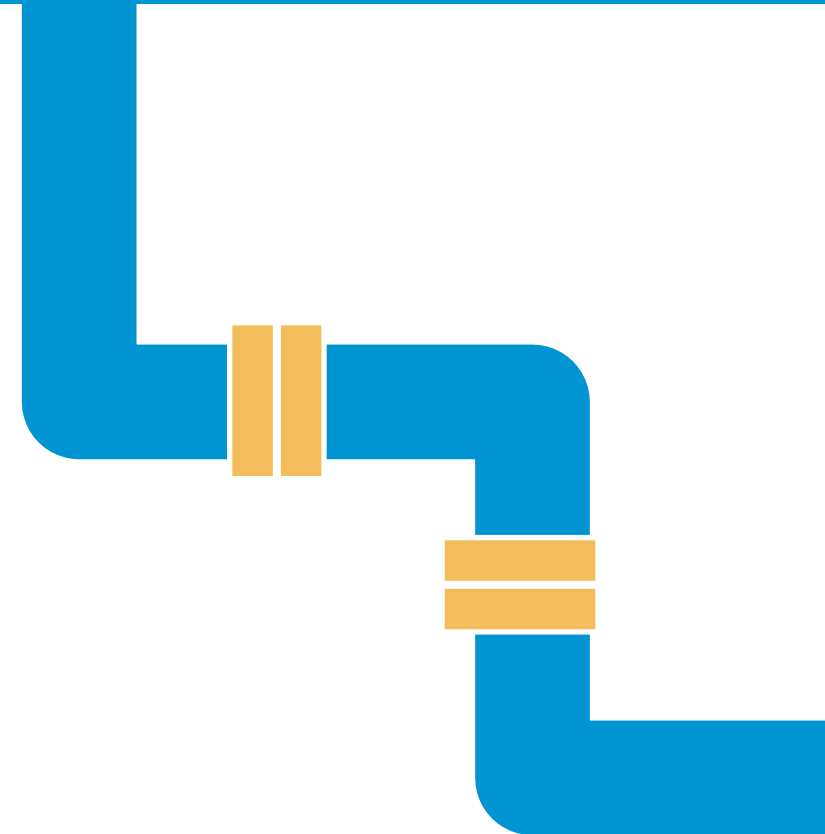
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To help develop this plan Wessex Water has already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

THE BUSINESS PLAN

OVERVIEW



Overall, Wessex Water's ambition is to be the best water company in the UK but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on eight specific areas. These eight areas are:



Delivering excellent customer service



Future proofing our services



Minimising sewer flooding



Using water in our region more efficiently



Ensuring bills are affordable for all



Protecting and enhancing the environment

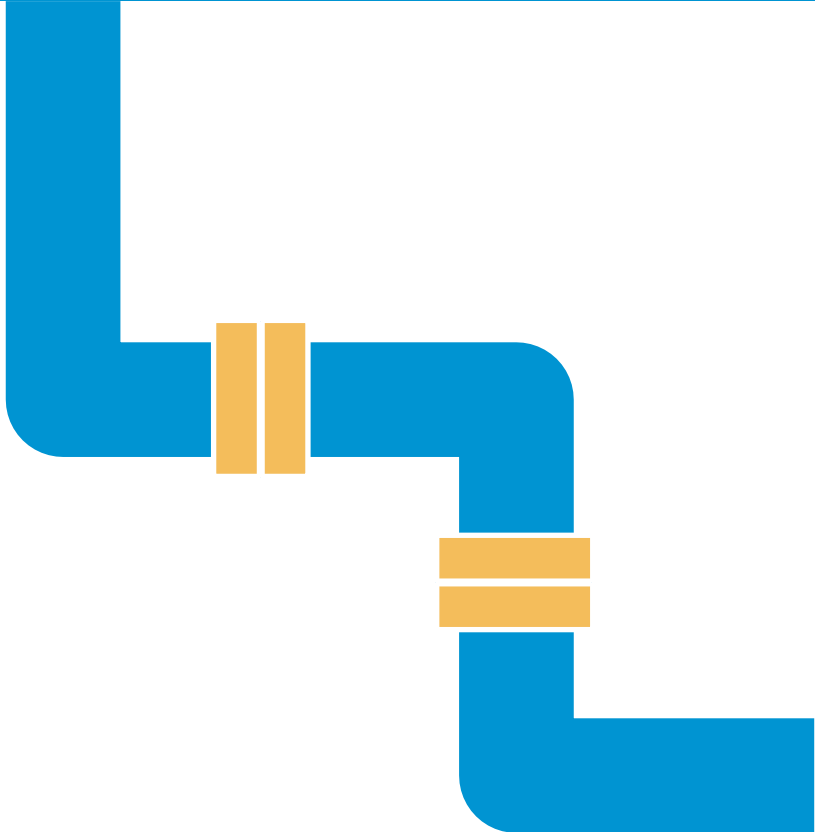


Providing excellent drinking water quality



Developing better relationships with the communities we serve

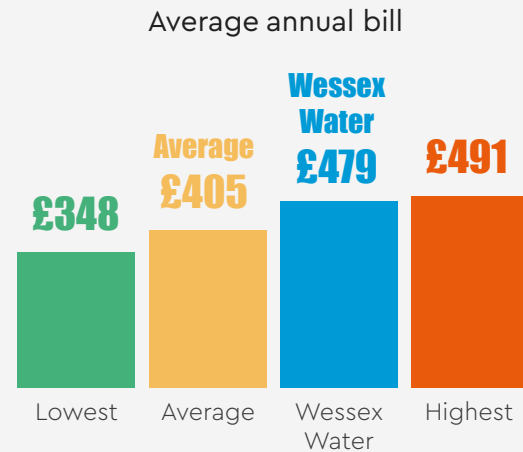
BILL IMPACT

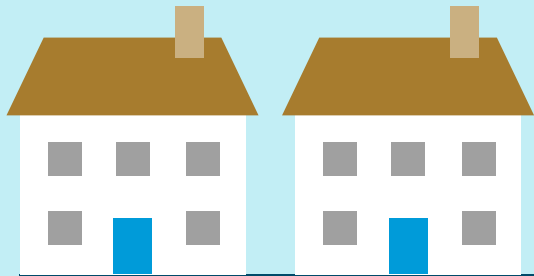




Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.





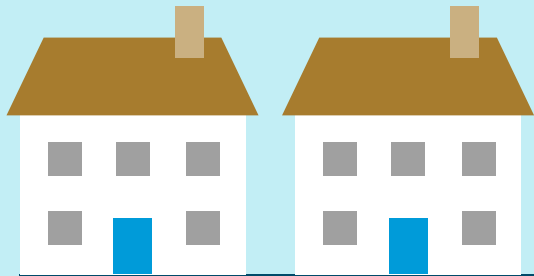
Wessex Water wants water bills to be affordable for all households.

The table below shows how your bill will change if Wessex Water adopts this plan.

This includes improvements within all eight areas of the business plan.

At present the average household bill	£40 per month	£479 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£45 per month	£539 per year
Under the plan we propose the average bill would be	£39 per month in 2020, rising to £42 per month by 2025	£469 per year in 2020, rising to £503 per year by 2025

Please note, bill figures have been rounded to the nearest whole number



Wessex Water wants water bills to be affordable for all businesses.

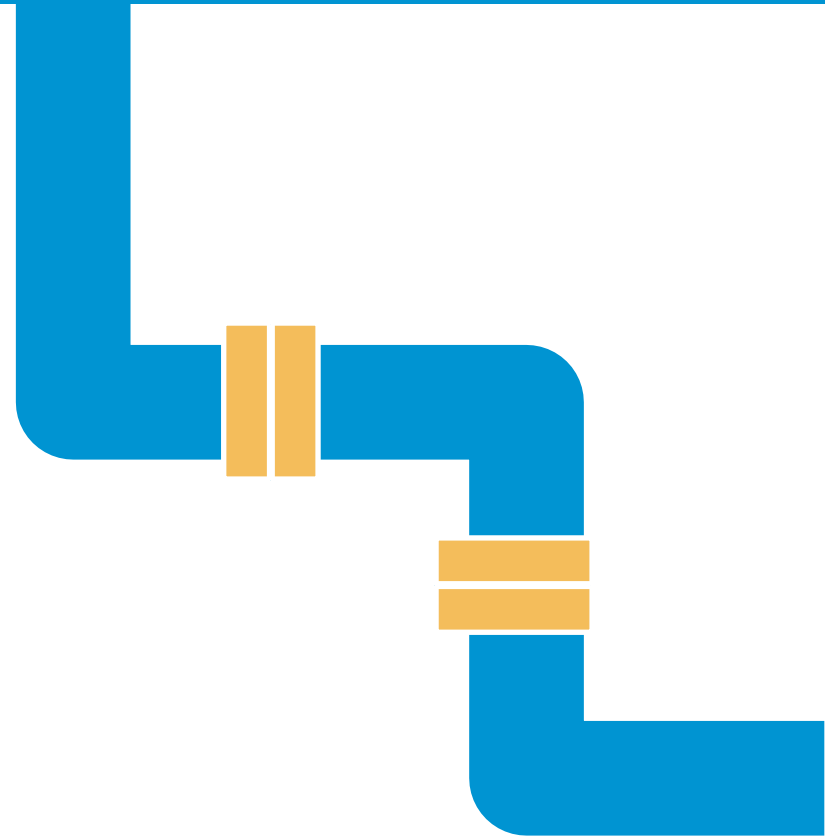
The table below shows how your bill will change if Wessex Water adopts this plan.

This includes improvements within all eight areas of the business plan.

At present the average household bill	£166 per month	£2,000 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£188 per month	£2,252 per year
Under the plan we propose the average bill would be	£163 per month in 2020, rising to £177 per month by 2025	£1,957 per year in 2020, rising to £2,102 per year by 2025

Please note, bill figures have been rounded to the nearest whole number


INTRO TO 8 AREAS



Over the following screens you will be shown more information about Wessex Water's proposed plans for each of these eight areas.

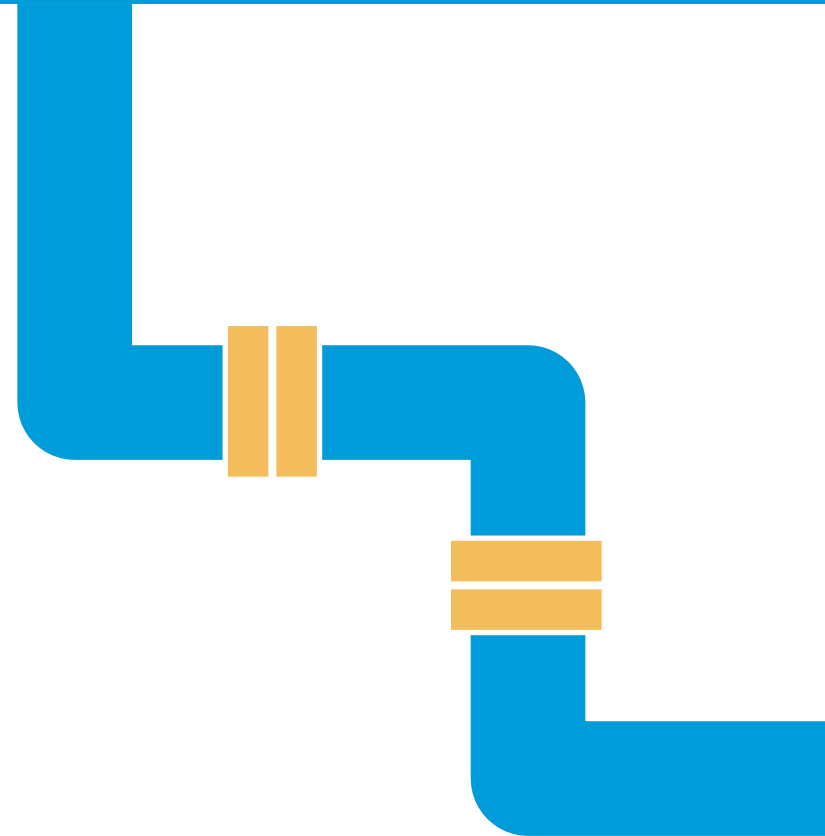
For each area you will be asked two questions

- 1 How important you think the area is
- 2 How Wessex Water's proposed approach makes you feel



Once you have reviewed all eight areas you will then be asked a few further questions about **Wessex Water's business plan as a whole**

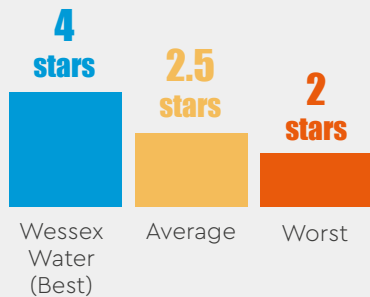
THE BUSINESS PLAN – ALL 8 AREAS





Here is how our current performance compares with other water companies:

Environmental Performance Assessment



Source: Discover Water, the official water company comparison site

We will invest in our biggest environmental improvement ever.

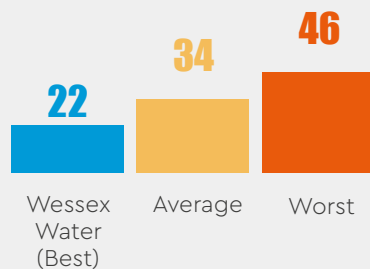
We will be investing in...

- 1 Protecting wildlife by improving the water quality of 1,300 miles of river
- 2 Carefully recycling "sludge" – the waste that's left after sewage is treated
- 3 Reducing overflows from our sewers after heavy rain
- 4 Improving the quality of sea water through improved treatment of sewage
- 5 Minimising water taken from rivers especially in sensitive areas
- 6 Working with local communities / partners to improve habitats for plants and wildlife and reduce risk of flooding at our sites and water sources
- 7 Reducing greenhouse gas emissions to be carbon neutral by 2040
- 8 Improving the condition of Sites of Special Scientific Interest on our land



Here is how our current performance
compares with other water companies:

Number of pollution incidents
per 10,000km of sewer



Source: Discover Water, the official
water company comparison site

We plan to reduce pollution incidents by at least a further 25% by 2025.

We will do this by...



1 Installing the latest technology to provide advance warning of potential polluting discharges



2 Cleaning sewers more often to stop problems before they occur



3 Doing more to help customers not cause blockages in our sewers, especially in hot spot areas

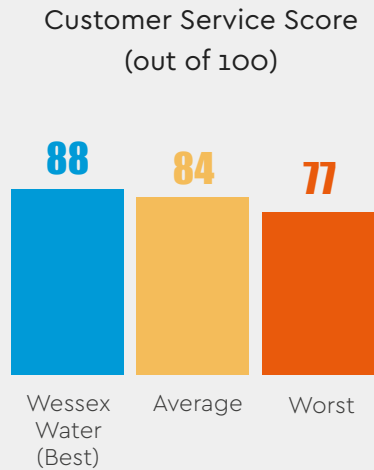


4 Improving our sewage treatment works to continue to be amongst the best in the industry



Delivering excellent
customer service

**Here is how our current performance
compares with other water companies:**



Source: Discover Water, the official
water company comparison site

We want to be in the top 20 of all UK companies for customer service.

We pledge to...

- 1** Always get the basics right by delivering reliable services and being there 24/7 for you
- 2** Continue to answer the phone with a person plus offering alternative ways to contact us
- 3** Improve and expand our online services, including opportunities to track and compare your water usage
- 4** Increase the number of people added to our Priority Services register because of disability or additional needs
- 5** Make our services more accessible to ensure no-one is excluded from contacting us



Future proofing our services

To future proof our service (and ensure sufficient water is available for at least the next 25 years) we are investing:



1

To minimise short (less than 3 hours) planned breaks to your supply



2

To reduce the risk of longer breaks in water supply (more than 12 hours)



3

To make sure the number of mains water bursts and sewer collapses doesn't increase



4

In cyber security to prevent hacking



5

To protect against the impact of drought or flooding in the future



Ensuring bills are affordable for all

We want to make sure bills are affordable for all...

We currently help...

31,000

households by applying a discount where people need one. By 2025 we want to help

86,000

households

We'll continue to support...

Customers who are struggling to pay their bills due to severe financial hardship or debt:



We lower their bills. On average we reduce annual water bills by £220



We can help with our debt write-off scheme

Customers on Pension Credit or who have a state pension as their only income:



We give a 20% reduction on their annual water bill (around £90)

We will also...

Work with independent debt advice agencies to help us reach eligible customers who may not know about our schemes. We are aiming to receive at least 2,300 applications from agencies per year up to 2025.

Continue to help all customers to save water (and therefore money) by providing information and advice and free water saving devices. We are aiming to receive at least 2,300 applications from agencies per year up to 2025.



Using water in our region more efficiently

We want to leak less water per kilometre than other UK water companies

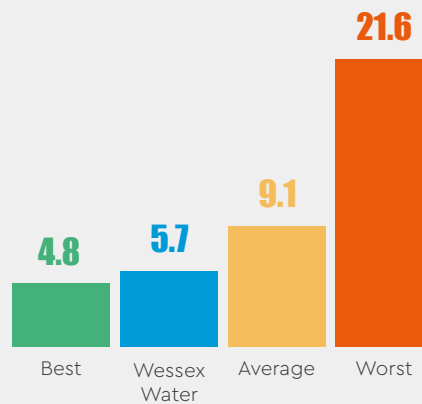
Here is how our current performance compares with other water companies:

Leakage from Wessex Water's pipe network is

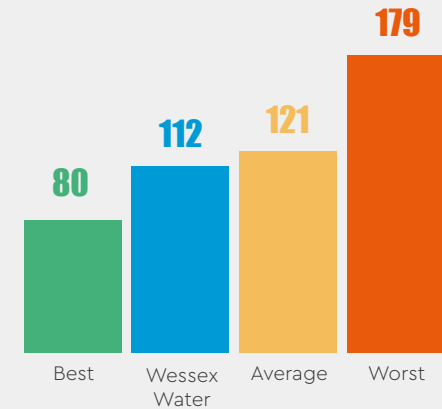
less than

half what it was 20 years ago

Leakage (litres per km of pipe per day)



Leakage (litres per household per year)



Source: Discover Water, the official water company comparison site

However the population is growing, climate change is happening and demand for water increasing. Therefore, using water efficiently is crucial. To keep the amount of water taken from the environment the same as it is now, we pledge to reduce leakage and do more to help customers use water wisely.



Using water in our region more efficiently

Specifically we pledge to...

1

Reduce leaks by a further 3% by 2025

2

Fix reported leaks on our network of pipes quickly (aiming for 90% within a day - up from 70% now)

3

Provide 40,000 free in-home checks for customers to help them save water

4

Educate 150,000 school children about using water efficiently

These changes mean...



You are very unlikely to have a water restriction (e.g. hosepipe ban)



You can be confident that essential water supplies will continue even in extreme droughts

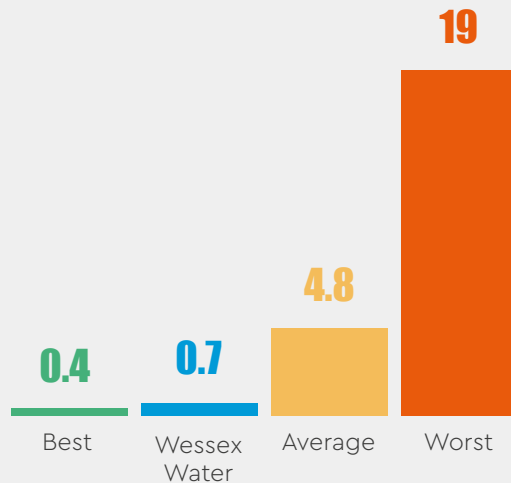


Providing excellent drinking water quality

Here is how our current performance compares with other water companies:

We want to be the best water company for the quality of our drinking water.

Water quality measure (from Chief Inspector of Drinking Water)



Source: Discover Water, the official water company comparison site

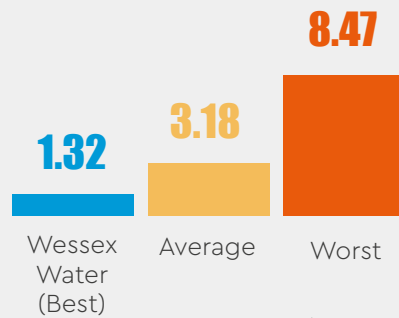
We will do this by...

- 1 Protecting the sources of our water from contamination (e.g. working with farmers to reduce fertiliser contamination)
- 2 Promoting the use of approved plumbers and fittings inside people's homes
- 3 Proactively maintaining our water treatment works and supply network, not just fixing problems after they happen
- 4 Improving the appearance of water, aiming to reduce the number of customers who need to contact us about the appearance of their water by 20%
- 5 Replacing three times as many lead pipes as we have in the past

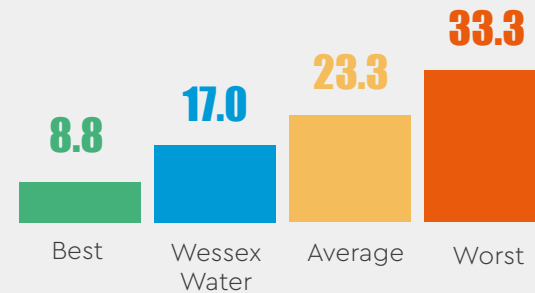


We want to be the best UK water company for sewer flooding. Here is how our current performance compares with other water companies:

Sewage flooding inside property
(per 10,000 connections)



Sewage flooding outside property (per
10,000 connections to sewers)



Source: Discover Water, the official water company comparison site

We will...

- 1** Reduce the number of properties flooded by 1250 by 2025
- 2** Invest in new and/or larger sewer capacity where there is new building/housing
- 3** Work with developers to provide the right capacity in our sewerage network
- 4** Continue to work with customers to raise awareness about what you can and can't flush down the toilet
- 5** Work with local councils to stop takeaways/cafes putting fat, oil, grease, and food waste down the sewers



Developing better relationships
with the communities we serve

We pledge to work our hardest to protect the water environment and invest in the future, but we will be asking our customers for their help. Here are some examples:

We will...

Provide the best services and protect the environment

Keep bills affordable to all and help you lower your bills by helping you to use less water

Future proof, ensuring a sustainable water supply for years to come

Give extra help to those who need it

We want you to help by...

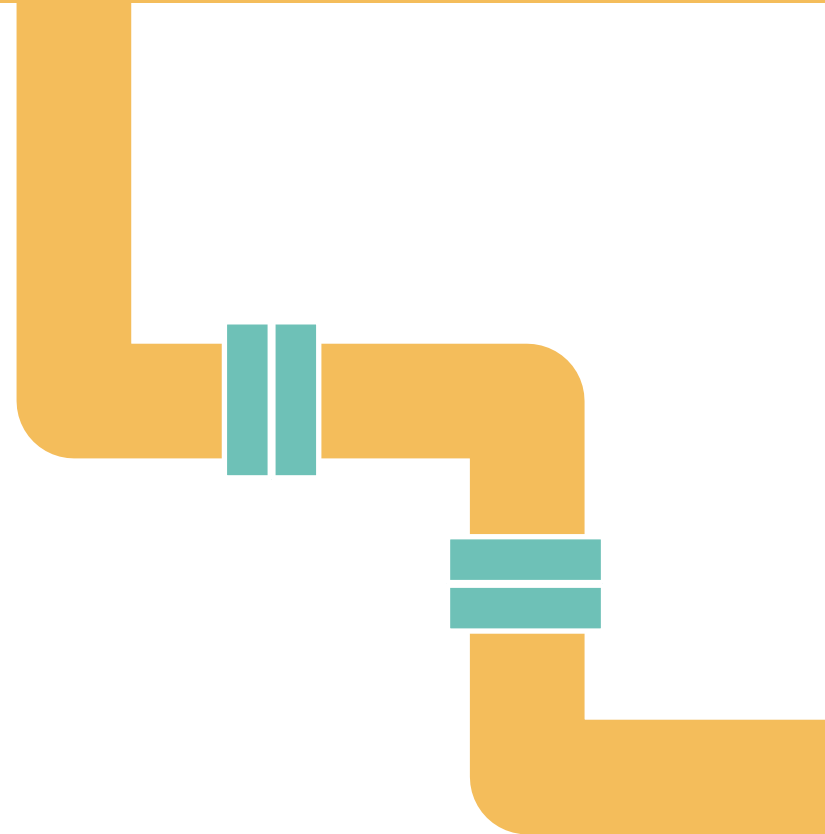
- Only ever flushing pee, poo and paper down the toilet
- Never pouring fat or oil down the sink
- Telling us if you see any leaks

- Paying your bills on time
- Telling us if you are struggling so we can help you

- Using water efficiently so we take less water from the environment
- Telling us what's important to you and your community

- Making the most of our support schemes
- Working with us to improve water quality inside your home/business

THE BUSINESS PLAN RECAP



To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:



Delivering excellent customer service



Future proofing our services



Minimising sewer flooding



Using water in our region more efficiently



Ensuring bills are affordable for all



Protecting and enhancing the environment

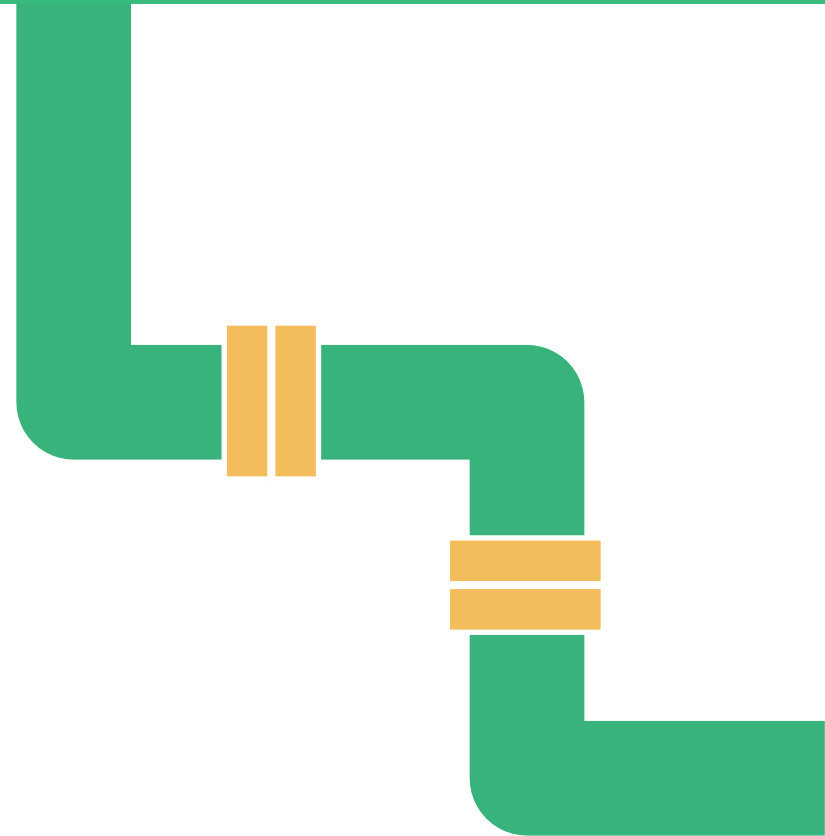


Providing excellent drinking water quality



Developing better relationships with the communities we serve

FINAL REVIEW OF BILL IMPACT





You have now seen all improvements Wessex Water plans to make by 2025

This is how your bill will change if Wessex Water adopts this plan

This includes all improvements outlined within the eight areas of the business plan

At present the average household bill

£40 per month

£479 per year

On average, if bills were to go up each year by inflation, by 2025 the average bill would be

£45 per month

£539 per year

Under the plan we propose the average bill would be

£39 per month in 2020, rising to £42 per month by 2025

£469 per year in 2020, rising to £503 per year by 2025

Please note, bill figures have been rounded to the nearest whole number



You have now seen all improvements Wessex Water plans to make by 2025

This is how your bill will change if Wessex Water adopts this plan

This includes all improvements outlined within the eight areas of the business plan

At present the average household bill

£166 per month

£2,000 per year

On average, if bills were to go up each year by inflation, by 2025 the average bill would be

£188 per month

£2,252 per year

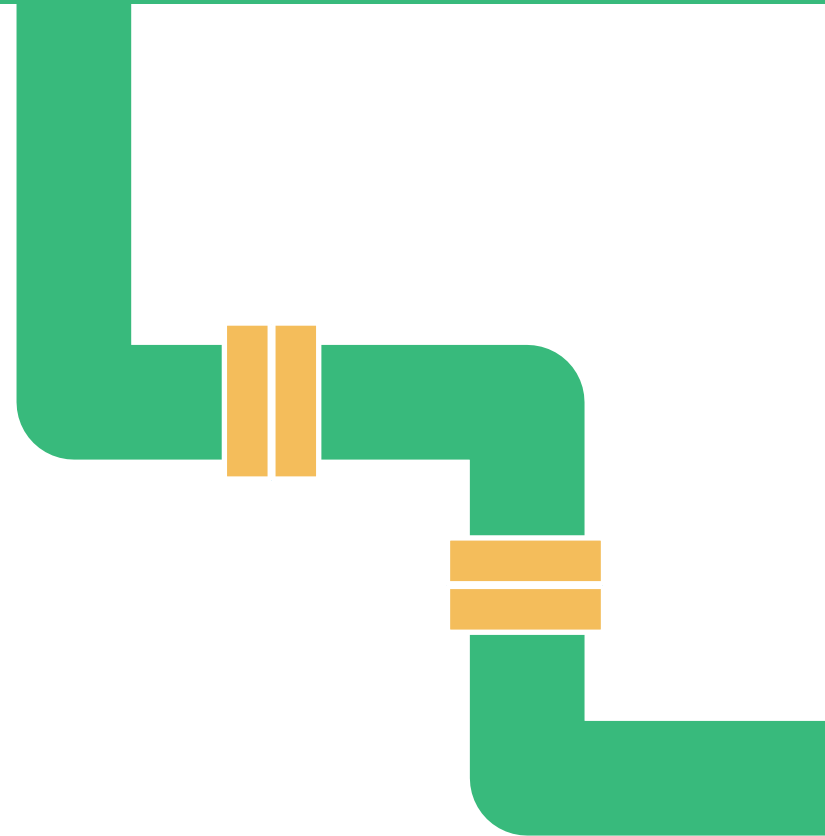
Under the plan we propose the average bill would be

£163 per month in 2020, rising to £177 per month by 2025

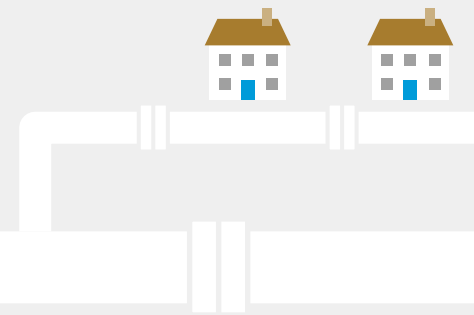
£1,957 per year in 2020, rising to £2,102 per year by 2025

Please note, bill figures have been rounded to the nearest whole number

FURTHER OPTIONS



Have your say on leakage



As mentioned previously, our plan is not yet finalised and there are some areas where we are considering adjustments. We want your help, but please remember any changes would have an impact on the bill you pay.

Below is a possible change to the area 'Using water in our region more efficiently'.

- In our plan we propose to cut leakage by 3% by 2025
- **However, we could cut leakage by 15% by 2025**
- If we did this, the average annual household bill would **increase by £6**

Under the plan we propose (cutting leakage by 3%), the average household bill in 2025 would be:

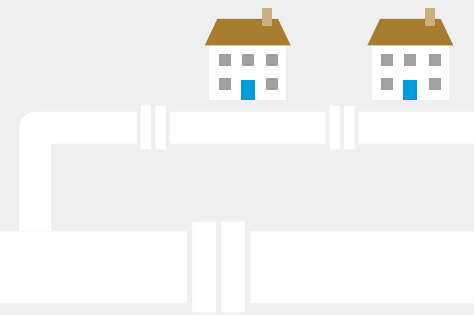
£503 per year

If we cut leakage by 15% (rather than 3%) the average household bill in 2025 would be:

£509 per year

If you would like to see the current proposed plan again, please click [here](#)

Have your say on leakage



As mentioned previously, our plan is not yet finalised and there are some areas where we are considering adjustments. We want your help, but please remember any changes would have an impact on the bill you pay.

Below is a possible change to the area 'Using water in our region more efficiently'.

- In our plan we propose to cut leakage by 3% by 2025
- **However, we could cut leakage by 15% by 2025**
- If we did this, the average annual business bill would **increase by £25**

Under the plan we propose (cutting leakage by 3%), the average business bill in 2025 would be:

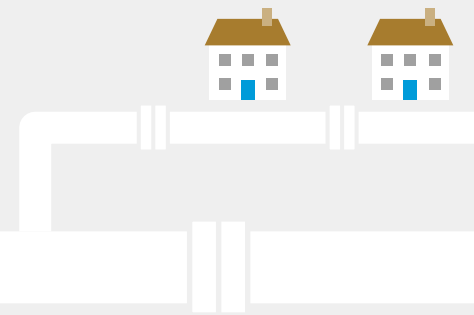
£2,102 per year

If we cut leakage by 15% (rather than 3%) the average business bill in 2025 would be:

£2,127 per year

If you would like to see the current proposed plan again, please click [here](#)

Have your say on sewage flooding



As mentioned previously, our plan is not yet finalised and there are some areas where we are considering adjustments. We want your help, but please remember any changes would have an impact on the bill you pay.

Below is a possible change to the area 'Minimising sewer flooding'.

- We know sewage flooding is one of the service failures that has the biggest impact on customers when it happens. In our plan, we will increase our investment in this area and reduce the number of properties flooded by 1250, by 2025
- **However, we could keep the level of investment the same as it is now, and reduce the number of properties flooded by 950, by 2025**
- If we did this, the average annual household bill would **decrease by £5**

Under the plan we propose (reducing the number of properties flooded by 1250), the average household bill in 2025 would be:

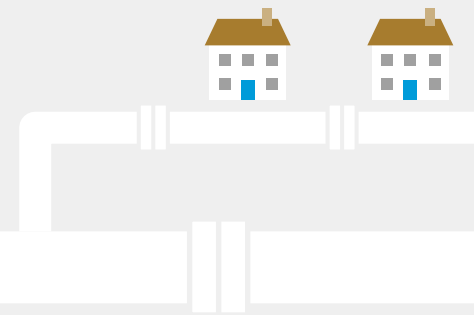
£503 per year

If we reduce the number of properties flooded by 950, the average household bill in 2025 would be:

£498 per year

If you would like to see the current proposed plan again, please click [here](#)

Have your say on sewage flooding



As mentioned previously, our plan is not yet finalised and there are some areas where we are considering adjustments. We want your help, but please remember any changes would have an impact on the bill you pay.

Below is a possible change to the area 'Minimising sewer flooding'.

- We know sewage flooding is one of the service failures that has the biggest impact on customers when it happens. In our plan, we will increase our investment in this area and reduce the number of properties flooded by 1250, by 2025
- **However, we could keep the level of investment the same as it is now, and reduce the number of properties flooded by 950, by 2025**
- If we did this, the average annual business bill would **decrease by £22**

Under the plan we propose (reducing the number of properties flooded by 1250), the average business bill in 2025 would be:

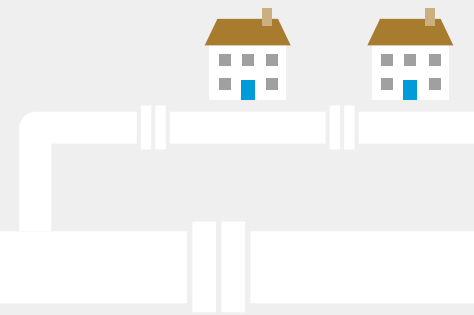
£2,102 per year

If we reduce the number of properties flooded by 950, the average business bill in 2025 would be:

£2,080 per year

If you would like to see the current proposed plan again, please click [here](#)

Have your say on leakage and sewage flooding



As mentioned previously, our plan is not yet finalised and there are some areas where we are considering adjustments. We want your help, but please remember any changes would have an impact on the bill you pay.

Below is a possible change to the areas 'Using water in our region more efficiently' and 'Minimising sewer flooding'.

- In our plan, we propose to cut leakage by 3% by 2025, and reduce the number of properties flooded by 1250
- **However, we could cut leakage by 15% by 2025, and reduce the number of properties flooded by 950**
- If we did this, the average annual household bill would **increase by £1**

Under the plan we propose (reducing the number of properties flooded by 1250), the average household bill in 2025 would be:

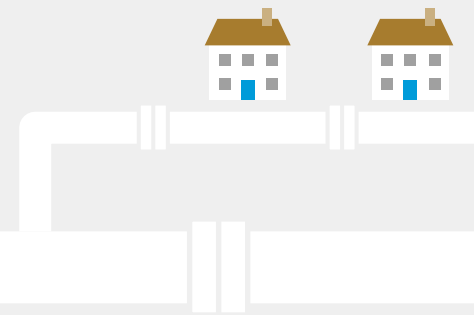
£503 per year

If we cut leakage by 15% by 2025, and reduce the number of properties flooded by 950, the average household bill in 2025 would be:

£504 per year

If you would like to see the current proposed plan again, please click [here](#)

Have your say on leakage and sewage flooding



As mentioned previously, our plan is not yet finalised and there are some areas where we are considering adjustments. We want your help, but please remember any changes would have an impact on the bill you pay.

Below is a possible change to the areas 'Using water in our region more efficiently' and 'Minimising sewer flooding'.

- In our plan, we propose to cut leakage by 3% by 2025, and reduce the number of properties flooded by 1250
- **However, we could cut leakage by 15% by 2025, and reduce the number of properties flooded by 950**
- If we did this, the average annual business bill would **increase by £3**

Under the plan we propose (reducing the number of properties flooded by 1250), the average business bill in 2025 would be:

£2,102 per year

If we cut leakage by 15% by 2025, and reduce the number of properties flooded by 950, the average business bill in 2025 would be:

£2,105 per year

If you would like to see the current proposed plan again, please click [here](#)

PR19 Plan Acceptability Testing

JUNE 2018

NOTE: Questions used in phase 1 and for non households have been included for information. This text has been highlighted and struck through

Sample:

- CLTs: 800 respondents
- Online: 200 Populus panel

15 min survey

HIDDEN QS

These are hidden questions (for internal use) to capture how and where respondents are taking the survey.

Capture whether interview is:

- ~~Pilot test~~
- ~~Online via WW panel~~
- Online via Populus
- CLT
- ~~In home vulnerable~~
- ~~In premises business~~

INTRODUCTION, DEMOGS & QUOTAS

These questions are to ensure we are talking to the right people.

For household customers we will achieve a good spread of age and gender to ensure the sample is reflective of Wessex Water customers. We will then weight the data to ensure it is representative of the Wessex Water customer profile.

For non-household customers we will set targets on business size to ensure a good spread of Wessex Water business customers.

While the surveys will be administered separately for household and business customers, this questionnaire contains all the questions we will ask to both household (HH) and business (Non-HH) customers.

Thank you for agreeing to take part in this survey. First we have just a few questions about (you / your business).

ASK HH CUSTOMERS

1. Are you...?
 - a. Male
 - b. Female
 - c. Other
 - d. Prefer not to say

ASK HH CUSTOMERS

2. How old are you?
[Close if 17 or younger]
 - a. Under 18
 - b. 18 – 24
 - c. 25 – 34
 - d. 35 – 44
 - e. 45 – 54
 - f. 55 – 64
 - g. 65+

ASK ALL

3. Please enter your **your business'** full postcode in the text box below. **For non-HH add: If your business or organisation is based in several locations, please enter the post code for the main administrative base.**

This will be used for research purposes only.

[Close if not Wessex Water postcode]

ASK HH CUSTOMERS

4. Are you the person responsible for paying your water and sewerage bill (this may be included in your rent)?
- Yes, I am solely responsible
 - Yes, I am jointly responsible
 - No, I am not responsible [Close]
 - Don't know [Close]

ASK NON-HH CUSTOMERS

5. Do you have financial decision making responsibilities for Utilities (e.g. water) at your business or organisation?
- Yes, I am the person with sole or ultimate responsibility
 - Yes, I am one of a group of people who make these decisions
 - Yes, I have some influence on such decisions
 - No, I am not involved at all in decisions about these services [Close]
 - Don't know [Close]

ASK ALL

6. Does Wessex Water provide either your water supply or sewerage services?
Please refer to this map to help you if you are unsure
- Yes, Wessex Water supplies both my water supply and sewerage services
 - Yes, Wessex Water supplies only my sewerage services (but not my water supply)
 - Yes, Wessex Water supplies my water only (but not my sewerage services)
 - No [Close]
 - Don't know [Close]

ASK NON-HH CUSTOMERS

7. Where is your business or organisation primarily based?
- At home
 - In serviced offices
 - In your own offices
 - In shops / garages / other outlets open to the public
 - In factories / storage facilities / depots
 - Not based anywhere as such (mainly out and about with customers or suppliers)
 - Somewhere else [Please specify]

ASK NON-HH CUSTOMERS

8. What is the principal activity of your organisation?

PUBLIC SECTOR

- Defence
- Education
- Central Government & Police
- Local Government & Health
- Other

PRIVATE SECTOR / THIRD SECTOR

- Agriculture, Forestry and Fishing
- Mining and Quarrying
- Manufacturing

- i. Electricity, Gas, Steam and Air Conditioning Supply
- j. Water Supply, Sewerage, waste management and remediation activities
- k. Construction
- l. Wholesale and Retail Trade, Repairs of motor vehicles & motor cycles
- m. Transport & Storage
- n. Accommodation & food services activities
- o. Information & Communication
- p. Financial and insurance activities
- q. Real Estate Activities
- r. Professional, Scientific and Technical activities
- s. Administrative and Support Services
- t. Public administration and defence
- u. Education
- v. Human health and Social Work
- w. Arts, entertainment & recreation

- x. Other service activities
- y. Other [PLEASE SPECIFY]

ASK NON-HH CUSTOMERS

9. How many workers (both permanent and temporary) are there at your company or organisation? If you work in a multi-national organisation please just think about those workers based in the UK.
- a. 0 – only you / self-employed
 - b. 1-9 workers
 - c. 10-49 workers
 - d. 50-99 workers
 - e. 100-249 workers
 - f. 250-499 workers
 - g. 500+ workers
 - h. Don't know

THE BUSINESS PLAN

These questions are to familiarise respondents with the business plan.

We will first show the respondent an overview of the plan and impact on bill before asking affordability and acceptability. This is to get an initial read on response to the plan overall (including the eight areas WW have chosen to focus on and perceptions of the bill increase).

We will then show the business plan in more detail over several screens using infographic imagery. This is a cut down, simplified version of the qual stimulus (which still includes all performance commitments). We will randomise the order areas 1-7 of the plan is shown to respondents to avoid bias. However, building relationships with communities will be fixed last. Findings from the qual suggest this works best as the final area as it switches focus from what WW will be doing to what they will be asking customers to help with. To avoid confusing respondents it's therefore best to show everything WW plan to do, and then switch focus at end.

After each area of the plan has been shown we will ask two questions: How important they think the area is to them and how Wessex Water's proposed approach makes them feel (using non-verbal scales). While these will provide some useful data, the primary purpose of these questions is keep respondents engaged when faced with so much information.

Once all eight areas of the plan have been shown, we will then show respondents the overview of the plan and impact on bill once again. This is so respondents consider the plan as a whole when answering the second round of affordability/acceptability questions.

(Screen 1 for HH – Sewerage only, **Screen 2 for Non-HH**, Screen 3 for HH – Sewerage and Supply water)

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intend to make over the coming years.

To help develop this plan Wessex Water have already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Show Non-HH customers: Some areas of this plan may seem less relevant to you as a business customer, however Wessex Water still value your opinion so please take your time to read through the plan and answer the questions carefully.

Show Sewerage only customers: Some areas of this plan may seem less relevant to you as Wessex Water do not supply your water (they only take your waste water away). However, Wessex Water still value your opinion so please take your time to read through the plan and answer the questions carefully.

(Screen 4 and 5 for all)

Overall, **Wessex Water's ambition is to be the best water company in the UK** but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on the following eight areas:

(Screens 6, 7 and 8 for HH, **Screens 6, 7 and 9 for Non-HH**)

Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.

Wessex Water wants water bills to be **affordable** for all households. ~~/ businesses.~~

The table below shows how your bill will change if Wessex Water adopts this plan. **This includes improvements within all eight areas of the business plan.**

You have now seen the overview of Wessex Water's proposed five year business plan and how the average household ~~/ business~~ bill will change by 2025.

Rotate order of acceptable / affordable questions

10. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

11. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

(Screens 10, 11 and 12 for all)

Over the following screens you will be shown more information around Wessex Water's proposed plans for each of these eight areas. For each area you will be asked two questions; **how important the area is to you** and **how Wessex Water's proposed approach makes you feel**. Once you have reviewed all eight areas you will then be asked a **few further questions about Wessex Water's business plan as a whole**.

SHOW ALL 8 AREAS. RANDOMISE ORDER 1-7

1. Protecting and enhancing the environment **(Screen 13 and 14 for all)**
2. Delivering excellent customer service **(Screen 15 for all)**
3. Future proofing our services **(Screen 16 for all)**
4. Ensuring bills are affordable for all **(Screen 17 for all)**
5. Using water in our region more efficiently **(Screen 18 and 19 for all)**
6. Providing excellent drinking water quality **(Screen 20 for all)**
7. Minimising sewer flooding **(Screen 21 for all)**
8. Developing better relationships with the communities we serve **(Screen 22 for all) [FIXED]**

OVER NEXT 8 SCREENS:

Show relevant stimulus for each area. Following every other area (following the relevant stimulus) ask respondents these two questions:

- How important is it to you that Wessex Water's five year business plan (**insert based on area being reviewed**: delivers excellent customer service | ensures bills are affordable for all | future proofs their services | protects and enhances the environment | uses water in the region more efficiently | provides excellent drinking water quality | minimises sewer flooding | develops better relationships with the communities they serve)?
 - a. Very important
 - b. Fairly important
 - c. Important
 - d. Slightly important
 - e. Not at all important
 - f. No opinion
- Below are 7 faces. Please select the face which best represents how you feel about Wessex Water's proposed approach to (**insert area being reviewed e.g. delivering excellent customer service**)



Ecstatic



Happy



Relaxed



Indifferent



Tired



Stressed



Frustrated

ONCE ALL 8 AREAS HAVE BEEN REVIEWED INDIVIDUALLY:

(Screen 23 and 24 for all)

To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:

(Screen 25 and 26 for HH, ~~Screen 25 and 27 for NHH~~)

You have now seen all improvements Wessex Water plans to make by 2025.

The example below shows how your bill will change if Wessex Water adopts this plan. This takes into account all improvements outlined within the eight areas of the business plan.

These next questions address how acceptable and affordable respondents believe the plan is. We have included two open ends to understand why people think it's affordable/unaffordable and acceptable/unacceptable here in more detail.

You have now seen and reviewed all eight areas of Wessex Water's proposed five year business plan and how the average household ~~business~~ bill will change by 2025. For the next few questions please think about the proposed plan as a whole.

Rotate order of acceptable / affordable questions

12. How acceptable or unacceptable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very acceptable
 - b. Somewhat acceptable
 - c. Somewhat unacceptable
 - d. Very unacceptable
 - e. Don't know

13. Why do you say that?
Open end

14. How affordable or unaffordable do you consider Wessex Water's proposed plan to be **for you**?
 - a. Very affordable
 - b. Somewhat affordable
 - c. Somewhat unaffordable
 - d. Very unaffordable
 - e. Don't know

15. How would you rate Wessex Water's proposed plan in terms of value for money?
 - a. Very good value for money
 - b. Good value for money
 - c. Poor value for money
 - d. Very poor value for money
 - e. Don't know

IMPLICIT TESTING

This question will test implicit perceptions of the plan. We have included a recommend list of words here based on the qual findings.

Implicit testing is an opportunity for us to go beyond respondents rational responses to understand what they implicitly think of the plan. Respondents are shown two words on screen, one on the left hand side and one on the right hand side. Each pair of words must be antonyms (e.g. Clear and Vague). Using the M or Z keys they must select which word they think best describes the plan (M=right word, Z=left word). The word they select shows their rational response. However by analysing the speed with which they select the word we can explore the implicit, more automatic responses to the plan.

16. Now you will see a series of words appear on the screen at the same time. For each combination of words please use the **M or Z keys** to quickly indicate which word you think best describes Wessex Water's proposed plan.

There is no right or wrong answer, we would just like to get your first impressions.

We would like you to do the test quickly, but accurately.

Randomise order codes shown

I think Wessex Water's business plan is...

- a. Dependable | Unreliable
- b. Clear | Vague
- c. Straightforward | Complicated
- d. Innovative | Old-fashioned
- e. Efficient | Inefficient
- f. Effective | Useless
- g. Good-value | Expensive
- h. Safe | Risky
- i. Sensible | Unrealistic
- j. Thorough | Incomplete
- k. Impressive | Dull
- l. Expected | Surprising

FLEX AROUND WATER EFFICIENCY & ENVIRONMENTAL IMPROVEMENTS

This section will then test those areas where there is flex within the plan. It is too difficult for respondents to read all alternatives and differentiate between the different price increases. Instead we will split the sample in to 3 cells. Each cell will see one of the possible adjustments that could be made to the plan. Through analysis we will then be able to compare the proposed plan vs. all alternatives to decide which option is preferred (see PPT called 'Example analysis')

Based on qual findings we have not included the additional option for water efficiency ('prioritise a 15% leakage cut but make changes in our other plans so you don't have to pay more on your bill'). Without a tangible implication as to what specific area of the plan would change respondents found it very hard to understand what this meant and many felt it would be foolish to select it when they don't know what else would change.

Split sample in 3 (min 333 per cell). Each cell will see one of the following options through the next section:

Cell 1— Leakage	Cell 2— Sewer Flooding	Cell 3— Leakage and sewer flooding
<p>Screen 28 and 29 for HH</p> <p>Screen 28 and 30 for Non-HH</p> <ul style="list-style-type: none"> In our plan we propose to cut leakage by 3% by 2025 However, we could cut leakage by 15% by 2025 If we did this, the average annual household/business bill would increase by (£8 / £33) 	<p>Screen 28 and 31 for HH</p> <p>Screen 28 and 32 for Non-HH</p> <ul style="list-style-type: none"> We know sewage flooding is one of the service failures that has the biggest impact on customers when it happens. In our plan, we will increase our investment in this area and reduce the number of properties flooded by 1250 However, we could keep the level of investment the same as it is now, and reduce the number of properties flooded by 950 If we did this, the average annual household/business bill would decrease by (£5 / £22) 	<p>Screen 28 and 33 for HH</p> <p>Screen 28 and 34 for Non-HH</p> <ul style="list-style-type: none"> In our plan, we propose to cut leakage by 3% by 2025, and reduce the number of properties flooded by 1250 However, we could cut leakage by 15% by 2025, and reduce the number of properties flooded by 950 If we did this, the average annual household/business bill would increase by (£1 / £3)

As mentioned previously, Wessex Water's plan is not yet finalised and there are some areas where Wessex Water could still adjust the plan. However, any changes would have an impact on the average water bill for Wessex Water customers.

Below is a possible change to the area (insert depending on cell being shown: 'Using water in our region more efficiently' / 'minimising sewer flooding')

If you would like to see the current proposed plan again, please click [here](#) (insert depending on cell being shown: cell 1 screen 18, cell 2 screen 21, cell 3 screens 18/21)

Rotate order of acceptable / affordable questions

17. How acceptable or unacceptable do you consider this alternative option to be for you?

- a. — Very acceptable
- b. — Somewhat acceptable
- c. — Somewhat unacceptable
- d. — Very unacceptable
- e. — Don't know

18. How affordable or unaffordable do you consider this alternative option to be for you?

- a. — Very affordable
- b. — Somewhat affordable
- c. — Somewhat unaffordable
- d. — Very unaffordable
- e. — Don't know

FINAL DEMOGS & CLASSIFICATION QS

These final questions are further classification questions.

Thanks for your answers so far. Only a few more questions to go.

ASK ALL

19. Approximately how much (do you / does your business) pay for your water and sewerage bill?
Please do not include any arrears or debt repayments you may be making to your water and sewerage company.
- Less than £12.99 per month / Less than £150 per year
 - £13 - £16.99 per month / £151 - £200 per year
 - £17 - £20.99 per month / £201 - £250 per year
 - £21 - £24.99 per month / £251 - £300 per year
 - £25 - £28.99 per month / £301 - £350 per year
 - £29 - £32.99 per month / £351 - £400 per year
 - £33 - £37.99 per month / £401 - £450 per year
 - £38 - £41.99 per month / £451 - £500 per year
 - £42 - £45.99 per month / £501 - £550 per year
 - £46 - £49.99 per month / £551 - £600 per year
 - Over £50 per month / Over £600 per year
 - Don't know

ASK ALL

20. How (are you / is your business) charged for the water you use?
- Metered (pay for what we use)
 - Unmetered (pay a fixed amount)
 - Don't know

WW Segmentation questions

ASK HH CUSTOMERS

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

SINGLE CODE

- A great deal
- A fair amount
- Some effort
- Not much effort
- None

ASK HH CUSTOMERS

22. Please tell me which, if any, of these apply to you?

MULTICODE

- a. I volunteer for a local organisation or a local charity
- b. I'm a member of an online group (like Facebook) for people living in my area
- c. I'm a member of a local action group like Neighbourhood Watch, Floodwatch, a conservation group, or the Parish Council
- d. I often pick up litter near where I live
- e. I report overflowing drains or leaking pipes in my neighbourhood
- f. I choose to use or recommend companies because they do things for the local community, like sponsoring a local team or donating to a local charity
- g. None of these [FIXED]

ASK HH CUSTOMERS

23. How strongly do you agree or disagree with the following statements about your water bill?

Please use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree.

Insert scale of 1 (strongly disagree) to 10 (strongly agree)

- a. I worry about being able to afford my water bill

Questions to identify vulnerable customers (for vulnerable interview boost these questions will be moved up to the screener, for CLTs they will remain here). These are the questions we typically use with other water companies to define vulnerabilities. We find respondents are happy to complete these questions, however we include the code 'prefer not to say' at each question so can opt out if they feel uncomfortable.

ASK HH CUSTOMERS

24. What is the occupation of the Chief Income Earner?

Use social grade scale

ASK HH CUSTOMERS

25. What is the combined gross income of your household? By this we mean how much money do all the people in your household have coming in, before Tax and National Insurance deductions. We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit)

- a. Up to £8,000 a year / up to £670 a month / up to £155 a week
- b. £8,001 - £16,105 a year / £671 - £1,342 a month / £156 - £310 a week
- c. £16,106 - £30,000 a year / £1,434 - £2,500 a month / £311 - £580 a week
- d. £30,001 - £40,000 a year / £2,501 - £3,300 a month / £581 - £770 a week
- e. £40,001 - £50,000 a year / £3,301 - £4,100 a month / £771 - £960 a week
- f. £50,001 - £70,000 a year / £4,101 - £5,800 a month / £961 - £1,345 a week
- g. £70,001 - £100,000 a year / £5,801 - £8,300 a month / £1,346 - £1,920 a week
- h. More than £100,000 a year / more than £8,300 a month / more than £1,920 a week
- i. Prefer not to say

ASK HH CUSTOMERS

26. Which, if any, of the following benefits or tax credits do you, or someone within your household, receive?
- a. No one in my household receives any benefits **[FIXED]**
 - b. Income support
 - c. Income-based Jobseeker's Allowance
 - d. Housing Benefit
 - e. Pension Credit
 - f. Working Tax Credit
 - g. Child Tax Credit (receiving more than the basic allowance that every family receives)
 - h. Income related Employment & Support Allowance (ESA)
 - i. Disability allowance
 - j. Personal Independence Payment
 - k. Universal Credit
 - l. I / Someone in my household receives another benefit and /or tax credit that is not specified on this list
 - m. Prefer not to say

ASK HH CUSTOMERS

27. Do you consider yourself to be officially disabled defined by the Equality Act 2010 as 'A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out day-to-day activities'?
- a. Yes
 - b. No
 - c. Prefer not to say

ASK HH CUSTOMERS WHO SAY 'YES' AT Q27

28. Which of the following disabilities do you consider yourself to have? Please select all that apply, and whether this is permanent or temporary

Row

- a. Yes — permanent
- b. Yes — temporary
- c. Yes — unsure whether permanent or temporary
- d. No
- e. Prefer not to say

Columns

- f. Visual disability
- g. Hearing disability
- h. Mobility disability
- i. Learning disability
- j. Mental health condition
- k. Disability requiring the use of at home medical equipment (e.g. dialysis machines)
- l. Other [Please specify]

ASK HH CUSTOMERS WHO SAY 'YES' AT Q27

29. How would you best describe the extent of your disability?

Row

- a. Severe
- b. Moderate
- c. Mild
- d. Prefer not to say

Columns (pull through 'yes')

- e. Visual disability
- f. Hearing disability
- g. Mobility disability
- h. Learning disability
- i. Mental health condition
- j. Disability requiring the use of at home medical equipment (e.g. dialysis machines)
- k. Other [Please specify]

ASK HH CUSTOMERS

30. What is your ethnic group?

White

- a. English/Welsh/Scottish/Northern Irish/British
- b. Irish
- c. Gypsy or Irish Traveller
- d. Any other white background

Mixed/multiple ethnic groups

- e. White and Black Caribbean
- f. White and Black African
- g. White and Asian
- h. Any other Mixed/Multiple ethnic group

Asian/Asian British

- i. Indian
- j. Pakistani
- k. Bangladeshi
- l. Sri Lankan
- m. Any other Asian background

Black/African/Caribbean/Black British

- n. African
- o. Caribbean
- p. Any other Black/African/Caribbean background

Other ethnic group

- q. Arab
- r. Any other ethnic group

s. Prefer not to say

VULNERABILITY CLASSIFICATION

Disability	
Personal disability	Yes at Q27
Financially Vulnerable	
Low incomes/in debt/financial support	Household income below £16,105, receive of one or more benefits

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intends to make over the coming years. It is really important that you understand the business plan and all changes Wessex Water intend to make so please read the plan carefully.



To help develop this plan Wessex Water has already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Wessex Water is currently finalising its five-year business plan for 2020 – 2025. This business plan outlines which service improvements Wessex Water intends to make over the coming years. It is really important that you understand the business plan and all changes Wessex Water intend to make so please read the plan carefully.



To help develop this plan Wessex Water has already asked many customers about what they want their water services to look like in the future. They now want to share the plan with you to see what you think.

Some areas of this plan may seem less relevant to you as Wessex Water does not supply your water (they only take your waste water away). However, Wessex Water still values your opinion so please take your time to read through the plan and answer the questions carefully.

Overall, Wessex Water's ambition is to be the best water company in the UK but continual improvements are required to stay at the top.

To ensure these improvements are made through the coming years, Wessex Water has focused its business plan on eight specific areas. These eight areas are:



Delivering excellent customer service



Future proofing our services



Minimising sewer flooding



Using water in our region more efficiently



Ensuring bills are affordable for all



Protecting and enhancing the environment



Providing excellent drinking water quality

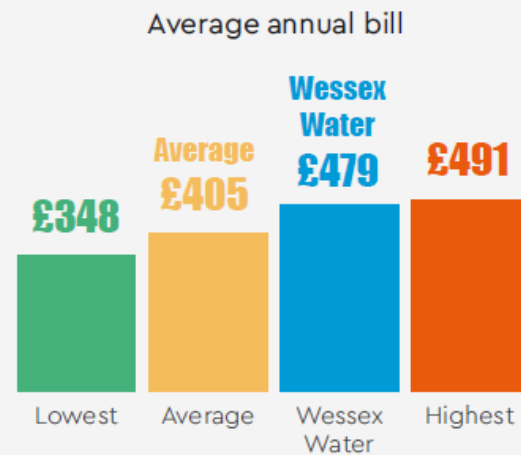


Developing better relationships with the communities we serve



Everyone gets their water from their regional water company. Each water region is different, for example the size and population of the area, whether it is mainly rural or urban, how much coastline it has and even the underlying geology and weather. This can affect overall bills in each region.

The chart below shows how the average household bill for Wessex Water customers currently compares to other UK water companies.





Wessex Water wants water bills to be affordable for all households.

The table below shows how your bill will change if Wessex Water adopts this plan.

This includes improvements within all eight areas of the business plan.

At present the average household bill	£40 per month	£479 per year
On average, if bills were to go up each year by inflation, by 2025 the average bill would be	£45 per month	£539 per year
Under the plan we propose the average bill would be	£39 per month in 2020, rising to £43 per month by 2025	£469 per year in 2020, rising to £516 per year by 2025

Please note, bill figures have been rounded to the nearest whole number

Over the following screens you will be shown more information about Wessex Water's proposed plans for each of these eight areas.

For each area you will be asked two questions

- 1 How important you think the area is
- 2 How Wessex Water's proposed approach makes you feel

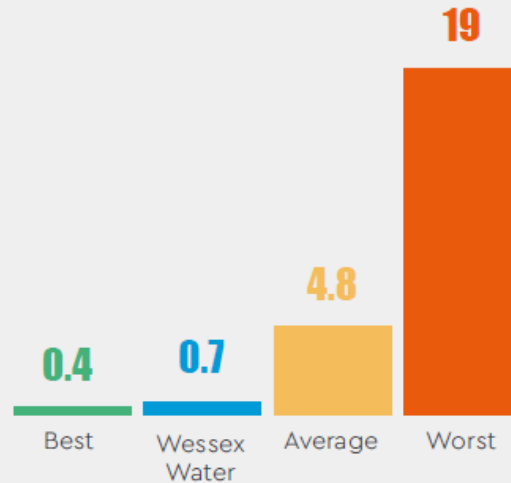
Once you have reviewed all eight areas you will then be asked a few further questions about **Wessex Water's business plan as a whole**



Providing excellent drinking water quality

Here is how our current performance compares with other water companies:

Water quality measure (from Chief Inspector of Drinking Water)



Source: Discover Water, the official water company comparison site

We want to be the best water company for the quality of our drinking water.

We will do this by...

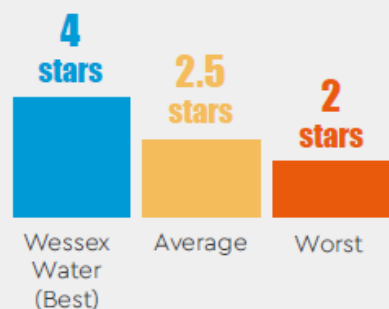
- 1 Protecting the sources of our water from contamination (e.g. working with farmers to reduce fertiliser contamination)
- 2 Promoting the use of approved plumbers and fittings inside people's homes
- 3 Proactively maintaining our water treatment works and supply network, not just fixing problems after they happen
- 4 Improving the appearance of water, aiming to reduce the number of customers who need to contact us about the appearance of their water by 20%
- 5 Replacing three times as many lead pipes as we have in the past



Protecting and enhancing the environment

Here is how our current performance compares with other water companies:

Environmental Performance Assessment



Source: Discover Water, the official water company comparison site

We will invest in our biggest environmental improvement ever.

We will be investing in...

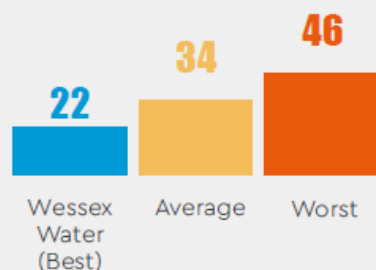
- 1 Protecting wildlife by improving the water quality of 480 miles of river
- 2 Carefully recycling "sludge" – the waste that's left after sewage is treated
- 3 Reducing overflows from our sewers after heavy rain
- 4 Improving the quality of sea water through improved treatment of sewage
- 5 Minimising water taken from rivers especially in sensitive areas
- 6 Working with local communities / partners to improve habitats for plants and wildlife and reduce risk of flooding at our sites and water sources
- 7 Reducing greenhouse gas emissions to be carbon neutral by 2040
- 8 Improving the condition of Sites of Special Scientific Interest on our land



Protecting and enhancing
the environment

Here is how our current performance
compares with other water companies:

Number of pollution incidents
per 10,000km of sewer



Source: Discover Water, the official
water company comparison site

We plan to reduce pollution incidents by at least a further 25% by 2025.

We will do this by...

- 1 Installing the latest technology to provide advance warning of potential polluting discharges
- 2 Cleaning sewers more often to stop problems before they occur
- 3 Doing more to help customers not cause blockages in our sewers, especially in hot spot areas
- 4 Improving our sewage treatment works to continue to be amongst the best in the industry



Using water in our region more efficiently

We want to leak less water per kilometre than other UK water companies

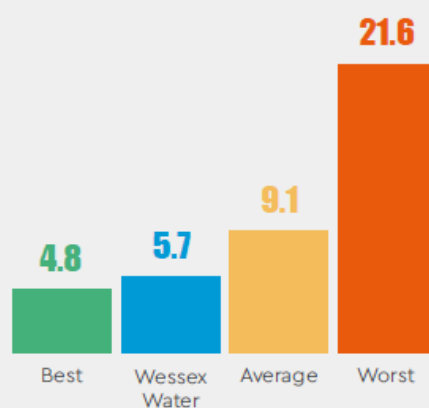
Here is how our current performance compares with other water companies:

Leakage from Wessex Water's pipe network is

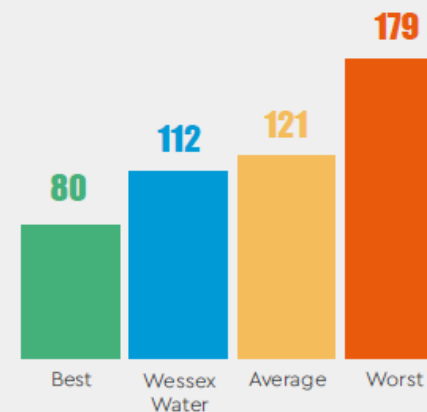
less than

half what it was 20 years ago

Leakage (litres per km of pipe per day)



Leakage (litres per household per year)



Source: Discover Water, the official water company comparison site

However the population is growing, climate change is happening and demand for water increasing. Therefore, using water efficiently is crucial. To keep the amount of water taken from the environment the same as it is now, we pledge to reduce leakage and do more to help customers use water wisely.



Using water in our region more efficiently

Specifically we pledge to...

1

Reduce leaks by a further 15% by 2025

2

Fix reported leaks on our network of pipes quickly (aiming for 90% within a day – up from 70% now)



3

Provide 40,000 free in-home checks for customers to help them save water

4

Educate 120,000 school children about using water efficiently

These changes mean...

-  You are very unlikely to have a water restriction (e.g. hosepipe ban)
-  You can be confident that essential water supplies will continue even in extreme droughts



Ensuring bills are affordable for all

We want to make sure bills are affordable for all...

We currently help...

31,000

households by applying a discount where people need one. By 2025 we want to help

86,000

households

We'll continue to support...

Customers who are struggling to pay their bills due to severe financial hardship or debt:

- 1 We lower their bills. On average we reduce annual water bills by £220
- 2 We can help with our debt write-off scheme

Customers on Pension Credit or who have a state pension as their only income:

- 1 We give a 20% reduction on their annual water bill (around £90)

We will also...

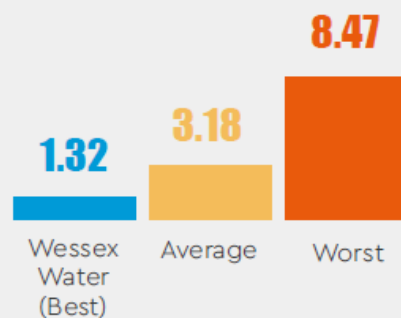
Work with independent debt advice agencies to help us reach eligible customers who may not know about our schemes. We are aiming to receive at least 2,300 applications from agencies per year up to 2025.

Continue to help all customers to save water (and therefore money) by providing information and advice and free water saving devices.

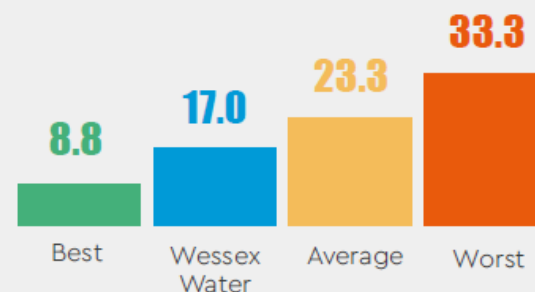
Minimising sewer flooding

We want to be the best UK water company for sewer flooding. Here is how our current performance compares with other water companies:

Sewage flooding inside property
(per 10,000 connections)



Sewage flooding outside property (per 10,000 connections to sewers)



Source: Discover Water, the official water company comparison site

We will...

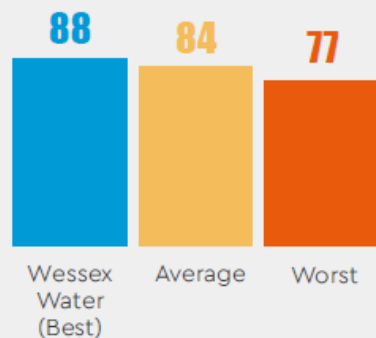
- 1 Reduce the number of properties flooded by 1250 by 2025
- 2 Invest in new and/or larger sewer capacity where there is new building/housing
- 3 Work with developers to provide the right capacity in our sewerage network
- 4 Continue to work with customers to raise awareness about what you can and can't flush down the toilet
- 5 Work with local councils to stop takeaways/cafes putting fat, oil, grease, and food waste down the sewers



Delivering excellent customer service

Here is how our current performance compares with other water companies:

Customer Service Score
(out of 100)



Source: Discover Water, the official water company comparison site

We want to be in the top 20 of all UK companies for customer service.

We pledge to...

- 1 Always get the basics right by delivering reliable services and being there 24/7 for you
- 2 Continue to answer the phone with a person plus offering alternative ways to contact us
- 3 Improve and expand our online services, including opportunities to track and compare your water usage
- 4 Increase the number of people added to our Priority Services register because of disability or additional needs
- 5 Make our services more accessible to ensure no-one is excluded from contacting us



Future proofing our services

To future proof our service (and ensure sufficient water is available for at least the next 25 years) we are investing:



1

To minimise short (less than 3 hours) planned breaks to your supply

2

To reduce the risk of longer breaks in water supply (more than 12 hours)

3

To make sure the number of mains water bursts and sewer collapses doesn't increase

4

In cyber security to prevent hacking

5

To protect against the impact of drought or flooding in the future



Developing better relationships
with the communities we serve

We pledge to work our hardest to protect the water environment and invest in the future, but we will be asking our customers for their help. Here are some examples:

We will...

Provide the best services and protect the environment

Keep bills affordable to all and help you lower your bills by helping you to use less water

Future proof, ensuring a sustainable water supply for years to come

Give extra help to those who need it

We want you to help by...

- Only ever flushing pee, poo and paper down the toilet
- Never pouring fat or oil down the sink
- Telling us if you see any leaks

- Paying your bills on time
- Telling us if you are struggling so we can help you

- Using water efficiently so we take less water from the environment
- Telling us what's important to you and your community

- Making the most of our support schemes
- Working with us to improve water quality inside your home/business

To recap, Wessex Water has focused its business plan on eight specific areas. These eight areas are:



Delivering excellent customer service



Future proofing our services



Minimising sewer flooding



Using water in our region more efficiently



Ensuring bills are affordable for all



Protecting and enhancing the environment



Providing excellent drinking water quality



Developing better relationships with the communities we serve

Populus Proposal

DECEMBER 2017

Populus

**Wessex
Water**
a YTL company

Contents

Pages	Chapter
4-10	Introduction and Objectives
11-20	Programme Overview
21-23	Understand
24-28	Explore
29-53	Measure
30-40	Overview
41-46	Business Plan Builder
47-49	Core Innovations for Survey
50-53	Other Innovation Options
54-59	Inform
60-61	Timings
62-72	Team and Experience
73-75	Costs
76-81	Appendix

Introduction and Objectives

Populus

A decorative graphic consisting of several blue pipes of varying thicknesses and orientations. The pipes are connected by green valves, each represented by two vertical bars. The pipes form a complex, interconnected network that starts from the left and extends towards the right, with some pipes crossing each other. The overall style is clean and modern.

Introduction

In accordance with the five-year Asset Management Plan periods, Wessex Water needs to submit its final business plan to Ofwat in September 2018 ready for the next Price Review (PR19). The business plan needs to be actionable and robust, meeting four key criteria; offering great customer service, ensuring resilience, providing affordable services, and delivering innovative approaches.

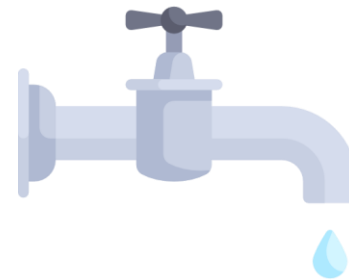
The business plan must outline which service improvements Wessex Water intend to prioritise over the coming years. Wessex Water has already conducted significant qualitative and quantitative research on its strategic direction, leakage and resilience to aid in developing a draft business plan.

The next step in the process is to explore and understand the acceptability of each service improvement (with the option to make changes) among all important stakeholders (including domestic, business and vulnerable customers as well as the Wessex Water Partnership and staff among others). Ongoing engagement with these audiences will ensure their feedback is taken into account at each subsequent stage of the business plan development. This will ensure that Wessex Water stays true to their customers and continues to be one of the leading water and sewerage companies in England and Wales.

Triangulation between this project's findings, existing research and potentially other channels will provide richer conclusions and recommendations that are robust, valid and actionable.

We believe that Populus is particularly well placed to conduct this research for Wessex Water. We have lots of experience in the utilities sector (having worked with companies such as Thames Water, Wessex Water, United Utilities) as well as experience working with regulatory boards including Ofgem and Ofcom.

This document outlines the approach we would take to meet the objectives set out in your brief.



Why Populus?

The relevant experience and expertise that Populus possesses puts us in a unique position to over deliver on the areas highlighted below:

1

Quality and Experience

We have allocated a highly skilled team to this project who have relevant experience in conducting research amongst your target audiences and using the methodologies proposed. Your project team collectively have over 70 years of research experience and are passionate about delivering high quality outputs to our clients. We have also included our head of analytics in the team as a consultant methodologist to ensure that the research will stand up to Ofwat's scrutiny.

2

Our Innovative Outputs

We see it as our responsibility to keep abreast of research innovations and continuously investigate new techniques. For the past three years we have won the MRS award for best data solutions on the back of our innovations – this year for the use of Virtual Reality technology in a survey. In order for us to adopt a new technique it must offer a clear improvement with regards to the insight it produces vs more established techniques. We have incorporated several innovative survey tools into our core approach – our Acceptability (Business Plan Builder) model, and our proprietary implicit and non verbal scale tools. We have also provided options for the use of virtual reality, chatbots and gamification to enrich the survey experience for respondents.

3

Relationship Management

We have experienced significant YoY growth and were previously named the fastest growing research and insight agency by the MRS. We achieved this through developing strong, long-term relationships with our clients who now trust us with their most strategic projects.

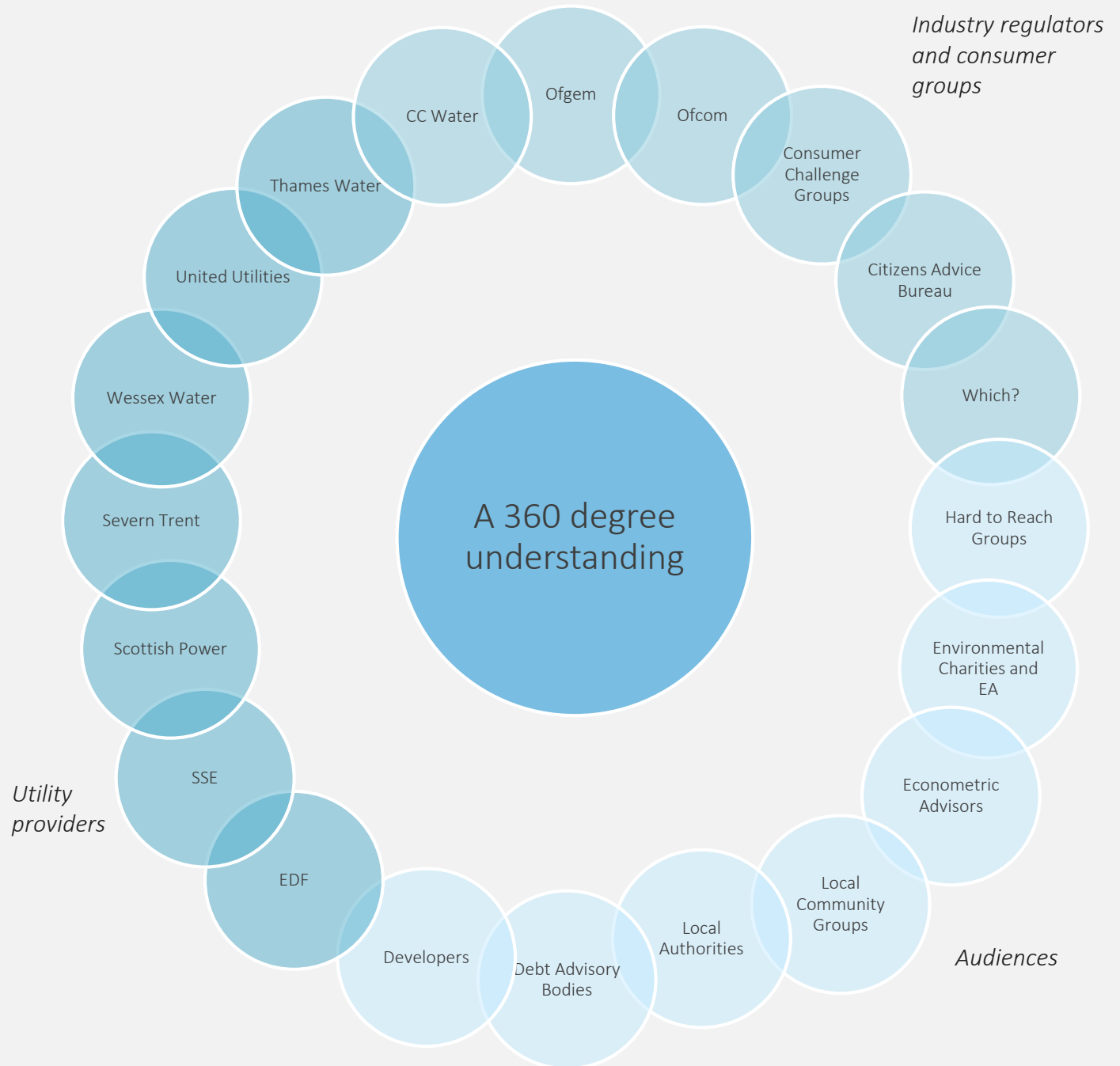
In 2016, we were nominated for the Aura: Trusted Advisor award. Members of Aura (100's of market research buyers) nominate those agencies that they feel add most value. Please see Page 81 for feedback from our last client audit.

Our Relevant Experience

We believe we are ideally placed to deliver this research for Wessex Water given:

- Our extensive work with utility companies
- Our excellent track record in engaging consumers and stakeholders in water research
- Our ability to bring insights to life to develop actionable recommendations and inform business plan development

Over 10 years, we have been working on behalf of, speaking to, and building relationships with the organisations and audiences shown on the right.



Objectives

This innovative programme of research will form one discrete component of Wessex Water's customer engagement programme, identifying the acceptability of Wessex Water's proposed business plan among customers and key stakeholders.

BUSINESS OBJECTIVE

To identify whether Wessex Water's business plan for 2019-2024 is accepted by both customers and stakeholders

RESEARCH OBJECTIVES

- 1 Explore customer and stakeholder reactions to Wessex Water's business plan for each of the 8-10 priority areas
- 2 Test acceptability of the 39 proposed performance commitments among Wessex Water customers
- 3 Test acceptability of the proposed overall business plan among Wessex Water customers
- 4 Test awareness of and satisfaction with Wessex Water's service offerings for vulnerable customers
- 5 Ensure research techniques are innovative and optimise customer experience
- 6 Within stimulus, utilise comparative information from other water companies to provide appropriate context
- 7 Build actionable insight through triangulation of findings from each phase of Populus' research programme

How the Research Will Meet the Objectives

1 Explore customer and stakeholder reactions to Wessex Water's business plan for each of the 8-10 priority areas	<p><i>Qualitative interviews:</i></p> <p>We will explore initial reactions to the proposed business plan through:</p> <ul style="list-style-type: none"> • 3 x engagement events (2 with domestic customers, 1 with business customers) • Depth discussions with vulnerable domestic customers and Wessex Water stakeholders
2 Test acceptability of the 39 proposed performance commitments among Wessex Water customers	<p><i>Quantitative survey:</i></p> <p>To test acceptability of the business plan we will conduct a 25 minute survey with Wessex Water customers (both domestic and business). The survey will include:</p>
3 Test acceptability of the proposed overall business plan among Wessex Water customers	<ul style="list-style-type: none"> • A Business Plan Builder to explore customers' acceptability of each performance commitment, and whether this matches Wessex Water's business plan for the 8-10 priority areas. Where appropriate comparative information will be included to provide context
4 Test awareness of and satisfaction with Wessex Water's service offerings for vulnerable customers	<ul style="list-style-type: none"> • Implicit testing and non-verbal scales to go beyond conscious responses and explore how customers truly perceive the proposed business plan
5 Ensure research techniques are innovative and optimise customer experience	<ul style="list-style-type: none"> • Further questions for vulnerable customers to test awareness of and satisfaction with existing service offerings targeted at this audience • Optional additions including virtual reality, gamification, and chatbots to make the survey very engaging and help bring the business plan – and each performance commitment – to life
6 Within stimulus, utilise comparative information from other water companies to provide appropriate context	<p>To ensure a wide representation of customers we will use a number of methods. While the method varies, the survey will remain consistent to ensure comparability</p>
7 Build actionable insight through triangulation of findings from each phase of Populus' research programme	<p>We will also utilise cognitive and pilot testing to ensure the survey is understood correctly by respondents, and to help iron out any design problems thus optimising the respondent experience</p> <p><i>Triangulation:</i></p> <p>We will triangulate our findings (across both the qualitative and quantitative methods) to help build robust and actionable insight. Feedback from Wessex Water's communication strategy could also feed into this process to ensure the widest representation of customers possible</p>

Benefits of this Research Project to Wessex Water

The engagement programme that Wessex Water has embarked on will ensure that customers and stakeholders underpin what the business does and how it does it. Accounting for both customers and stakeholders is essential to developing a constructive and realistic business plan that can be implemented without backlash. Populus will ensure that delivering the four customer benefits (great customer service, affordable bills, resilience in the round and innovation) outlined by Ofwat in PR19 is central to all aspects of the research – from the design to the interpretation and triangulation to giving final recommendations.

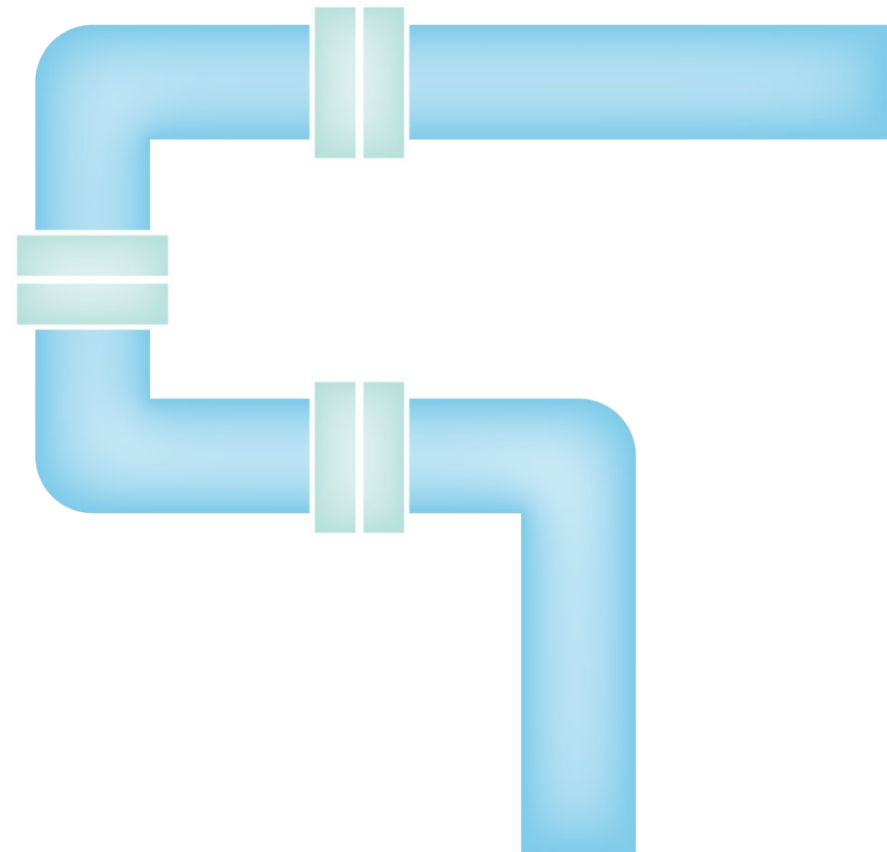
The benefits of this project are shown below:

- Wessex Water will be able to develop a robust business plan that meets Ofwat's requirements and that focuses on delivering the four customer benefits highlighted by the regulator
- Wessex Water will be able to prioritise the performance areas that are deemed to be most important to customers and those that customers are most willing to accept
- Wessex Water will minimise the chances of facing any backlash towards its business plan by investigating the acceptability of customer findings with stakeholders

- Wessex Water will be able to increase the value of existing data sources (e.g. social media data and previous research) by triangulating these with survey data and delivering insight conclusions and recommendations
- Wessex Water will engage with customers through innovative and appealing research techniques, thereby demonstrating the business' commitment to using the best and most up to date methods to uncover insight that has a beneficial impact upon the water industry

Programme Overview

The research is designed to provide robust findings and a holistic view of the customer base, while ensuring maximum customer engagement through innovative techniques



Programme Schematic

We suggest using multiple sources of data collection to triangulate our findings. A full break down of how the individual stages of the research design will fall out is shown below:

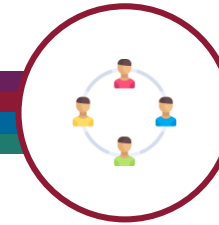
UNDERSTAND



Crystallisation Workshop – to understand the proposed business plan and existing Wessex Water research

Half-day interactive session with key stakeholders, select Wessex Water customers and staff, and representatives from the Wessex Water Partnership

EXPLORE



Qualitative Research – to explore customer sentiment

3 days of Qualitative ‘Engagement Events’:
48 domestic customers (split over 2 days)
16 business customers

In-Home Depth Interviews with Vulnerable Audiences:
6 ‘Main Stream Vulnerable’ – e.g. those with less severe disabilities or experiencing debt
6 ‘Super Vulnerable’ – i.e. those with more significant vulnerabilities/ more socially isolated e.g. those who do not speak English and thus need interpretation and those being cared for with more significant disabilities

12 Depth Interviews with stakeholders

Followed by an interim report/debrief with key stakeholders and the Wessex Water Partnership to discuss how findings will feed into the quantitative stage

Programme Schematic (2)

MEASURE



Quantitative Research – to measure acceptability of proposed business plan

Face to face central location test:
500-1000 customers

Online survey:
400 customers (Populus panel)

In-Home/Premises face to face:
100 businesses, 50 vulnerable customers

400 customers (Wessex
Water's 'Have Your Say' Panel)

All data collection tools listed above will incorporate innovative techniques such as non verbal scales and implicit testing to explore how the business plan resonates on an emotional, as well as rational, level

Additional VR, chatbot or gaming technology can be integrated in the face to face central location testing

INFORM



Delivery of results – to inform key stakeholders on research results.
Triangulation of our findings across different approaches

Insight to Action workshop - interactive session at Wessex Water's head office

PowerPoint report – integrated Qual and Quant findings

Face to face debrief – to key stakeholders and the Wessex Water Partnership

Results summary and data tables available as standard

Considerations – Methodology (1)

We have carefully considered the methodology to ensure it will withstand Ofwat scrutiny and provides a holistic view of the Wessex Water customer base

Consideration

Implications for methodology

Ensuring all findings withstand Ofwat scrutiny

- Ofwat set out its criteria for assessing business plans in its Final Methodology published December 13th, 2017. Its approach to engaging customers supports the key themes of PR19 – affordability, customer service, resilience and innovation. Water companies need to understand their customers’ preferences/priorities and deliver the outcomes that matter to them long term. This includes all customers and those in circumstances that might make them vulnerable/those that are hard to reach
- We have designed both our qualitative and quantitative stages around these principles – paying particular attention to reaching out to “seldom heard” groups, incorporating innovative and engaging approaches to understanding affordability and customer service and including comparative information to analyse the longer term view on performance

Ensuring a holistic overview of the Wessex Water customer base

Qualitative Exploration stage

- For the qualitative stage we have recommended an approach that captures the views of domestic, business & “seldom heard” groups. We will also conduct depth interviews with Wessex Water stakeholders and industry experts
- The qualitative stage will enrich our understanding of the “seldom heard” by conducting interviews with those that are hard to reach via a quantitative methodology – for example, those that need a carer (e.g. those with severe disabilities) or interpreter (e.g. those that don’t speak English) present. Populus is well versed in this area and recently presented a paper at the Utilities Conference with United Utilities on this topic

Quantitative Measurement stage

- We know from experience that it isn’t possible to gain a robust quantitative sample of 1000-2000 Wessex Water customers via online channels only. We are therefore proposing a core face to face approach, supplemented with an online survey. Not only will this approach allow us to reach a robust sample of customers, but using multiple methodologies will allow us to triangulate our findings and be more confident in the validity of our outputs.
- While our face to face central location test will allow us to reach some “seldom heard” customers (e.g. the digitally disconnected who would have been excluded from an online only approach), we recommend conducting additional boost interviews that would take place in-home to reach a more robust and representative sample. For example, interviews would be conducted with those with ill health, disabilities, mental illness, in financial difficulty and the digitally disconnected.
- Business customers are hard to reach & we propose conducting face to face boost surveys with this customer group at their business premises

Considerations – Methodology (2)

We have paid particular attention to ensuring an optimum customer research experience and incorporating innovative techniques into the project design

Consideration

Implications for methodology

Ensuring an optimum customer research experience

Qualitative Exploration stage

- Populus believes that it is crucial to ensure that respondents have a positive/engaging research experience, particularly on topics where there might normally be a lack of customer engagement
- We have recently shown how we can deliver on this through our leakage research for Wessex Water, incorporating engaging stimulus material and bringing the subject to life through creative tasks. We would incorporate some of these principles into the Acceptability testing work, ensuring that we explore large amounts of information with customers in an engaging way. Populus' Head of Qualitative, Andy Barker, has previously been nominated for an MRS award for a workshop which explored some of these engagement techniques

Quantitative Measurement stage

- It is essential that we ensure a positive survey experience for customers with regard to cognition and ease of filling in the surveys. This will lead to more engaged participants and therefore higher quality data. To do this we have recommended a stage of cognitive testing and survey piloting that will gather customer feedback on the questionnaire and allow for any changes to be made to aid cognition

Demonstrating an innovative approach to make our research work harder for you

Qualitative Exploration stage

- Agencies might typically approach this research through focus groups &/or co-creation workshops. We recommend against this and instead advocate holding 'Engagement Events' to bring the business plan and priority areas to life in a more innovative way for customers
- Innovations for the event would include 'zoning' – creating interactive zones in the space for each of Wessex Water's priority areas. Each zone would include posters, presentations, videos and objects bringing the business plan to life, with customers moving through each zone (priority) in turn

Quantitative Measurement stage

- Populus has provided options to incorporate Virtual Reality (VR) technology, chatbots &/or gamification into the central location testing. A VR film would bring Wessex Water's business plan to life for customers, while chatbots and gamified surveys would provide more engaging approaches. These techniques would ensure that customers are fully immersed in the research experience therefore yielding high quality results
- We will also include our own proprietary implicit testing tool across both the face to face and online interviews. The tool was developed with Dr. Alastair Goode, a widely respected cognitive scientist, and will allow us to identify both explicit and implicit perceptions of Wessex Water's business plan. Incorporating non verbal scales will also increase our understanding of more emotional responses to the business plan

Considerations – Methodology (3)

Our approach has been designed to incorporate comparative information, as well as considering the optimum design for testing acceptability.

Consideration

Implications for methodology

Ensuring that comparative information is incorporated into the design

- Populus is aware of the benefits of incorporating comparative information into our approach, having previously undertaken research for Thames Water on this subject. We have used our knowledge to consider how comparative information could be integrated into both the quantitative & qualitative stages. There is a danger of customer confusion, but Populus have the expertise to avoid this

Qualitative Exploration stage

- There are two potential approaches we could take; firstly, within each zone at our planned 'Engagement Events', we would access the Discover Water website to take respondents through comparative data. Alongside this we would also have separate stimulus created by our internal design team to ensure that comparisons are clear. As an alternative, we might have a separate comparative 'zone' within the event with the sole purpose of exploring comparative information with customers

Quantitative Measurement stage

- Our experience means that we are knowledgeable in how to successfully integrate comparative information into survey design. It is important to represent performance in a simple, visual way and incorporate historical data as a means to show the company's progression over time. For more information on our approach to comparative information please see Page 20

Ensuring that acceptability is successfully captured

Quantitative Measurement stage

- Testing acceptability is at the core of the research – but we also note that Wessex Water is keen to provide customers with the option to make changes to the business plan if necessary. Providing this flexibility will ensure that the research and business plan remain customer centric. We would recommend incorporating a 'Business Plan Building' module similar to the one used by Populus in the recent 'Willingness to Pay' project for Wessex Water. This will present various options to customers, allowing them to scale elements of the business plan up and down, highlighting bill impact
- Not only will this provide a clear view of customer priorities and the acceptability of the business plan, but it will also provide an engaging format through which to complete this module of the survey. There would also be the potential to use an adapted version of Wessex Water's online game in the central location tests to ensure acceptability is successfully captured

Considerations – Methodology (4)

We have carefully considered research locations and the stakeholder groups to be interviewed to maximise the utility of the research.

Consideration

Implications for methodology

Qualitative Exploration stage

- To further add to the engaging nature of the research we would look to undertake the ‘Engagement Events’ within venues that are relevant to the subject matter – further bringing the research to life for participants. For example, locations such as Wookey Hole or Bath Roman Baths would ensure that respondents are immersed in the research experience

Quantitative Measurement stage

- From our knowledge of the Wessex Water region we are aware that it is a broad geographic area and that the demographics within the area can be very varied. We therefore need to ensure that we choose venues for the central location tests that acknowledge the diversity of the area. For example, venues might include locations within Bath (which would yield a more affluent, urban respondent), Chippenham and Taunton (to capture a mixture of urban and rural audiences) and coastal locations including towns such as Poole, Bournemouth and Weymouth
- Our fieldwork team have experience of running central location tests in the area and have great insight into the towns/venues that will also provide sufficient footfall

Qualitative Exploration stage

- From the brief it is clear that Wessex Water wishes to include the views of stakeholders within the research – including staff and members of interested external organisations. Alongside these groups, we would recommend incorporating the views of experts into the exploration stage to provide an even fuller reaction to the business plan. Category experts and audience experts can provide invaluable feedback and have been previously useful in sharing information across other regulated industries in order to drive plans forward and consider new areas that may have previously been overlooked
- Populus also has an existing relationship with the Wessex Water partnership, with Andy Barker previously presenting to the Partnership, and we believe that this awareness should mean that we have more traction in securing interviews and building relationships with members

Considerations – Sampling

This research project is designed specifically to reach all relevant audiences and provide a holistic view of the customer base.

<i>Sample type</i>	<i>Who they are</i>	<i>How we will reach them</i>
Domestic	<ul style="list-style-type: none"> • Wessex Water’s Domestic customer base 	<ul style="list-style-type: none"> • ‘Engagement Events’ • Face to face central location test survey • Online survey
Business	<ul style="list-style-type: none"> • Wessex Water’s Business customer base • Businesses in the Wessex Water region 	<ul style="list-style-type: none"> • Depth interviews • Face to face in-premises survey
“Seldom Heard”	<ul style="list-style-type: none"> • Customers who are less likely to take part in research (e.g. digitally disconnected, financial, social, physical or mental vulnerabilities) 	<ul style="list-style-type: none"> • Depth interviews • Face to face in-home survey
Stakeholders	<ul style="list-style-type: none"> • Wessex Water stakeholders – including staff and members of interested external organisations • Category and audience experts 	<ul style="list-style-type: none"> • Depth interviews

Considerations – Vulnerable Customers

Sample structure

We are considered experts in the area of vulnerable customers, as evidenced by the fact that we are presenting on the subject at the upcoming MRS Utilities conference. Vulnerable customers can be defined in many ways, including:

- Households with a low income
- Faith and ethnic groups
- Customers with a physical disability
- Those who have high water usage due to a health condition
- Customers with a mental health condition
- Customers with a learning difficulty
- Older and socially isolated customers

Through the various stages of this research we will reach customers with a wide range of vulnerability types and severity:

Qualitative depth interviews: These will reach customers with moderate to severe vulnerabilities. These vulnerabilities, such as visual impairment or learning difficulties, tend to prevent customers from taking part in quantitative surveys so it is important their views are captured in this first stage

Quantitative central location tests: Natural fallout means we will reach some vulnerable customers via central location testing. These vulnerabilities will range from mild to moderate, including low income customers, those of a minority faith or ethnic group, and those with mental health conditions

Quantitative in-home boost survey with vulnerable customers: Due to the nature of central location interviews we cannot guarantee sufficient base size for subgroup analysis. We therefore recommend conducting in-home surveys with 50 vulnerable customers to boost the sample size. Again, these customers vulnerabilities will range from mild to moderate

Considerations – Comparative Information

Populus believes it is essential to include comparative information in the research, as this will provide useful contextual information to customers when making judgements about the business plan.

Integrating comparative information is not straight-forward and requires expertise around how to best present information to customers who may not be numerate. We need to work hard to engage, speed educate and be crystal clear on metrics shown.

Populus has extensive experience of integrating comparative information into its research and has outlined some key recommendations below based on previous learnings.

Go back to basics



- Few people have any working knowledge of the water industry and customers are generally disengaged
- When presenting comparative information respondents will first need educating about basics including the role of the water provider

Keep it simple



- Comparisons should be kept simple, using a limited number of metrics, that are clearly explained in a non-technical way. Jargon should be avoided
- The units of measurement are not critical or essential to understanding, but the relative rank position of the company is

Visuals are key



- Performance should be represented in a simple, visual way – even “averages” can be difficult for consumers to understand
- Bar charts are effective but infographic overviews are also well received

Don't overload customers

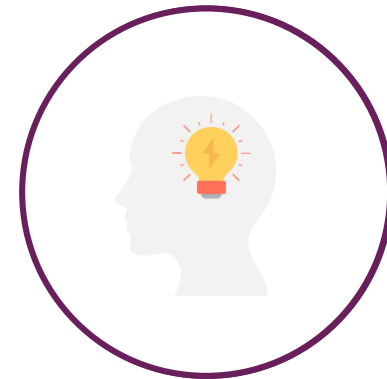


- Including comparative information is useful for respondents – but if too much is included they can feel overloaded
- Attributes should be kept to a minimum (no more than seven), and the number of companies compared limited

Populus recently presented at the Water Industry Workshop on how customers react when they are faced with comparative information and would bring this expertise to the Acceptability Testing project for Wessex Water.

Understand

We will begin the project with a Crystallisation Workshop. This meeting gives Populus a chance to immerse in the Wessex Water brand and better understand the context of this research within the business. It will also be an opportunity to explore the existing data sources owned by Wessex Water which could be used for triangulation



Crystallisation Workshop – Phase One

Achieving a conclusion that is both representative and actionable for you is our ultimate aim. Only by fully engaging with a range of levels across the business can we be sure we are addressing the true issues. In our experience, an initial 'Crystallisation Workshop' with key stakeholders and customers will be essential for a multi-faceted project such as this.

We will facilitate a half-day session with the project team stakeholders, select Wessex Water customers and staff, and representatives from the Wessex Water Partnership. We will split the workshop into two phases (Phase One of which can be seen below, Phase Two on the next page) and capture all discussions in a formal write up to be shared with Wessex Water.

In our experience, collaboration is the key to conclusion, so we envisage this workshop as very discursive. Both Phases will require members of your team to present us with short presentations, opening up for group discussion and feedback.

1) Understand and explore project objectives, and discuss key issues to address in the research

- We recognise that the widest possible range of customers, staff and stakeholders should feed back on the business plan, so acknowledge that a varied selection of attendees should be invited to this workshop. In particular, we know that the Wessex Water Partnership exists to challenge the business plan and customer engagement programme, so understanding their perspective will be of paramount importance to our research structure
- The first half of the workshop will involve members of the team giving a brief introduction to the research – background to the project, current state of play, overall research plan within the business etc
- We will then challenge those in attendance to raise key issues they may have, across many levels of the business, and work together to iron-out the best way to tackle these. This could be preliminarily designing potential questions, or action-planning around key project timings

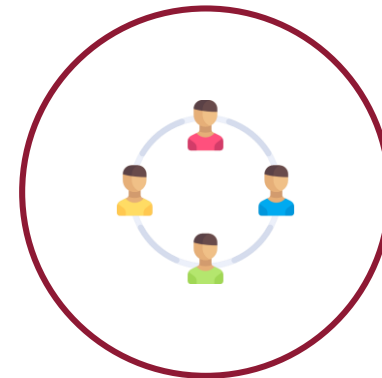
Crystallisation Workshop – Phase Two

2) Unpick existing data sources held by Wessex Water to identify knowledge gaps and strengths, and discuss opportunity for triangulation

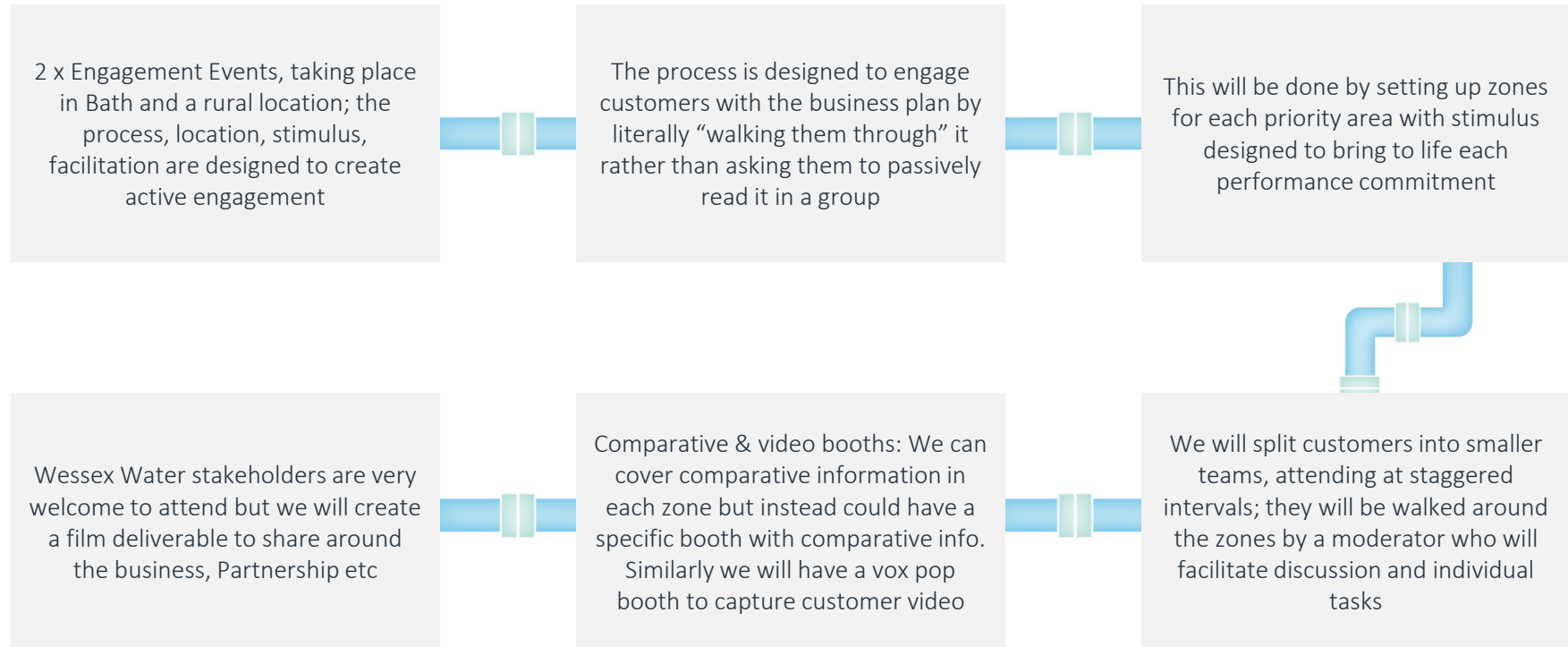
- This session also provides opportunity for Wessex Water to present interesting, relevant findings from previous research studies. This has several benefits, including:
 - Identifying Wessex Water's knowledge gaps so that we can then determine which of these gaps this research can fill and discuss what the best approach will be
 - Informing better survey design. For example, our previous leakage research with Wessex Water found that that customers would prefer to see no bill impact from initiatives to reduce leakage, but trust Wessex Water to be transparent with modest future investment. This finding will help feed into the survey where we can explore possible trade offs between, among other things, bill rises and leakage modifications
-
- We will evaluate and discuss the Wessex Water Partnership's annual report. This will ensure the research subgroup's respective views are taken into account from the outset of the project
-
- We will finally discuss opportunities for triangulation, using both our proposed research methods and (where appropriate) existing data sources held by Wessex Water, to reach a reliable and accurate conclusion across a representative base of your customers

Explore

We will run Engagement Events with domestic and business customers to test response to the business plan and make refinement recommendations; this will include customers in vulnerable situations. We will also interview internal and external stakeholders & experts



Overview of Explore



Sample Overview

Domestic Customers

- 48 x customers across 2 events/locations (24 in each event/location)
- Split into 4 x staggered groups of 6 at each event
- Sample to cover:
 - Metered vs unmetered
 - Range of lifestages
 - Range of Socio-economic groups
 - Range of bill sizes
 - Home owners vs renters (private and LAHA)
- Locations to represent urban and rural customers

Domestic Customers in Vulnerable Situations

- We will cover “mainstream” vulnerable customers e.g. those with less severe disabilities or experiencing debt (6 interviews)
- We will also cover those with more significant vulnerability/more socially isolated e.g. those who do not speak English and thus need interpretation and those being cared for with more significant disabilities

Business Customers

- 16 x customers across 2 events
- Split into 2 x staggered groups of 4 at each event
- Sample to cover:
 - Different sectors
 - Different bill sizes
 - Range of size of business (e.g. micro to larger SMEs)
 - Different levels of importance of water to the business

Other Stakeholders

- 12 interviews
- This can include:
 - Internal staff of all levels
 - Partnership
 - Charities (e.g. CAB)
 - Experts (e.g. on vulnerability)

Engagement Elements – the 4 P's

Place

- Location is key and is an active player in the project
- By using a venue which is inspiring, relevant or quirky we can get a higher level of engagement in the subject and thus better insight (e.g. we ran food product development sessions in cookery schools)
- Hence considering Bath Roman Baths and Wookey Hole as examples

Process

- By walking people around the event rather than them passively consuming material as they sit in a group, they will literally more actively engage
- We will facilitate and use different styles of questions, discussions and tasks (some individual responses) to keep people interested throughout all the priority areas
- We will rotate the order in which we walk people through the zones to ensure equal engagement for all priority areas

People

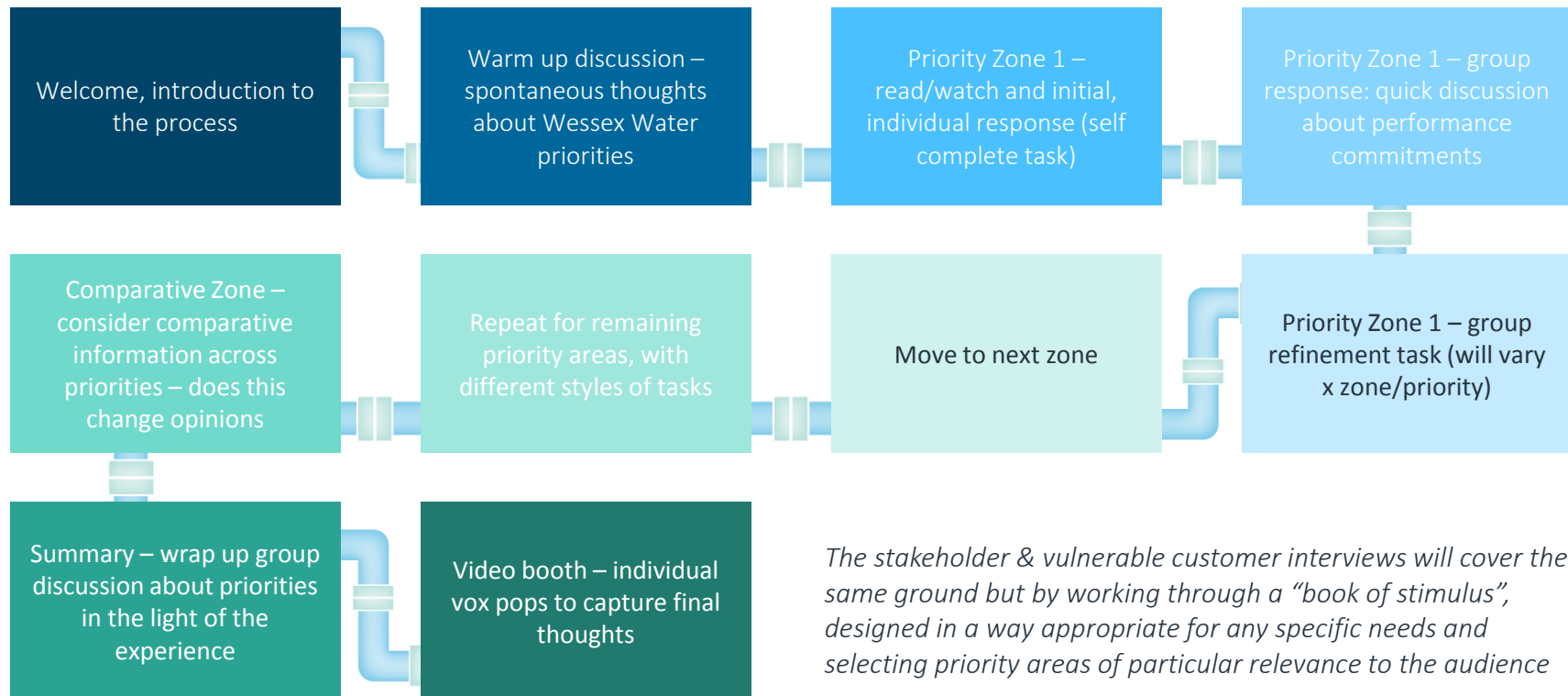
- We will ensure a diverse mix of people across the sessions
- Because people will be moving around the event, there will be a natural buzz which should be contagious, further enhancing engagement

Production values of stimulus material

- Not strictly a “p”, but by investing design time (which we can do) into stimulus material we can get a more effective read than if the material is poor quality, unclear, too wordy etc

Discussion Guide Overview - Events

Below is a brief outline of the session guide. We will provide a more thorough version upon commission.



Measure - Overview

We propose face to face central location interviews with Wessex Water domestic customers. The 25 minute survey can contain innovative techniques including virtual reality, gamification, implicit testing and non-verbal scales.

This will be supplemented by an online survey of customers to triangulate findings, as well as face to face in-home/in-premises boost interviews with “seldom heard” and business customers

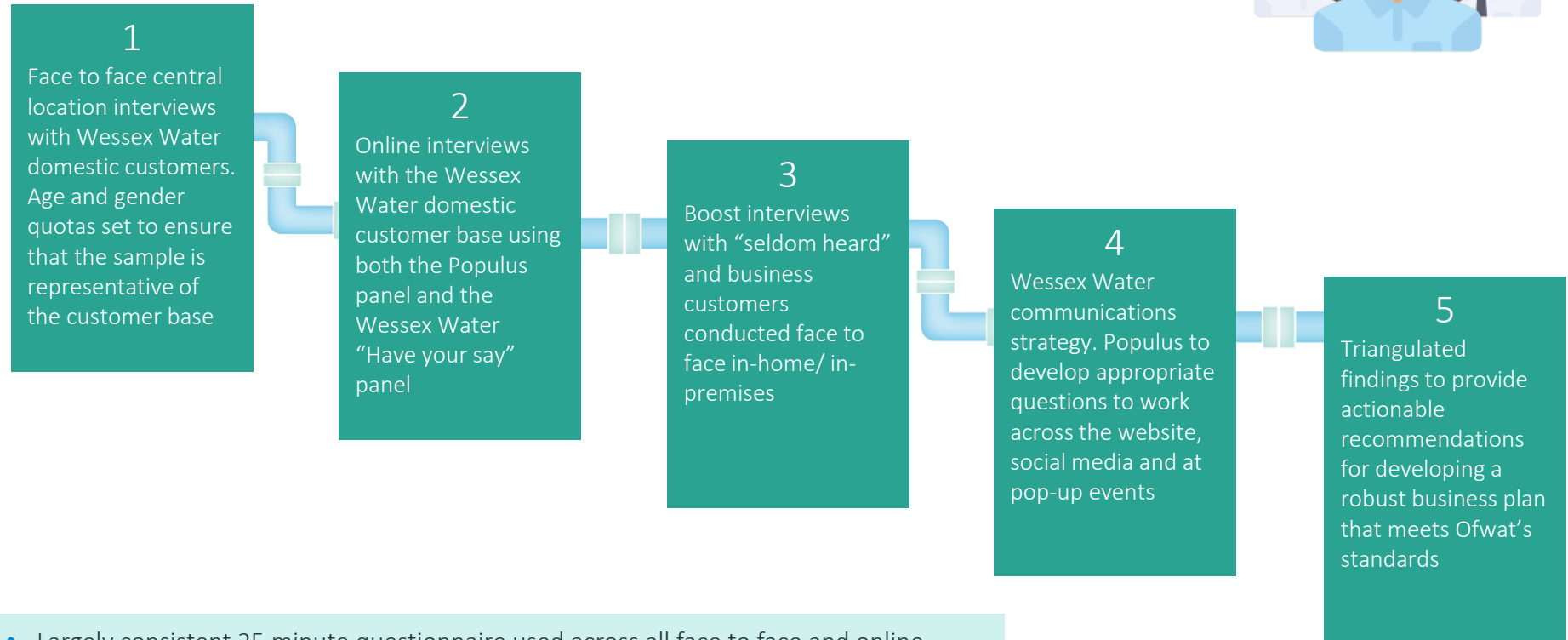


Measure - Overview

Our suggested quantitative approach, the rationale behind it, our sampling design, the structure of the questionnaire and options for innovations to be used



Measure



- Largely consistent 25 minute questionnaire used across all face to face and online interviews, with opportunity to tailor this for seldom heard/business customers
- All interviews to include innovative tools such as Business Plan Builder, implicit testing and non-verbal scales
- Option to include Virtual Reality and Gaming elements into central location tests

NB. We have assumed for the purpose of this proposal that Wessex Water will provide Populus with lists of its business customers for stage 3 of the research programme

Selecting a Methodology

We have selected face to face central location interviewing as our *core* methodology. This will be supplemented with online and face to face in-home/ in-premises *boost* interviews. Our reasoning is outlined below.

METHODOLOGY

Face to Face (CAPI) – CORE

- ✓ Interviewing face to face allows respondents to interact directly with the innovative elements on the research, while achieving the robust, representative sample required to meet Ofwat’s requirements satisfactorily
- ✓ The approach is also accessible for customer groups such as the digitally disconnected

Online – BOOST

- ✓ From previous experience we know that we will not achieve a sufficient sample size via an online methodology alone
- ✓ For example, for the recent Wessex Water Acceptability research we achieved c400 interviews from the Populus panel and c400 interviews from the “Have your say panel” after exhausting both of these avenues
- ✓ Nonetheless, online interviews are a robust and cost effective approach and allow us to incorporate innovative techniques. They will therefore supplement the f2f CAPI interviews

Telephone

- x Undertaking quantitative interviews via telephone limits the capacity for innovative techniques
- x The innovative approaches that we are recommending, for example the Business Plan Builder, implicit testing and non-verbal scales, utilize visual prompts and therefore cannot be completed via telephone

LOCATION

Central Location Interviews – CORE

- ✓ Hosting interviews in central locations (e.g. towns) will achieve a robust sample size due to high footfall, making it the most efficient face to face methodology
- ✓ Setting appropriate quotas (e.g. gender, age) will ensure the sample is representative
- ✓ A warm and dry environment means the interview length can be increased slightly and respondents will find it easier to interact with innovative techniques

In-home/ in-premises – BOOST

- ✓ Although central location interviews will be our core approach, they will not provide robust numbers of “seldom heard” or business customers
- ✓ Although in-home and in-premises face to face interviews are typically more costly, they will allow us to boost our sample of ‘hard to reach’ groups allowing for sub-group analysis
- ✓ The environment allows for a longer interview length and inclusion of innovative techniques

Street Intercept

- x Given the involved nature of the research and implicit testing, street interviewing is not viable
- x Interview length is also a barrier as surveys must be short to encourage respondent participation, particularly in bad weather

Sample Overview

Core approach

500/1000 central location test interviews with domestic customers



- CAPI interviews to take place in central venues at locations across the Wessex Water region
- Locations to take into account the diverse nature of the Wessex Water region – for example, urban (Bath), market and county towns (Chippenham and Taunton) and coastal (Bournemouth, Poole, Weymouth)
- We would expect to achieve 35 interviews at each location per day
- Sample to be representative of the domestic customer base with demographic quotas set
- An incentive of £5 will be offered
- To include business plan builder, implicit testing and non verbal scales
- Potential to include virtual reality, chatbots, and/or gamified survey experience

Online boost interviews

400 online interviews with domestic customers



- Sourced via the PopulusLive panel
- Representative of Wessex Water customers with quotas set on demographic profile
- To include business plan builder, implicit testing and non verbal scales

c400 online interviews with domestic customers



- Sourced via the Wessex Water “Have your Say” panel
- Natural fallout of demographics
- To include business plan builder, implicit testing and non verbal scales

Face to face boost interviews

50 interviews with “Seldom Heard” customers



- Face to face in-home CAPI interviews with digitally disconnected and those with financial, social, physical or mental vulnerabilities. Specific target quotas to be finalised with Wessex Water on commissioning
- An incentive of £10 will be offered
- To include business plan builder, implicit testing and non verbal scales

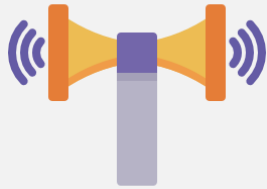
50/ 100 interviews with business customers*



- Face to face in-premises CAPI interviews
- Representative of the Wessex Water business customer base
- We have assumed that Wessex Water will be able to provide business customer lists
- An incentive of £10 will be offered
- To include business plan builder, implicit testing and non verbal scales

Other Engagement Channels

Questionnaire to be integrated into the communications strategy



As Wessex Water wishes to ensure that the widest possible range of customers and stakeholders are consulted on the business plan, a communication strategy will also be implemented to support the quantitative stages

Populus would work with Wessex Water to design appropriate questions on the business plan to work across the Wessex Water website, social media and at pop-up events

Questionnaire to be distributed via the Wessex Water magazine



In the brief, Wessex Water outlines the potential to use the Wessex Water magazine for distributing a 1-2 question survey as part of the research

Populus believes that as testing the business plan is such an involved task this may not be a suitable route to take for testing acceptability. We would recommend that instead a link to a fuller online survey is included in the magazine so that the topic can be explored in more detail

We would discuss this in more detail with Wessex Water on commissioning

Subsample Analysis

Using our knowledge of the Wessex Water customer base and previous research we have been able to explore the feasibility of subsample analysis for Wessex Water.

Conducting the boost interviews in the proposed way means that we will be able to provide subgroup analysis of both seldom heard and business customers, as well as key customer segments including:

- Seldom heard
- Business/domestic
- Metered/unmetered
- Bill size
- Disability
- Age
- Gender
- Social grade



We are also able to explore the feasibility of conducting analysis by other key subgroups for Wessex Water.

Questionnaire Overview

We have outlined our initial thoughts on questionnaire flow below. The final questionnaire would be finalised in partnership with Wessex Water, incorporating the views of the Wessex Water Partnership.

Screening questions

- To capture key screening information including Wessex Water customer and responsibility for bill

Visualising your Business Plan

- For respondents to become fully immersed in the business plan we believe it is essential for it to be presented to customers in an engaging way
- We would therefore work with our internal design team to create an infographic outline of the business plan
- Please see Page 38 for examples of how this could be visualised for respondents



Implicit responses to the business plan

- Implicit response test and non-verbal scales to gain immediate, automatic responses to the business plan
- For example, does the business plan show that Wessex Water is 'innovative', 'cares for its customers', 'is future thinking'?



Closing questions

- To capture key demographics for analysis (e.g. metered/unmetered, dual service/wastewater only)

Business Plan Builder

- Respondents will be presented with the various choices made by Wessex Water when constructing the business plan
- Customers will be able to create their own amended business plan by changing elements in line with corresponding bill impacts
- This will be followed by key diagnostic questions about the amended business plan, including its acceptability
- Please see Pages 41-46 for more information on the Business Plan Builder

Option	Level	Impact on Overall Bill
Efficient water use	Low	-£3.19
Water meter options	Low	£0.00
Water saving devices	Low	£0.00
Check for leaks	Low	£0.00
Water saving services	High	£0.00
Water use training	High	£0.00
Water saving products	High	£0.00
Revised service	Low	£0.00
Customer service	Low	£0.00
Drinking water quality	Low	£0.00
Protecting the environment	Low	£0.00
Total impact of your plan on Overall Bill		+£3.19

Overall responses to the business plan

- To capture key diagnostics about the business plan, including its overall acceptability

In line with Wessex Water requirements, there would also be an additional questionnaire module for vulnerable customers. Please see the next page for more information

Questionnaire Module For Vulnerable Customers

There would be an additional survey module designed specifically for customers with vulnerabilities – testing awareness and satisfaction of the Wessex Water service offering.

All customers would be screened to ascertain vulnerability and qualifying customers presented with questions about relevant aspects of Wessex Water's service.

Relevant elements of service explored would include the Priority Services Register, Restart and Assist.

Have you heard of
the Priority Services
Register?

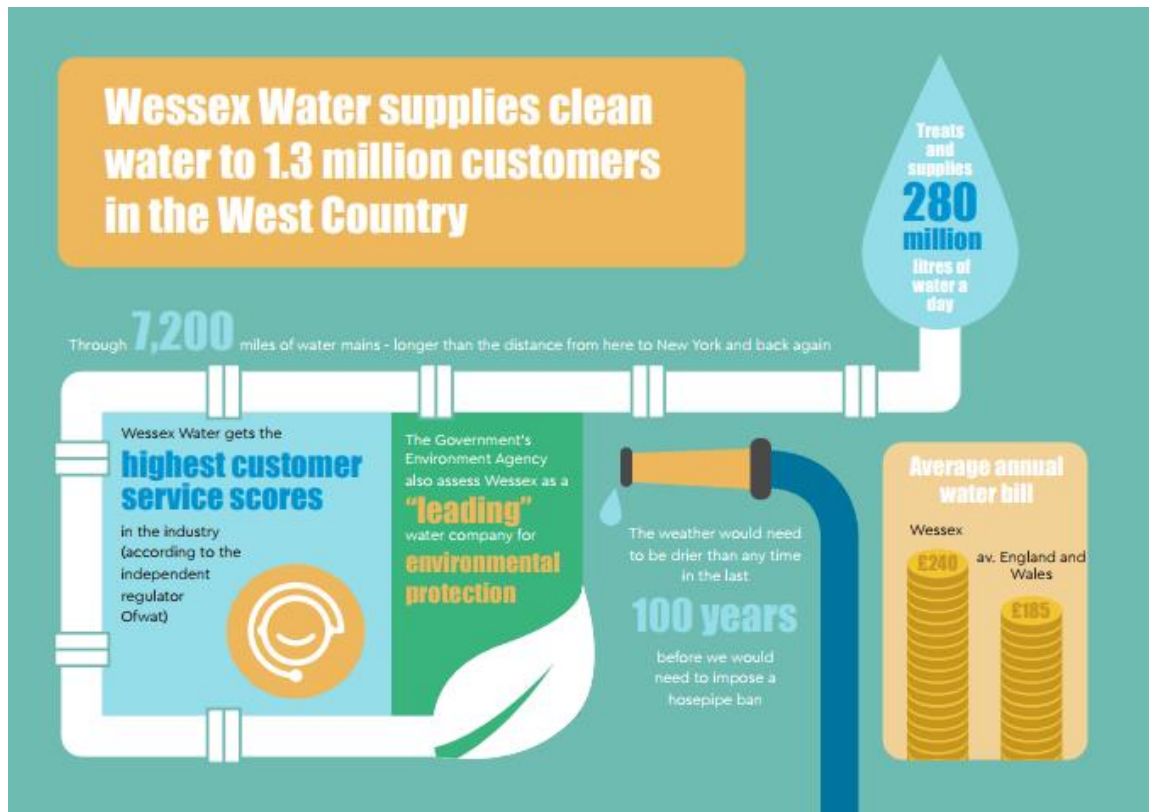
Have you used this
service?

How satisfied or
dissatisfied are you
with this service?



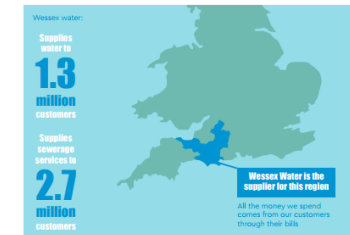
Visualising Your Business Plan

It is essential that the business plan is presented to customers in a clear and engaging way to ensure that respondents are fully immersed in it and understand key concepts before completing the acceptability test. We would work with our internal graphics team to design an infographic overview for customers to take them on a visual journey through the business plan. See below for examples of how the business plan could be presented to customers based on previous stimulus created for Wessex Water.

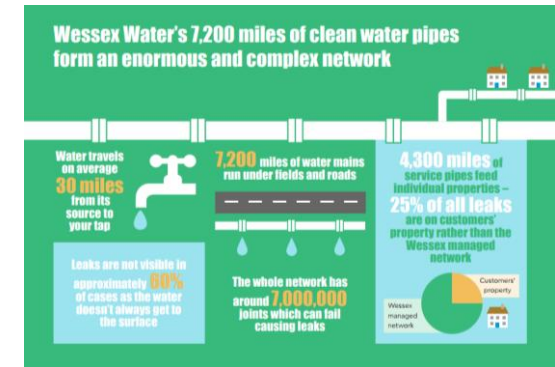
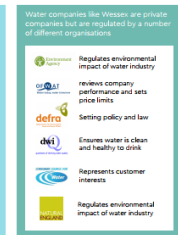


Water is supplied (and waste water processed) by regional water companies in England and Wales

The water market in England and Wales



Regulating the water industry



Cognitive Testing and Piloting

Testing the impact of the questionnaire before we roll out the complete survey is a key consideration in conducting research such as this. We understand that feedback is the key to a streamlined process, so recommend conducting cognitive interviews in person to check the understanding of the questionnaire with respondents. We will then pilot the full survey to iron out any problems with the design.

When conducting a cognitive interview, we evaluate performance through the lens of a four-stage question response process (comprehension, retrieval, judgement and response), and consider the difficulty a respondent faces when formulating an accurate response. They are then able to convey feedback and tell us why this may be.

We have outlined in the table to the right the various types of error which can occur at this stage.

Additional costs have been provided for 10 cognitive interviews to be conducted as required, taking place face to face, in-home.

	Cognitive Stage Definition	Errors/ Problems
<i>COMPREHENSION</i>	Interpret the question	Unknown terms, ambiguous concepts, long or overly complex
<i>RETRIEVAL</i>	Search memory for relevant information	Recall difficulty
<i>JUDGEMENT</i>	Evaluate and/or estimate response	Biased or sensitive, estimation difficulty
<i>RESPONSE</i>	Provide information in the format requested	Incomplete response options



As part of this checking process, we will also pilot the questionnaire itself in a central location. The pilot will be among 50 respondents.

The purpose of the pilot will be to check for understanding of questions, flow and question clarity, as well as interview timings, and to make sure the questions are working as they should. Results will be compared across methods to check for consistency, as we understand our approach contains multiple methods of data collection. Changes will be made prior to fully launching the survey, should the pilot highlight any problem areas.

Innovative Techniques

At Populus, we strive to lead the way by incorporating innovative techniques into our research programmes. Here is a summary of the techniques we will include in the research, with the core integrations on the left and recommended extras on the right.

We recommend all interviews incorporate the below techniques



Business Plan Builder

Respondents put together their own version of the business plan depending on their individual priorities and quantify acceptability



Implicit Testing

The time taken for respondents to associate words with an overarching question is recorded to explore more automatic and implicit responses



Non Verbal Scales

Respondents select an image rather than a word to track emotional responses to the business plan

Budget and time permitting, we suggest using the below innovations for a randomly selected subset of the face to face sample to further triangulate our findings



Virtual Reality

360-degree immersion into real-life scenarios to further bring the business plan to life



Chatbots

Interactive, responsive, social conversation



Modified Gaming Experience

Engaging immersion with a 'playable' feel

Measure – Core Innovations for Survey

The core innovations will be used for all interviews that we conduct. These include our proprietary implicit testing tool and non-verbal scales – which will increase our understanding of more emotional responses to the business plan



Implicit Response Testing

In psychology and behavioural economics the term 'implicit research' describes research approaches that are able to bypass people's rational, conscious thoughts and assess their automatic attitudes and reactions. Relying solely on explicit research approaches equates to the tip of the iceberg in terms of the entire multitude of emotional and motivational processes (most of which are subconscious) that ultimately determine our attitudes and beliefs.

To better understand customers' implicit responses to the business plan, we will use our proprietary implicit testing tool. This tool shows respondents several sets of words, and asks them to select the most appropriate attribute to describe the business plan. By identifying which word they select we can identify the rational response to the business plan. However, looking to the speed at which respondents select each attribute we can go beyond the rational response to explore implicit, more automatic responses to the business plan. This tool therefore goes beyond the conscious to fully identify how consumers truly perceive the business plan.

1. Respondents are first shown an outline of the business plan to review

Q. The business plan you have just seen was...?

2. Series of attributes are then shown

3. Respondent selects which word fits best with the business plan by pressing Z or M as quickly as possible

4. Timed response indicates certainty – a fast response shows stronger implicit association between the business plan and attributes

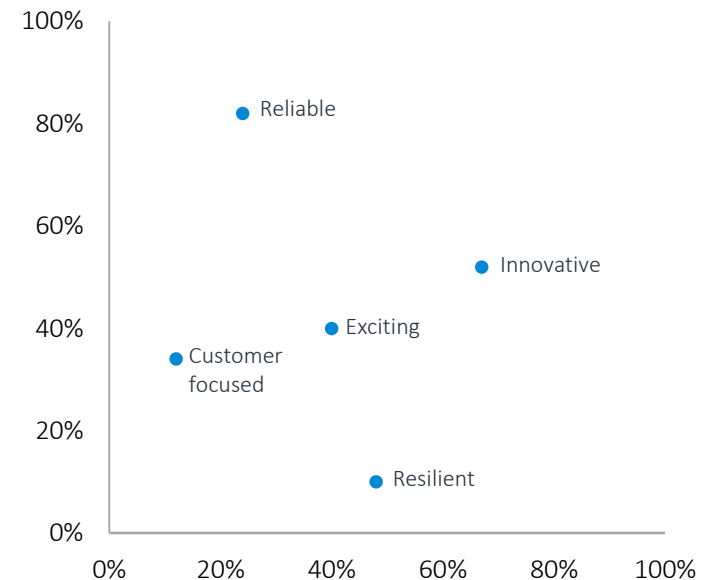
INNOVATIVE TRADITIONAL



EXCITING BORING



Rational Response
(strongly agree)



In the example output to the right, reliable and innovative both score highly – reliable at a rational level and innovative at an implicit level

Non Verbal Scales

Populus understand that consumers are not simply rational decision-makers whose preferences are entirely predictive of their behaviour. Rather they are driven by their emotions, environmental influences and social intuition. As a result, we ensure our questionnaires are designed to understand not only what people think, but how they feel, and the context in which they make decisions. We design questions based around the latest thinking in behavioural economics – applying psychological insights into human behaviour to explain decision-making.

We have seen that when posing the more emotional questions that revolve around asking a respondent how they feel, explicit prompted lists do not always capture the true response. We therefore suggest showing images of emotions, without labelling or explaining what they represent, to allow respondents the freedom to interpret the image and attribute their reaction to a softer, more nuanced response. Collaborating with you, our design team would develop bespoke images that reflect the emotions you feel are most appropriate to test.

Some of the key benefits of using Non Verbal Scales in research are:

CUSTOMER ENGAGEMENT – respondents respond well to colourful images to break up the word-heavy questionnaire structure

ACCURATE EMOTIONAL RESPONSE – the images are more interpretable for the respondent, and they are able to contextualise their emotions more simply, rather than selecting an emotion from a pre-coded list which might not truly define their emotional response

REDUCED RESPONDENT FATIGUE – breaking the survey up with alternative scale maintains respondent engagement and refocuses the mind. This preserves the quality of the data and reduces fatigue

This is an example of how the Non Verbal Scale could look



Measure – Other Innovation Options

These additional innovation options can be used for a sub-set of the f2f sample if required. They include Virtual Reality technology to bring the business plan to life, and the use of chatbots and gamification to create engaging experiences



Using Virtual Reality

Using VR will help customers feel better placed to evaluate their support and acceptance of change, while giving you an unique opportunity to demonstrate your commitment to customer engagement and innovation to both Ofwat and the public.

For this particular project, we believe that VR could be used at the respondent education stage to really bring the Wessex Water business plan to life and immerse customers in its content.

We suggest conducting VR among a subset of the sample on a face to face basis, rather than incorporating it into the survey for our online panel and your 'Have Your Say' panel. Doing so would reduce the sample size that are able and willing to complete the survey, and increase the costs for purchasing and mailing out usable headsets to each respondent.

We would work closely with you to advise on the story and progression of the film, but it would then be your responsibility to develop the film itself. We have a trusted production house who would gladly provide this service for you, but would require a financial and time investment from you to complete the film.



We are the first UK research agency to undertake a trial which embedded a virtual reality experience within an online survey environment.

We understand there are considerations in using this innovative technique, but we have experience in how to avoid potential pitfalls.

- Filming for the VR needs to be done in high-resolution in order for the experience to look realistic once scaled down onto a mobile phone screen. Our production house partner are experts in configuring films for multiple device usage
- Clear instruction would be provided on the day of interviewing to demonstrate to each respondent how to use the provided device and headset. Knowledgeable assistants would be on hand to help with any difficulties and ensure everyone has a seamless experience. We will pay particular attention to those that are less digitally, physically, mentally or socially able to use the headset
- At the analysis stage we will conduct quality checks to ensure respondents have completed the survey as intended, and anyone who has not will be removed from the final data

Chatbots

Working in collaboration with our trusted software provider, we can design a survey that allows respondents to fill out a questionnaire whilst in the guise of having an online conversation.

This sophisticated software allows our chatbot to pose questions on a platform similar to Facebook Messenger and WhatsApp, and can filter subsequent questions depending on a respondent's answers. We are also able to include stimulus such as images or videos, and the surveys help to maintain respondent engagement throughout a lengthy study.

The chatbot can also exclaim and convey surprise or interest, and slip in real-life conversational remarks. This enables respondents the opportunity to truly connect with the survey, transporting them away from a standard online study and into a friendly exchange more akin to a discussion than an interview.

The option is there for you to fully customise the bot too, allowing you to add logos, colours or even change the language!



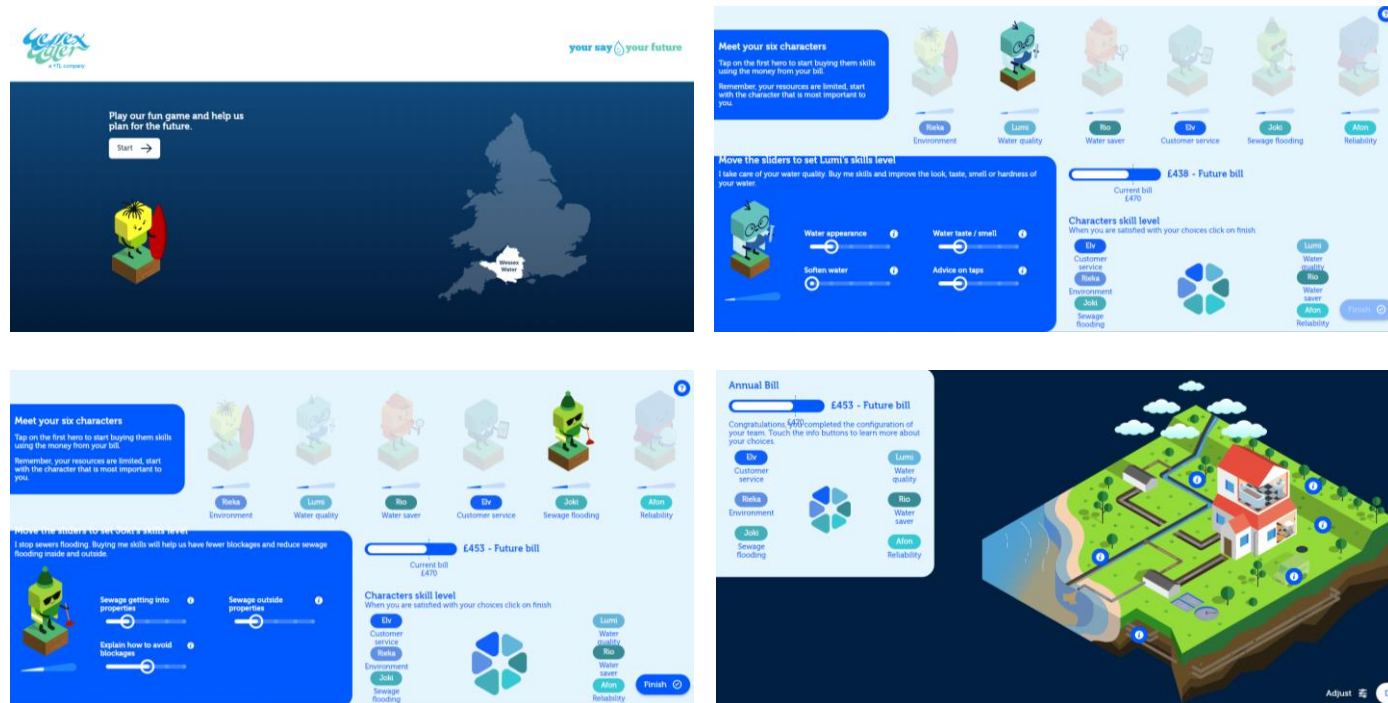
The chatbot technology is outside the scope of surveys we have suggested for this research. We are more than happy to discuss and incorporate its use but please be aware that it is a standalone element, not something to integrate into our online panel surveys. As such, we suggest using chatbots for a subset of the sample in our face to face central location testing methodology.

We are also aware that you have a provider that can develop the chatbot survey, and are only too happy to work directly with them if that is your preference!

Game Modification

Within the quantitative survey we will include an Acceptability Business Plan Builder using Populus' standard template (with Wessex Water's logo). However, there is the option to gamify the Business Plan Builder using the same structure shown on the Wessex Water website. Gamifying surveys makes them much more interactive and engaging, improving the respondent experience. We would work alongside Wessex Water's programmers to ensure the game matches the proposed business plan.

We are happy to work alongside the developer to adapt the game to suit the specific objectives of the research and would provide costs for this based on a consultation role. The cost for development of the actual game would be borne by Wessex Water.



Inform

We will triangulate findings with existing research, before hosting a full-day Insight to Action debrief session. All findings will then be combined in a summary PPT report that is suitable for sharing with stakeholders



Our Approach to Triangulation

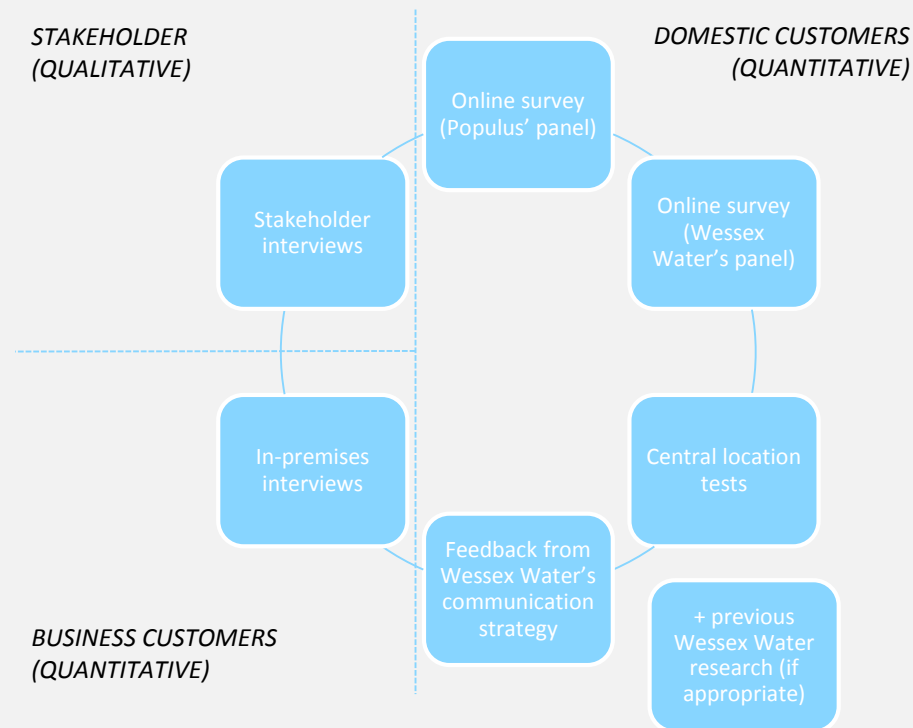
Triangulation is an ongoing process throughout the project, starting with the crystallisation workshop. However, triangulation of our findings will be incorporated here within the final report too.

We will use all our data sources to maximise robustness, validity and depth to conclusions and recommendations. At Populus we are well practiced in applying triangulation for our clients, and therefore understand the benefits and the considerations.

Our approach to triangulation is:

- To review strategic objectives and audit potential external triangulation data sources (from previous research) in a crystallisation workshop with Wessex Water, to ensure that we know what knowledge gaps need to be filled. We will also work closely with you throughout the whole process so all parties are clear and comfortable with the research methods and approach to triangulation
- To utilize the methodological and water sector expertise of the most appropriate team members for each task/stage. As we are a method agnostic agency (providing qualitative, quantitative and analytical analysis) we have the research expertise to select and execute the most suitable methodologies to meet your objectives
- To document all stages of triangulation, and particularly the rationale behind our data source choices and weighting choices, so that it withstands Ofwat scrutiny. Documenting these stages ensures transparency and demonstrates we have avoided confirmation bias (manipulating existing data sources to support our findings)

We will consider the following sources for triangulation:



Quick case study

We run a longitudinal study for a TV provider that tracks and measures customer's experience with their TV service. In order to add context and validation to our results we use a variety of different sources, including primary research conducted by another agency, the TV provider's own technical faults, service data and BARB viewing data. As it is a tracking study we also triangulate data sources over time at regular intervals.

One challenge that we encountered was that the perceived number of faults on the service was much higher than the operational data. Our scrutiny of the data revealed that this was partly due to low broadband speed which affected the TV service but was not flagged as a technical fault. We also had to consider that customer's perception of their service may not matched up 100% with internal data but it is still a valid insight.

Triangulating the data added depth and understanding, and helped the TV provider build a solid business case for migrating more customers from a copper to a fibre broadband package.

Deliverables

Embedding the research into the Wessex Water business and engaging with key stakeholders is just as important to us as analysing the numbers.

We would work closely with Wessex Water to design and deliver fully-tailored reporting that reflects specific needs and requirements. We are more than happy for all of our outputs to be included in the PR19 submission to Ofwat, and subjected to a peer review prior to submission.

In addition to the deliverables outlined below, Wessex Water stakeholders are welcome to attend the Qualitative 'Engagement Events' to experience the customer insight first hand.

Outputs we will deliver



TWO SUMMARY WRITE UPS

One summary following the Crystallisation Workshop, and another summarising our research findings



DATA TABLES

Both respondent level and analysed tabulated data will be available in SPSS, Excel & PDF format



POWERPOINT REPORT

Robust report synthesising findings from both Qual and Quant stages and all triangulation data sources



INTERIM QUAL AND FINAL QUANT/QUAL PRESENTATION

High-quality presentation of results to key stakeholders and Wessex Water Partnership by Managing Director. Interim Qual debrief to refine options tested at Measurement stage

Outputs we suggest to include



INFOGRAPHICS

High quality infographics to illustrate the main findings to key stakeholder groups



VIDEO MONTAGE OF 'ENGAGEMENT EVENTS'

Professionally-produced video showing highlights of qualitative 'engagement events'



QUALITATIVE VIDEO VOX POPS

Recorded interviews to hear responses in respondents' own words



INSIGHT TO ACTION DEBRIEF*

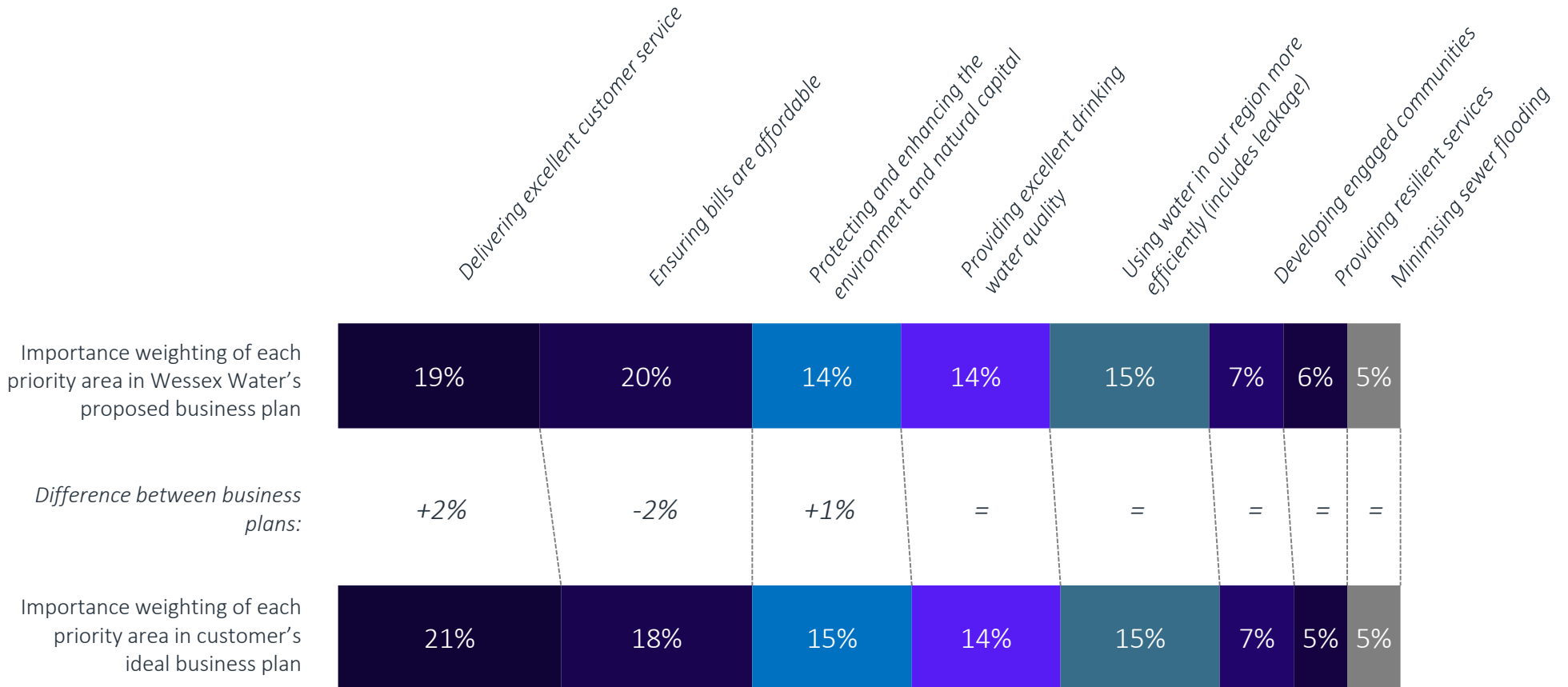
Interactive session delivered at Wessex Water's head office to bring the findings of the research to life for stakeholders

*Please note, Insight to Action Debrief will incur additional cost

Example Output (1)

The outputs will identify whether customers place similar emphasis on each priority area as is set out in Wessex Water’s draft business plan.

In this example, the business plan largely matches customer priorities. However, customers place slightly more importance on customer service and environmental provisions than currently accounted for in the business plan.



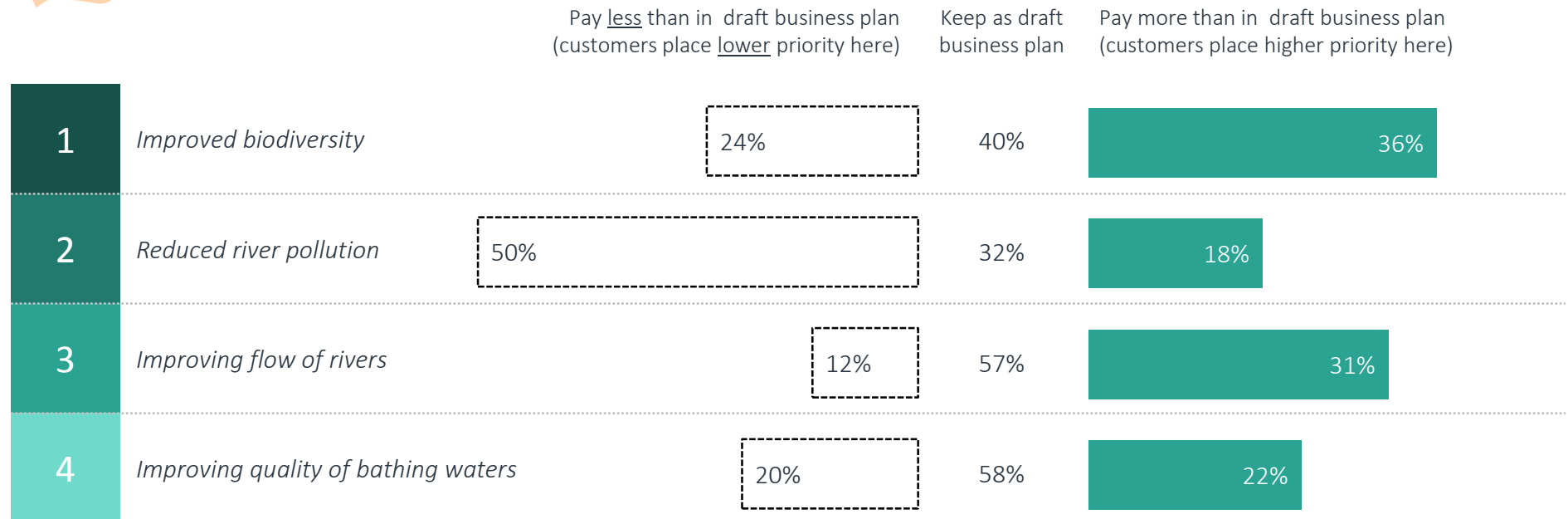
Example Output (2)

The outputs will also identify whether customers place similar emphasis on each performance commitment within each priority area as laid out in Wessex Water's proposed business plan.

In this example, over half of customers agree with the plan laid out for bathing waters and river flow. Less than a third of customers agree with the plan laid out for reduced river pollution – they want to spend less here.



Protecting and enhancing the environment and natural capital



Insight to Action Debrief

We understand that it is vital for the research programme to be designed and delivered in a way that is both sufficiently detailed to address every layer of the problem and digestible for all involved.

Senior members of the Populus team will bring findings to life for key stakeholders at Wessex Water and members of the Wessex Water Partnership, in an Insight to Action debrief. We would hold this event at your head office to ensure all key personnel are able to attend.

Collaborative thinking will help develop specific business actions for Wessex Water and their proposed business plan that are based on the findings but realistic in practice. We will mix presentation of research insights with creative tasks, using energisers and a range of different 'game-style' tasks and types of stimulus to encourage stakeholder engagement.



We kick off with a debrief of key insights

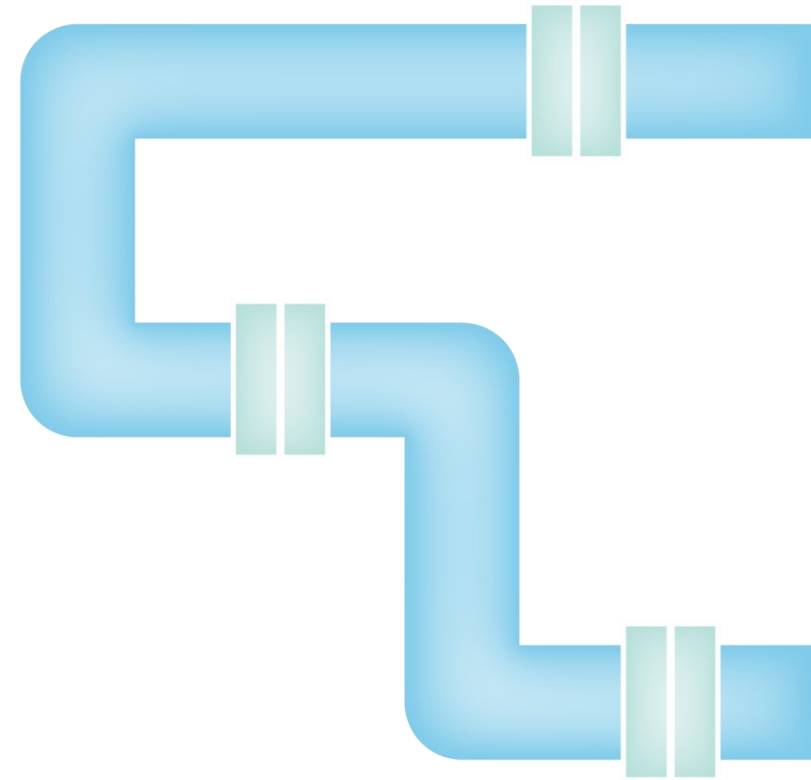


This is followed by creative tasks designed by Populus to bring the insight to life



We finish by developing a list of actions and next steps to ensure the insight lives on in the business

Team and Experience



Senior Contact and Methodologist



Gary Muncaster – Managing Director

As Account Director, Gary will oversee the implementation of this research project, including our approach to reporting and the interpretation of results. He will play a critical role in the 'Inform stage' and will be part of the senior team, along with Tom and Andy.

With a PhD from Middlesex University and 20 years' research experience, Gary applies a rigorous analytical framework to meet his client's business objectives. Gary is an accomplished presenter and is able to adapt his style to suit various audience sizes, levels of seniority and agendas.

Gary has worked with numerous utility companies (including Wessex Water, Thames Water, Scottish Power and United Utilities) to deliver research projects on topics as comparative information, willingness to pay and acceptability testing. He has also worked with a range of regulatory organisations including The Pensions Regulator, Ofcom and Gambling Commission, so he understands what they look for and appreciates the scrutiny they apply when investigating research approaches and outputs.



Karsten Shaw – Head of Analytics

Karsten's key role will be to advise and consult on the sample design for the 'measure stage', ensuring that the right weights and quotas are used and the methodology can withstand any scrutiny.

Karsten joined Populus having spent over a decade working in the prestigious Marketing and Data Sciences team at GfK. At Populus, Karsten is responsible for devising innovative and exciting analytics solutions to help clients to better understand their audience, assess the efficiency of their marketing activities, improve customer satisfaction and more. He has a wealth of experience in working with energy and utilities companies including: Thames Water, United Utilities, EDF and Scottish Power. Karsten is well experienced in scrutinising online and face to face methodologies to ensure they take into account demographic profiles, selection probability, quotas, weightings etc. He will ensure that the sample design makes for a representative survey and can withstand the scrutiny of academic and commercial organisations. He will examine the design effects due to any clustering, stratification or weightings applied and ensure the survey estimates are reflective of the sample size of the survey.

Explore stage (Qualitative)



Andy Barker – Head of Qualitative

Andy will lead the 'explore stage'. He will be involved in everything from running the 'Engagement Events' to conducting the vulnerable customer and stakeholder interviews, and finally reporting. He will be part of your senior support team, along with Gary and Tom.

Having previously headed the qualitative units at YouGov and Research International, Andy brings with him a wealth of experience in consumer research and a proven track record for helping companies develop business plans, innovate and communicate more effectively. In 2014, Andy was nominated for the MRS award for 'Best workshop' and also won an award for 'Best presented paper' at the AQR-QRCA global qualitative conference in 2011.

Andy has 20 years' experience of conducting research for a range of utilities clients such as Thames Water, Wessex Water, United Utilities, British Gas, Scottish Power and SSE. He also presented this year at the MRS Utilities conference in which he spoke about a project he did for United Utilities involving vulnerable customers. His knowledge enables him to engage effectively with individuals in focus groups, depth interviews and deliberative events in order to uncover important insights on complex issues relating to a market that is generally not understood. He recently conducted interviews with Thames Tideway stakeholders on behalf of Thames Water. The stakeholders included Defra, CC Water, Environment Agency and ITA.



Rosie will support Andy on the day-to-day project management of the 'explore stage' including the fieldwork, analysis and reporting.

Rosie joined Populus in 2015 having previously been a Research Executive at Future Thinking. She holds a degree in Sociology from the LSE and has worked on qualitative projects for a variety of clients in a range of sectors including utilities, energy, FMCG and technology. Some of Rosie's clients include Thames Water, United Utilities and NCTL. She has worked on a range of projects focused on understanding stakeholder opinion and customer sentiment.

Measure stage (Quantitative)



Tom Scrimgour - Quantitative Director

Tom will oversee the 'measure stage' of the research including survey design and implementation of the Business Plan Builder, implicit test and non-verbal scales. He will be part of your senior support team, along with Gary and Andy

Tom joined Populus in 2014 and now manages a number of quantitative research projects for top clients in the energy, telecoms and sport sectors. He holds the Market Research Society Advanced Certificate in Market and Social Research Practice as well as a BA in Marketing Management from the University of Newcastle Upon-Tyne. Tom has a wealth of experience in the utilities sector with clients including Thames Water, Scottish Power and National Grid, for whom he has worked on a range of projects including customer segmentations, willingness to pay and customer satisfaction. He is experienced in triangulating different data sources to provide his clients with the full story and will ensure that this is done to the highest standard for Wessex Water.



Amy Kemp - Research Manager

Amy will be your key account manager and will support Tom on the 'measure stage'. At Populus, she specialises in quantitative research, overseeing projects and reporting on findings for a wide variety of clients including many in the utilities and energy sector such as National Grid and Scottish Power. She has an MPhil from the University of Cambridge in Criminology, having also studied the subject as an undergraduate at Durham University.

Amy is really excited about working on this project because she loves getting involved in projects that involve innovative techniques like implicit testing and virtual reality. One of Amy's key strengths is project management and her clients often say she brings a lot of positive energy to the team! She enjoys working on projects that will have a clear business impact that can aid future planning, as is the case with this one.

Projects Conducted Within the Water Sector

Building on our experience shown, the below highlights the breadth of projects we have conducted on behalf of the water sector alone. We are happy to share any case studies in more detail.

Comparative information	Customer journey mapping	Acceptability testing	Meter research
Campaign development and evaluation	Voice of the customer programmes	Concept testing	NPS perceptions tracking and target setting
Vulnerable customers	Developing and testing brand iterations	Measuring 'in the moment' experience	B2B
Customer expectations	Testing marketing material with customers	Tariff trials	Segmentations



Wessex Water – Willingness to Pay

This research demonstrates our experience in testing the acceptability of investment changes and how this sentiment changes when the direct impact on the overall bill increases or decreases.

Problem & Approach



- Wessex Water wanted to better understand customer priorities for investment areas, and to what extent they would accept greater investment by tracking how much respondents would be willing to increase their overall bill by
- We incorporated a 'Bill Builder' into our online survey, whereby Wessex Water customers could select different areas for investment and choose how much investment they feel is acceptable
- Respondents were then able to see the direct impact these choices had on their bill, and go back to change answers if necessary

Insight



- The research revealed that all respondents would accept a slight increase on their bill in favour of greater investment by Wessex Water in general
- Most respondents saw improved biodiversity and reducing pollution incidents as the most acceptable attributes to invest in, partly due to these attributes resulting in the lowest level of additional investment
- Fixing water leakage and improving miles of river with less than good quality water were seen as high priority too, but were less acceptable when customers saw the impact this investment would have on their bill

Benefit



- Informed Wessex Water's preliminary PR19 business plans. Populus was able to identify which attributes for investment were the most popular, and how acceptable an overall bill rise would be for each of these elements, to feed into their PR19 acceptability testing plans

Electricity North West – Acceptability Testing

This research demonstrates our experience in testing the acceptability of investment changes and how this sentiment changes when the direct impact on the overall bill increases or decreases.

Problem & Approach

- In response to Ofgem’s increased onus on Distribution Network Operators (DNOs) to demonstrate understanding of key stakeholders, Electricity North West enlisted Populus to investigate the attitudes of customers in its region
- An innovative process was used to educate consumers about the little-understood role of DNOs in the electricity sector. These ‘educated consumers’ were then able to express informed opinions about the key issues on a range of topics including investment decisions and voice their acceptance of these plans
- An acceptability tool enabled consumers to visualise the cost/savings of investment activities on their typical electricity bill and re-examine their acceptance of these plans

Insight

- The research revealed that ENW customers were more accepting of bill increases than non-ENW customers from outside the region, with those in rural areas more accepting than urban
- ‘Educated customers’ were less willing to pay extra for reducing the duration and frequency of power cuts than unengaged customers, but more willing to pay to reduce major equipment failure

Benefit

- Fulfil regulator requirement. This research enabled ENW to be seen by Ofgem to be taking active steps in their business to understand their customers’ views
- Invigorate and engage customers. ENW is a hidden entity that many customers do not know of, so by conducting this research, ENW was able to connect with and educate its customers on the importance of its role
- Confirmed the ideal business plan. The results provided evidence that ‘educated consumers’ supported and accepted the plan that was eventually put forward by ENW to Ofgem



Thames Water – Social Tariffs

This research demonstrates our experience in testing the acceptability of introducing a new ‘investment’ and how this sentiment changes when the price rise increases or decreases.

Problem & Approach



- The Floor and Water Management Act included provision for water and sewerage companies to introduce social tariffs, aimed at households who would otherwise have difficulty in paying their bill
- The aim of this research was to assess how acceptable the inclusion of a social tariff in Thames Water’s new business plan was, as well as exploring acceptability for a social tariff at different price points
- The survey used a Gabor Granger price laddering approach to understand acceptability of a social tariff and broad acceptance of its introduction

Insight



- The research revealed that, when given details about the specific tariff proposed by Thames Water, 2 in 3 customers accepted its introduction for an additional low charge
- A small proportion were opposed to the tariff in principle, with cost having little impact on their views

Benefit



- Fulfil regulator requirement. This research enabled Thames Water to be seen by Ofwat to be taking active steps in their business to understand their customers’ views
- Guided commercial decision-making. By way of a custom-built interactive simulator, Thames Water was able to adjust the social tariff subsidy outside of the price points tested in this survey, enabling them to track how acceptable it would be at different levels
- Confirmed the inclusion in Thames Water’s business plan. This research confirmed customer support and acceptability for introducing social tariffs, and gave Thames Water a steer on how much to set the initiative at to align with customer acceptance

National Grid – Reputation and Influence

This research demonstrates our experience in testing priorities for improvement using a Max Diff exercise and acceptability of these changes among stakeholders.

Problem & Approach



- Ahead of RIIO-2, National Grid needed to understand the context of the overall industry view and its own current standing to inform strategic action planning
- By incorporating a Max Diff exercise into our online surveys, we were able to test how important different elements of National Grid's service were, before exploring how acceptable it is for National Grid to continue offering their service, among industry stakeholders, journalists and MPs

Insight



- The research revealed that the resilience and reliability of the energy network were the crucial elements to focus on, ensuring that electricity and gas gets to consumers whenever, wherever and however they need it
- Overall understanding of the brand was limited, so building knowledge of the brand was necessary to engage the public and raise perceptions of efficiency and innovation. Low levels of comprehension around what the brand does impacted negatively on key image perceptions
- National Grid's service was perceived as acceptable in its basic role, but most believed the role has to change in future and it will be judged on how it goes about this

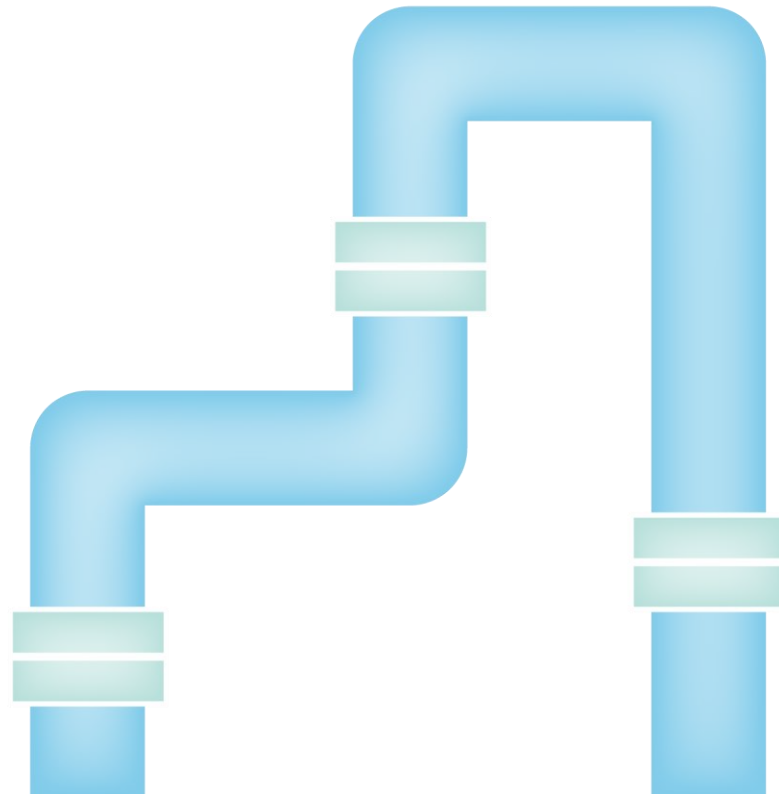
Benefit



- Informed National Grid's business plan. This research educated National Grid on how to position itself in the next few years and achieve leadership, and where their priorities should lie in their business plans to provide an acceptable service
- Highlighted brand strengths. Populus was able to identify public perception of the brand, and where the opportunity lay to better engage with consumers

Appendix

Populus



3rd Party Providers

For this research, we will use several methods of data collection. In order to achieve this, we require assistance from 3rd party fieldwork and operations providers. We have outlined who we shall be collaborating with and their relevant experience in each field below. We work with both providers regularly, and consider them highly capable, trusted partners in research.



- *RED will organise and host the central location tests within the Wessex Water region*
- We have selected RED as they are highly experienced in central location tests, most recently testing a new concept throat lozenge
- RED also have substantial experience in the Water sector, conducting both quantitative and qualitative research with clients including Thames Water. A recent study involved recruitment for an online consultation on the topic of charging changes instigated by Ofwat



- *pplinsights will organise and execute the quantitative interviews with vulnerable customers and business customers*
- We have selected pplinsights due to their extensive experience in interviewing these harder-to-reach audiences. Recent experience includes face to face interviews with vulnerable customers on behalf of Bright House stores
- We have worked closely with pplinsights for projects with Thames Water where they interviewed business customers face to face

For each provider, we have been assigned a dedicated account manager to lead fieldwork and operations on a day-to-day basis. Should any personnel be unavailable or the relationship break down, we have contingencies in place for alternative members of staff to pick up where the primary contact left off

Ensuring Respondent Welfare

Populus is a founding member of the British Polling Council and abides by its rules. We adhere to the standards laid out in the code of conduct as a minimum often employing more rigorous controls than those stated. Earlier this year we achieved the Fair Data accreditation which demonstrates our commitment to applying and meeting exceptionally high standards.

We take the welfare of our respondents incredibly seriously. Members of PopulusLive, our proprietary panel, are paid above the living wage for their time (significantly more than other research panels) and are considered an asset of the business and, therefore, are well looked after. The panellists themselves regularly give feedback attesting to this high level of care:

<https://www.populuslive.com/Testimonials/2017.aspx>

We expect our fieldwork partners to adhere to the same high standards and regularly monitor both their processes and outputs to ensure that they are meeting the standards required. All our fieldwork providers follow the MRS guidelines specified in this document:

<https://www.mrs.org.uk/pdf/MRS%20Researching%20Vulnerable%20Participants%20best%20practice%20note.pdf>

If at any point a respondent is dissatisfied with their experience in relation to this project we are committed to following the process recommended by the MRS with regards to handling complaints (which is laid out on the right).

If we are unable to resolve any complaints we will notify Wessex Water and include an initial assessment on how we believe this might negatively affect their reputation.

Our Commercial Director, Duncan Garnett, will take responsibility for this directly.

‘To help us deal with the complaint as speedily as possible it would be helpful if you could provide us with details of the research project and the identity of the researcher/interviewer/moderator. This information can be found on the thank you leaflet you were provided at the interview or on the invitation you received before the group. For telephone or online research, your telephone number or email address respectively should be enough to allow us to find the relevant project. Occasionally we may ask you to outline your complaint in writing to ensure we have a thorough understanding of the facts.

What happens if we cannot resolve your complaint straight away... There may be occasions where we need more time to carry out investigations and therefore we will not be able to resolve your complaint straight away. If this is the case, we commit to the following timetable: Within 5 business days from the date of your complaint we will try to provide you with a full reply. If this is not possible, we will confirm in writing that we are looking into your complaint and who will be handling it on your behalf. Within 2 weeks from the date of your complaint your complaint will have been investigated and we will write to you with our response. If we are still not in a position to resolve your complaint then we will inform you of the reasons and when we will make contact again. Within 4 weeks from the date of your complaint in the unlikely event that your complaint has not been resolved at an earlier stage, we will write to you with our final response. If you are dissatisfied at any time with any aspect of our complaints process, you may write to: Duncan Garnett, Commercial Director (insert Populus address). If you are still dissatisfied and wish to pursue your complaint you have the right, within three months of our final response, to ask The Market Research Society (MRS) to review your case. You can find out more about MRS by contacting: MRS, 15 Northburgh Street, London EC1V 0JR Telephone: 0207490 4911 Email: codeline@mrs.org.uk www.mrs.org.uk

Project Management

Our responsibilities as project managers are to ensure that all components of the research process function optimally. This includes:

- Executive support with the design and implementation of research methodology. Your senior team: Gary, Tom and Andy will all be involved in the project from start to finish and will advise and guide you throughout the process.
- Day-to-day project management:
 - liaison with the Wessex Water research subgroup and project management
 - ensuring that key deadlines are adhered to and any potential risks are flagged immediately, with a plan in place to resolve them
- Detailed management of survey logistics including optimising survey design, and applying the right quotas
- Monitoring all quality controls to ensure the data is accurate and can be trusted
- Data preparation and analysis including the appropriate weighting of results
- Reporting on project status and related issues frequently
- Turning around additional tabular analysis in a timely fashion
- Ensuring the final project outputs are of the highest possible standards
- Presenting research outputs to the Wessex Water Partnership and research subgroup
- Attending all necessary meetings with the Wessex Water research subgroup at appropriate milestones to sign off fieldwork materials and comment on timings.

Populus's approach to project management is a hands-on one. We believe that frequent communication and meetings help cement relationships and provide both sides with an insight of key issues involved in the running and management of the project

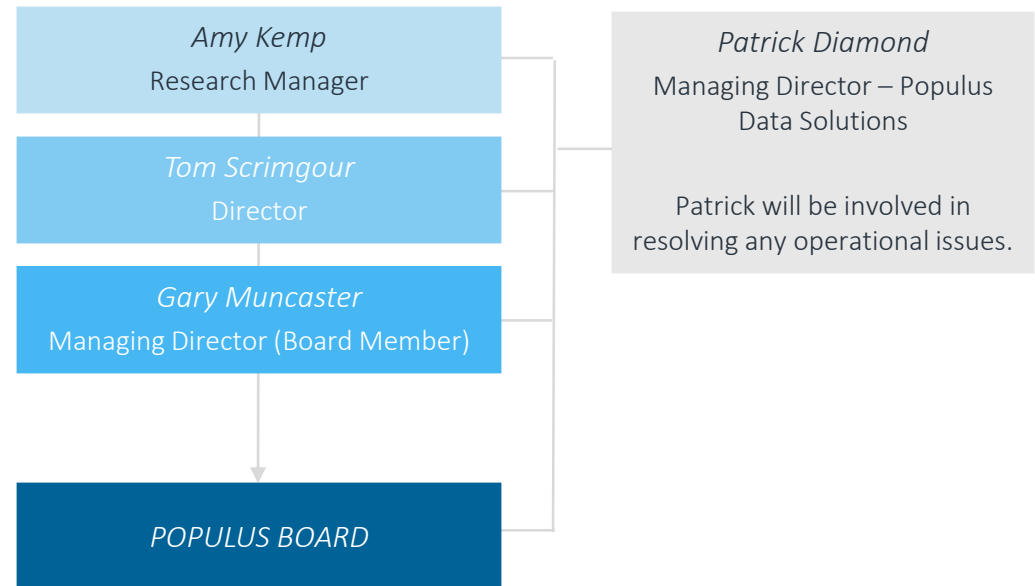
Escalation process

For the duration of the research programme, Populus will aim to ensure the highest levels of client satisfaction across all areas. However, should Wessex Water raise a complaint, we will endeavour to resolve any issues in accordance with the below process:

Initially, all complaints should be made to the Account Manager which will be Amy Kemp. If the complaint relates to the data/research findings, Amy will rectify ASAP. Operational complaints will also be dealt with by the Account Manager and the Managing Director of Populus's in house fieldwork company- Populus Data Solutions (Patrick Diamond).

Any complaints regarding the unsatisfactory or inefficient management of the account or project will be escalated to the Account Director and the Managing Director, and will be dealt with ASAP.

Any complaints that cannot be resolved to the client's satisfaction shall be escalated to the Populus Board, who will meet to discuss the issue and propose an appropriate course of action within 3 days of receiving the complaint.



Our Most Recent Client Audit

Our clients gave us average scores of:

- 10/10 on referral
- 9/10 on attitude
- 9/10 on process and delivery

Key strengths		
<i>Powerful client empathy</i>	<i>Trusted partner</i>	<i>Highly regarded capabilities</i>
<p>“They get what we’re trying to achieve” “Open, friendly but professional” “Extension of my team” “Options considered to reach best solution” “I like working with them”</p>	<p>“A trusted working relationship” “There when I need them – inherent trust” “I could have them run more meetings with stakeholders without me, if I needed to” “Trustworthy, helpful, personal” “Reliable, accessible, trusted partner” “A ‘trusted advisor’ vs. supplier of services” “Sound, solid, honest – in trusted hands”</p>	<p>“Fantastic all-round agency” “Know their stuff” “Good with complexity” “Rapid, high quality research” “Influential output, with business impact” “Credibility with important stakeholders”</p>

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