

# Young People's Panel reports

Final report 2022

Final report 2021

Final report 2020

Final report 2019

Business plan  
2025-2030



**Wessex Water**  
YTL GROUP

FOR YOU. FOR LIFE.

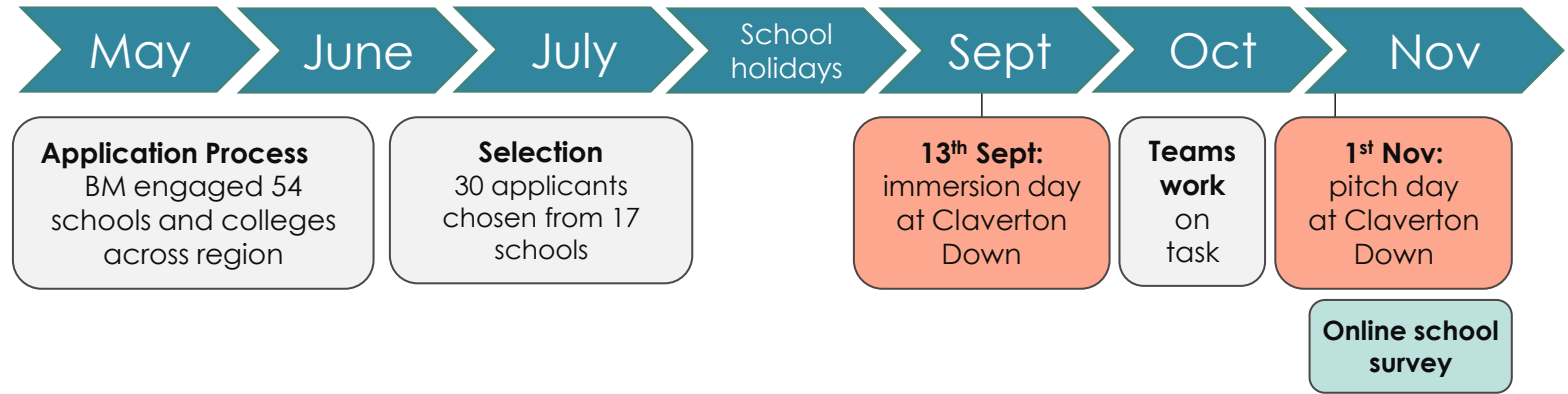
# Young People's Panel 2022

November 2022



## Young People's panel

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



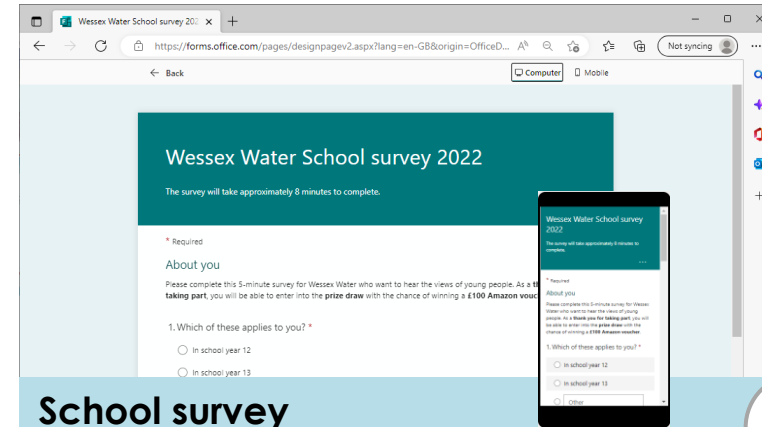
**Day 1:** focus on business immersion with Wessex Water & CCW experts plus:

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



**Day 2:** focus on team presentations plus:

Group discussions: drainage, CSOs and solution priorities



## School survey

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



Future customer perspectives

Changing water behaviours

Campaign ideas to support PCC reduction

Long term Drainage and Wastewater Management Plans

Conclusions





# Future customer perspectives

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



## Issues with school



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



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

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

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

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



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



## Political and economic concerns



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



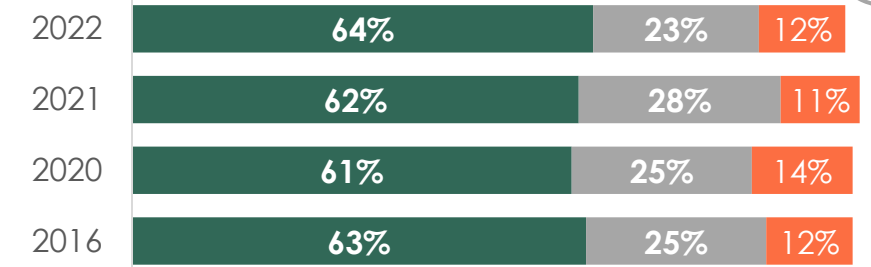
- Isolated comments that are more optimistic:
  - Lucky to live in England and that **"it could be worse"**
  - Culture of **overthinking** the future: live for the moment

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

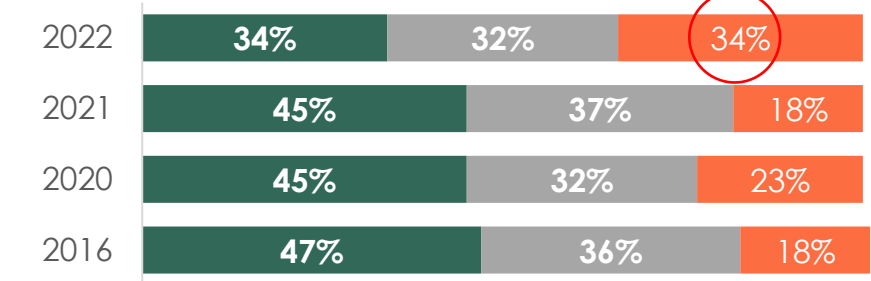
"No one really gets taught how to pay and what happens. How many bills do you get given right away, for everything, including water?"

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

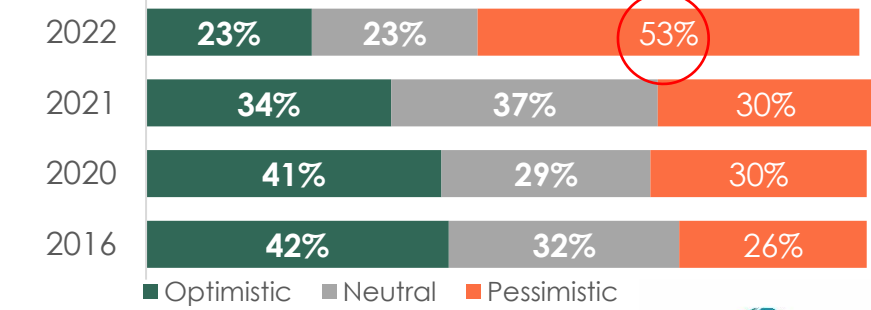
## Employment prospects in next 10 years



## Financial prospects in next 10 years

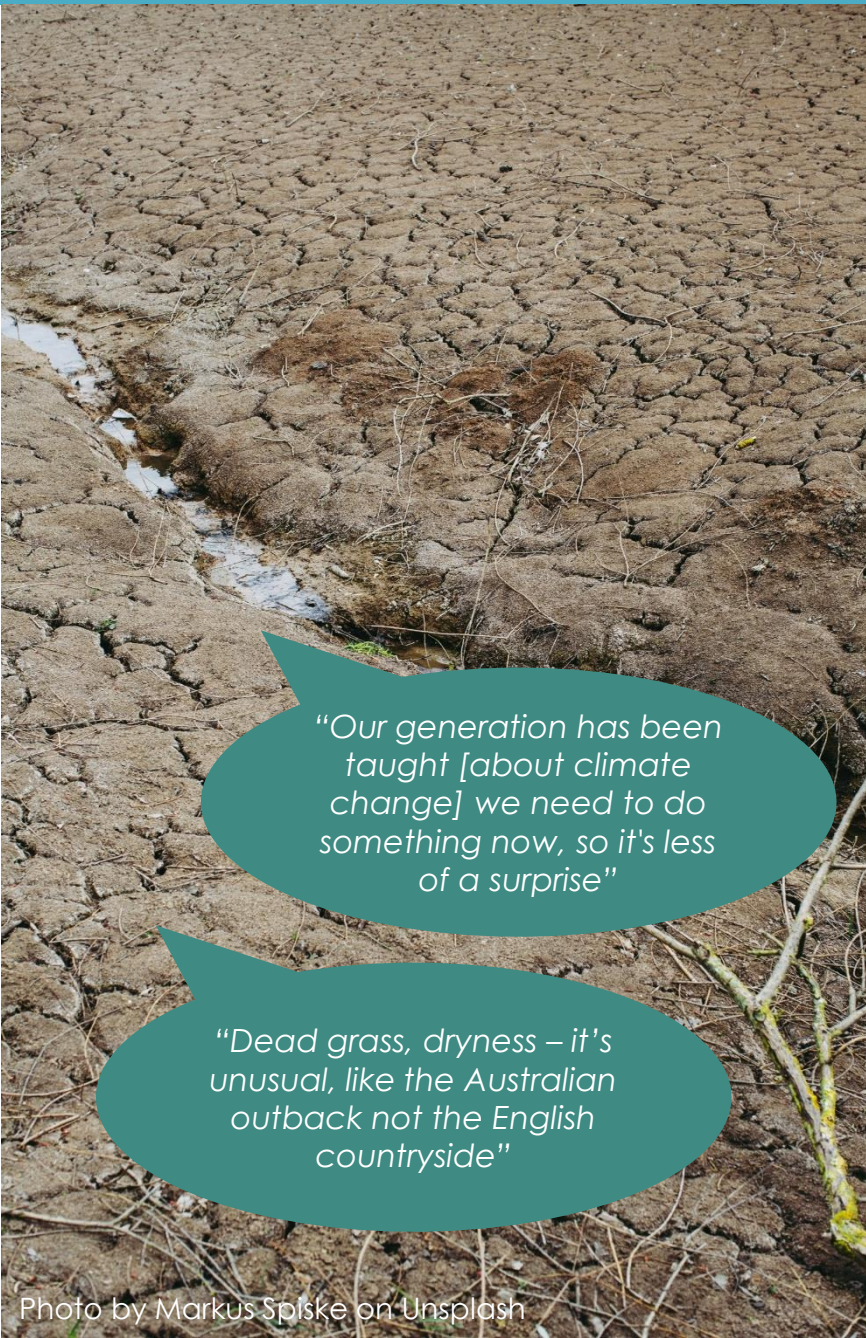


## Prospects of getting on housing ladder in next 10 years



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





“Our generation has been taught [about climate change] we need to do something now, so it's less of a surprise”

“Dead grass, dryness – it's unusual, like the Australian outback not the English countryside”

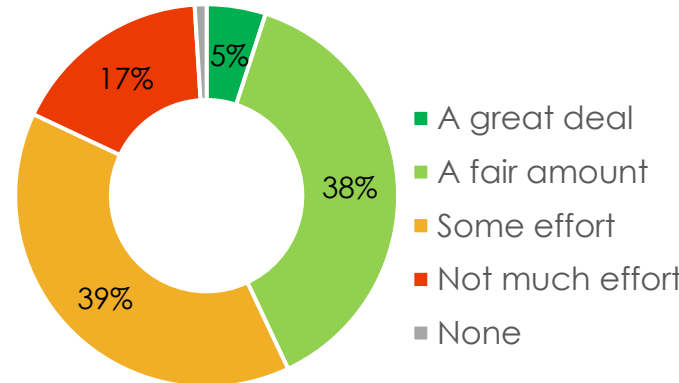
**Thinking about what you buy, how you travel and how you live your day-to-day life, which best describes you...**

- 6%** **very concerned** about impact on the environment and **spend considerable** time or money to reduce it
- 49%** **think about impact** on the environment and try to make a difference **without spending** too much time or money
- 41%** **think it's a bonus** if what doing is environmentally friendly
- 5%** **don't tend to think** about impact on the environment



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

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



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





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



## Environmental concerns and the summer heatwave

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



"The heat, and climate change, hit home"

"I kinda enjoyed it"

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

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

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



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

Hose pipe ban experienced over the summer?



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

Different behaviour during the hot weather...

### Used less

### Used more

Took shorter showers to save water **37%**

Watered plants more often **35%**

Didn't water the lawn, let it go brown **26%**

Went wild swimming / went swimming outside **26%**

Re-used water (from left-over drinks, cooking, washing up, etc) to water plants **26%**

Used a paddling pool / hot tub **19%**

Showered or bathed more frequently **19%**

Watered the lawn more often **10%**

### No change

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



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



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



BLUE MARBLE

Photo by Rhamely on Unsplash

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



■ Several times/week    
 ■ Once or twice/month    
 ■ Once/twice in last 6 months  
■ Once in last 12 months or less    
 ■ Never/don't know

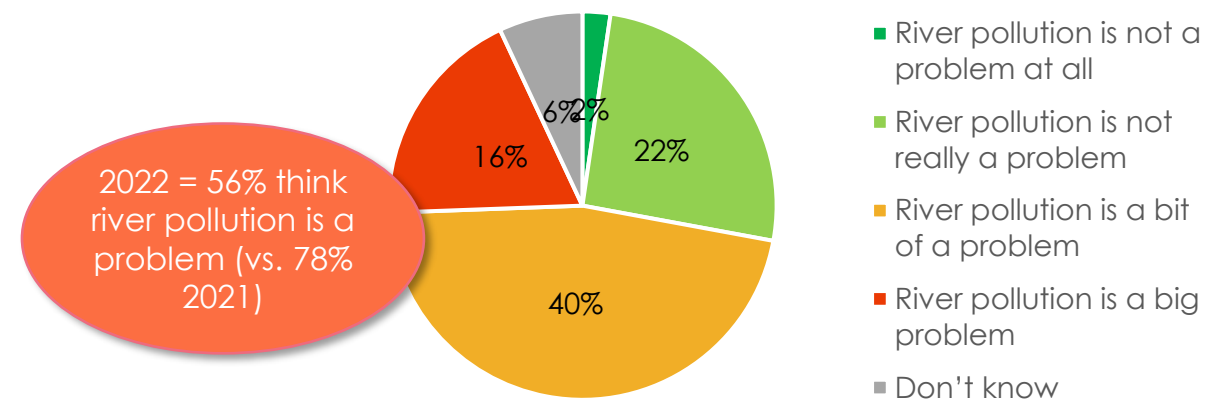
## Over a third have swum or paddled in a local river in the last year

Sitting / relaxing by a river	48%
Swimming or paddling in the river	<b>35%</b>
Exercising by a river	34%
Recreation on a river (Boating, canoeing, rafting)	26%
Fishing	7%
Other	4%
None	15%

## Expect local river water to be safe enough for...

Letting a dog swim in it	75%
Dipping your toes in it	68%
Using a paddleboard or canoe in it	67%
Going fishing	53%
Going swimming in it	44%
Letting children play in it	43%
Submerging your head under water	<b>25%</b>
Drinking from it	3%
None of these	4%

## Local river pollution



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

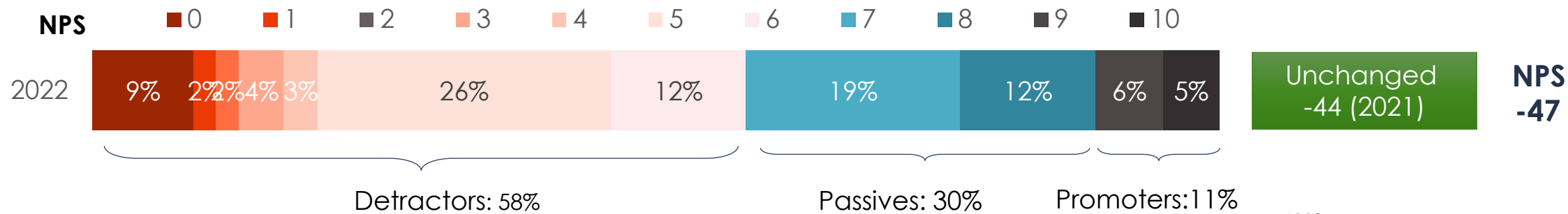


Which activities would you expect the water quality of your local river safe enough for? Which of the following describes your view on levels of pollution in your local rivers? Q5: How often have you visited rivers in your region for recreational purposes? Which activities over the last year, if any,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



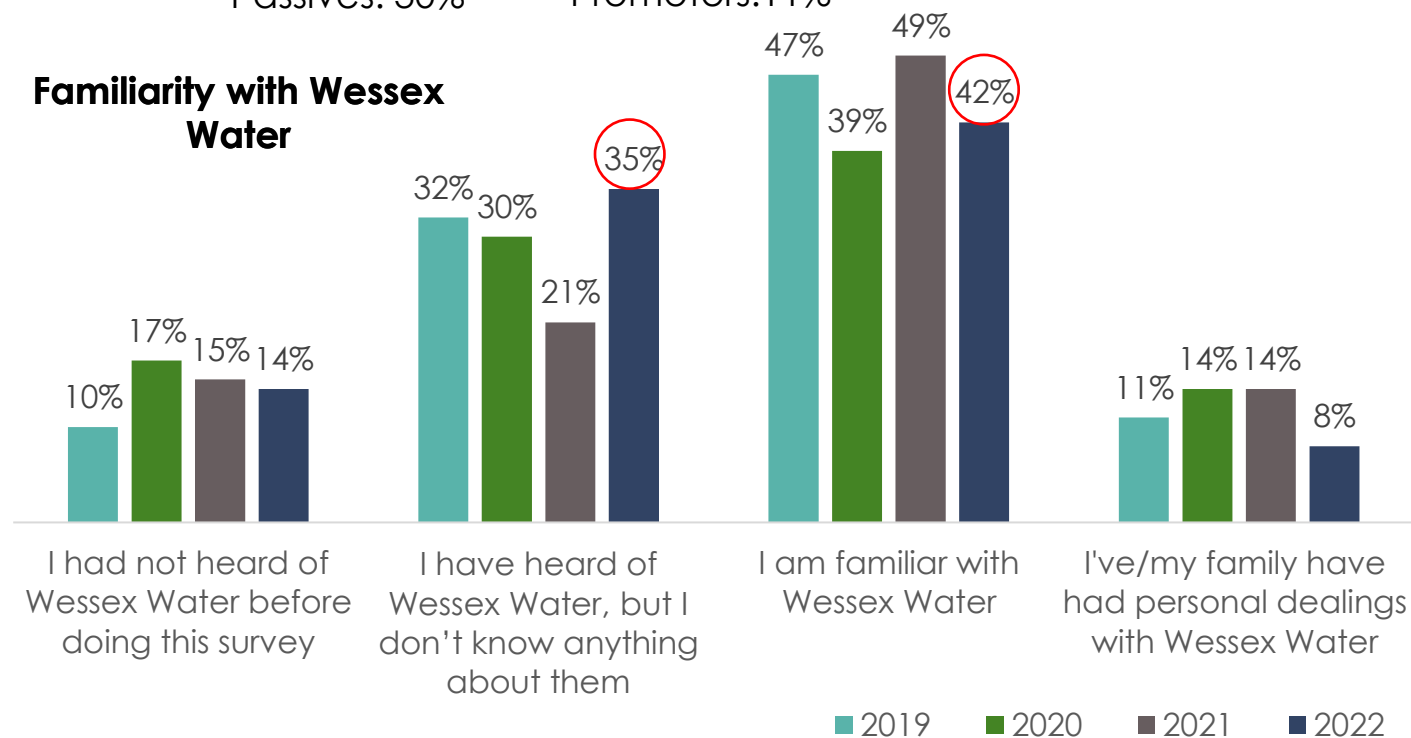
# What are future customers' opinions of Wessex Water...

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



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

## Familiarity with Wessex Water



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



BLUE MARBLE

# Changing water behaviours

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



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

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



## Motivations to change

Achieve better **work habits**:

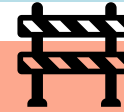
- Get organised
- Create revision schedule
- Efficient time management
- More disciplined with studying

Achieve more **environmentally friendly habits**:

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

Achieve good **health and wellbeing habits**:

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



## Barriers preventing change

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

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



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



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



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



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



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

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



## Water usage habits

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



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

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

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





# What would be the 'Blue Planet' moment with water for it to resonate with the public?



## How do we change perceptions of water use...



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

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

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





# Campaign ideas to reduce PCC

# Core task – briefing process

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

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

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

TEAM

**Question 1** As a team, make a guess about how much water we use....

Guestimate many litres of water an individual uses on average per day

Guestimate how much water we all use per day...

Add name	1	2	3	4	5	6	TOTAL of each item (people runs, bath, showers, flushes)	TOTAL water usage
Number of people in household								
Dishwasher runs per day x 18 litres per run (if per week 7-7)							Total number of dishwasher runs x 18 litres	
Washing machine runs per day x 50 litres per run (if per week 7-7)							Total number of washing machine runs x 50 litres	
Baths taken per day x 80 litres per bath (if per week 7-7)							Total number of baths x 80 litres	
Showers taken per day x 50 litres per shower							Total number of showers x 50 litres	
Toilets flushed per day x 5 litres per flush							Total number of flushes x 5 litres	
Additional usage for miscellaneous (cooking, cleaning, washing up, hand washing): add 30 litres per person per day							Total number of people x 30 litres	
							TOTAL TEAM WATER USAGE =	
							TOTAL USAGE PER PERSON =	
							TOTAL USAGE PER HOUSEHOLD =	

### People and the environment

We are faced with 4bn litres per day gap in the supply-demand balance by 2050

9 out of 10 people say that their personal water use had an impact on the environment, yet far few take action.

Around 40 million people in England live in water stressed areas, yet most of them don't think there's a problem

Our insights and data shows that people will take action if motivated

There is a huge opportunity for a sector wide campaign to help people understand why they should value water and take action!

### THE BRIEF: the task

Reducing what we use is now urgent: it isn't just a nice idea; it's imperative

✔ Control the controllables

Wessex Water is working hard managing water supply and the performance of the network (reducing leaks)

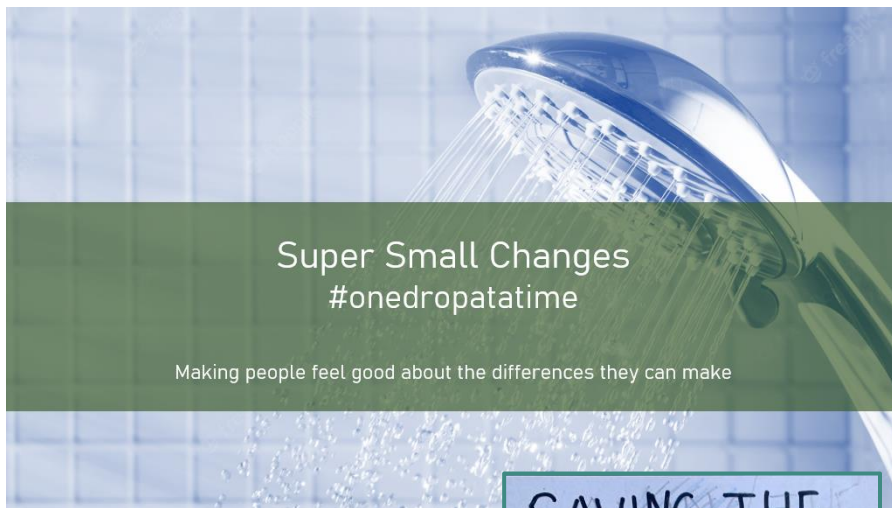
- Earlier, you estimated how much water each person uses on average...
- The industry, in managing its supplies of water, needs to reduce this figure from 142 litres per day to **110 litres by 2050**

? And the uncontrollables

...that's people!

Your task is to help Wessex Water design a compelling campaign to have maximum impact on people (and businesses) in the Wessex Water region

The best ideas will be implemented into Wessex Water's campaigns... and CCW want to give them industry-wide profile



Super Small Changes  
#onedropatatime

Making people feel good about the differences they can make



wessexwater\_ Show us your #supersmallchanges

## Key ideas and insights:

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

## Campaign solutions

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





## Wessex Water Advertising Campaign – TEAM KITCHEN

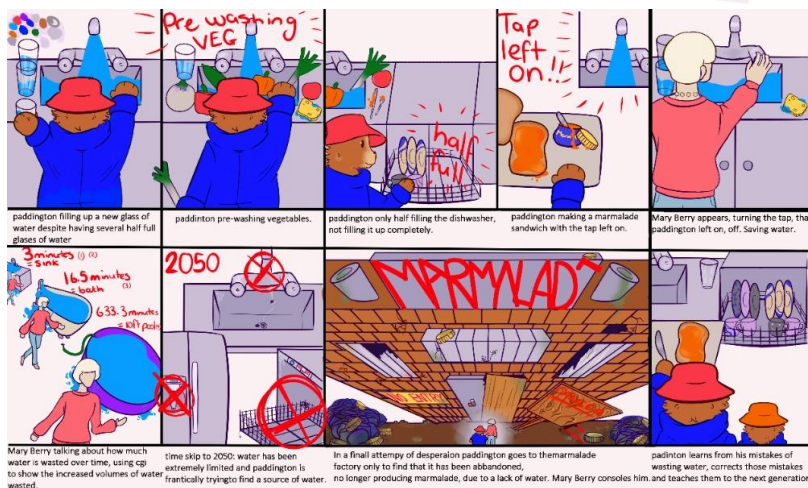


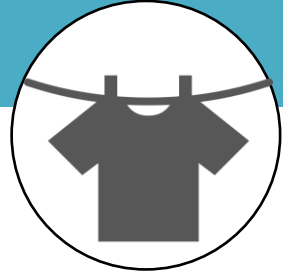
### Key ideas and insights:

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

### Campaign solutions

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





## Saving Water With Team Laundry

Zoe, Toby, Ringnyu, James, Izzy, Gus



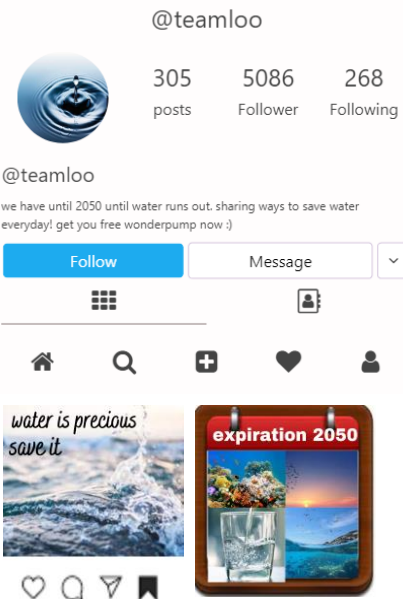
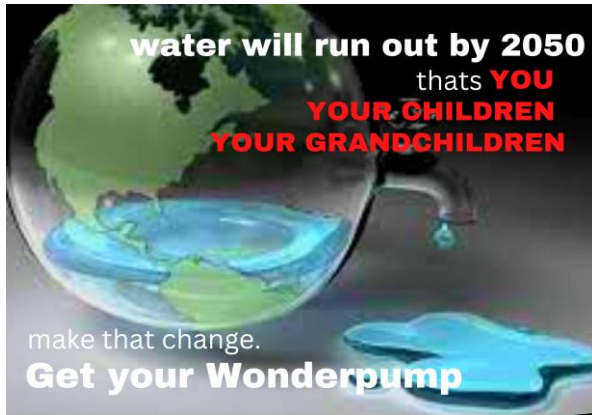
### Key ideas and insights:

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

### Campaign solutions

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





## Key ideas and insights:

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

## Campaign solutions

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

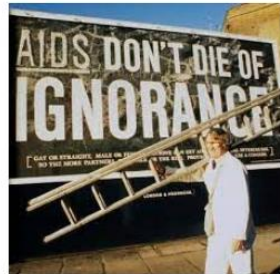


### How Can We Reduce Our Own Water Usage In The Garden?

- Use a watering can instead of a hose
- Avoid watering roses, except for young seedlings
- Prioritise young plants and seedlings - more established plants will survive for longer periods without water
- Make sure to cover your pools and hot tubs and invest in high quality covers to avoid excess evaporation
- Use greywater - gently used water from your bathroom sinks, showers, tubs and washing machines. This means that you are not using any excess water at all
- If you do use a hose, use a trigger to control the flow
- Add water retaining crystals to the soil to keep in moisture
- Water early in the morning or late at night so that water does not evaporate in the heat of the day before it can reach the roots
- Leave plants and shrubs dry until they show signs of wilting - watering too often can keep roots shallow and weaken plants
- Don't waste water on paths and patios
- Weed regularly to make sure the watering is helping the plants and not the weeds

## Key ideas and insights:

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



## Campaign solutions

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





# Strong themes from the presentations

## Some consistent themes emerged from the 5 presentations

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

## Specific insights have potential for behaviour-specific campaigns

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



An aerial photograph of a wastewater treatment plant. The facility is situated in a rural area with green fields and dense trees. In the foreground, two large circular aeration tanks are visible, each with a central mechanical structure. Behind them, several smaller circular clarifiers are arranged in a grid. The central part of the plant contains various buildings, pipes, and infrastructure. The overall scene is well-maintained and integrated into the natural landscape.

# Long term Drainage and Wastewater Management Plans

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

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

**Q1 What's the most common size of the waste pipe from your home to the sewer?**  
 A. 25 cms in diameter  
 B. 60 cms in diameter  
 C. 120 cms in diameter

**Q2 If someone washing the dishes discovers that their wedding ring went down the plughole and down the drain, is it lost forever?**  
 A. Yes: it would eventually corrode away to nothing  
 B. Yes: it's down the drain and irretrievable  
 C. Not necessarily; many rings have been found in the sewers and handed to the police

**Q3 What is a 'combined sewer'?**  
 A. A type of sewer that receives both dirty wastewater (from our sinks and loos) and rain water run off  
 B. A pipe made of concrete and plastic  
 C. A mixture of different pipe sizes

**Q4 What is a 'storm overflow'?**  
 A. A rain storage facility for rain running off roads and buildings  
 B. A means of moving storm water from one place to another  
 C. A pipe running into a river or the sea used during storms when combined sewers run out of capacity

**Q5 Which of these are true – can be more than one?**  
 A. It is illegal for water companies to discharge untreated water into rivers or the sea  
 B. 75% of sewer blockages are caused by flushing wet wipes  
 C. Storm overflows only carry diluted sewer water

**Q6 How many storm overflows exist in the Wessex region?**  
 A. 30  
 B. 300  
 C. 1,300

**Q7 How can water companies stop using storm overflows? Can be more than one**  
 A. Separate stormwater to stop it entering the combined sewer network in the first place  
 B. Construct large rainwater storage tanks to catch heavy rain  
 C. Create real-time monitoring systems to detect when combined sewers are full

**Q8 How much does it cost to build a new storm overflow in the Wessex region?**  
 A. £10 million  
 B. £10 billion  
 C. £10 trillion



### How should Wessex Water balance the options to address the problem?

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

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

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

Max = 50



## Future customers were unaware of the problem of CSOs

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

*“They need to raise more awareness, it’s something people wouldn’t be aware of otherwise... people aren’t aware of what’s happening and how much needs to be done.”*

*“Trying to find a solution that has maximum efficiency but whilst not disruptive”*



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Photo by Andy Newton on Unsplash



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






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

## Increase capacity of existing sewer networks



- Replace existing sewer with a larger diameter sewer to increase volume of sewage and storm water that can be collected and transported towards the water recycling centres.
- Doing this could reduce the likelihood of the sewer pipes being 'overwhelmed' with too much storm water mixing with sewage during heavy rainfall events
- This can be disruptive to the community – digging up roads etc.



Minimum scale of investment	Level of impact reducing risk of sewer floods	Carbon emissions
		

15

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

*"That makes sense"*



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

## Seal sewer pipes to reduce 'infiltration' Wessex Water YTL GROUP

- Groundwater can sometimes seep into sewer pipes from the soil and rock surrounding them.
- This clean water takes up space in sewer pipes and reduces the amount of sewage and storm water collected and transported to the water recycling centres.
- Sewer pipes can be renovated to seal the cracks and reduce infiltration
- Data on the condition of sewer pipes can be used to target problem parts of the network



Minimum scale of investment	Level of impact reducing risk of sewer floods	Carbon emissions

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

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

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



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



- But relies on changing behaviour which they acknowledge is difficult

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

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

## Customer engagement to prevent 'sewer misuse'



- Some are unaware of what can and can't be flushed down the loo and poured down drains. Investment in **behaviour change campaigns** is a relatively low cost activity but it relies on people 'doing the right thing'
- Designed to communicate:
  - The 3Ps message (only Pee, Paper and Poo!),
  - Use of reusable products rather than single use wet wipes and sanitary items
  - How to dispose of "unflushables" correctly
- Activity can include social and traditional media campaigns, 'giveaways' to help people swap their behaviours, engagement officers knocking on doors in communities with blockage issues.
- Data can be used to target activity in **blockage hotspots**.



Minimum scale of investment	Level of impact reducing risk of sewer floods	Carbon emissions



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

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



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



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

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

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

## Household-level rainwater separation from sewers



- Programmes and incentives to encourage customers to put less rainfall from their property (roofs, driveways etc) into the sewer system
- Water butts, soakaways and rainwater gardens could be installed in gardens to capture rainfall, reducing the risk of the sewer system being overwhelmed during rainstorms
- Wider benefits may include:
  - reduced water bill because householder can utilise water stored in butt
  - Attractive and usefulness of garden features



Minimum scale of investment	Level of impact reducing risk of sewer floods	Carbon emissions

18

## Community level sustainable drainage



- Often known as Sustainable Drainage Systems (SUDS) – same concept as household water butts and soakaways, but on a larger scale.
- Rainwater and surface water are kept separate from the sewerage system so the network is less likely to become overwhelmed at times of heavy rainfall
- Rainwater is captured into 'swales' and 'soakaways' that can become a community and environmental resource



Minimum scale of investment	Level of impact reducing risk of sewer floods	Carbon emissions

19







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



- It comes with a high cost and high environmental impact

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

*“Surely that [carbon emissions] doesn’t really matter because of the benefit you get!”*

## Increase treatment capacity at water recycling centre



- Build bigger tanks, buildings, filtration systems etc. at existing water recycling centres to treat larger volumes of ‘combined’ wastewater (i.e. sewage plus storm water).
- A potentially very robust solution but higher cost and with higher environmental (carbon) impact
- Certainty of its impact relies on ability to predict size of future rainstorm events (i.e. climate change modelling)



Minimum scale of investment	Level of impact reducing risk of sewer floods	Carbon emissions

# Future customers prioritise increased treatment capacity as a solution

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

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

## The rules:

- Future customers were asked to decide how they wanted Wessex Water to deploy the six options with their associated investment, impact and carbon emissions
  - The groups were told they could 'spend' a total of 50 points across as many of the investments as they wished
    - Initially, they made their decisions based on the 'points'
    - Once each group had reached a decision on 'points' the financial impact was revealed and the group was able to change their choices if they wished
- Future customers felt the need to spread their risk and invest in several options rather than focus on a few
  - Reflecting the importance of the issue, they elected to spend all 50 points
  - When money is no object, future customers favour the reliability of increasing treatment capacity and educating people on 'good' flushing behaviours
  - Solutions seen as less reliable are down-weighted



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

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

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

- Future customers were then informed the minimum bill will be £500 on average, which assumed no additional investments made. The maximum investment would increase the bill to £650
- With cost in the equation, most wanted to reduce their investments from the maximum £650 to under £600 (between £599 and £575)
  - In recognition of the cost of living crisis
  - Reflecting concern for customers on lower incomes (specifically those on the boundary, ineligible for support)
- For most, investment reduced across the board but in particular slowing investment in treatment capacity and community level sustainable drainage
  - This would enable short-term relief to bill payers as well as long-term improvement
- While some worried that prices will continue to rise and not investing now will mean greater increases in future

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

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





# Conclusions

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

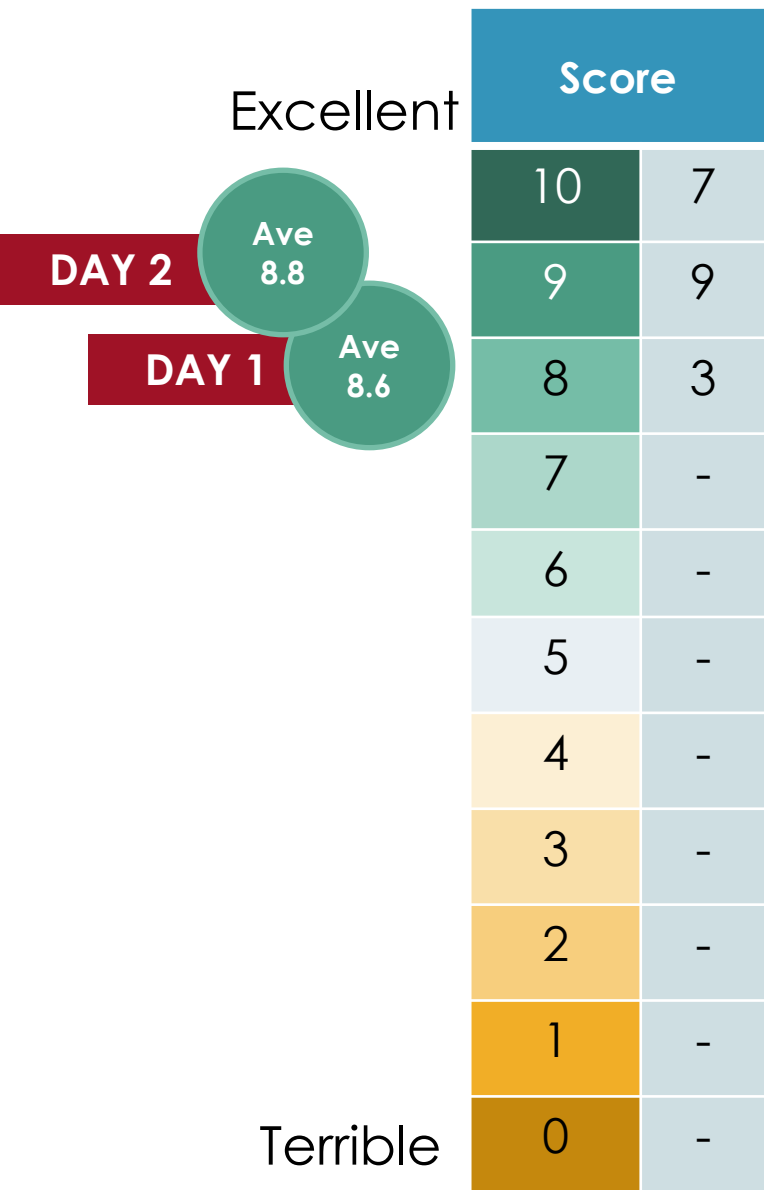
The heatwave might have brought home some of the environmental impacts of a drought period but for this age group, it feels more normal than worrying. The energy crisis is much more pressing than concerns about water resources.

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

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

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





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

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

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

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

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

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



BLUE MARBLE

[www.bluemarbleresearch.co.uk](http://www.bluemarbleresearch.co.uk)



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





# Young People's Panel Final report December 2021

**Wessex Water**   
YTL GROUP 

**your say**  **your future**  
young people's panel

blue  marble



### Young People's Panel at Wessex Water

Day 1 (22<sup>nd</sup> Sept 2021)

- 'Speed immersion' with Wessex Water experts & task
- Group discussion
- Task briefing

Day 2 (12<sup>th</sup> Nov 2021)

- Task presentations
- Group discussion
- Group activities:
  - Control room visit
  - Communications task

### Schools survey

- Sent to the Head of the Sixth Form / school of students participating in the Young People's Panel
- A total of 326 students from years 12 & 13 took part
- Included questions about behaviours and attitudes towards:
  - Future plans / prospects
  - The environment
  - Wessex Water
- Fieldwork took place between 5<sup>th</sup> to 24<sup>th</sup> November 2021

### Online community (3 days)

- 15 students from the panel took part in an online community over 3 days
- Students completed the activities and questions between 23-25 November 2021

# A snapshot of future customers' prevailing attitudes

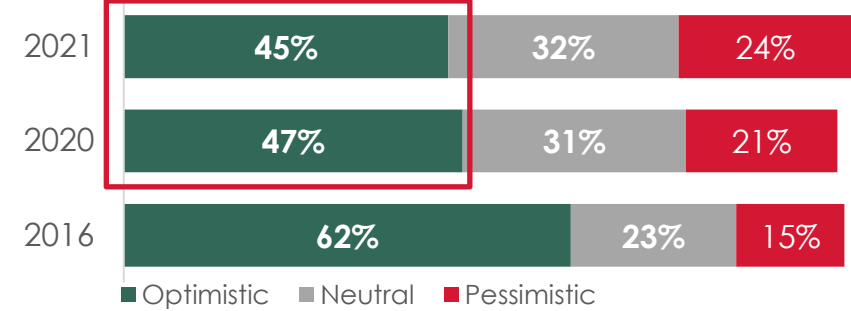




## COVID-19 over the previous 18 months

- ☹️ Overall, sentiment towards COVID and 'lockdowns' is **negative**. People felt there had been a detrimental and lasting impact on their lives
- ☹️ Most found the quality of teaching in online classes **poor** compared to in-person; there was evidence of different experiences between school types
- ☹️ Students are open about the impact on their **mental health** – feeling anxious when meeting up with friends again afterwards.
- 😬 Very **few found this period a good opportunity** to “improve themselves” despite the additional free time they had

## Health and wellbeing



“The quality of teaching went down and mental health has dipped from not interacting with friends.”  
Future customer

“Online it's hard to ask questions - it's hard to unmute yourself and ask a question, so we missed out on learning.”  
Future customer



## Lasting impacts of COVID-19

- ☹️ The biggest concern is about the impact COVID has had on people's **mental health**
- ☹️ At school, **online seems to have become an acceptable** teaching channel, e.g. when teachers are ill or weather is bad
- ☹️ Plus, there is **greater use of laptops** in school which isn't preferred by all
- 😊 In general, the general public seem to be **more appreciative and nicer** to each other
- 😊 There is a perception the **UK has caught up with other countries technologically**, as adoption of computers & tech was accelerated
- 😊 During lockdown, there were **reduced emissions**, it's hoped some reduction will be maintained
- 😊 Another perceived environmental benefit is the **reduced use of paper** with increased use of tech
- 😊 There are **benefits for family life**, parents continue to work from home, spend less time commuting and at home more

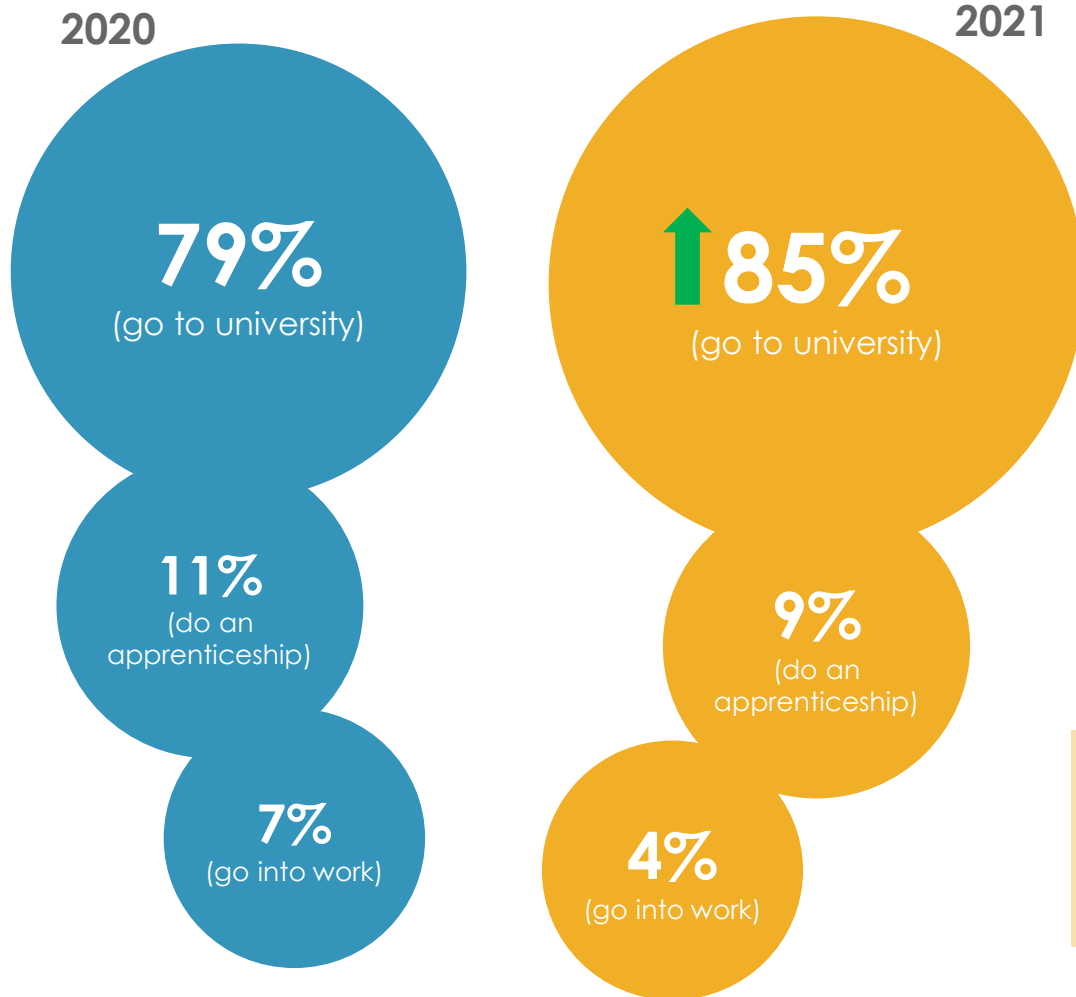
*"It's also been difficult from a mental health perspective because we haven't met many people - it will have an effect for a whole generation."*  
Future customer

*"It's hard getting back into a real person setting - you don't know who to sit next to... seeing friends again is nerve-wracking as haven't socialised in a long time."*  
Future customer

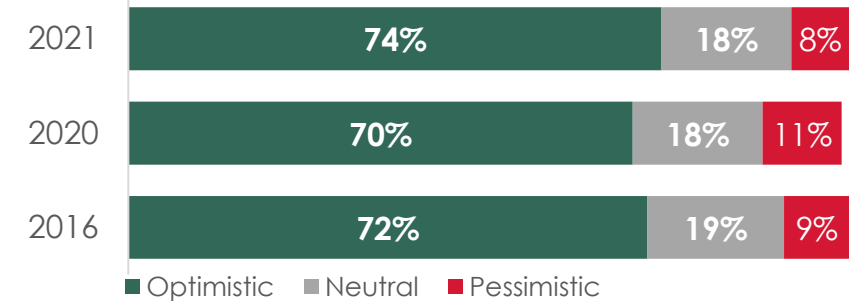
*"The UK was lagging behind technologically and it's brought us up to speed with other countries."*  
Future customer

*"If my dad couldn't work from home he'd have to commute two hours."*  
Future customer

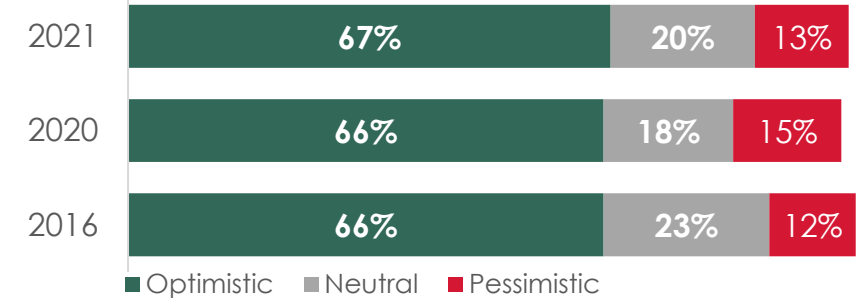
## Future plans (after year 13 or a gap year)



## Social life and friendships



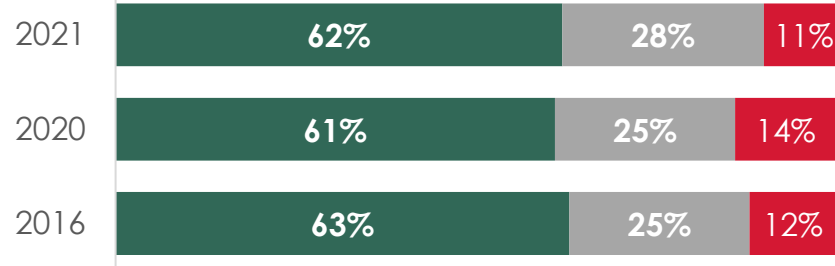
## Achieving educational goals



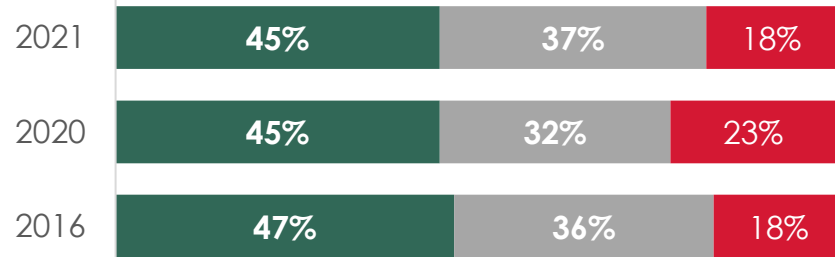
Are apprenticeships becoming less attractive, there seems to be a directional trend downwards (in 2019 13% expected to go onto one) Is this trend evident in interest in the Wessex Water apprenticeship scheme?

# Are declines in optimism to accessing the housing ladder the tip of the iceberg to long-term attitudes to financial security...

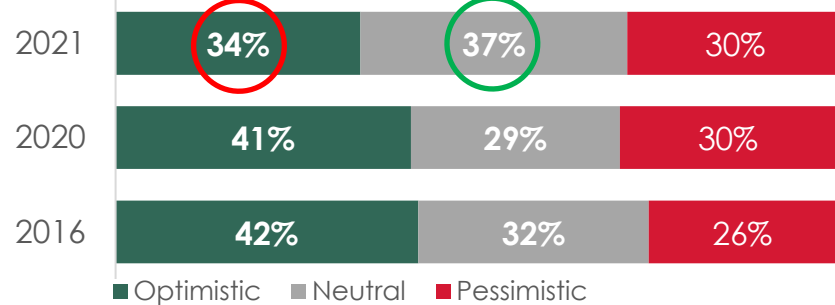
## Employment prospects in next 10 years



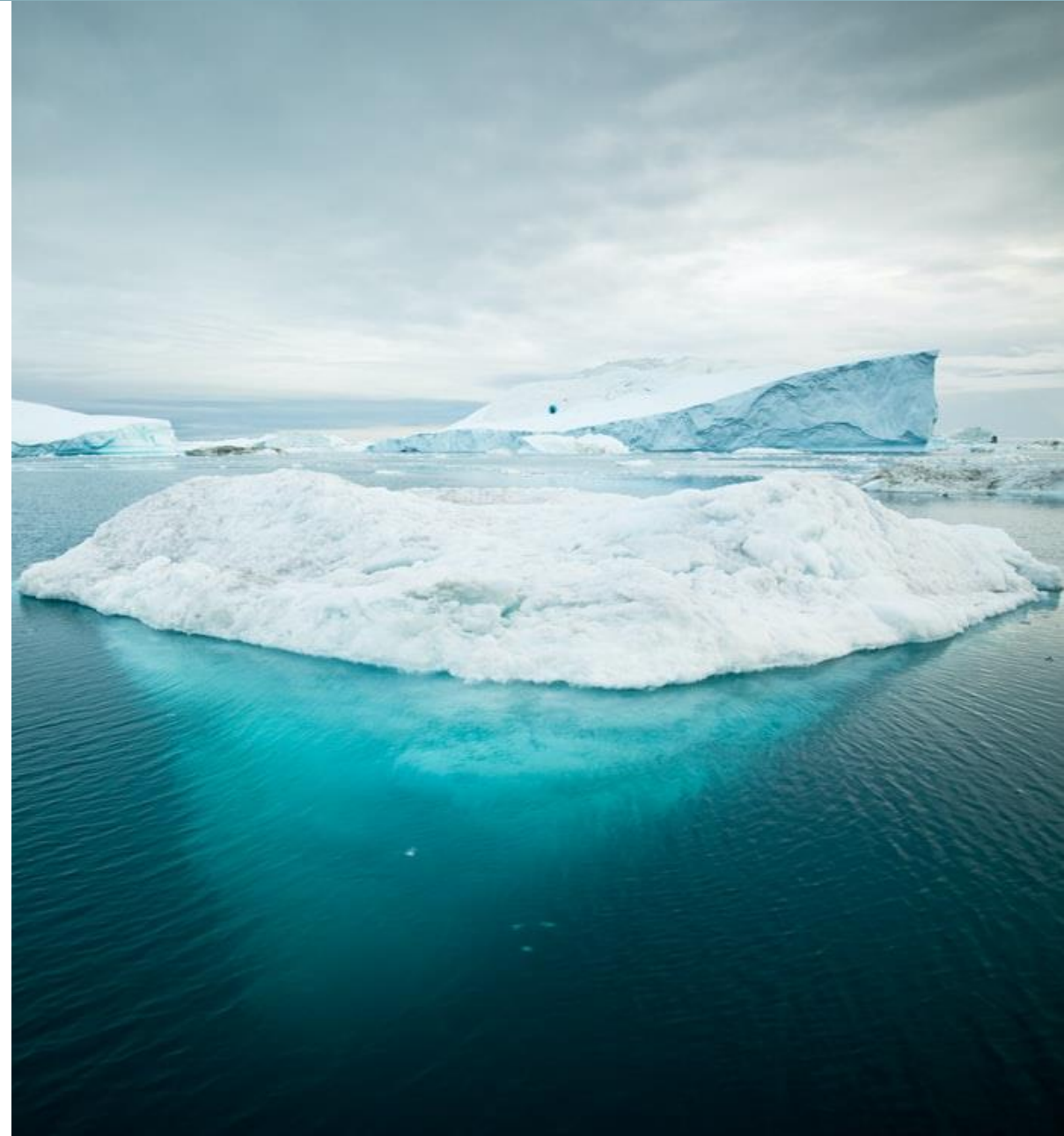
## Financial prospects in next 10 years



## Prospects of getting on housing ladder in next 10 years



■ Optimistic ■ Neutral ■ Pessimistic



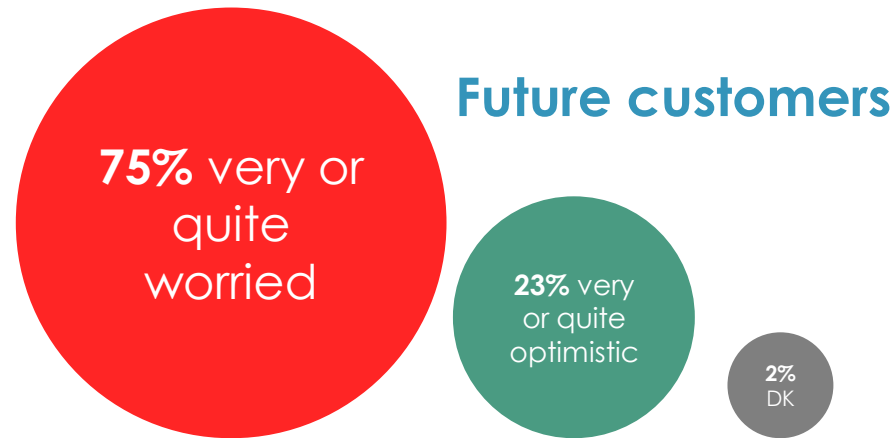
# Environmental attitudes



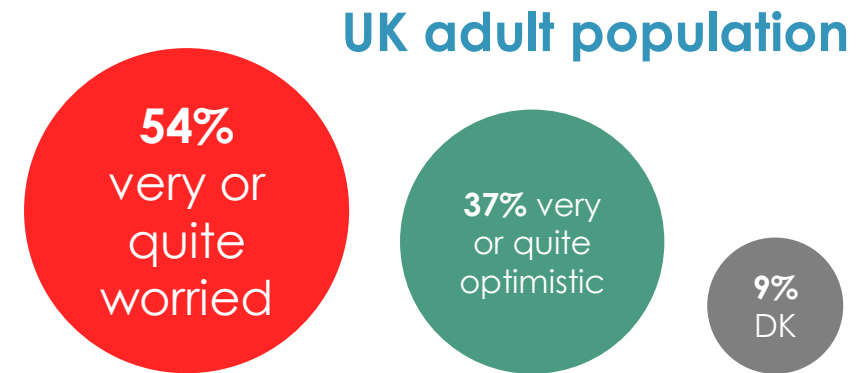



# Overall concern about the environment appears greater for future customers

- Climate change weighs heavily on the minds of our future customers, with most worrying about it 'from time to time' and some worrying 'everyday'. [YPP Community Panel of 15 participants]
- Reflected again in the School Survey, three quarters say they are very or quite worried - a significantly higher proportion than we saw in our national survey with adults



**Vs.**



 Q: Considering how climate change might affect people in the UK, how do you feel about the future?  
**YPP School Survey 2021 (326)**

Q: Considering how climate change might affect people in the UK, how do you feel about the future?  
**Blue Marble Environmental Attitudes Survey 2021 (2,090)**

# Top of mind local environmental issues relate to what future customers have experienced

## Spontaneous local environmental concerns

- **Flooding:** referencing the Somerset levels, dredging the Parrett, surface water flooding and drains overflowing
- **River pollution:** esp. noticeable during summer, several wild swimmers; Warleigh Weir in the news; agriculture run-off
- **Air quality:** Bath known to be particularly bad; discoloured stone; traffic related
- **Littering:** a general problem

*"The loss of one species can have an impact on the whole ecosystem."*  
Future customer

*"Extreme weather - affects everywhere, rural and urban areas, and has a direct impact on Wessex Water's pipes."*  
Future customer



## Prompted local environmental concerns

Unanimous agreement of three most important issues selected as 'catalyst' factors that cause chain reactions.

- **CO2 emissions**
- **Loss of different species**
- **Extreme weather events**

**Local droughts** generally of lowest concern: most had never encountered droughts.

*"The new electric scooters have been found [in the river]... basically anything that can be picked up and stolen is chucked in it. It's the biggest thing you notice."*  
Future customer

*"In the past few years the big climate effects we've had has been flooding, 2014 when river Parrett was dredged properly which caused massive flooding around where I live."*  
Future customer

# While future customers are more worried about the environment than adults, their specific concerns follow similar patterns.

- Micro plastics and air pollution are the biggest concerns by some margin.
- Future customers are notably more concerned about biodiversity and less concerned about river pollution from sewage
- River pollution from sewage is a significant concern with over a quarter of future customers and over a third of adults putting it in their top 3 concerns



	Future customers	UK adult population
Micro plastics in the environment	61%	65%
Air pollution from household smoke and road vehicles	61%	56%
More frequent and severe flooding from rivers and the sea	36%	36%
Reduced biodiversity	36%	18%
The need for more trees to be planted	33%	34%
River pollution from sewage	28%	36%
More frequent and severe droughts	16%	14%
Erosion of soil and reduced soil fertility	15%	15%
River pollution from agriculture	13%	14%
Invasive species on land and water	3%	8%

## Future customers feel that responsibility falls on governments and companies, with consumers having the least responsibility.

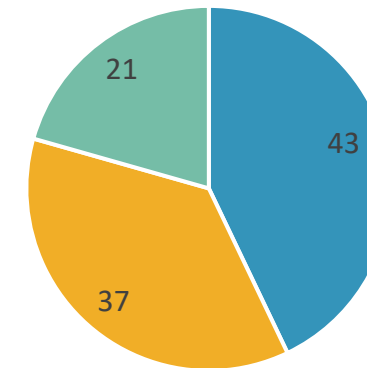


- **Companies** engage in behaviours most detrimental to the climate and therefore shoulder more responsibility for addressing the problem.
  - However, respondents believed that companies will not make the changes necessary without being forced to by governments and laws.
- Ultimately, future customers believe **governments** are responsible for addressing this issue
  - They hold the legislative power to introduce regulations and laws that force companies to reduce their impact on the climate.



## Who is responsible for addressing climate change?

■ Governments ■ Companies ■ Consumers



Panellists were given 100 points to allocate responsibility: this shows the average allocations given.



Around half of our YPP panellists started to follow **COP26**, however initial interest subsided as the conference went on.



*“Governments should properly regulate companies and end subsidies to harmful industries such as meat, fish, oil and coal, to reduce climate change: it is the world's companies that need to stop polluting.”*  
Future customer

*“Consumers, by definition, can only consume what is on the market and being offered by companies. If there are no effective combatants for climate change then consumers cannot help the situation.”*  
Future customer

# Like UK adults, future customers are not completely accurate about the most impactful behaviours

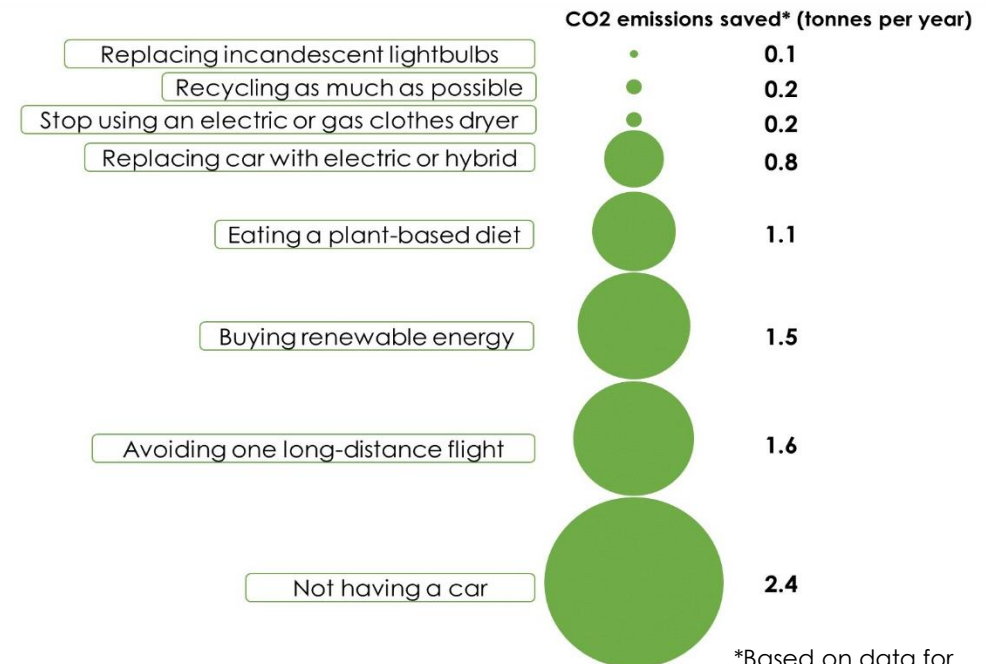
As observed in previous research with the wider population, future customers are not always accurate about what actions have the most impact in **tackling climate change**

## PERCEIVED MOST IMPACTFUL BEHAVIOUR CHANGE

1. Buying renewable energy
2. Not having a car/replacing it with an electric or hybrid
3. Recycling as much as possible



## ACTUAL MOST IMPACTFUL BEHAVIOUR CHANGE



\*Based on data for developed countries

- Most of our future customers are **already** recycling as much as possible and replacing inefficient lightbulbs

### Once shown the actual most impactful behaviours...

- Our future customers feel they are most likely to **avoid one long distance flight**, and try to **eat a plant based diet**
- They are reluctant to **stop using a car**; many explicitly mentioned the necessity of a car when living in rural areas.

*"For me, not having a car just because of where my family and I live, it's a small village and we rely on driving to get us to almost everywhere we go..."*

Future customer

*"For people like me and my family who live in rural areas, giving up a car is very hard as it is our only option of transportation."*

Future customer

# Most panellists have adopted 'easy' behaviours of recycling and replacing traditional lightbulbs to reduce their carbon footprint



Replacing traditional lightbulbs with more efficient LED lightbulbs

Replacing a car with an electric or hybrid

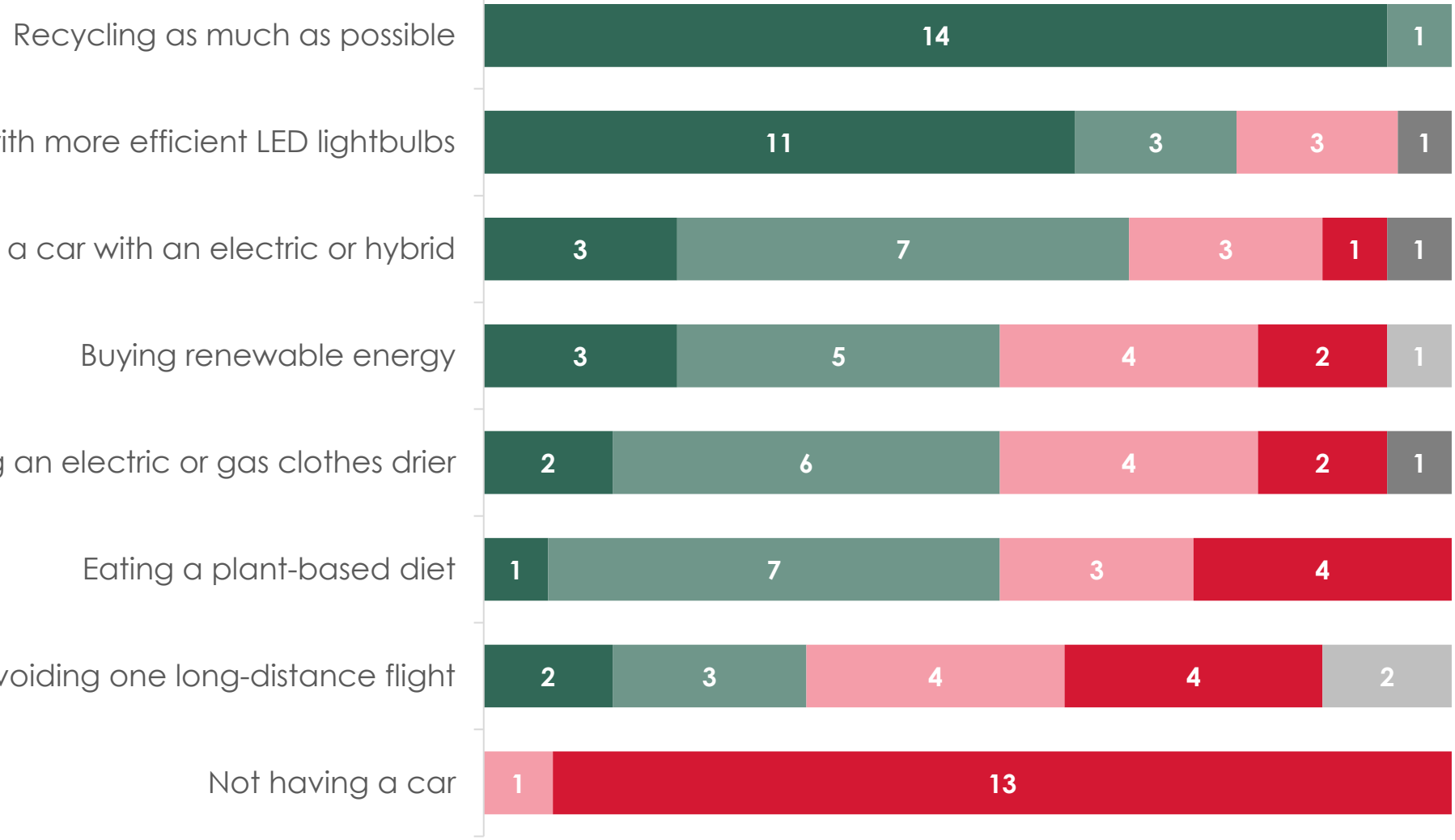
Buying renewable energy

Stop using an electric or gas clothes drier

Eating a plant-based diet

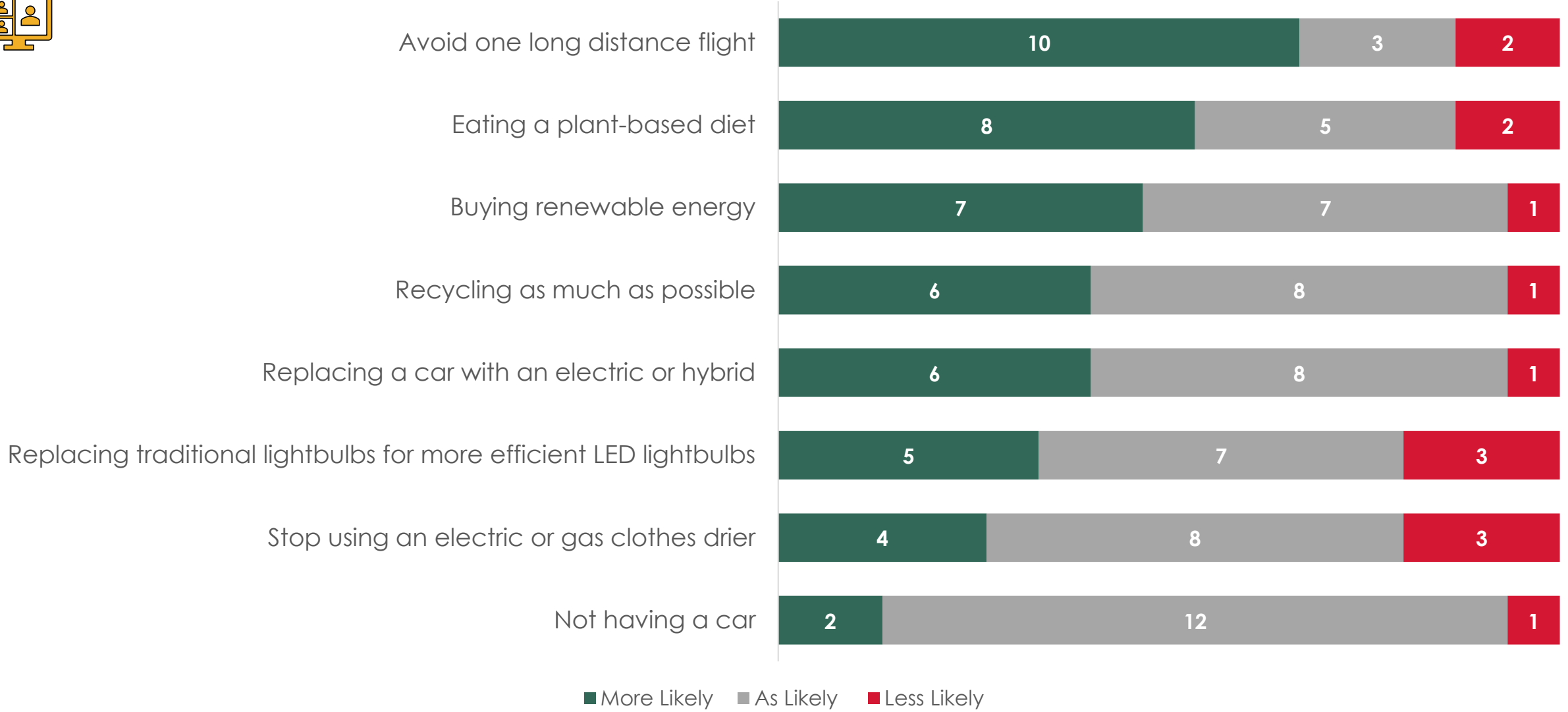
Avoiding one long-distance flight

Not having a car



Very Likely   Quite Likely   Not Very Likely   Not At All Likely   Not Sure / Don't Know   Not Applicable

# Once informed about the most impactful behaviours, most panellists felt they would adopt those with more impact; even so, most still remain reluctant to give up a car



# Giving up meat or changing/getting rid of the car are seen as the hardest changes to make, there are plenty of reasons not to change if the environmental impact is doubted



## CHANGING TO HYBRID OR ELECTRIC / NOT HAVING A CAR

- Cost of changing
- Lack of belief in the benefit of reduced emissions
- Loss of independent transport, especially in rural areas

*"Electric/ hybrid cars are expensive, so they need to reduce in price in the next few years"*  
Future customer

*"The general population may not be able to afford to just buy a new electric or hybrid car for the sake of reducing carbon emissions."*  
Future customer



## ADOPTING A PLANT BASED DIET

- Lack of willpower or desire to give up the taste of meat
- Cultural norms
- Perception that vegans are 'different' → not me!
- Difficult to find food without animal ingredients

*"Meat is delicious and, from personal experience, it takes massive willpower to be able to change your diet."*  
Future customer

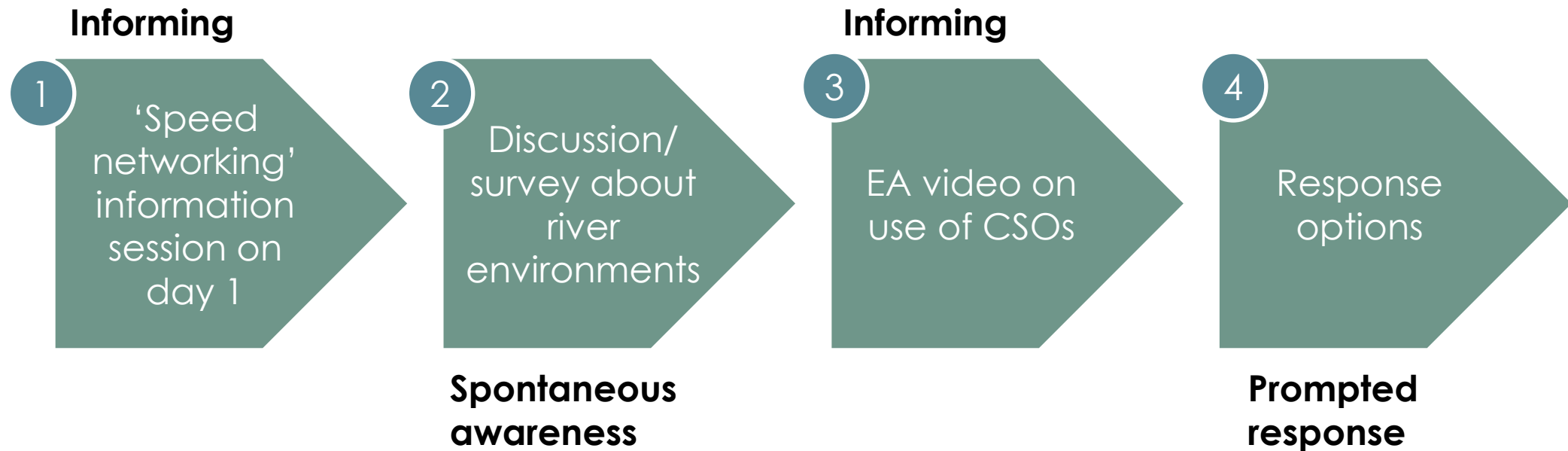
*"I think eating plant based will be hard for the majority of people to do as there is such a culture around eating meat".*  
Future customer



# River environments



# Information journey about CSOs, causes and impact



# Issues around sewage blockages prevalent in their assessment of Wessex Water's top 3 Challenges

## 1 'Speed networking' information session on day 1

- Following a fast-paced immersion exercise, the panellists reported back on the themes that they felt were most important.
- Tackling sewer pollution and its causes - and educating the public – were new and salient themes



### ENVIRONMENTAL ISSUES

Climate change the key challenge

Aim for net zero carbon emissions:

- Reduce diesel vehicles
- Increase use of electric & hybrid
- Use biofuel or electric buses

Encourage environmentally positive customer behaviours:

- Water butts
- Option for electronic statements

**Improve water operations:**

- **Monitors in pipes**
- **Reduce sewage flow into rivers**



### PUBLIC EDUCATION

Tailor **to different ages** e.g. Schools & digital channels for young, future customers; Newspaper ads for older

**Educate about blockages in particular:**

- **Doesn't seem to be clear what is flushable or biodegradable**
- **Before the day, many students didn't know either**
- **Has a wide-reaching impact on the business**

Ensure campaigns are engaging



### INTERNAL & INDUSTRY COMMS

- Diverse range of customers
- Internal departments communication between plants and departments
  - Grown a lot
  - Comms needs to be effective and quick
- Opportunity with other water regions/ companies
  - Share experiences
  - Share network

# Widespread experience of local rivers – and pollution

## 2 Discussion/ survey about river environments



*"On The Last Leg it was a running joke – saying this was very, very bad."*  
Future customer

*"You wouldn't want to touch the water."*  
Future customer

River swimming is popular amongst this age group – which they perceive to be part of living in a rural region.

- Aware of swimming hotspots
- Experience of pollution (and other hazards such as glass and needles)
- One uses SAS app

Most Future customers **able to name their local river** and many had anecdotes of time spent there.

Crucially however, many associated them with **high pollution levels** (mainly from littering) and anecdotes of self and friends getting sick from swimming there.

### Awareness of the problem fairly widespread:

- Some have seen news reports about pollution locally (e.g. Warleigh Wier); and on social media – including warnings not to swim.
- Some have seen sign boards at swimming/ paddleboarding spots.
- A handful have heard about river pollution from national sources: press, The Last Leg (TV)


### But understanding of the causes less so

- No explicit mention of CSOs

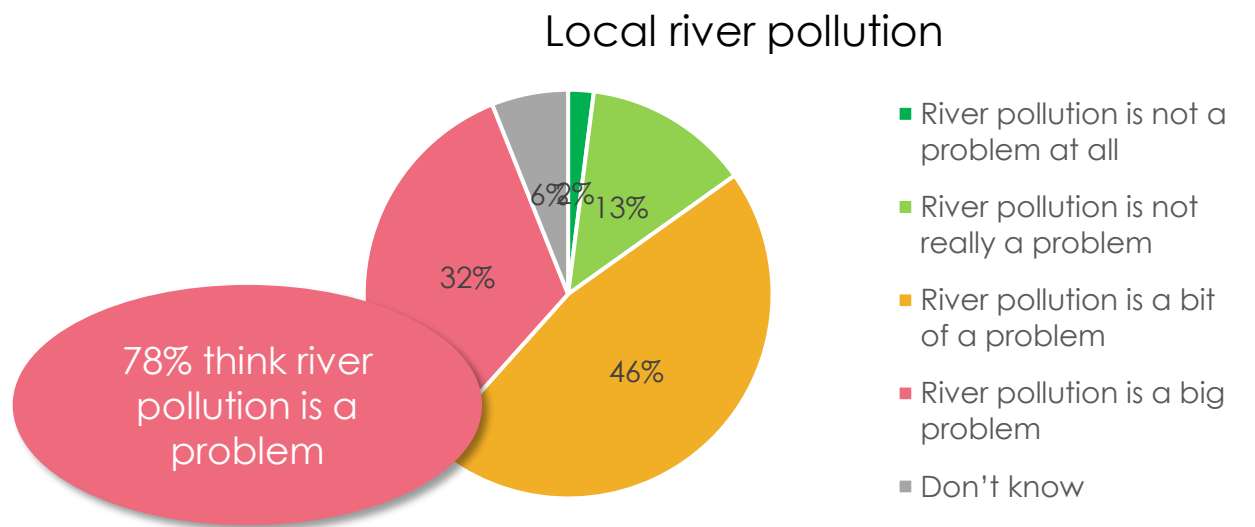
# Rivers play a large part in the lives of future customers but most think river pollution is a problem and so they doubt the safety of local rivers

- Most future customers walk near their local rivers (84%) and almost half swim in them (47%)
- Even so, only 45% deem their local river safe enough to swim in and only 1 in 4 believing it is safe to submerge their head
- Nearly 8 out of 10 think river pollution is a problem

Visited /used local river for in past 12 months	
Walking by a river	84%
Sitting / relaxing by a river	61%
Swimming in the river	47%
Cycling by a river	43%
Having a picnic by a river	36%
Running by a river	33%
Paddling, cooling off or splashing about in the river	29%
Paddle boarding	25%
Feeding ducks	21%
Boating, canoeing or rafting	21%
Fishing	8%
None	5%



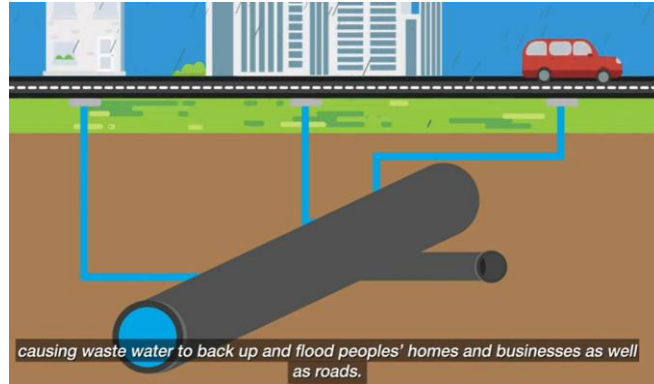
Expect local river water to be safe enough for	
Letting a dog swim in it	71%
Dipping your toes in it	64%
Using a paddleboard or canoe in it	63%
Going swimming in it	45%
Going fishing	44%
Letting children play in it	41%
Submerging your head under water	26%
Drinking from it	5%
None of these	6%



# The EA video shed new light on the issue for our future customers

3

## EA video on use of CSOs



[What is a storm overflow and how do they work? - YouTube](#)

*"It is a necessary evil but steps need to be taken to reduce it."*  
Future customer

*"I thought that 'fat' just related to the size of the blockages."*  
Future customer

*"Some are constantly discharging so they need more treatment works."*  
Future customer

### New understanding and surprise

- Sewer spills are related to heavy rain
- Surprise at age of pipes across large part of system
- Surprise that the problem has not been addressed
- That CSOs are managed as part of the system – and not accidents or malpractice: a release valve to prevent sewer flooding in communities
- That people's behaviour can help reduce this happening

### However the information is undermined by hearing stories of constant or repeated discharges

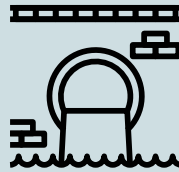
- And an overarching belief that releasing sewage into rivers is just a bad thing to do

### Key insights with implications for communications

- The video informed (for the first time for many) about the impact of fats, oils and grease causing blockages
- This aspect had been lost in the much more prevalent communications about wet wipes
- Several talked about pouring fat being a common behaviour at home
- Awareness of 'Fat bergs' but not always associated with fat (rather that 'fat' simply describes the size of the blockage)

# Once informed about CSOs, future customers view as an urgent issue that requires action

## Spontaneous thoughts about what should be the response to CSOs



- Despite a greater understanding of the purpose and use of CSOs, future customers agree that use of sewer overflows is a **pressing matter in need of urgent solutions**
- Spontaneously, open to solutions including: raising awareness, updating infrastructure, innovative planning design and climate action
- **Solutions should be multi-faceted** with short term measures such as building awareness and education but also longer-term infrastructure projects
- In terms of responsibility they believed this is a **shared responsibility** but the onus is particularly with water companies and the government.



*"It's a problem that shouldn't occur."*  
Future customer

*"It is not an entirely avoidable problem but more should be done about it to prevent it."*  
Future customer

*"We need something to stop gap it then you can move to long term."*  
Future customer

*"I think that it is a major issue that needs to be addressed as it has a knock on effect on other things like business, economy and people's lifestyle."*  
Future customer

# Prompted solutions suggest all parts of society have roles to play

4

## Response Options



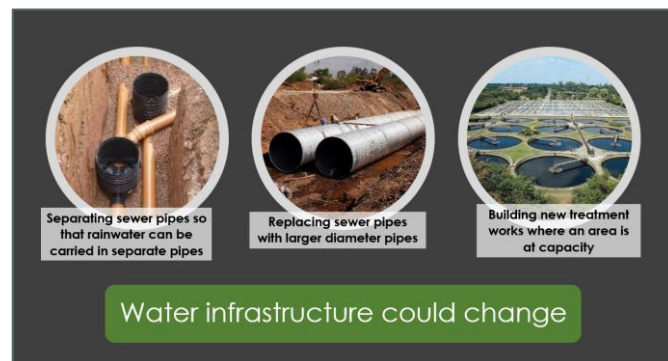
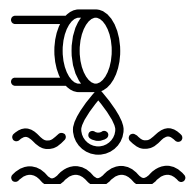
### Customers seen to have an important role to play

- ‘How can people engage if they don’t understand?’
- Not just flushing wipes (which they feel is widely known) but the FOGs message too



### Town and household design part of the solution

- Slightly lower support for these types of solutions
- Questions about effectiveness, safety and cost
- Strong support for grey water – and initiatives such as free water butts
- Support new regulations for new buildings



### Solutions with greatest impact


- Future customers conclude that the drainage system needs overhauling e.g. water storage on a large scale; pipe separation
- Awareness this is long-term and expensive though think it must be done

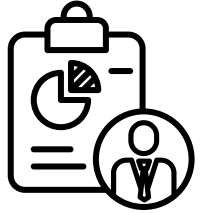


# Smart meter roll out






We tasked our future customers with designing a new customer experience for smart water meters, asking them to consider optimising the experience at all stages of the customer journey 



**Your Task:** design the customer experience for a Smart Meter 30

**The Old (current) World**



After meter is fitted, customers are given a **'Welcome to your meter' booklet**

**Bills are sent in the post** every six months (some receive online)

If there is a **problem**, customers can telephone, email, write or LiveChat the **Call Centre**

?

---


What could a **better 'Welcome'** look like?



What information do customers want to know? **When?**  
How do they want to be informed?

What if **something goes wrong?**

How can customers be **encouraged to use their water usage data long-term** to reduce consumption

**The New World in 2025**





**Your Task:** design the customer experience for a Smart Meter 32

Consider how Wessex Water can excite ALL customers about their Smart Meters. Think about:


- The type of information people want and how they want to see it
- Which channels are relevant at different stages in the journey
- What Wessex Water should be saying to create engagement, the drive for change and maintain it




**Data**




**Devices**





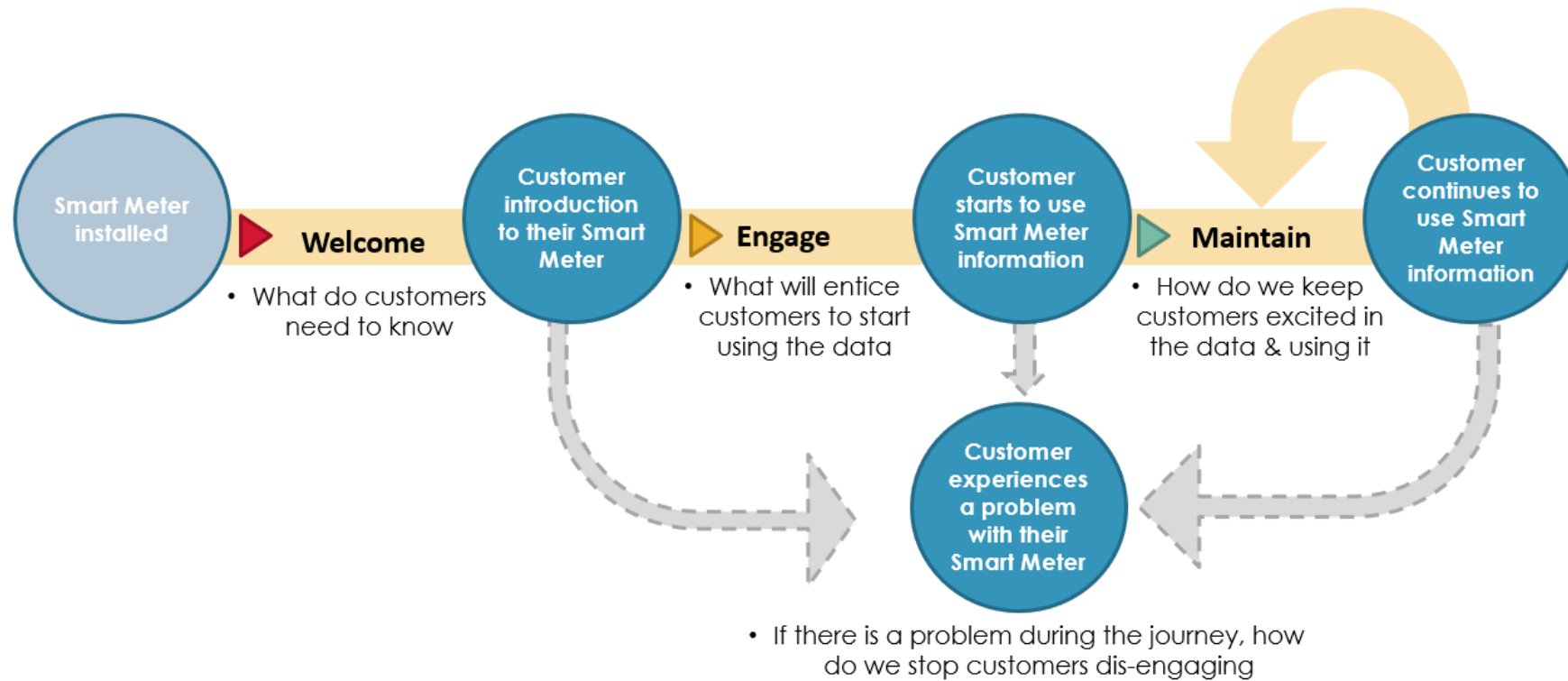
**Comms**



← What is relevant to different population groups? →





**How should Wessex Water engage with customers at all stages of their Smart Meter journey, to encourage them to use the data and keep using it to minimise water usage?**

We asked our future customers to design a new customer experience for a Smart Meter, focusing specifically upon:

- On boarding process
- Maintaining engagement
- Additional features
- Accessibility

They were also asked about the smart meter, particularly what type of data to show, how the data should be presented and what should happen if something goes wrong.

The presentations provided an insight into future customers' opinions.

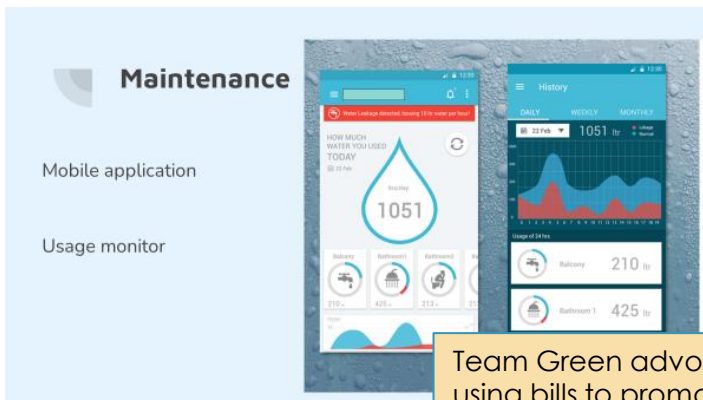
# Overall responses – how did future customers tackle the problem?

## Four teams all worked to the same brief with some overarching themes emerging

- Future customers were unanimous in suggesting an **app** to access the smart water meter.
- Most presented ideas for a dedicated water meter platform containing **live water updates**
- Three out of the four teams recommended an **in-home device** in addition to the app
- They emphasised the importance of the **personality and positioning** of the smart meter
- **Accessibility** was also integral to rolling out smart meters, with features to suit all
- Finally, some teams suggested that to fully engage people, smart metering would need to include **aspects beyond water** e.g. linked to other utility costs, or including features/information that would be more obviously relevant e.g. local weather information.

## Personality and positioning.

Future customers were keen to bring the customer into the heart of the smart meter operation with user-friendliness critical to success. For instance, Team GREEN would design the meter to be like a 'friend'; and other teams similarly focused on making a tangible and friendly interface, appealing to the customer.



Team Green advocated using bills to promote water saving messages rather than what they saw as 'adversarial bills'.

Team JEMGAH designed 'Ripple', their in home device. The design includes innovative features such as interactive touch screen: creating a compelling interface that would encourage customer engagement

## Our inspiration → current Ripple design



Buttons include:  
-on the left:  
-brighten screen  
-dim  
-settings  
-bill



Buttons include:  
-on the right:  
-home  
-up  
-down  
-on/off

**RIPPLE**

The device is a mixture of touchscreen and buttons to be **inclusive** accessibility of all ages. The screen 'ripples' as you touch it to make it engaging to use.



You can fold and collapse the IHD, so it is portable and adjustable



Future customers highlighted the importance of the on-boarding process, reflecting the likely barrier to use/engagement if the technology is not easy to use. They focused on two aspects:

- **Installation:** this will require clear communications and help where needed from Wessex Water personnel
- **Tutorial:** As the technology will be new to many, an online tutorial will be beneficial, advising how to set up and make the most of the smart water meter

## Installation

The smart meter will be installed free of charge by a member of the Wessex Water team, whereby the homeowner will be given brief instruction on how to use the smart meter including:

- Where to find the information on the In House Device (IHD)
- How to connect to the app
- How to sign up for the opt-in services.

A tutorial will also be available in the settings tab of the IHD and the app for new homeowners moving into a house that already has a smart meter, and homeowners will be given a brief pamphlet that displays how to use these features.

Team JEMGAH envisaged using a physical In-home Device (IHD) as well as an App. The tutorial could be accessed from the IHD (and not require customers to download the App)

This team also highlighted the need for onboarding new occupants where a smart meter is already installed.

## What we will include in our Welcome System:

- A compact, leaflet style booklet with simple information about how to use the Meter and its full capabilities.
- An email or text may also be sent with the same information to make sure the customer has information, mitigating complaints and queries to WW Customer Services.
- A page in the welcome booklet, with a simple troubleshooting flowchart.

we are:  
to WW

tential tech



Team Azul describe their Welcome System, introducing customers to smart water meters.

They recommended a leaflet - accessible either online or as a physical format - containing all the necessary information e.g. setting up the device, key features, customer service contact details and a feedback page

## Future customers designed a smart meter programme to provide tangible benefits to the user:



- Make it **user-friendly and enjoyable**: interface and data should be presented in a way that is easy to read and personalised
- Promote **incentives**: e.g. how reducing usage can have rewards and communication on any reduced bills/saving
- **Environmental**: if the environmental benefits of water saving are clear, customers will be more engaged.

### • Solar Power

As well as making our meter waterproof, we will make the Smart Meter Solar Powered that also has the option to be plugged in.



Team Azul designed a solar powered meter, underlining its environmental credentials

### • Keeping the customer at the heart of the service

Customer experience: The smart meter should be user friendly to optimise ongoing engagement

Team Green suggest simple, interesting communication about household water usage. Personalisation is also key with features like adjustable font size and frequency of communication.

Welcome  
TO THE TEAM

By introducing 'The Hub', we are:

- Engaging younger individuals with a fun aspect of the meter (fun facts, etc.)



### Online platform

Team Azul recommended an online 'hub' or platform for achieving initial engagement. This would be a simple, centralised and easily accessible hub for smart meter data, and include fun features aimed at a younger audience.

**Future customers believe additional features are vital in stimulating ongoing engagement with smart meter data:** 

## Benefits:

- Ongoing incentives/ rewards for usage targets
- Linking rewards for 'good' usage to charity donations

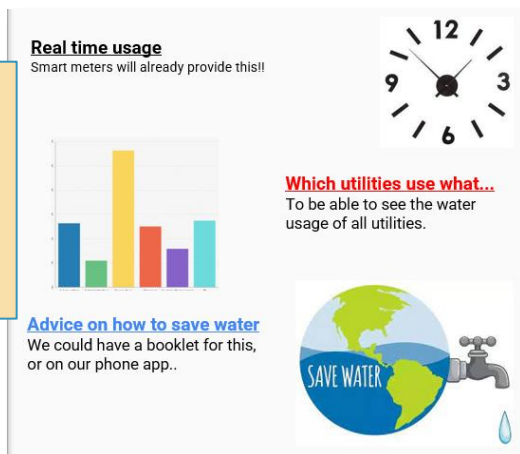
## Customer experience:

- Offering water saving advice
- Giving real-time water usage
- Providing other services to encourage more frequent visiting the app/monitor e.g. weather updates
- Excellent customer support if something goes wrong

## Platform/device:

- A shared platform e.g. with gas and electricity data
- Platform accessible through an App
- Waterproof device: see usage as you use water

Team YELLOW included water advice and real time usage, broken down into individual utilities. This more granular of information would maintain interest in the smart meter data.



## User incentives/rewards

As well as suggesting incentivising water reduction through discounted bills or charitable donations. They also emphasised 'gamification' through simple features such as having water saving targets - and badges for meeting them.

Team JEMGAH built in a 4% discount on water bill for household customers who save 20% or more on water usage. Financial incentives are key to future customers for maintaining meaningful meter engagement – but non-financial rewards could also be useful.

You can donate the points you earn from the water that you save each month to WaterAid and change lives by bringing clean water to communities that have none.



Team JEMGAH included charitable donations as part of their design. This was popular with future customers who recommend partnering with charities to create and maintain engagement.

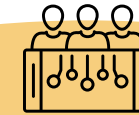
Donate your points via the  
Ripple App.



## Accessibility was very important for our future customers. Ideas included:



- Audio and large font options for visually impaired
- Touch screen
- Text to speech software (TTS)
- Opt-in paper options for some services
- All features must be inclusive of different customer groups



**Inclusivity** was an important consideration for future customers. They emphasised how different ethnicities, technological capabilities and cognitive or physical disabilities could mitigate customer access – and ability to use less water.

Team JEMGAH provided notes on accessibility features:

## General Notes on Accessibility

- Settings options for accessibility are key
- Intuitive and consistent design is important through all platforms
- Inbuilt help centers within contact points that connect to online chat or phone line
- Information should aim to be accessible using the preferred contact point independently for all
  - Many do not have access to phones/internet
  - Many want the ability to access information without needing the help of another

## Accessibility within the App and IHD (both named Ripple)

### App/Website

- Compatible with existing Accessibility software
- Auditory feedback
- TTS Friendly graphs and charts
- Syncs with IHD

### IHD

- Tactile buttons
- Easily Maneuverable
- Built in TTS (text to speech software)
- Touchscreen
- Standby screen will have the time

Team JEMGAH also considered accessibility in both the app and in-home device advising on what they saw as the key features



# Summary of team presentations and judges' responses



# Team Green – the winning team

## Smart Meter roll out The customer experience

Team Green



### Content and stats (cont.)

- 2020 YPP Survey data
- 70% of respondents say that a water company should invest in the environment as a priority over the local economy and businesses.
- Nearly 25% of YPP respondents felt unsure about their financial future.

### Engagement

Simplify the set-up and the interface for quick, easy access for all

Account

FAQ page and forum (will need a trial phase to know what these would be)

Billing - a digital pay slip (a week in advance) so you are aware of the incoming expense

In dept  
spendir

### Maintenance

Mobile application

Usage monitor

### FAQ's

- How long will the rollout of our integrated system take?
- What is the estimated cost of installing several million usage monitors?
- Will my water bills increase when I receive my smart meter?
- Do I have to get a smart meter?



**Key features** the judging panel liked about team Green's presentation:

- Consideration of wider issues, CSOs and perceptions in the media
- The tag line 'only spend what you use'
  - Smart metering save you money
- The suggestion of taking small steps
- Good inclusion of research
  - Including YPP 2020
- FAQs capturing
  - Costs & timeline of rollout
  - Move away from adversarial bills to a water saving message
- Inclusivity – recognition that some households need to use more water through no fault of their own, e.g. health issues

### Presentation summary:

- Engaging and inclusive welcome plan
- Transfer customers to App interface
- Provide customers with data comparisons
- App maintenance
  - Specialised team of software experts
  - Long-term integrate all water data to the App



## The Smart Meter Customer Experience

JEMGAH



### General Notes on Accessibility

- Settings options for accessibility are key
- Intuitive and consistent design is important through all platforms
- Inbuilt help centers within contact points that connect to online chat or phone line
- Information should aim to be accessible using the preferred contact point independently for all
  - Many do not have access to phones/internet
  - Many want the ability to access information without needing the help of another

**Key features** the judging panel liked about team Jemgah's presentation:

- The device name, 'Ripple'
- Research conducted before and after the team's ideas were developed
- Recognition of different types of customers / segmentation
- Long term use of reinforcement/rewards:
  - Competitive aspect comparing progress
  - Charity links and incentives
- Charity partner ad

**Presentation summary:**

- Smart meter data on a device ('Ripple') or an App
- Providing real-time water usage and information on customer bills
- Customer incentives:
  - Online badges
  - Charity based long-term incentives

### Primary research

We did some research on what current customers would like to see and understand about smart water meters.

Some key questions that arose from this were "will the smart water meter":

- Save money?
- Affect internet?
- Help the environment?

You can donate the points you earn from the water that you save each month to WaterAid and change lives by bringing clean water to communities that have none.

Your 30 second shorter shower will help Abeda and her brothers to be able to drink fresh water each day.

Donate your points via the Ripple App.

### What people thought about this plan

'I like the idea of helping people less fortunate than me'

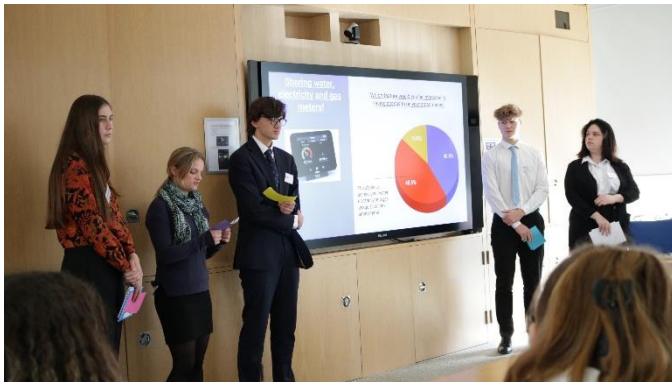
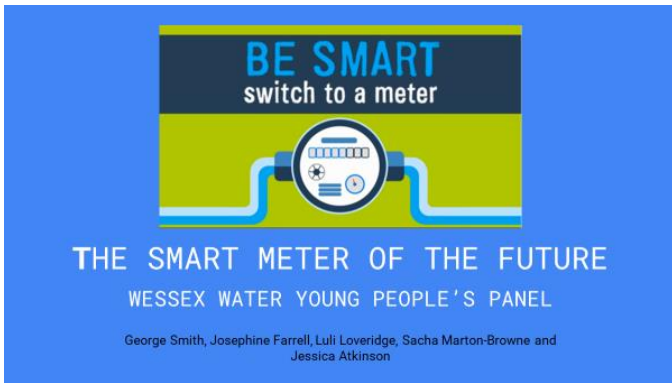
'Saving water and helping the environment and helping other people at the same time is a win-win'

'The thought that some people in the world don't have clean drinking water is awful - I would definitely like to help put this right'

'It would be great if Wessex Water did something like this'



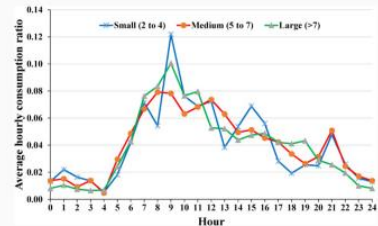
20 people asked:  
18 said it would change their usage of water



### How can we keep our customers engaged?

One key way in which smart meters can be used to promote water savings is by using the data recorded and transmitted by smart meters to provide frequent feedback to consumers about their water usage.

- Having an appealing layout.
- Using mobile apps and in home digital displays creates an easier way of reading measurements and data based off water usage.



### Key features the judging panel liked about team Yellow's presentation:

- The team took a broader, holistic view
- Incorporating gas and electric into the same Smart meter with water is:
  - More useful for the customer
  - Demonstrates working in partnership with customers
- Usage data:
  - Providing water use per appliance
  - Minutes of usage
- Inclusion of research from other countries
- The preparation of a mock-up leaflet

### Presentation summary:

- Benefits of smart meters for customers
- Engaging customers with usage feedback
- Welcoming customers to their smart meter
- Features customers would like:
  - Water, electricity and gas in one meter
  - Availability of an App
  - Ability to adjust App font size
  - Advice on saving water

### Sharing water, electricity and gas meters!

Which feature would you be interested in having access to on your smart meter?

The ability to access your water, electricity and gas usage all on one smart meter.

### What features would you want on your smart meter?

We asked customers what features they would like to see on their smart meters and we got some frequently recurring answers...

**Real time usage**  
Smart meters will already provide this!

**Which utilities use what...**  
To be able to see the water usage of all utilities.

**Advice on how to save water**  
We could have a booklet for this, or on our phone app...

## CUSTOMER JOURNEY





## Wessex Water Young People's Panel

Designing the implementation and creation of a smart water meter



### Initial Research

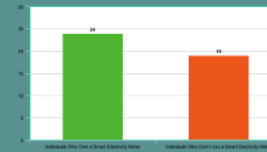
- We wanted to ask people around us about their Electricity Meter usage.
- We asked 30 individuals whether they had a Smart Electricity Meter.

#### Findings:

- Out of 30 people asked,
- 24 owned a smart electricity meter
  - 19 of those 24 did not use them.

Many of those questioned identified problems such as:

- Taking up a space at a plug socket
- Not being able to see the meter
- Not being able to see the meter



### Increase understanding of customers water usage and the consumption process in general.

'To address the second aspect of the brief, we needed to explore how to develop customer understanding and thus engagement'

#### Main Idea:

- The Hub

Create a section within the Water Meter, a swipe left from the main screen, to access 'The Hub', the customer engagement feature of our meter. Customers can access:  
\* real time weather reports

By introducing 'The Hub', we are:

- Engaging younger individuals with a fun aspect of the meter (fun facts, etc.)
- Maintaining engagement with adult customers by giving the meter a purpose other than just seeing level of



### Provide accurate, real-time data.

'To address the third aspect of the brief, we needed to explore how we could provide the main function of a smart meter in a new, engaging way'

#### Main Idea:

- The WW App

Create an app to complement the water meter.

By adding the WW App, we are:

- Maintaining engagement as many have the ability to

In our research we found the highest rated apps:

1. Showed hourly/daily water usage on a graph without the app.

Enabling them to save with their phone in a positive way. Another app we liked was the function of the Meter by giving detailed information about consumption and costs.

#### Research:

We looked at what was in the market at the moment in regard to Water Tracking Apps.

We found mixed results, with apps such as 'South West Water for Android' having an average review of 1.3 / 5. Other apps such as 'Anglian Water' had an average review of 4.3 / 5. We remembered talking to the Communications Lead for WW and learning that WW have great digital facilities to carry this out.

2. To provide extra cost

Another app we liked was the function of the Meter by giving detailed information about consumption and costs.

### Positive Customer Experience

'To address the final aspect of the brief, we needed to explore how to give a positive customer experience'

#### Main Idea:

- New Welcome System

Create a new welcome system, accessible to all ages and situations.

By adding the new Welcome System, we are:

- Mitigating complaints and queries to WW Customer Services.
- Giving Customers solutions for potential tech problems.
- Suggesting new ways to save water

What we will include in our 'Welcome System':

- A compact, leaflet style booklet with simple information about how to use the Meter and its full capabilities.
- An email or text may also be sent with the same information to make sure the customer has information, mitigating complaints and queries to WW Customer Services.
- A page in the welcome booklet, with a simple troubleshooting flowchart.



## Key features the judging panel liked about Team Azul's presentation:

- Describing the meter as a 'friend'
  - That would help, encourage and reward customers
- The broader research the team conducted about other Apps
- The device design:
  - Solar powered device
  - Waterproof
- The goal to keep usage alive in the longer term by maintaining engagement with customers beyond water e.g. weather

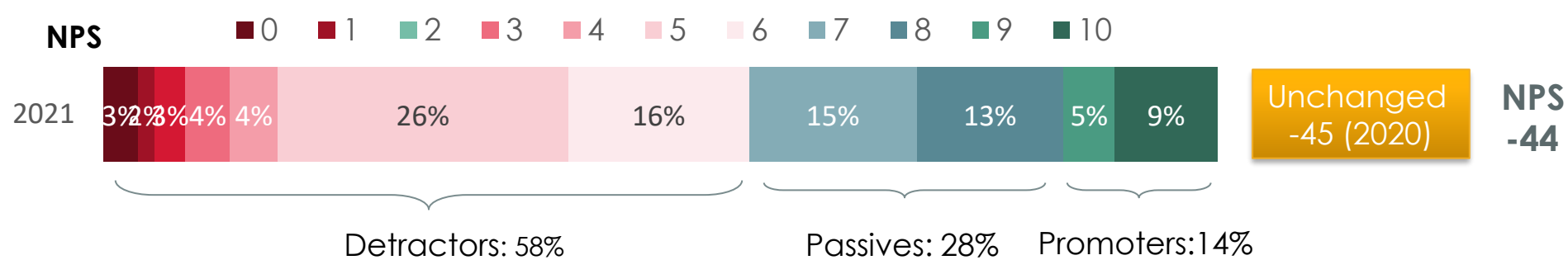
## Presentation summary:

- Researched customers to understand their needs
- Solar powered Smart Meter device to address environmental concerns
- The Hub (in addition to water usage data) to engage all ages of customers
- An App to complement smart meter device
- Provide a welcome system accessible to all

# Interventions, behaviour change & communications

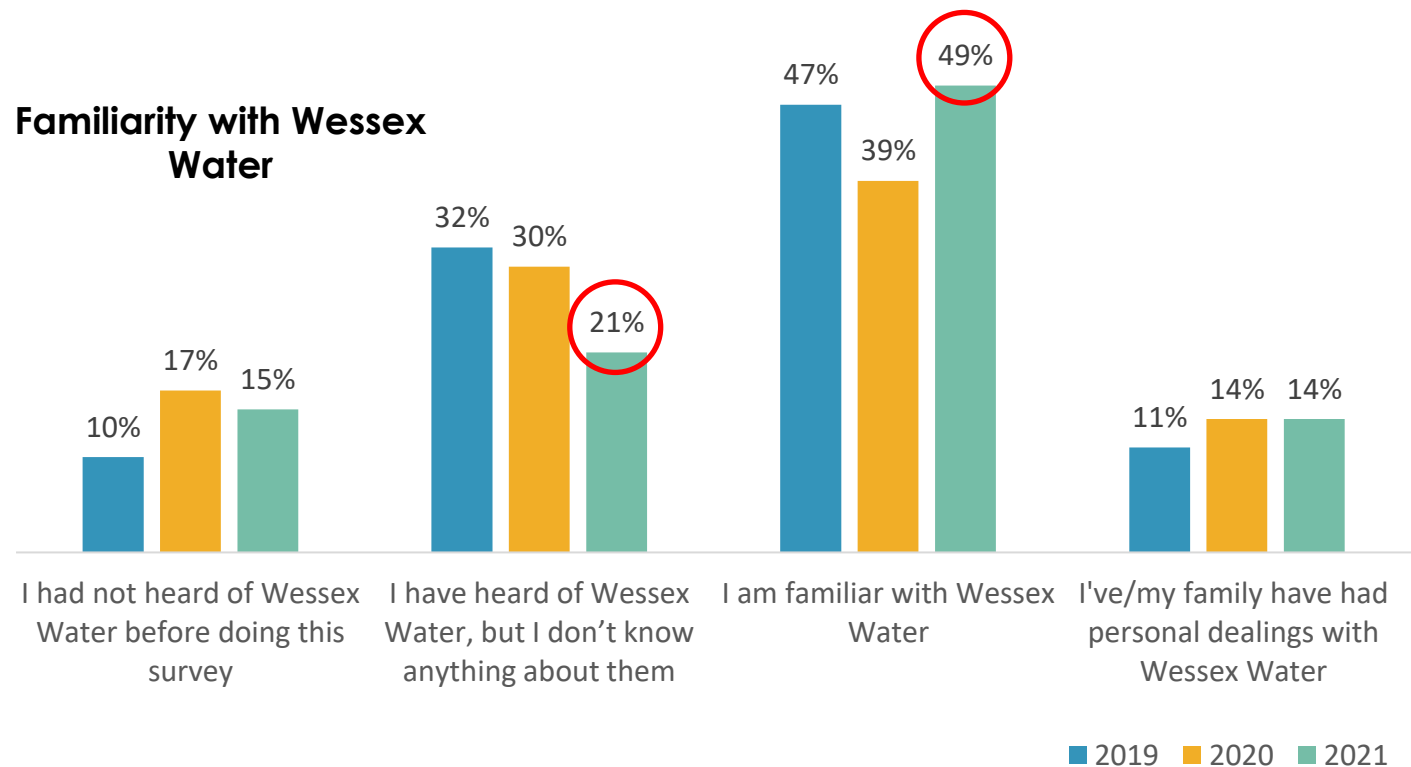


# Future customers are aware of Wessex Water but do not know it well enough to rate it highly



- In our survey, future customers' familiarity was again at 2019 levels, with nearly 1 in 2 being familiar with WW
- NPS is unchanged, with more detractors than promoters, and a score of -44

## Familiarity with Wessex Water



*"I've put 5 since that's mutually good and bad - I have not had an experience with Wessex Water, so I have no reason to praise or dislike."*  
Future customer

# Before participating in YPP, most hadn't thought about what is involved in supplying water



## Day 1 prevailing attitudes towards water generally

- Take water for granted!
- Many believed water system was simpler than it was – were unaware of environmental ties, regulations and complicated infrastructure involved
- Not thought of water in-depth before – it's always just there!
  - Now feel guilty about water wastage, find it hard to comprehend the amount of water they use
  - Also taken aback by how pertinent water is to their lives – issues that affect them all
- Perception that there's a lot of crisis management (e.g. hose pipe bans), they don't hear about crisis prevention

*"Literally the only thing I thought was a water company was a few people that ran it with a few engineers running pipes."*  
Future customer

*"I just think I need a drink and I don't think about much more."*  
Future customer

*"At first it seems really simple like providing water but then it seems really complex."*  
Future customer

*"They deal with so many things that are common things in our lives."*  
Future customer



# Once informed, future customers fully back the idea that we need to be more water conscious



Future customers most energised by the need to communicate about **sewer blockages**

Because they lead to

- Polluted rivers
- Higher bills

Also see the urgency for people to be more **conscious about water consumption**

Linking climate change to

- Water shortages
- Flooding

**High motivation to support behaviour change around specific activities that reflect their existing habits:**



- **Future customers already claim to:** never flush wet wipes, tampons, cotton/wool buds etc down the toilet and never wash up with a running tap.



- **However, they are not comfortable about:** reducing the number of toilet flushes per day as well as taking at least one shower fewer per week and reducing time spent showering.



According to future customers' self reported behaviour, flushing the wrong things down toilets is not something their generation does.

Household/kitchen wipes are the most commonly used among future customers and, although <sup>42</sup> only a few people, baby wipes seem to be the most multi-purpose, having a wide range of uses



### Usage of wipes in the household

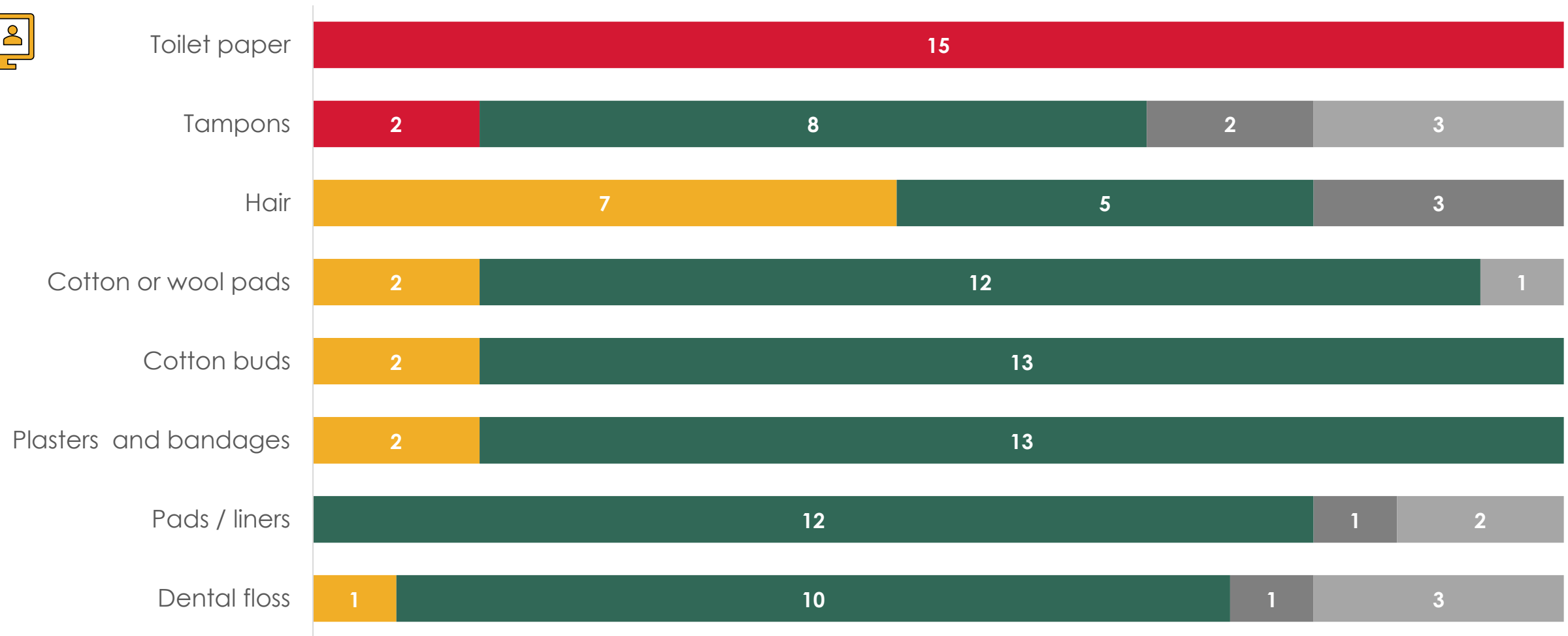
	Face cleaning / make up removal	When going to the toilet	Bathroom cleaning	Kitchen / general household cleaning	Cleaning floors	Do not use
Household / kitchen surface cleaning wipes			1	10		5
Face / Make-up removal wipes	7					8
Floor cleaning wipes			2	3	5	9
Moist toilet wipes		3		1	1	11
Toilet cleaning wipes		2	3	1		11
Baby wipes	1	1	2	2	1	12

### Wipe disposal

	Always flushed	Sometimes flushed, sometimes binned	Always put in the bin
Household / kitchen surface cleaning wipes			10
Face / Make-up removal wipes			7
Floor cleaning wipes			5
Moist toilet wipes	1	2	3
Toilet cleaning wipes		2	3
Baby wipes			2

NB: None of the panellists use toddler training wipes

# The message to bin rather than flush seems to have got through with most but there is opportunity to reinforce the message with some uncertainty about a few items




■ Always flushed down the toilet     
 ■ Sometimes flushed, sometimes put in the bin     
 ■ Never flushed, always put in the bin  
■ Don't Know / Not Sure     
 ■ Not applicable / Don't use this item

# The goody bags, what happened next...




**Gunkpot** – most panellists hadn't used this item but intended to in the future

**Leaflet** – most panellists had used this item and wouldn't use it again

**FreshX** – this was the second most already-used item. It was also the second most likely to be passed on to someone else 

**Hair catcher** – most panellists had either already-used this item, or hadn't yet but intended to in the future. Only two panellists had already used this item and wouldn't do so again

**Face pads** – many panellists had already used this item. Many also had also passed on the item to someone else

**Reusable water bottle** – this was the most already-used item. The majority of panellists that hadn't used it intended to do so in the future 

# Of all the items in the goody bag, the reusable bottle stands out as the item with greatest universal appeal; the leaflet has also reached most but it's not going to be kept



Reusable water bottle



FreshX



Face pads



Hair catcher



Leaflet



Gunk pot



- Have used and will use again
- Not used but intend to in the future
- Not used but passed onto someone else
- Have used and won't use again
- Not used and won't use

## Face pads:

- Panellists that had used the face pads found them **'extremely useful'** and easy to incorporate into their daily lives
- They also reported that previously they **did not know** that reusable face pads existed and that since using them they had **'saved a lot of money'**

## Hair catcher:

- Panellists that had used the hair catcher found it **simple and easy to install** and useful in preventing their drain from getting blocked
- Some panellists were **surprised at the amount of hair** the hair catcher prevented going down the plug.
- Despite this, the hair catcher **did not fit all** panellists baths or showers, which prevented some from using the item

## Leaflet:

- Panellists found the leaflet **informative** in letting them know what shouldn't be flushed down the toilet

## FreshX:

- Panellists that had used the FreshX spray reported that it had helped them to **cut down on wet wipe usage**

## Gunkpot:

- Panellists reported that the Gunkpot encouraged them to **stop throwing fats and oils** down the sink

## Reusable water bottle:

- Despite being the most already used item, panellists had **little to say** about the water bottle other than it being 'really nice'

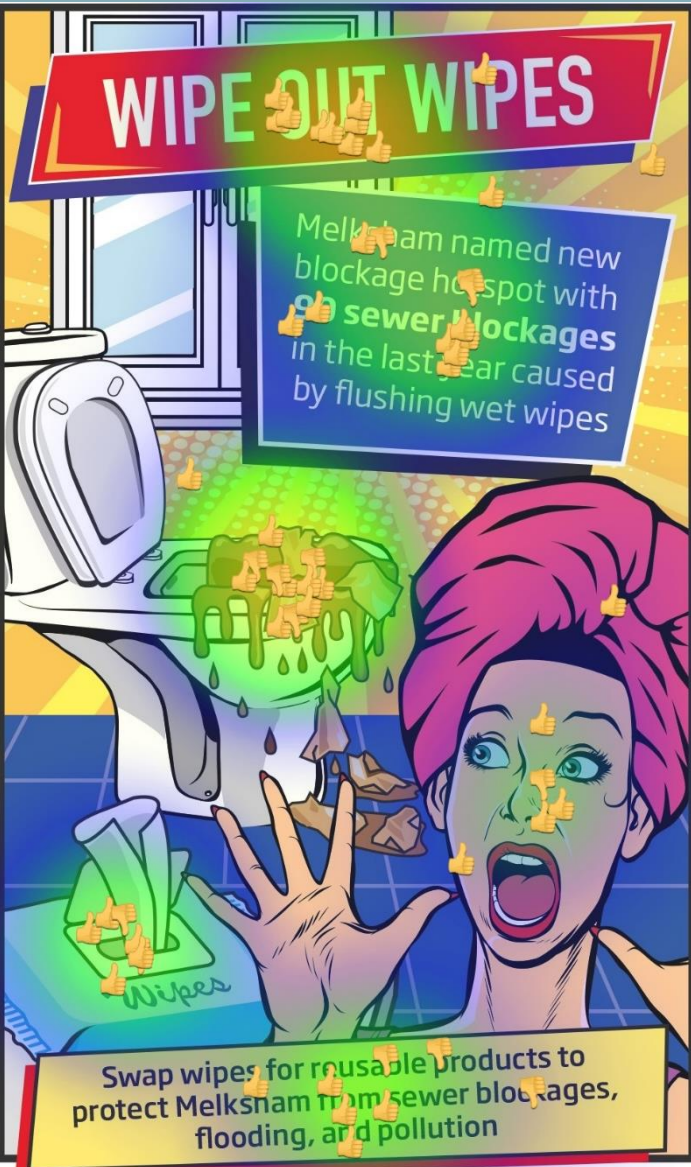
*"All of the items are great and have been very useful in helping me to learn new ways to help the environment."*  
Future customer

*"These items can all be used to prevent things like hair, wipes, fats and oils from entering our sewer systems as the combination of all these items leads to blockages."*  
Future customer

*"Thank you for all the nice stuff!"*  
Future customer



# Response to the pop art post were generally positive, with panellists rating it on average 7.6 out of 10



👍 Panellists reacted **positively** to the 'Wipe Out Wipes' title, commenting that it was 'catchy' and 'easy to remember'.

👍 Similarly, they thought the blue box was **informative**, although some thought the data was unclear with one panellist commenting that they were unsure whether 99 sewer blockages a year is a lot.

👍 The soiled toilet bowl had more **mixed reviews** – some panellists thought that it was unpleasant and 'graphic', although some also conceded that this would persuade the viewer to stop using wipes. Many others concurred with this point – that the image illustrates the negative consequences of flushing wipes.

👍 Most panellists **like the image** of the screaming and shocked woman, commenting that it was 'eye-catching' and 'engaging'.

👍 Panellists reacted **positively to the wet wipes**: they clearly showed what the cause of the issue was.

👍 Some panellists wanted to see **more details** on what reusable products consumers could switch to instead of wipes, although most saw this piece of information as useful and presenting a solution to the issue.

*"I think it is always good to include some statistics, it gives the poster some reality."  
Future customer*

*"[It's] not appealing to the customer, however it does show the negatives to flushing wipes."  
Future customer*

*"[They] could potentially give some ideas on what people could switch their wipes for."  
Future customer*



# Response to the Facebook post were more negative, with respondents rating it on average 6.3 out of 10



Responses to the text at the top of the post were **mixed**. Many thought the text was 'bland', 'boring', 'not very persuasive.' Others described the text as 'informative', 'clear', and 'concise'.



*"Informative but a little boring."  
Future customer*



Many responded **negatively to the image** of the Goodie Bag items. Above all, respondents stated that it was not clear what the items in the image were and more information was needed.

*"It is really difficult to know what the items are with just the photo and no explanation."  
Future customer*



A few recommended taking the pamphlet out of the image as the words were **illegible** and therefore it was 'pointless' and 'distracting' to include it.



Use of the word **'free' was received** positively: it is likely to attract people to the advert and encourage them to order the Goodie Bag.

*"Everybody loves the word 'FREE', I think this does a very good job to attract attention."  
Future customer*

*"What are these items and why should the customer want them?"  
Future customer*



In conclusion



# What have we learned about future customers in 2021?

## Mood of the moment

- While the pandemic has had some positive benefits for society and family life, concerns about the impact on young people's mental health and wellbeing remain much higher than pre-2020
- Specifically, this age cohort call out the negative impact on their education (and their antipathy to online learning)
- We also see increasing pessimism about their long term financial prospects, reflecting a more uncertain economic outlook generally

## Environment & climate

- Future customers are more emphatic in their concern for the environment when compared with general population views – but are similar in seeing micro plastics & air pollution as the biggest issues
- In contrast to the adult population, future customers appear more concerned about loss of habitats and biodiversity – but a little less concerned about river pollution. This might be a stronger messaging idea for younger audiences?
- Echoing other recent research, young people are not clear about which personal actions will have the most impact in tackling climate change. However, unlike adults they are open to adopting some of the higher impact choices (e.g. avoiding one long distance flight and eating a plant based diet). Although like adults, they are reluctant to not having a car. Perhaps they want the same opportunities and experiences as generations before them?

# What have we learned about future customers in 2021?

## River pollution

- Future customers in the Wessex region are (almost) all river users in some form, and almost half have been river swimming in the last year
- Perhaps unsurprisingly therefore, 8 out of 10 think river pollution is a problem – but awareness and understanding of the causes of pollution are not understood
- With the benefit of immersion sessions and briefing on CSOs, future customers believe this should be a major focus for investment
- Though they also think wider society has a role: consumer behaviour around flushing wipes and pouring fats; and town planners/developers in building more sustainably for drainage purposes. (To date, the FOGs message has had little cut through with this customer segment)

## Wessex Water

- Young people are entirely removed from the world of water and waste services: the YPP experience is revelatory for them!
- Once they understand the impacts of climate change on a water company they are more engaged
- The pitch presentations convey future customers' desire for more accessible, friendlier, consumer-centric and ethical communications
- This was reinforced by their preference for the 'pop art' social media example
- They see the YPP initiative conveying a future-thinking company (as do their schools)

*"We were delighted that XXX and XXX were selected to take part and I know they are valuing the experience."*

Deputy Head – Sixth Form

# YPP 2021 received 'best-ever' feedback scores!

		Score	
Excellent		10	7
<b>DAY 2</b>	Ave 9.5	9	9
<b>DAY 1</b>	Ave 9.2	8	3
		7	-
		6	-
		5	-
		4	-
		3	-
		2	-
		1	-
		0	-
Terrible			

- The 6<sup>th</sup> year, the YPP is clearly valued by the panellists – and schools support it
- Very positive feedback: a learning experience on many levels: the world of work and water, collaborating with new people, a team challenge, meeting senior industry figures
- Each year we learn and evolve: implementing more interactive elements and ice breakers worked well
- Very few could suggest improvements this year: some would like more hands-on help between meetings and more engaging control room activity

✓	Interesting and enjoyable	✓	Learnt about Wessex Water
✓	Well organised	✓	Learnt about water usage
✓	Great judges feedback	✓	Interactive and mature

*"It was fun, met lots of nice people, learnt a lot."*  
Future customer

*"Was very informative and I learned a lot about the huge amount that Wessex Water does."*  
Future customer

*"Setting this up to listen to young people and young people's ideas show that they are interested in young people and looking forward."*  
Future customer

*"Clear explanation of the tasks and information. Clean rooms and good refreshments and lunch."*  
Future customer

# Appendix



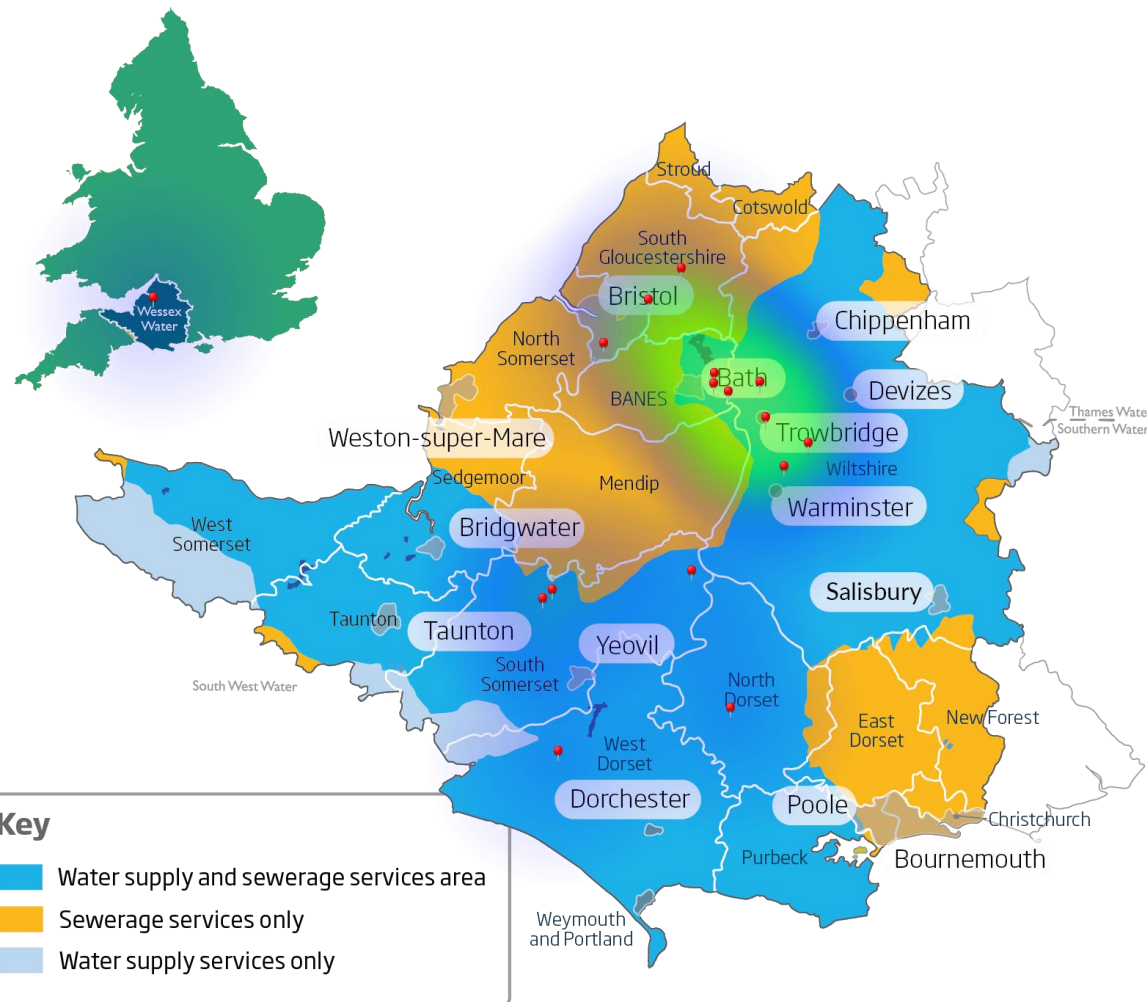
# We had an interesting and dynamic group of students taking part this year



# Most feel they are part of the community where they live as a result of their own participation

Being connected **influenced** by:

- ✓ What people do in the community e.g. taking part in community kitchens or village competitions and shows
- ✓ Length of time lived in a place
- ✓ Identifying with the character and culture of the town/village / feeling proud to be part of it
- ✓ Sense of friendliness amongst neighbours and the wider community
- ✓ Availability of areas to mix and get together, such as parks and shops



People **can feel disconnected**:

- ✗ Some rural areas have few neighbours and lack a community feel
- ✗ Cultural differences make it difficult for people to connect

But, **not everyone wants to be connected** to the local community – they value the peace and quiet of rural living



## DON'T

- ✗ **Overload with information**
- ✗ **Lecture/talk at** people
- ✗ Use **boring, long** tasks
  - ✗ Lose concentration, or switch off during tasks like this
- ✗ Use **breakout rooms**
  - ✗ Experiences in school lessons negatively impacting perceptions

*“Make it not like a lesson – make it different, unique, a little bit different, not a chore – like something you might do in your spare time!”*  
Future customer

## DO

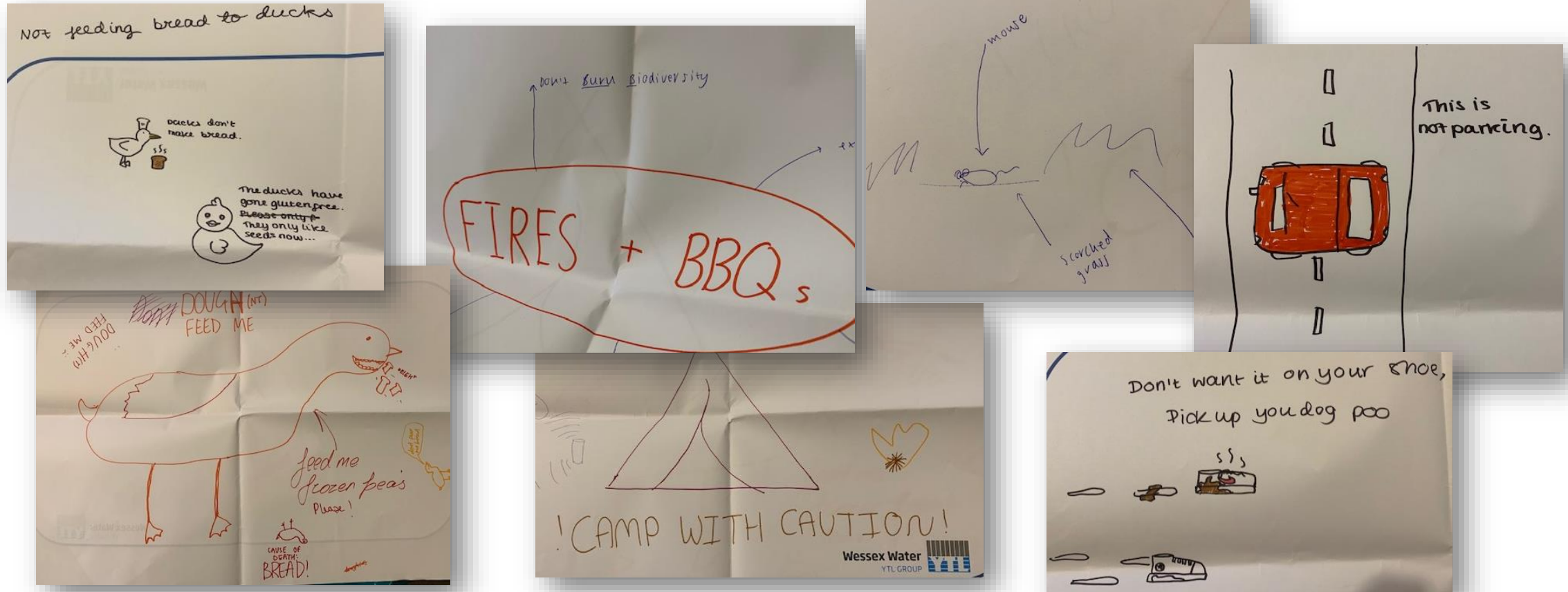
- ✓ Provide **bite-sized** information
- ✓ Keep it **simple**
- ✓ Make it **engaging**
- ✓ **Easy** to access
- ✓ **Interactivity & participation** is key to engagement:
  - ✓ Quizzes
  - ✓ Surveys
- ✓ **Engaging** speakers:
  - ✓ Tone of voice
  - ✓ Positive and passionate → project that they want to be there
- ✓ **Flexibility:**
  - ✓ Enable users to tailor it to themselves, e.g. speed-up or slow-down
  - ✓ Don't insist on cameras on – might be having a bad day

Student views about online education are clearly impacted by their experiences during COVID-19 of online schooling





# Engagement: reservoir information boards



Panellists were given a talk on community engagement around reservoirs – and asked to think about ways to communicate with visitors.

- Teams sketched ideas, often looking for humorous ways to make a serious point (a scorched mouse or a badly parked car)
- They were surprised to learn that bread is not good for ducks ('Doughn't feed me...' or gluten-free ducks)
- Linking the message with a powerful environmental motivation: (Don't burn biodiversity)



**Blue Marble Research Ltd**

[www.bluemarbleresearch.co.uk](http://www.bluemarbleresearch.co.uk)

01761 239329

# Young People's Panel

Final report  
24th November 2020

 victoria ulph	 Laura Weston	 Rowan Wood	 msmith	 Andy Pymmer
 Rosie Graham-Hicks	 Emma Partridge	 Aimee Shaw	 elinor cayzer	 gazzsingh
 Tom Linzell	 Morven	 Kathy Thornton	 Joanna Pawlik	 Amelia Roberts
 Honor Crockett-Ch...	 Lucy Harrington	 maddy sinha	 Michael Blackmore	 Wilbur Hyde
 Isaac Michaels	 Esther	 Lucy Pennell	 Immy Cole	 matt

- **Twenty-two\* Sixth formers from the Wessex Water region attended the 2020 Young People's Panel**
- **Two main meetings took place virtually via Zoom**
- **Plus an interim group discussion with diary pre-task**

\*25 confirmed for day 1



## Profile of candidates

- Gender mix
- Mainly school year 13, some year 12
- From 20 schools across the region



## Pre-task prior to attending

- Fact finding & SWOT for WW
- Reflections/predictions on impact of Covid-19 on their generation



## Day 1: September 16<sup>th</sup> 2020

- Half-day revolving around speed networking with WW senior staff
- 'Warm up' group discussion and briefing on the core task



## Interim group chats: mid-October

- Status check-in
- Discussion of bathroom habits (with shower + bath diary)



## Day 2: November 3<sup>rd</sup> 2020

- Five teams presented back to judging panel
- Group discussion with Blue Marble on social purpose



## School survey

- Online survey distributed to participating schools
- 555 responses from 14 schools

## Schools of this year's panellists

- Abbeyfield School
- Beechen Cliff
- Clevedon School
- Hardenhuish
- King's Bruton
- Matravers
- Monkton Combe Senior School
- Nailsea School Sixth Form
- Parkstone Grammar School
- Queen Elizabeth's Hospital Bristol
- Queen Elizabeth School, Wimborne
- Ralph Allen School
- Sexey's
- Shaftesbury School
- St Augustine Catholic college
- St Brendan's Sixth Form
- The Blue School
- The New Sixth (St Gregory's)
- Weston College
- Winterbourne Academy



Facing your future during a pandemic  
Environmental attitudes  
Bathroom habits & wipe usage



Views of Wessex Water  
Their response to and ideas about (corporate) social purpose for a water company



Develop elements of a campaign to generate positive / minimise negative associations with hard water in the region



## Being 17 in 2020:

- Covid-19 & my future
- The environment
- Water & bathroom habits



Young people's optimism towards their educational goals and social life is similar to those in 2016 (post-referendum); though a greater proportion are now worried about their health & wellbeing

## Panellists' 2020 retrospective

Looking back to January...

- Focussed on school, planning enrichment / preparing for Uni
- Highlights looking forward to big events, holiday breaks, learning to drive & latent awareness of Coronavirus

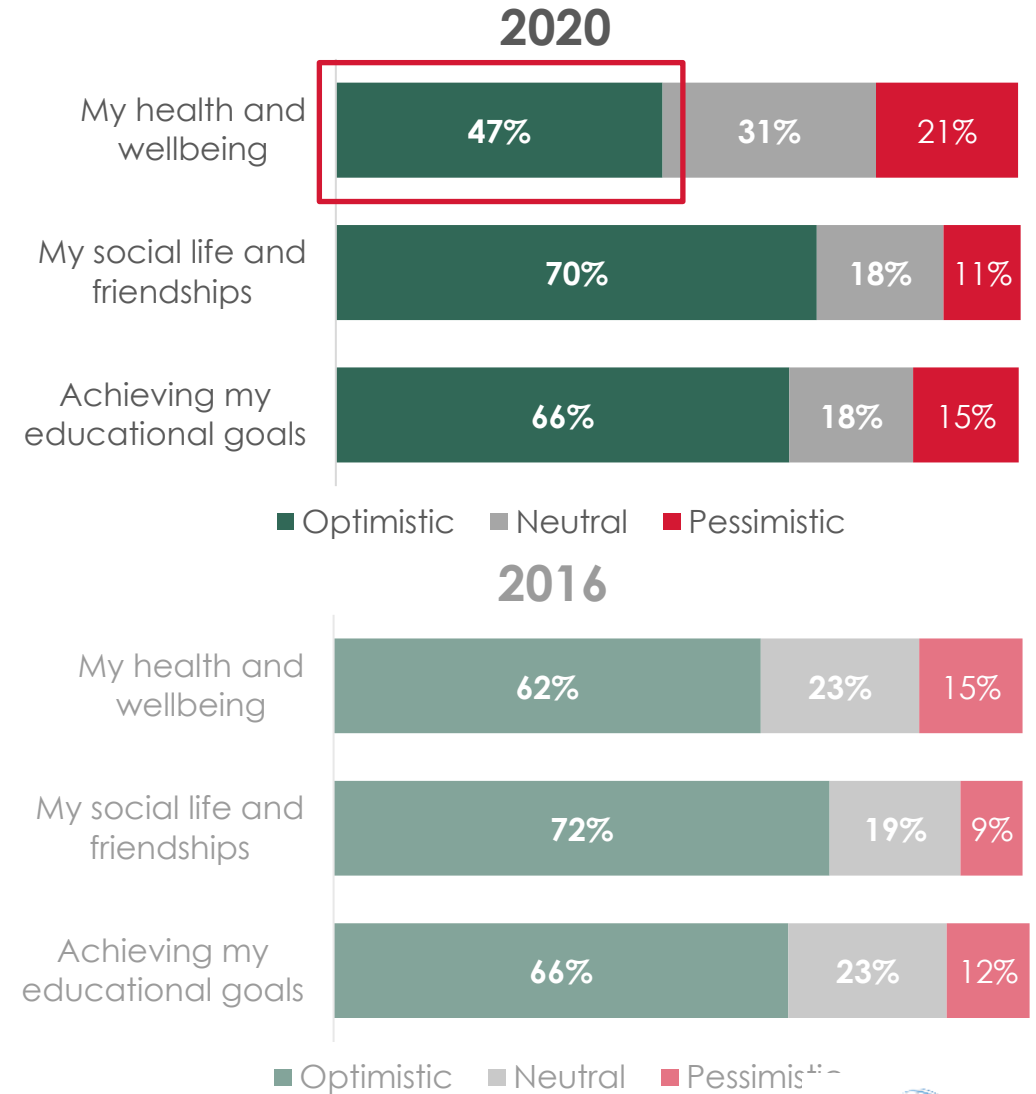
...and then...

### A lot was cancelled

- Y12 mocks, Summer schools, holidays, sports competitions – personal & big events
- Studying remained (the only) focus, though in a different guise

*'Pretty normal year, doing my year 12 exams, trying to get good grades - but then it all hit the fan.'*

*'Thought I would get work experience that would look good on my personal statement - but it got cancelled.'*



Q5: How are you currently feeling about the following issues in relation to you and your school life? Base: 2016 (578) / 2020 (555)



## THEIR WORLD

*'It was a big change. Suddenly I had to police myself to do the work. It took a bit of self-discipline and was a bit of a struggle to start. I'm glad to be back to school because I'm glad to have a routine.'*

*'Academically it's helped me understand that I'm a better learner when I'm on my own, and that I can study things without always relying on teachers. So it's made me more independent. [...] But the downside is that people are less social.'*

*'I was basically dealing with household politics for six months, which was kind of challenging. But it seems like we're past that now.'*

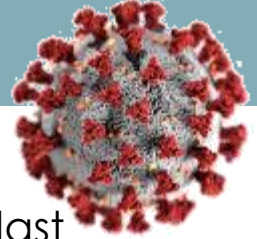
## Highs

- Family time, e.g. extended Easter holidays, seeing more of their working parents
- Online learning + tools effective
- Flexibility; no commuting
- Finding who is a 'true friend'
- Found new hobbies / interest; learnt new skills; developed existing ones
- A lot of sleep
- Self-reflection

## Lows

- Initial personal health concerns
- Social life suffered
- Some struggled with home schooling: focus, workloads, comprehension
- Missing family members
- Family tensions
- Uncertainty about A-levels
- No release / break: boring
- Change of grading a worry (predicted = final) & 'inflated' grades of other years
- Feel compromised for Uni applications





## THEIR WORLD

*'We're already one of the most depressed generations.'*

*'Like right now, it's quite hard to understand people that you haven't met properly.'*



### Loneliness

- Isolating; friendships suffering; summer would have been last with many of their friends before Uni
- Particularly those implicated in caring for / being considerate of vulnerable family members
- Too much social media



### Added school pressures

- Very demanding; every test could determine their final grade



### Generational mental health struggles

- Though some felt a negative impact on their mental health; others thrived, albeit still seeing their generation as a whole impacted



### Reconsidering the future

- If university will be solely online, not the 'real' experience; competing with 2020 intake who deferred and international returns to campus
- Looking for 'stable' jobs

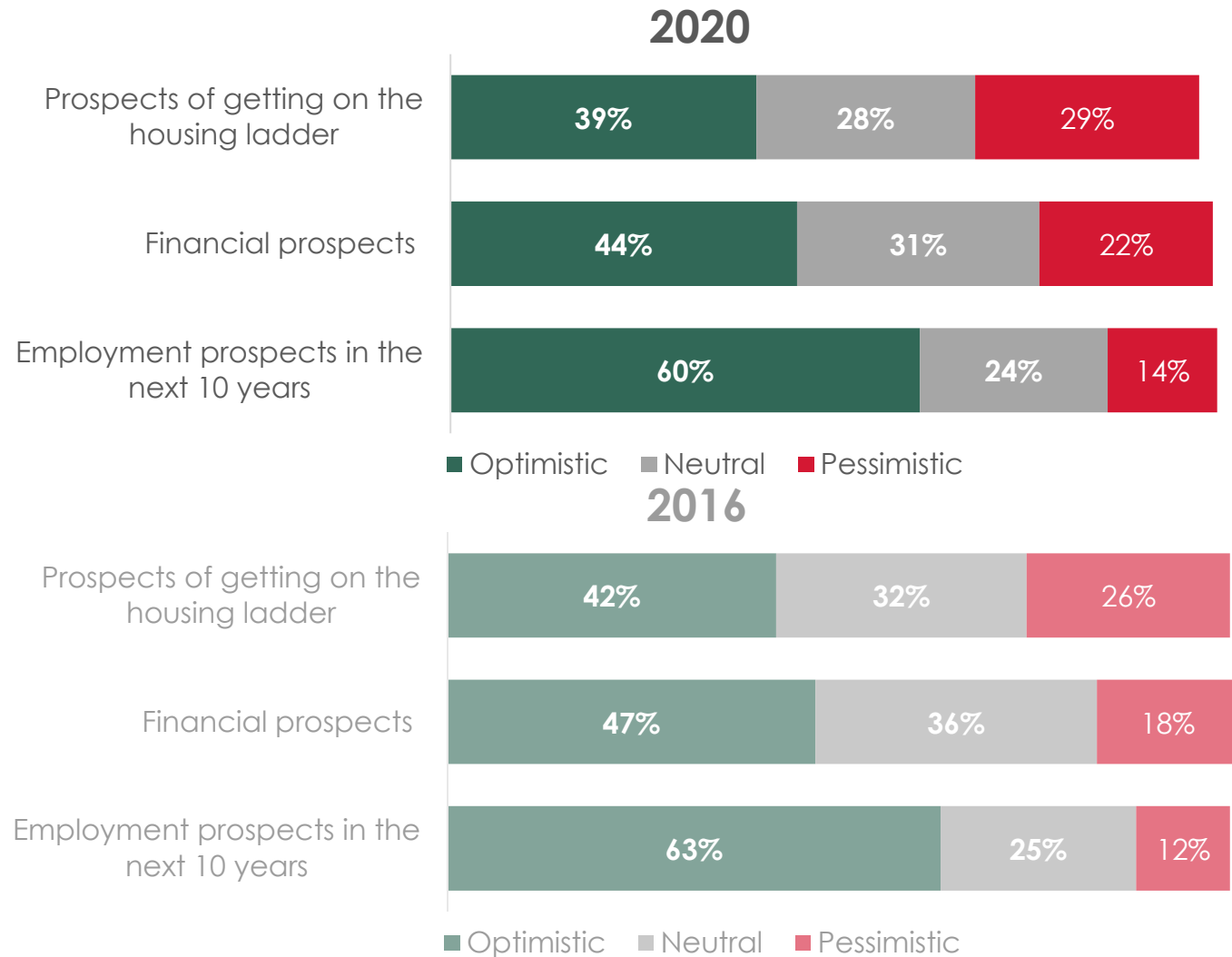


### Long-term effects

- Increased resilience; adapted to remote working
- People / society (finally) adapting to modern technology
- Uncertainty about workplace 'make-up': remote? full-time?
- Harder to 'connect' socially: people becoming awkward



Most perceived effects have been immediate, some have passed since the lifting of the first lockdown, meaning the pandemic hasn't (yet) led to greater long-term worries about the future compared to 2016. Some directional changes in longer term prospects though none significant.



**...in the next 10 years**

Q6: How are you currently feeling about the following issues in relation to life after education? Base: 2016 (578) / 2020 (555)

## THEIR WORLD

### Govt. power

- Seen decision making and rules imposed very quickly
- No parliament debates
- Questions about longer term control over life beyond emergency

### Impact of Covid-19

- Not worried about catching it, but staying away from grandparents in return
- Too much plastic used - hypocrisy of avoiding plastic straws v wearing disposable masks
- When tiers came in some slice of normality in their world (parties, etc)
- School rules make gov general rules pointless; e.g. rule of six v 'bubble' of 300 at school

### Future of travel

- Hesitation to travel v greater curiosity learning about other countries, e.g. through seeing different approaches to handling crisis or more 'relaxed' education systems
- And picturing remote working opportunities

### Future jobs

- Lack of UK innovators: are people too comfortable in jobs?
- Fear not working with / around people (all just from home)
- (New) businesses all becoming online businesses; won't need people?
- End of shops?

### Economy

- Lack of jobs / opportunities
- Across sectors
- Regardless of education

### Environment

- Threat of climate emergency front of mind
- Need to re-use more, not just recycle
- Pushing against fast fashion
- Transport needs to change: EVs / trains need to be more affordable; e.g. more high-speed trains at competitive prices (to planes)
- Bonus: less travel / pollution through wfh
- Worried some consumer action is 'just another trend' – real change needs gov action

**THEIR WORLD**

1

I'm very concerned about my impact on the environment and make considerable effort to reduce it even if it means spending more time, effort and/or money for it.

10

I think about my impact on the environment and try to do things to make a difference whenever I can, as long as I am not spending more time, effort and/or money for it.

3

It's an added bonus if what I'm doing is environmentally friendly but it's not a big issue for me.

1

I don't tend to think about my impact on the environment in my day to day life.

Panellists name a range of individual actions as part of being environmentally conscious, though demand systemic action for effective change as they admits it's difficult & costly to always consider the environment

- Consumer actions**
- Refill water bottles / keep cup
  - Avoid fast fashion / buy from thrift shop
  - Eat less meat
  - Recycle
  - Being an 'eco rep' at school
  - Clear up beaches
  - Walking / cycling / taking bus to school
  - Washing up bowl
  - Refill packs / avoid plastic
  - Buy UK grown produce
  - Climate strikes
  - Flights with carbon offset

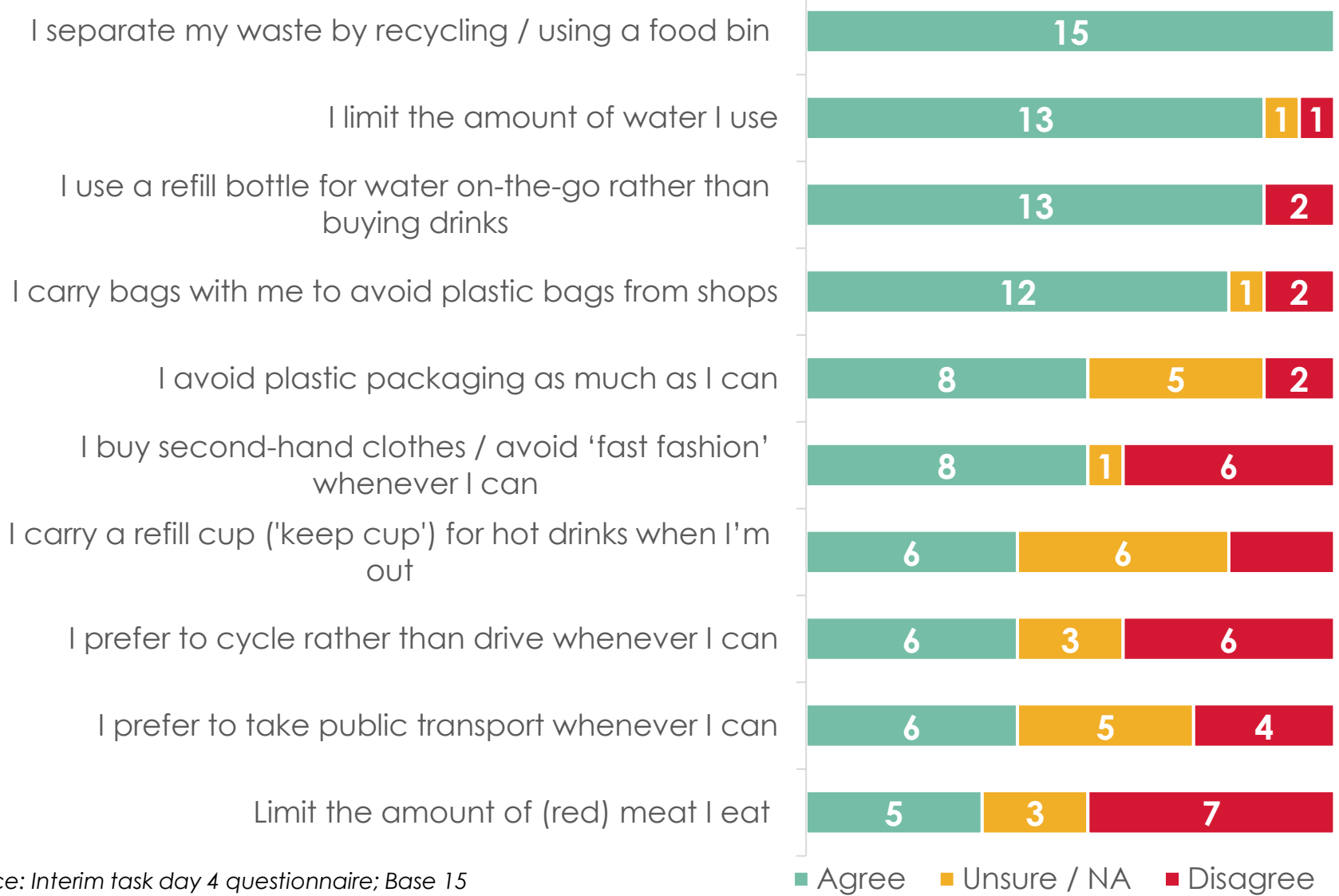
*'Most pollution and waste comes from big corporations. Banning plastic straws - that doesn't actually help anyone. What about the companies that are dumping sewage into the sea? We need less individual change and more systemic change.'*

- Govt./ corporate actions needed**
- Many poor practices are invisible to consumers
  - Majority of emissions from corporations; limit what consumers can do
  - Consumer action not effective enough
  - Govt. needs to make renewables more accessible
  - Industries need to stop producing plastic, etc. to the stop buying

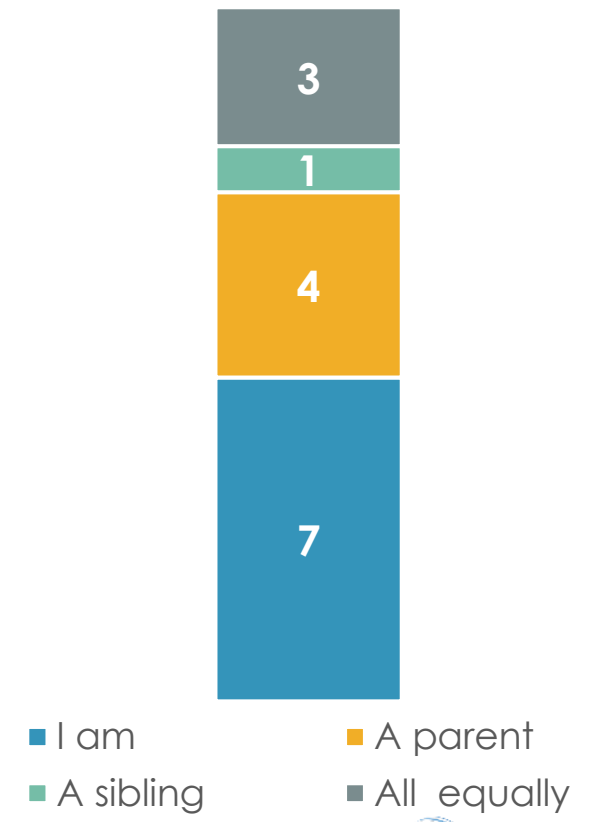
# Environmental focus – their own behaviours



Out of all individual actions the convenient and free, like recycling and claimed water saving alongside carrying a water bottle and bags, are the most common environmental behaviour amongst panellists, who also tend to believe they are the most eco conscious in their homes.



## Who is most environmentally conscious in your HH?



■ I am  
■ A sibling  
■ A parent  
■ All equally



Source: Interim task day 4 questionnaire; Base 15

## THEIR WORLD

Despite recalling some responsible water behaviour, water issues are not front of mind to them



### Water risks

- Very limited knowledge of water risks e.g. shortages are associated with other countries, often dry / landlocked nations
- Some heard of droughts in the South East
- A couple heard about a hose pipe ban



### Water conscious

- Not bill payers, so don't think about usage
- Some don't believe they use more than their parents – and see this as a cliché
- Turning tap off when brushing teeth is the norm
- Dishwashers v bowl washing debate: a parental structure rather than their choice



### Where have they learned it?

- Early childhood:
  - School (water cycle)
  - CBeebies song
  - Parents
  - Children's books

THEIR WORLD

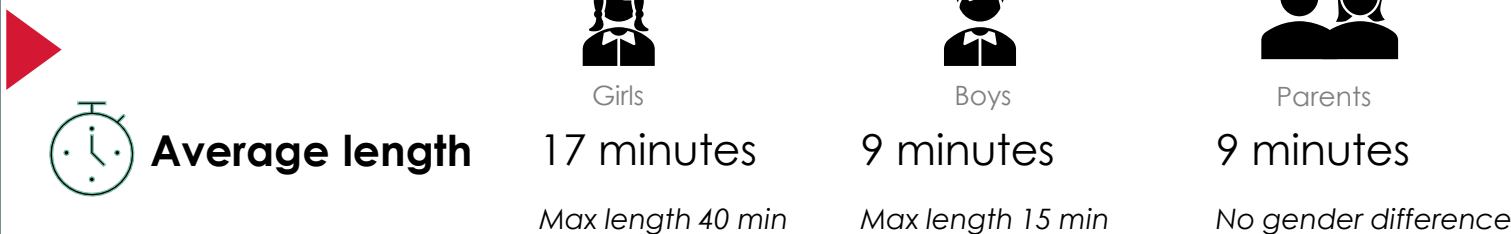
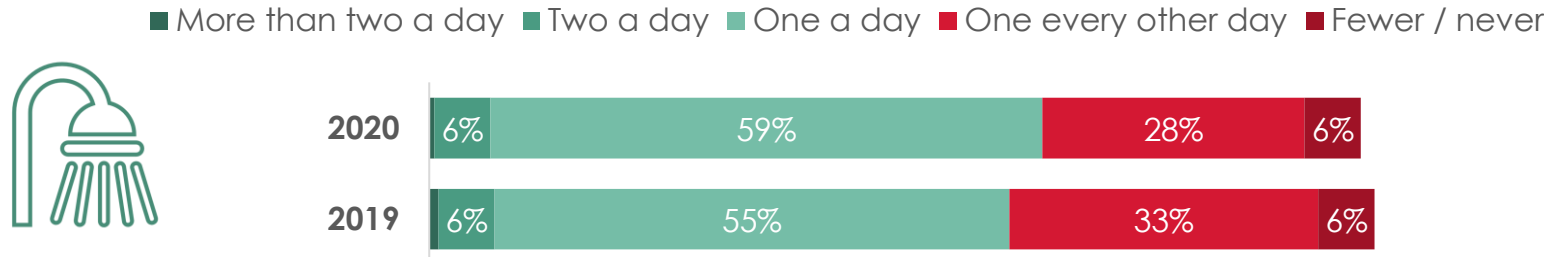


This year we piloted a shower + bathing household diary in between events to find out more about bathroom routines

Panellists did not think this was very long

Avg. 12 mins

No significant changes year-on-year in number of baths or showers taken; bar a directional change in shower frequency from every other day to daily



Q8: Now thinking about the way you use water, over the last few weeks, on an average day how many showers have you taken?  
 Q9: Thinking back over the last few weeks, on an average day how many baths have you taken? Base: All respondents (555)

THEIR  
WORLD

(Why) teenagers shower more (often)?

...and specifically?



- Very social and active lives: conscious of appearance (inc. odour); sweat more
- Peer pressure / expectations
- Hormones
- 'Self-care'= bathing rituals (girls)



Girls

- Long hair
- Hair conditioning
- Shaving legs
- Beauty routines, e.g. face masks, scrubs



Boys

- More functional showers
- Few even have very quick cold showers, e.g. to wake up or feel warm when getting out



Both

- For pleasure / comfort
- Low water pressure, i.e. time spent not representative of water used
- Balance a cold bathroom
- *Short showers*: limited hot water supply

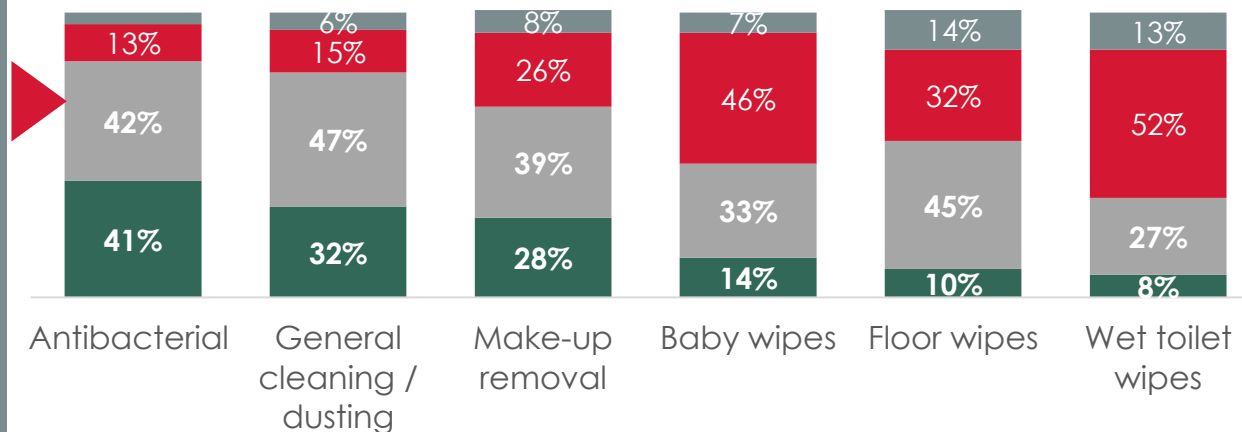


In the midst of a pandemic the majority of households have antibacterial wipes; very few teenagers use wet toilet wipes & would dispose of all other wipes in a bin

Though many know not to flush any wipes; misleading labelling is a concern and panellists feel WW can play a role in influencing industries

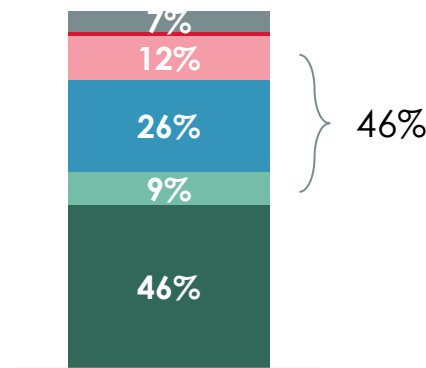
Which of the following types of wipes do you usually have in your house and which of these do you use personally?

■ Use ■ Have at home ■ Don't have at home ■ Unsure



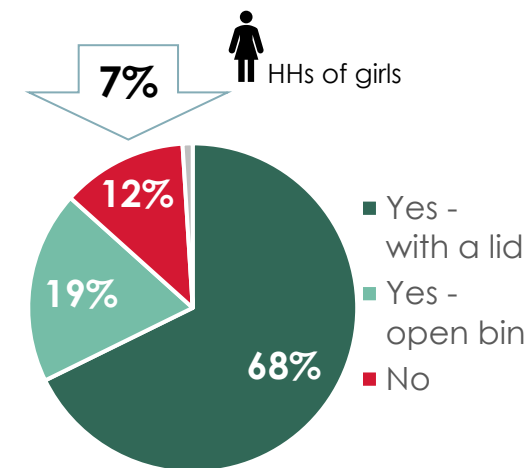
■ Unsure / don't know

- Any wipes as long as it goes down the pipe
- Degradable & flushable/easy to flush/fine to flush
- Only those labelled flushable, easy-to flush, fine to flush
- Only degradable wipes
- No wipes should be flushed



Which wipes, if any, can be flushed?

The vast majority have a bin in their bathroom



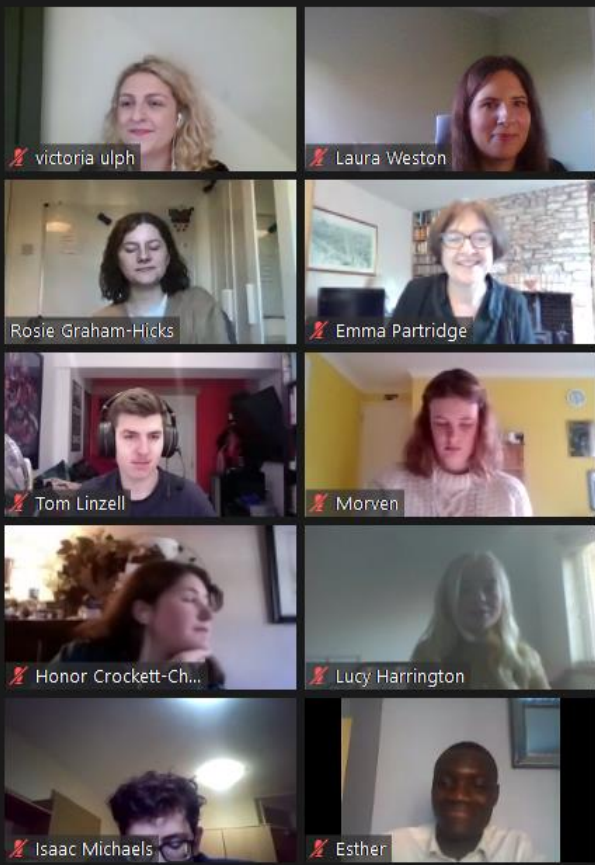
Qualitatively those who need a bin have one; concept of a yukky bin is alien to them. How is it different to a bin?

Q10: Does your household have a bin in the bathroom(s)?

Q11: Which of the following types of wipes do you usually have in your house and which of these do you use personally?

Regardless of wipe use, which if any, of the following types can be flushed down the toilet?

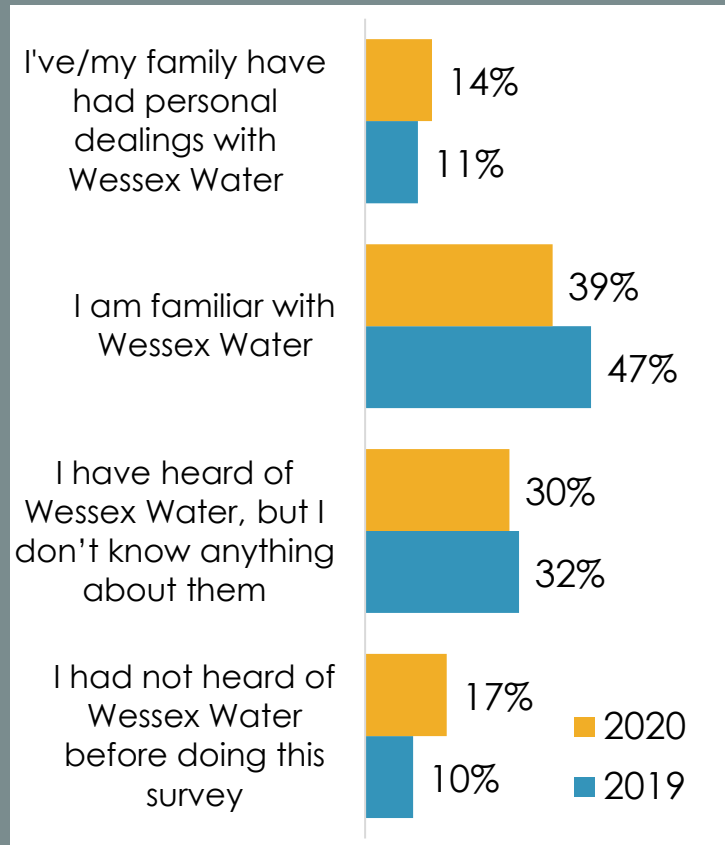
Base: All respondents (555)



What do you know about WW?  
Do companies like Wessex Water need a social purpose?  
How would this manifest to future customers & wider society?

# Wessex Water knowledge

Though panellists & other young people have limited knowledge of Wessex Water, their overall impression is fairly positive



## Overall very limited knowledge of Wessex Water

- Provide water and sewerage services

## Some (of their parents) have had personal interaction

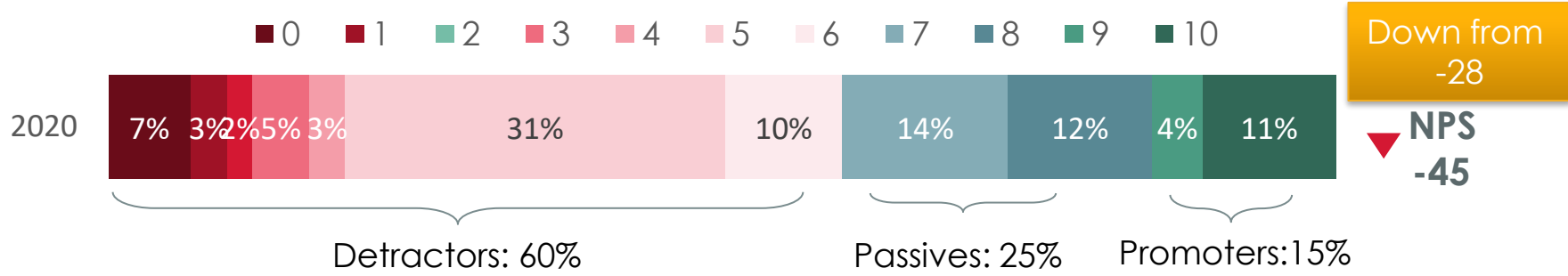
- Feedback tends to be positive: nice team / cooperative
- One had work experience in Saltford labs
- School close to WW HQ
- Good customer service

## Recognise busses & vans

- Often where new developments pop up
- Notice maintenance work

## Better than other water companies?

- Latent awareness of other water cos dumping untreated sewerage into rivers, not aware of WW doing so
- Look after the environment

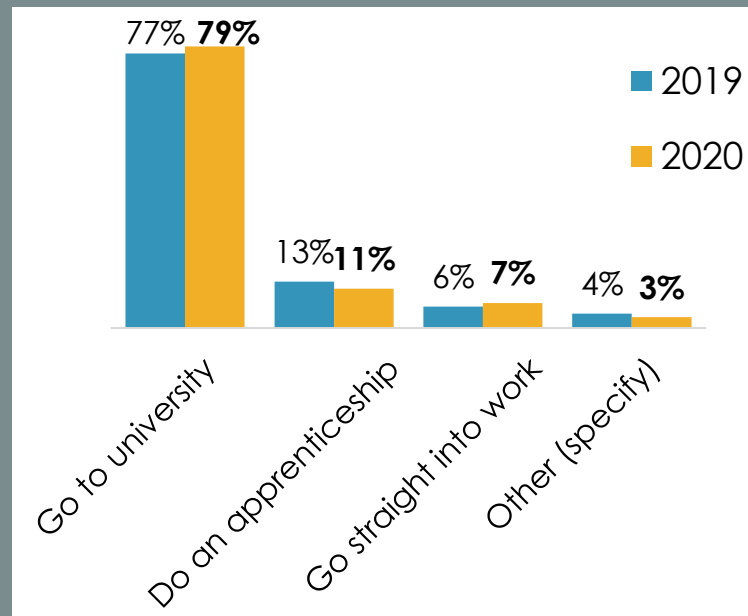


Q15: Which of the following reflect your awareness of Wessex Water?  
 Q16: How likely are you to describe Wessex Water as a good company to someone you know?  
 Base: All respondents (555)

# Their expectations from a future employer

THEIR WORLD

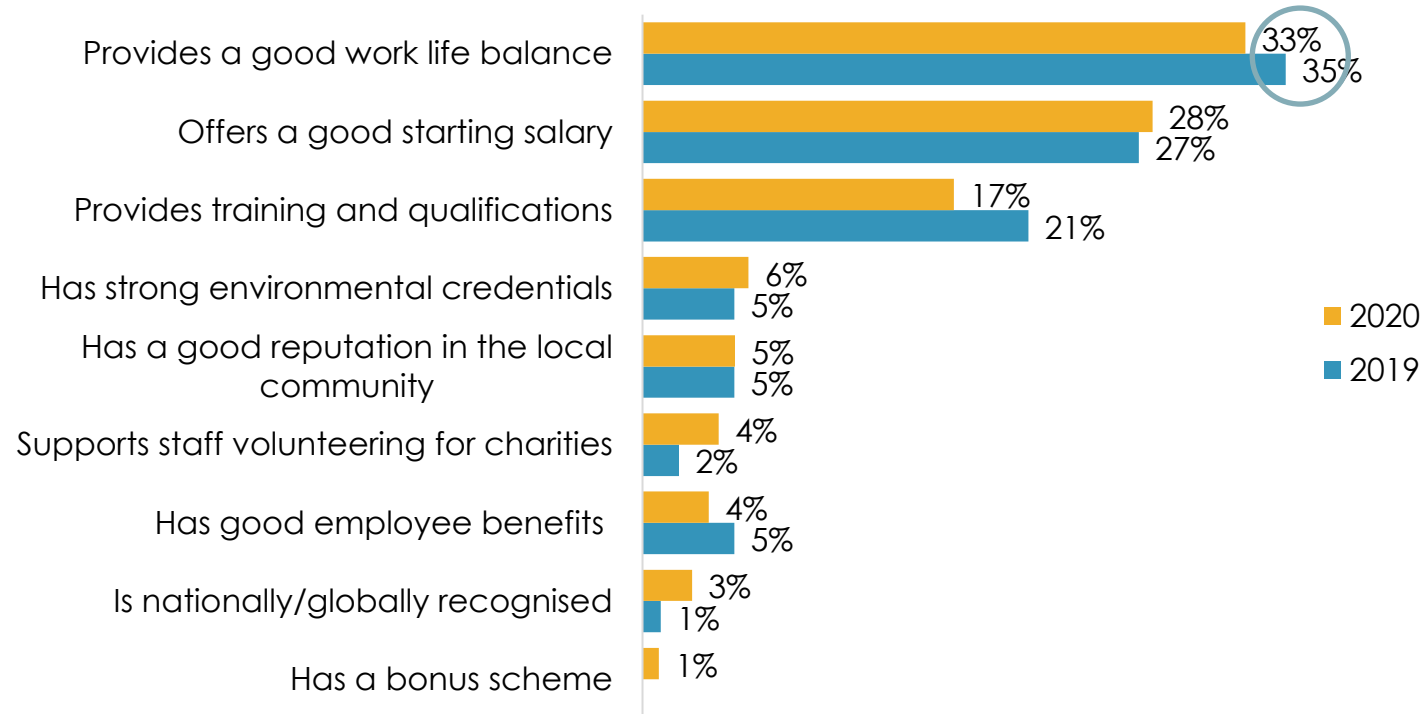
The majority of sixth formers are planning on going to university – consistent with 2019



A good work-life balance remains most important to this generation followed by salary level, whilst training and qualifications is waning as a top consideration

## An employer that....

### Most important year on year



Q4: What are you most likely to do after year 13 or after a gap year?  
 Q7: When thinking about your future work life, which of the statements below is the **most important** when considering an employer? – Most important  
 Base: All respondents (555)

# Their expectations from a future employer

## THEIR WORLD

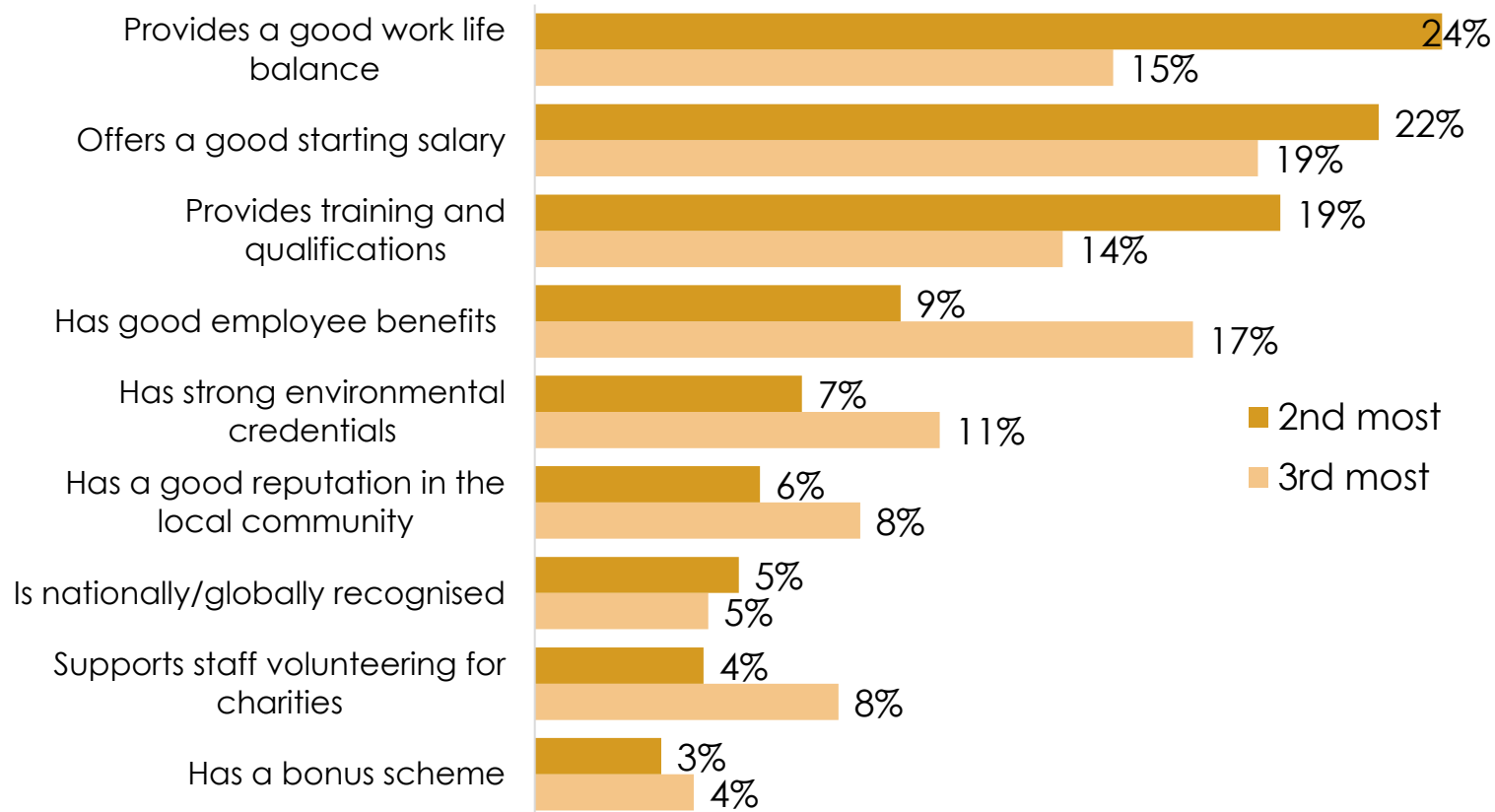
However, training is a strong secondary factor



Social value positioning, like environmental creds, charity initiatives and local reputation are further down the list when choosing an employer

## An employer that....

2nd / 3<sup>rd</sup> most important 2020



Q7: When thinking about your future work life, which of the statements below is the most important when considering an employer? – 2<sup>nd</sup> / 3<sup>rd</sup> important

Base: All respondents (555)

# Social value of (water) companies



Protecting the environment (single cause)



Cleaning beaches



Slow, sustainable fashion



Free meals



Against animal testing



Employ the elderly



Staff shareholders



Local, fair wages, ethical



Sustainable clothing?



Sustainable packaging?  
Free meals  
Community football

## Social value – general

- Terminology needs explaining; once understood difficult to distinguish from CSR → 'genuine' CSR?
- Though big companies come to mind initially, as does cynicism around their motives; more interested in profit than doing good; small businesses and NGOs appear more credible in this space
- Commonly associated with ONE core activity, rather than a range

**Tension between: Social purpose should be linked/relevant to core business vs a commitment to a separate/non connected cause**

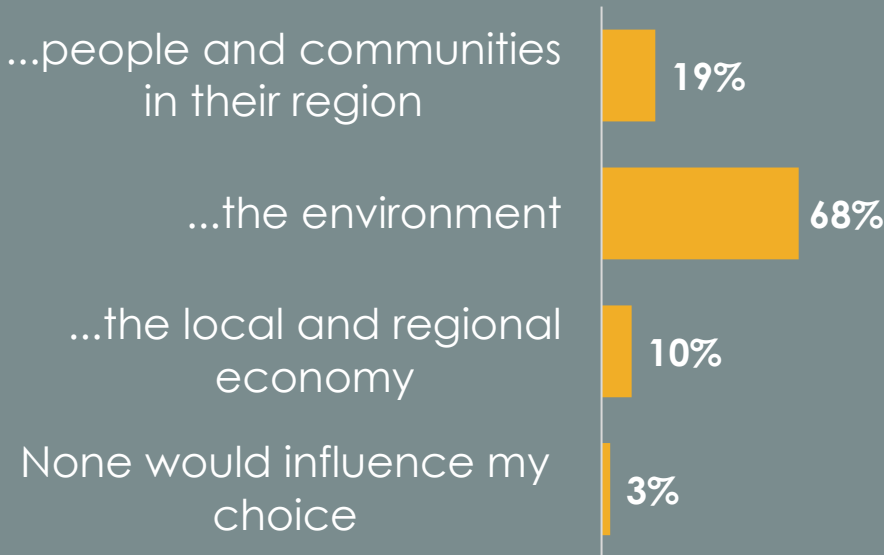
## What could a water company do?

- Operate environmentally friendly practices; reduce waste, carbon neutral
- Talk about the initiatives it is doing
- Big (local) events, fayres with refill points, water bottles + clean up after
- Sponsor fun runs (inc. support athletes)
- Collaborate with (local) charities, e.g. environmental ones
- Community initiatives, e.g. cleaning parks, beaches
- Conservation work, e.g. planting trees
- (More) 'poo' busses
- Invest in local businesses
- Apprentice schemes
- Community engagement e.g. YPP
- Work with farmers
- Industry activism against 'flushable' labelling
- Fighting for a cause outside of core business, e.g. social justice, diversity

# Water company expectations & social value



## A water company that supports...



Sixth formers across the region are most impressed with water companies supporting the environment, yet qualitatively environmental actions are further scrutinised and local initiatives appear more impactful to them

### Positive: Added (social) value

Playing a full part in the **communities** we serve e.g. offering grants to support community and environmental initiatives (such as a rainwater harvesting system at Bath City Farm) and providing staff volunteers for local projects e.g. providing hot meals to vulnerable people during Covid lockdown in 2020 and our Covid Relief Fund for organisations dealing with the pandemic.

Demonstrates not just interested in making money; going out of their way; could go further by supporting local businesses who suffered due to the pandemic

Promoting **social mobility** by growing skills and providing opportunities in a workforce through apprenticeships and educational programmes.

Going the extra mile; good pay and training valuable; should also result in job at the end

Supporting and driving **economic growth** across our region, by being a large local employer; supporting local suppliers & businesses.

Good, particularly now; important to provide opportunities to local workers + businesses; want more evidence of this and how many are NEW opportunities v longstanding employees

Q13: Imagine you could choose from three different water companies, all exactly the same other than the way they invest their profits to benefit society. Which would be the most appealing to you as a future customer?  
Base: All respondents (555)

# Water company expectations & social value

## It depends

Leading the improvement of the **natural environment** of our region through our work to adapt to and mitigate climate change, reduce pollution, conserve water, promote sustainable agriculture and eliminate single use plastic.

Priority, but should be default. Go further with conservation work and provide evidence

Promoting **culture, inclusion, and diversity** so that our business is a place where everyone enjoys working and feels they are treated fairly and given every opportunity to further their career.

Impactful and easy to implement; but also expected and reflects basic HR law; also company benefits from this. To add value it needs to go further and celebrate and promote diversity and inclusion

Becoming **carbon neutral by 2030** by a continuation of activities including energy efficiency practices and investment in renewable energy. Where emissions are unavoidable, seeking to offset through local sequestration projects or buying offsets.

Should be doing this, but target is more ambitious than legislation and demonstrates more commitment; difficult to measure / evidence in advance

## BAU

Supporting the healthy functioning of society and the environment with **essential water services** today and into the future.

Absolute key function of a water company

Ensuring everyone can benefit from and afford our services, with a range of **lower rate tariffs and discounts for people on low incomes** and partnership working with debt advice sector.

Recognise don't have to, but should to as a moral company – generally service must be affordable (basic human need)

Making responsible investments now in existing pipework and treatment works to **upgrade infrastructure** and prepare for the additional challenges of climate change and population growth.

Any good company needs to prepare for future, core to their survival

Requires evidence of going 'above and beyond' legislation

Expected as core business of a 'decent' water company

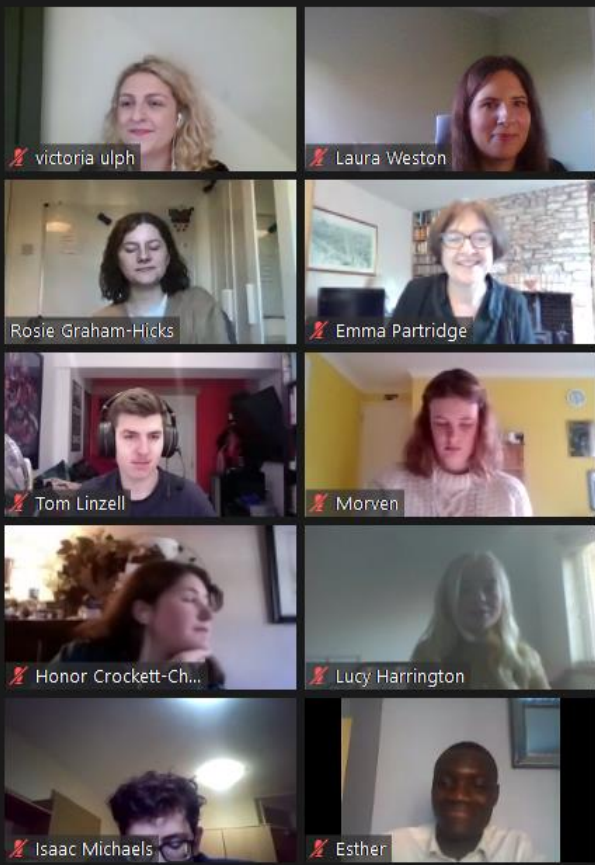




Move with the times: what once was social purpose will soon become BAU (esp. environmentally)

Claims need evidence; preferably in form of actions not promises

Greater opportunity to be credible due to regulated status; can't make false claims



# CORE TASK

Develop elements of a campaign to generate positive / minimise negative associations with hard water in the region

# Core task: make hard water attractive

## CORE TASK

Following speed networking with Wessex Water senior staff, group discussions and a full briefing presentation on the business problem behind the core task, 5 teams prepared solutions and presented to the judging panel.

Find out more about the region and the hard water issue to develop insights on which to build a campaign

- Where does our water come from?
- What does this region mean to people?
- **How does (effective) advertising commonly integrate heritage / provenance i.e. the place/region makes the product special?**

Design two outputs that could feature in a Wessex Water campaign

1. Wessex Water magazine article; 700-800 words; audience aged 35 and over
2. Short form social media video, max. 60 secs for (future) customers under 35

### Team New Wave (1)

Task

1

Find out more about the region and the hard water issue to inform your campaign

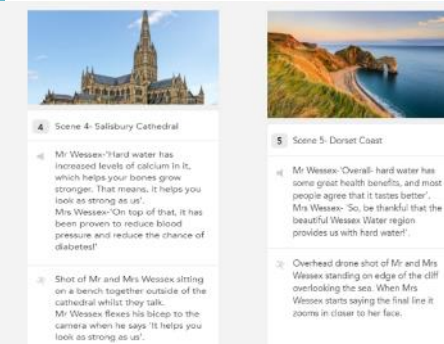
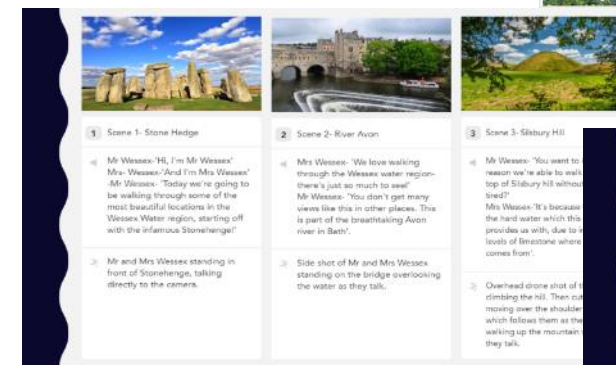
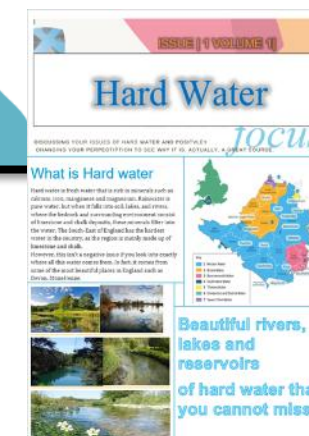
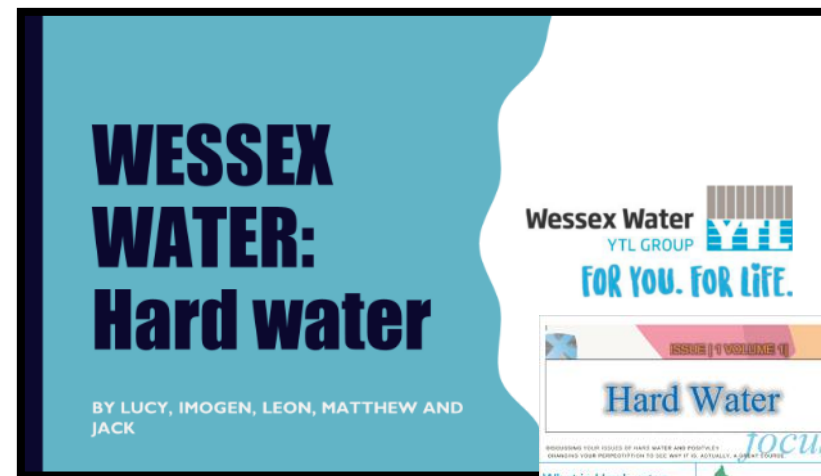
- Understood the benefits and challenges of hard water
- Researched Welsh Water & Scottish Water campaigns
- Found key Wessex areas where water is sourced from, understanding it is mainly groundwater, too

Task

2

Design two outputs that could feature in a Wessex Water campaign

- Identified iconic areas of beauty near the Wessex Water sources to feature in the campaign (e.g. Stonehenge, Silbury Hill, Dorset coast)
- Video: Illustrated storyboard highlighting the health benefits of hard water using Mr & Mrs Wessex with tongue-in-cheek humour (~hard water makes you 'hard')
- Article: Visual and eye catching highlighting the (health) benefits of hard water and imagery of the beautiful area



# Presentation highlights

## Team Coleslaw (2)

Task 1

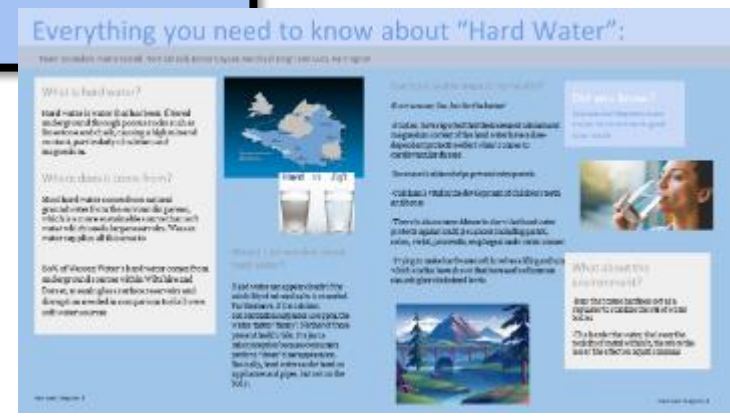
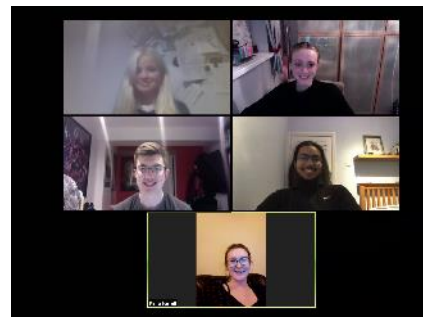
Find out more about the region and the hard water issue to inform your campaign

- Understood the benefits and challenges of hard water including the advantages of boreholes over reservoirs
- Found the key areas of Wessex (hard) Water origins
- Identified physical, (potential) mental health and environmental benefits of hard water

Task 2

Design two outputs that could feature in a Wessex Water campaign

- Approached different audiences with different positive messaging about hard water; younger audience: focus on environment and mental health (with caveats) & health for older audience
- Video: Cheesy, quirky TikTok video appropriate for younger age group; highlighted changes to execution given a budget
- Article: Factual piece with a focus on health, specifically highlighting calcium(bone health) and magnesium
- Critically evaluated own media campaign



# Presentation highlights

## Team 3

Task

1

Find out more about the region and the hard water issue to inform your campaign

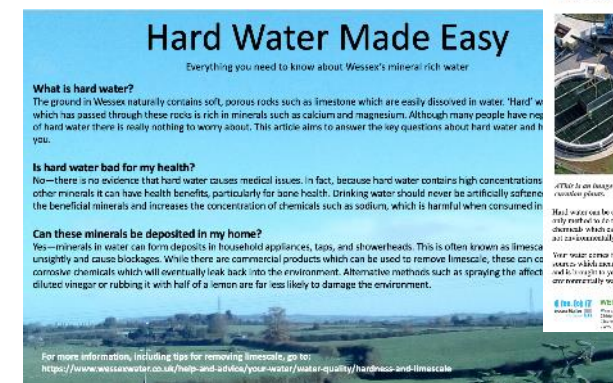
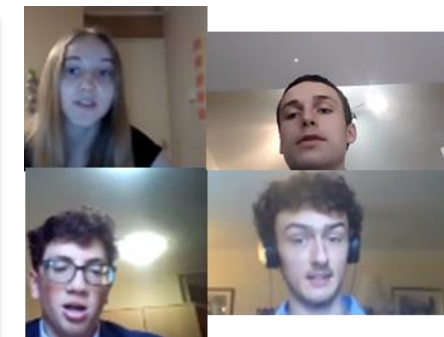
- Researched facts of hard water and familiarised with common complaints from customers
- Identified wider issue of information availability online, e.g. when searching for solutions in Google customers would mainly find commercial softeners
- Identified transparent communication is key for customer satisfaction

Task

2

Design two outputs that could feature in a Wessex Water campaign

- Focus on redressing common concerns; highlighting some environmental benefits and health benefits of hard water coupled with advising against commercial softeners or solvents to cure build-up; local area a backdrop
- Video: Description of a video narrated by a young person explaining safety on hard water with countryside backdrop, closing with a family discussion about hard water
- Article: Factual piece addressing common concerns about hard water and offering sustainable ways to solve build up; supplemented by a leaflet



Hard water in the Wessex area

What is hard water

- There are people in our area who don't like the taste of hard water. However, the minerals in our water are good for you.
- In fact, hard water can be beneficial to your health.
- You can make your water softer by using a water softener. However, this can be expensive.



- We wanted to execute our video by using our main idea throughout of connecting customers perception of hard water positively to their love of the region.
- Our techniques used are aimed to attract the younger market.
- We devised a storyboard:
  1. Video starts with title page and image of a bright countryside which is familiar to customers. This creates feelings of home and happiness.
  2. Switches to an interview from a young person talking about the measures Wessex goes to to make sure the water is safe to drink and why hardness doesn't cause any health risks (brief explanation on what hardness is). Being a younger person, the audience will resonate more with their ideas and opinions.
  3. Then switches again to some images of the beautiful countryside the water comes from while interviewee continues to speak on area water comes from.
  4. Flick to a happy family talking persuasively about hard water and educating the viewer on its benefits. Talk about how they used to have a negative view of hard water but how this all changed and how little it affects their lives.
  5. Finally a slide that says for more information visit our website

# Presentation highlights

## Voice of the Young (4)

Task

1

Find out more about the region and the hard water issue to inform your campaign

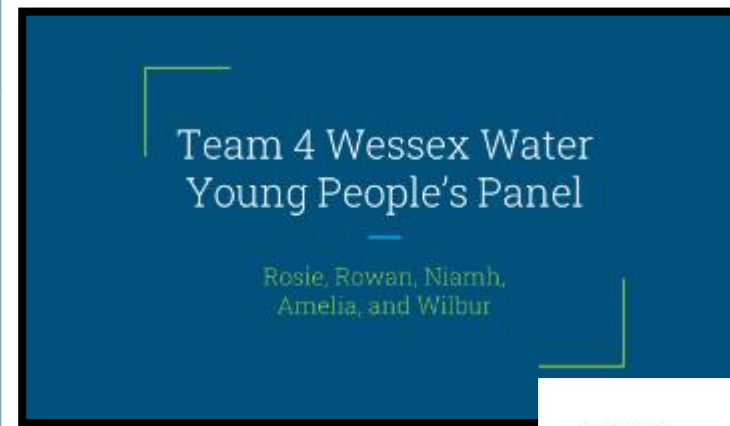
- Holistic research of Wessex Water resources on hard water, Wessex history, groundwater extraction and successful campaigns
- Reviewed past Wessex Water magazine articles

Task

2

Design two outputs that could feature in a Wessex Water campaign

- Decided to incorporate an informative approach in hard water facts, background and remedies with a different tone to the two audiences; accessible and less formal for younger audiences; serious but friendly for older readers
- Video: Reporter style informative video covering facts and remedies for hard water set in the countryside
- Article: Immersion into Wessex with a brief history of the area, highlighting reservoirs for a day out continuing with normalising hard water, recapping some facts and solutions



### VOICE OF THE YOUNG



#### HARD WATER



Here in the Wessex region, we're all proud of our beautiful surroundings, with scenic reservoirs and stunning rivers flowing through our countryside. But due to these features of our landscape, our water is unfortunately hard compared to other areas. You may have come across water associated with this hard water... and yes, I am talking about limescale... but it's not all bad, and here's why.

The Wessex region has a rich history, with the Stone of Wessex, celebrating the first Coronation ceremony as we know them today to become King of the English in 1066 AD. The area is full of beauty spots that are perfect for days out, enjoying nature through a dog walk with the family, or taking a more peaceful day to one of the many serene reservoirs that Wessex has to offer, such as the Clonville Reservoir, shown in the accompanying photos. This accessibility makes the area perfect for bike week during the Covid pandemic, where accessible locations are often easier hard to come by whilst staying safe.



Did you know that 60% of people in the UK live in hard water areas? This benefit is largely down to the rich mineral content and scaling of the 'Wessex' area, supported by the groundwater systems that are brought to the surface through the water supply, and making use of reservoirs have a chance to drink. However, it is the same groundwater systems that can be self-sustainable that falls to the floor into harder water after it flows through rocks rich in calcium carbonate. It is this calcium carbonate that dissolves into our water and makes it hard. This comes with a slight catch as it's often thought that harder water is worse water, but in fact this isn't the case.

Actually, there are some issues with harder water when it comes to everyday use. Patches of calcium carbonate can collect in appliances such as kettles and hot water boilers, as well as pipework, leaving a sticky deposit known as limescale. Whilst limescale isn't harmful when it comes to health risks associated with them, they can cause tea to taste slightly different and have limescale deposits in appliances.

However, it's not all bad news, hard water also has many benefits to us too! Due to the higher concentration of calcium carbonate in our water, we have a larger intake of essential minerals like calcium and magnesium in our diet. This leads to many benefits such as stronger teeth and bones, and improved regulation of body functions. So we think it's worth having harder water for these extra health benefits!

If the hardness of your water still has you fretting about the health benefits, there are some solutions to help reduce its impact. Whilst there is no way to soften water at our houses, if you really want softer water then you can have a treatment, where softeners installed using an ion-exchange resin that will increase the water's sodium content, which can be harmful to your health in large amounts. It is however, depends on your health and other appliances you're worried about. There are also reusable water filters available that can be fitted to your current kettle, or you could even buy a specialist limescale kettle, which has an inbuilt filter to get rid of the mineral deposits. It is just worth checking if there are any grants or discounts available, as these can help offset the cost of appliances. Check out the Wessex Water YouTube channel for handy tips to do away with limescale.

It's the deliciousness of this you can make the most of! The health benefits of limescale in your country life, so enjoy Wessex Water limescale and give the best tip for help with softening, just as you're enjoying limescale.



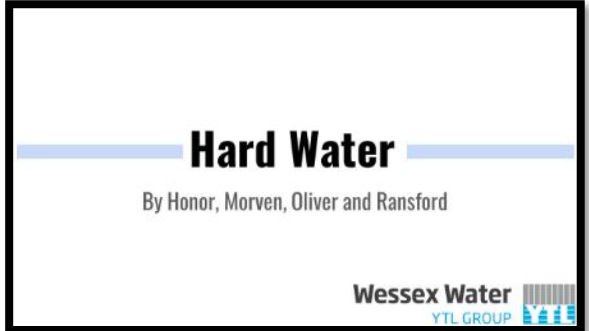
## Wessex Water Crew (5)

**Task 1**  
**Find out more about the region and the hard water issue to inform your campaign**

- Proprietary research into local people's attachments to the area, by age group
- Reviewing successful ad campaigns that establish customer closeness
- Identified that the benefits of living in the beautiful Wessex area outweigh the negatives of hard water

**Task 2**  
**Design two outputs that could feature in a Wessex Water campaign**

- A factual campaign educating on the reasons for hard water and the relationship to a beautiful area coupled with solutions to address these. Greater emphasis on beautiful area in article. 'Spotting the signs' in video.
- Video: The journey of your hard water, facts and signs with commercial ways to address associated issues
- Article: Leading with the associations of living in a beautiful area followed by a comprehensive summary of the benefits and drawbacks of hard water with a commercial solution to address build-up



### NATURAL BEAUTY MEANS NATURAL WATER



All across the area, there is natural beauty. From Wiltshire to West Somerset, we are lucky enough to be surrounded by it. There are no disadvantages to living here, but sometimes small problems may arise. Namely, the water in our taps.

The region covered by Wessex Water is supplied with water from a reservoir or, more likely, from underground in Wiltshire and Dorset. This means that you will get hard water from your taps. This is better than it sounds, as this means that our water has a higher mineral content than other places in the UK. It often occurs in areas where the bedrock is made of sedimentary rocks, like limestone, and the rainfall collects minerals like magnesium and calcium as it makes its way underground. This is not only very cool, but these minerals can also contribute towards the recommended daily allowance. All of this evidence shows us that hard water is no different to any other kind and even the World Health Organisation agrees, so 'There does not appear to be any convincing evidence that water hardness causes adverse health effects in humans'.

Now, all of this sounds great, but you may be wondering what the point of this article is. The price of living in this area of outstanding natural beauty is that hard water causes limescale, which can cause expensive damage to both heating systems and appliances. Limescale has both visible and invisible effects on the home. It can build up on kettles, cause scum and weaker water

pressure may occur from showers and taps. Limescale can build up in the household's water, which can reduce water flow and pressure in heating pipes, as well as affecting appliances.

Again, you may be wondering why all these negatives are being pointed out. What is the point of living in this area if you will have to deal with all the negatives of hard water? Luckily, there is a safe, cost effective solution. Scaleguard. This is simple to fit, will not change the mineral content in your drinking water and does not require a separate drinking tap. It also prevents limescale building up in your heating system and water pipes. Therefore, you can continue to live in this beautiful area and drink water provided by us, with a quick and simple solution that could save you thousands of pounds.

The Wessex Water region is famous for many reasons, for its natural beauty and for it being the starting point of the Romanticism. William Wordsworth's Lyrical Ballads was written when he lived in the Quantocks, which led to the creation of a whole new genre of poetry. Wordsworth writes that 'the best portion of a great man's life, his little, domestic, unremembered acts of kindness and love', which should inspire us all to change the world for the better. One way we can do that is by saving our water, our hard water, which will help us to preserve the world for the next generation, so they can not only share the natural beauty of the area, but the water that comes with it.



Did you know your location plays a roll in the type of water you receive?



From Wiltshire to West Somerset, we are privileged to be surrounded by natural reservoirs and beautiful river. However there are downsides to this. Hard water tends to form around these areas. This is due to the topography of the landscape.



**Ways to reduce water hardness :**

- Water softeners can be installed in your home to soften the water.
- Water conditioners can be used.
- Water can be boiled before using it.
- Hard water filters can be installed to reduce the water hard water the tap deposits.



# Presentations overview summaries

## WINNERS

### **Tongue-in-cheek humour & eye-catching imagery**

Developed caricatures to emphasise the health benefits of hard water in iconic scenery. Attention grabbing article layout.

### **Cheesy or factual**

Cheesy TikTok video for young audience recapping environmental and mental health benefits. Factual health messaging in article for older customers

### **Redressing common concerns & highlighting the benefits**

Focus on health and environmental benefits and advise against commercial softeners

### **Factual and accessible**

Education and (sustainable) remedies delivered at the right tone for each audience

### **Benefits of natural beauty outweigh the nuisance of hard water**

Factual and transparent  
Acknowledge the issues and offer comprehensive solutions

# Core task: what are the insights and opportunities?

## Focus on the benefits

- Health (e.g. calcium, magnesium)
- Environment
- Taste

## Highlight the beauty

- Landmarks
- AONBs

## Be transparent

- Mention boreholes (sustainable extraction)
- Acknowledge hard water



## Common themes



### Health benefits

Highlight the health benefits, specifically where minerals are positively associated – without overclaiming. Conversely, emphasise the danger of sodium through softening processes



### Environment

Establish that hard water is generated in a sustainable way and offer environmentally friendly means of solving common issues with hard water build-up



### Pride in the area

Reference the iconic beauty of the area, e.g. Dorset, Wiltshire



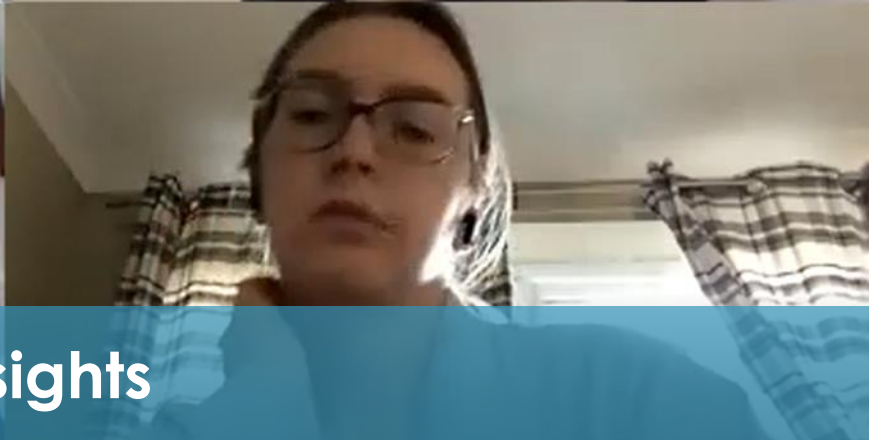
### Address concerns

Be transparent and open about hard water concerns – rather than covert – but balance this with solutions and benefits



### Use humour to win younger audiences

Whilst future customers need to know the facts, the delivery needs to be appealing and entertaining to be effective



Reflections on the day & key insights



# Reflections on day 1

Excellent

Score (9 panellists)	
10	-
9	1
8	5
7	1
6	-
5	1
4	1
3	-
2	-
1	-
0	-

Ave  
7.2

Terrible

Good experience; though the 'real life' feeling and immersion in the business was lacking somewhat...



*'It was very well organised where we had group meetings and whole team discussions at appropriate times. However some members had some technical difficulties which made it difficult in certain times.'*

*'Enjoyable but somewhat worsened by the zoom call aspect as it was kind of awkward'*

*'I liked the speed networking session; it was very effective and efficient.'*

*'I did regret not being able to see around the offices and the corporate environment, and I was hoping for there to be an attempt at allowing us to get a feel for some of the key sites and facilities.'*

# Reflections on day 2

...by the second day most had accepted the virtual aspect

Excellent

Score (22 panellists)	
10	1
9	7
8	9
7	2
6	2
5	1
4	-
3	-
2	-
1	-
0	-

Ave 8

Terrible



- Feedback from senior leaders
- Giving / viewing presentation
- Well organised
- New people & teamwork

*'Smooth running considering it was online.'*

*'Enjoyed talking to the Blue Marble team as people don't usually ask young people specifically about topics so it was nice to give an opinion'*

*'Spending the second part of the morning in different teams was a breath of fresh air'*

*'The Senior Wessex team members also seemed very amicable and were very engaged with the presentations, which made me more engaged in turn.'*

Panellists were accepting of the virtual format but also shared ideas to improve the experience; on day 2 they particularly wished for more focussed time with Wessex Water

## **Overall, could the day(s) be improved?**

- Deeper immersion into the corporate world, e.g. (virtual) site tour
- More time with senior Wessex team, e.g. team feedback sessions
- More interactive and outcome based / problem solving tasks
- Broader brief allowing for a more diverse response
- More detailed framing / set-up of the day including warm-up instructions and 'outro', e.g. 'effective mingling at the beginning and permission to 'linger' at the end

- **Covid-19 & lockdown** left its mark on the generation with some heightened anxiety about the immediate future but also indications of increased personal resilience, greater self-reflection and a more questioning outlook
- **Climate emergency and the environment** remains important to them, but clearly isn't 'their issue' to solve
- A generation who appear to have **good knowledge of pro-environmental water behaviours** however nearly half think it is fine to flush wipes labelled as flushable or degradable. And 12 minute showers seen as acceptable.
- **Teens don't like the criticism of their using too much water:** they think there are valid reasons why they need more showers. And in a diary shower timing task, girls spend twice as long in the shower as their male counterparts and parents.
- In reframing water quality, future customers focused on **the positives of hard water:** taste, health and environmental wins...
- At face value, future customers want to see water companies express social value through environmental initiatives. However considered exploration suggests that **supporting local communities and economies might be seen as adding greater social value**



**Blue Marble Research Ltd**

[www.bluemarbleresearch.co.uk](http://www.bluemarbleresearch.co.uk)

01761 239329



## Overview

- 17 panellists took part, 9 boys / 8 girls, Aged 16-18
- Other people taking part: mums & dads, some siblings
- Age range of participants 6-64
- Average of +2 adults in the HH and +1 child / 3 people
- Live in homes with an average of 2 bathrooms

## Diary observations – Day 1

- Not everyone showers every day, *is this acceptable amongst peers?*
- Others showered more than once, what might be a reason for that? (boys only)
- **Average shower (panellists): 12 minutes**; range 2 to 40 minutes; median 10 minutes
  
- **Girls: 17-minute average** / 16 minutes median
- **Boys: 9-minutes average** / 8 minutes median
  - longest boy shower was 15 minutes, longest girl shower 40
  - Only 1 panellist (girl) reported a bath
- **Parents** – same number of showers, some none a couple 2
- Average length for parents **9 minutes** – **mums 10 minutes** / **dads 9 minutes**
- Younger siblings (pre-puberty) bathe / shower much less

# Appendix – overview of findings: interim bathroom diary task

Final survey section – 15 completes

## Environmental attitudes

1/15: I don't tend to think about my impact on the environment in my day to day life.

3/15: It's an added bonus if what I'm doing is environmentally friendly but it's not a big issue for me.

### **10 / 15: I think about my impact on the environment and try to do things to make a difference whenever I can, as long as I am not spending more time, effort and/or money for it**

1/15: I'm very concerned about my impact on the environment and make considerable effort to reduce it even if it means spending more time, effort and/or money for it

### **Eco-behaviour statements ranked by highest to lowest agreement**

1. I separate my waste by recycling / using a food bin
2. I use a refill bottle for water on-the-go rather than buying drinks
- 3. I limit the amount of water I use, e.g. turn of the tap when brushing teeth, quick showers**
4. I avoid plastic packaging as much as I can
5. I carry bags with me to avoid plastic bags from shops
6. I prefer to take public transport whenever I can
7. I buy second-hand clothes / avoid 'fast fashion' whenever I can
8. Limit the amount of (red) meat I eat
9. I carry a refill cup ('keep cup') for hot drinks when I'm out
10. I prefer to cycle rather than drive whenever I can

### **Who would you say is most environmentally conscious in your household?**

**7 / 15 – they are**

3 / 15 – their mum

1 / 15 – their dad

1/ 15 – their sibling

3 / 15 – all care equally

### **How much of your life has changed following lockdown and the impact of Coronavirus by letting us know if you are doing any of the following more or less or about the same as before:**

#### MORE

1. Worry about my future job prospects
2. Planning future / what I do when leave school
3. Worry about my own health & wellbeing
4. Worry about health & wellbeing of my parents/grandparents
5. Study / revise

#### ABOUT THE SAME

1. Care about my local community
2. Worry about the environment or climate change
3. Research how ethical a company or brand is (e.g. treatment of staff/suppliers, vulnerable people, diversity/inclusion)



# Young People's Panel

Final report  
25<sup>th</sup> November 2019

**your say**  **your future**  
young people's panel

- Twenty-one sixth formers from the Wessex Water region attended the 2019 Young People's Panel
- Two meetings took place at Wessex Water's HQ



## Profile of candidates

- Gender mix
- Mainly school year 13
- From 15 schools across the region



## Pre-task prior to attending

- Imagine the world in 2050, what is the world like? What is different and what has triggered this?



## Day 1: September 24<sup>th</sup> 2019

- Full day of tasks designed to immerse the panellists in the world of Wessex Water
- Briefed on a future business challenge before working in teams to prepare for the second meeting



## Day 2: November 5<sup>th</sup> 2019

- Four teams presented back to judging panel
- Instagram task
- Question time with senior Wessex Water staff



## School survey

- Online survey distributed to participating schools
- 703 responses

- Backwell Sixth Form
- Beaminster School
- Gordano School Sixth Form
- Hardenhuish School
- Holyrood Academy
- Kings School Bruton
- Nailsea Comprehensive School
- Parkstone Grammar School
- Ralph Allen School
- Sexey's School
- St Augustines Catholic College
- St Brendan's Sixth Form college
- The New Sixth St Gregory's Bath
- Thomas Hardy sixth form
- Wells Cathedral School



## FUTURE WORLD

What does the world in 2050  
look like to those born in c.2002?



## TODAY

How are Future Customers feeling  
about the world today?

- General optimism
- Social media
- Environmental views
- Generational perspective
- Water in their lives



## CORE TASK

Ideas to develop a water  
efficient, waste savvy smart  
home of the future in a  
sustainable community



FUTURE  
WORLD

What does the world  
in 2050 look like to  
those born in c.2002?

FUTURE  
WORLD

YPP tasked to imagine the future world via a pre-task exercise before the meetings – then build on **themes** in their teams



## Technology

- AI replacing humans: high unemployment / greater productivity
- VR widely used (e.g. therapy); sub-dermal VR
- Greater integration of smart technology
- TV obsolete
- No physical money



## Ephemeral experiences & artificial intelligence

## Transport

- Electric vehicles the norm
- Fewer cars (electric won't replace all petrol)
- New ways to travel: under water, flying (hover boards), low-orbit space travel

## More (public) transport away from the roads



FUTURE  
WORLD



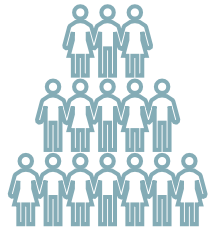
## Living in large metropolises

### Population growth

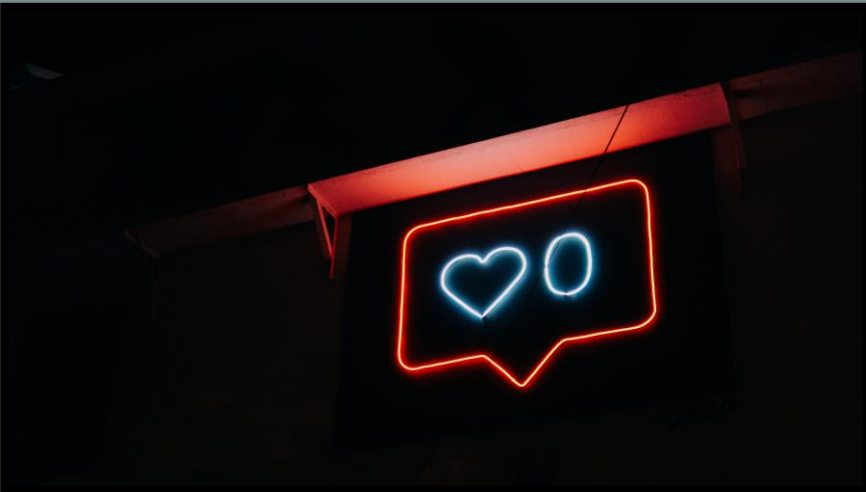
- Over-crowding
- Housing shortages
- No more small villages (overpopulation)

### Societal shifts

- Scarce resources (despair?): growth of religion & communities
- Greater divisions / extremism
- World of instant gratification i.e. no patience, no 'real communication'



## Today's challenges driven to the extreme





FUTURE  
WORLD



## Humans

- Fish-tank babies (replacing in-belly pregnancies)
- Designer babies; altered DNA
- Children growing up faster (looks; responsibility)

## Test-tube humans propelled into adulthood

## Delocalised relationships enabled by advanced technology

## Social networks

- Transmitting memories & feelings directly, no more emojis
- Internet friends grouped by interests (replace organic contacts)



FUTURE  
WORLD



## Water

- More droughts
- More flooding
- Higher sea levels
- More brackish water upstream
- Instant wastewater management; sewage to drinking

**Innovative solutions  
meets bigger challenges**

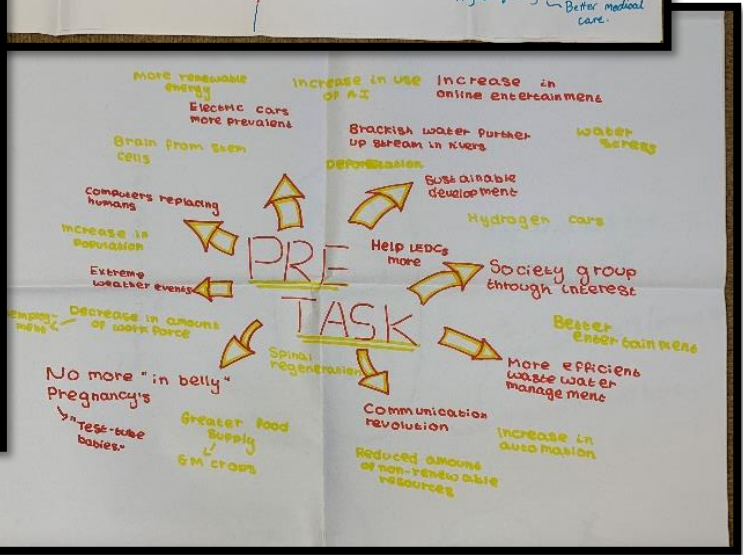
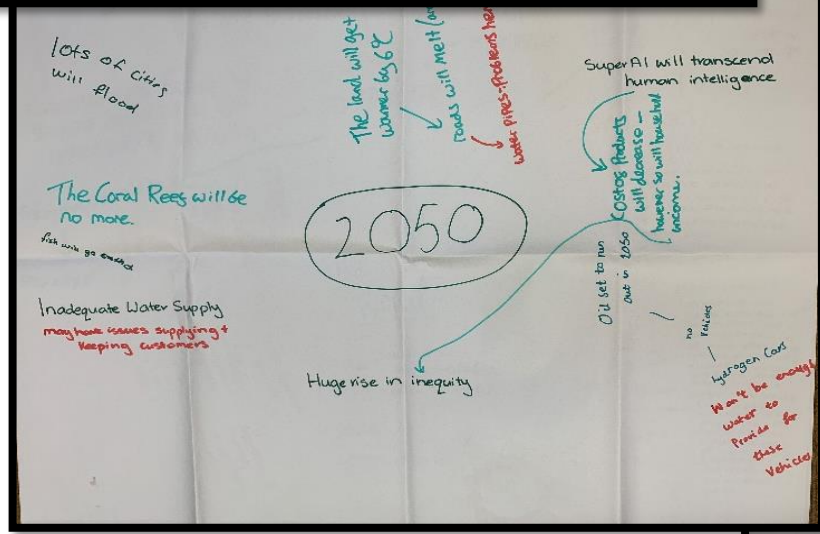
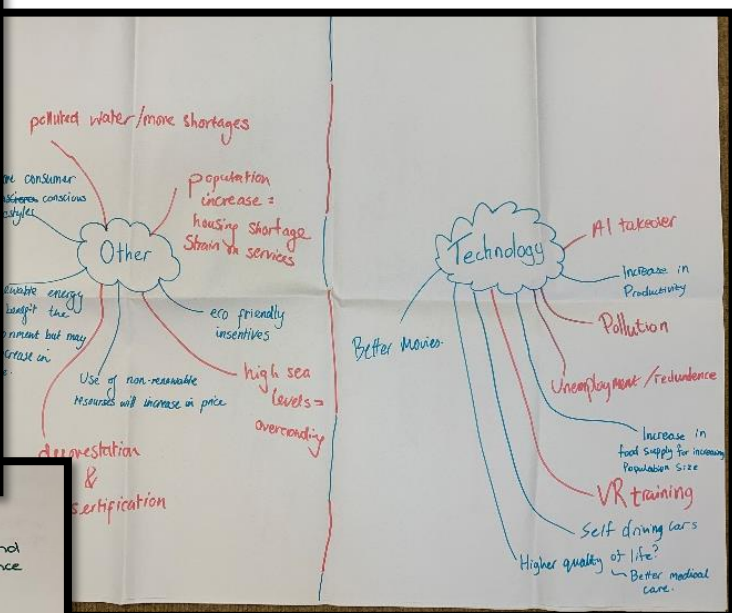
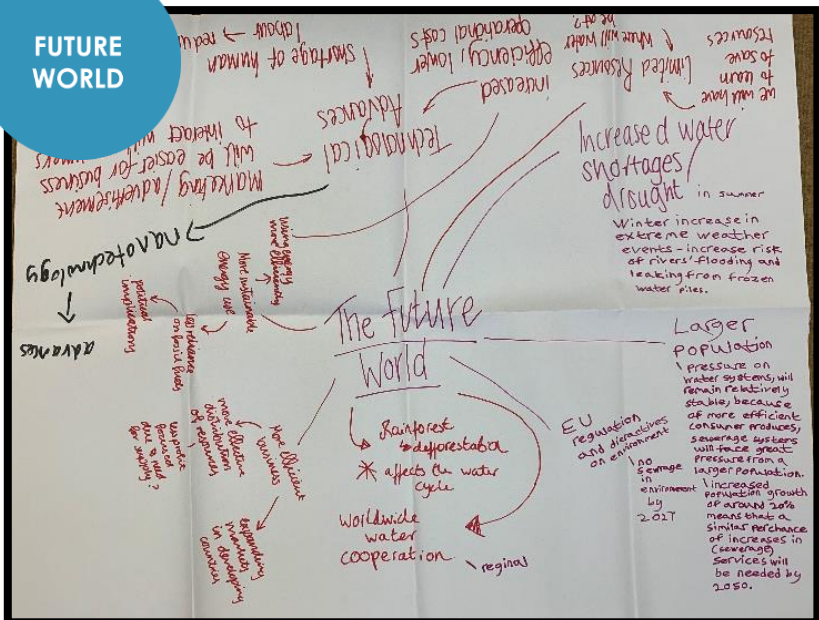
**Natural resources and  
unpredictable weather**

## Planet Earth

- Oil runs out
- Desertification; water shortages
- Loss of the rain forest
- Loss of wildlife/ many species
- More natural disasters



FUTURE WORLD



## Some dystopian themes but also positive changes

- More 'conscious lifestyles'
- Global cooperation – more effective distribution of resources (including water)
- Medical advances e.g. stem cell technology, spinal regeneration
- Ample food via GM crops
- Positive tech advances (mitigating threats)



# TODAY

How are Future Customers feeling about the world today?

- General optimism
- Social media
- Environmental views
- Generational perspective
- Water in their lives

TODAY

An optimistic cohort in 2019 – in spite of continuing uncertainty in the world around them.



## 2019 cohort looking ahead

- Looking forwards to next stage of life: getting beyond (stressful) school year, excited about the future – for most this means university
- Exciting in sense of new technologies / jobs
- Building up work experiences
- Managing distractions: social life, pubs, social media
- Independence will bring change: managing money, new friendships, responsible for e.g. own washing
- Some experiencing financial realities: car insurance, petrol

*The world is interesting right now; lots of industries are booming and constantly moving...having that be my future is [exciting]*

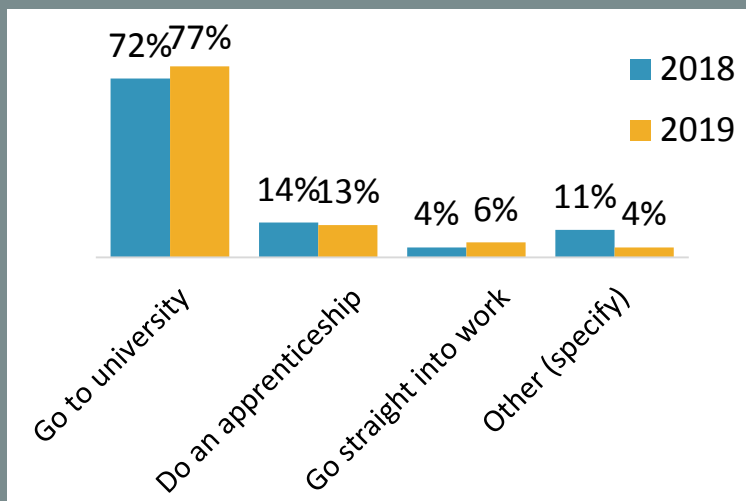
## A microcosm of an uncertain & divided UK?

- Political uncertainty (Brexit) – divisions within age group; 'Groundhog Day' conversations
- Climate strikes and protests
- Sense some battle-weary /cynical
  - Question if protests change anything
  - Feel under-informed (by schools) on current affairs
  - Polarised / extreme views – and indifference
  - Who to believe? What is fact?
- Potentially positive if Brexit is bringing young people into politics

*We are preparing for our future based on what we know now, but we don't know what is going to happen*

TODAY

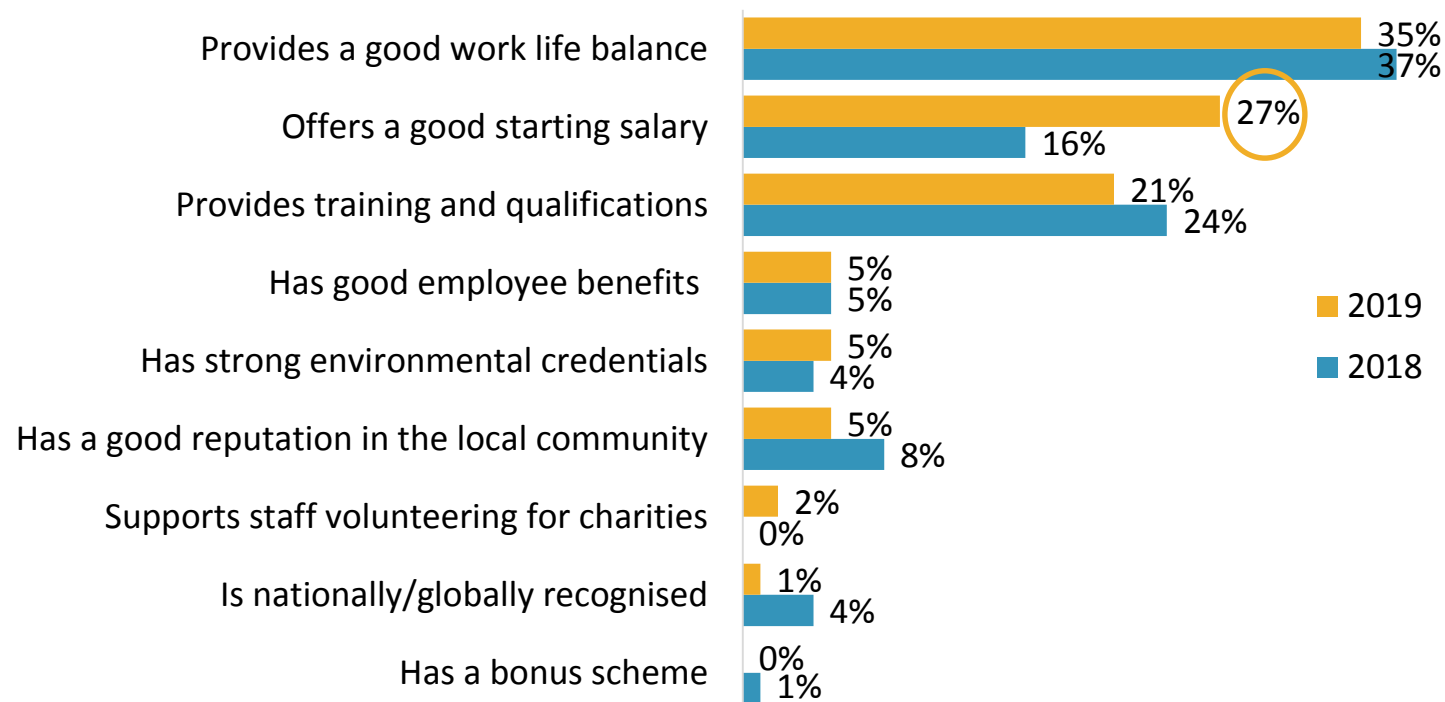
The majority of sixth formers are planning on going to university – consistent with 2019



A good work-life balance remains most important to this generation – but salary level is of increasing priority

## An employer that....

### Most important year on year



Q5: When thinking about your future work life, which of the statements below is the **most important** when considering an employer?

TODAY

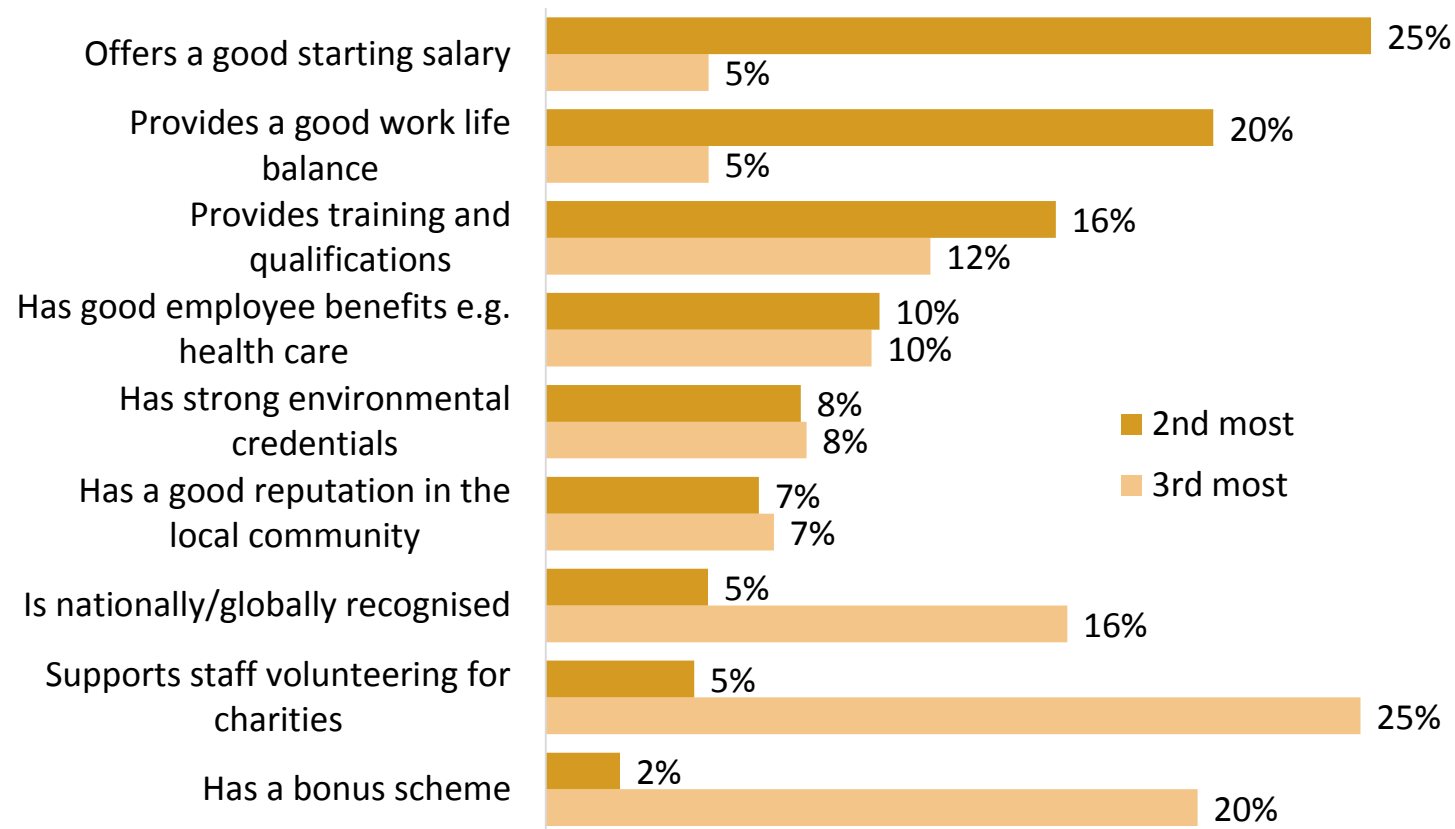
Starting salary is also the highest ranking secondary factor.



Opportunities for staff volunteering is also important.

## An employer that....

2nd / 3<sup>rd</sup> most important 2019

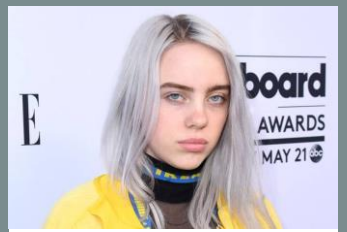


Q5: When thinking about your future work life, which of the statements below is the **second / third important** when considering an employer?

# Who are the dominant influencers in 2019?



Lil Pump and the Gucci gang



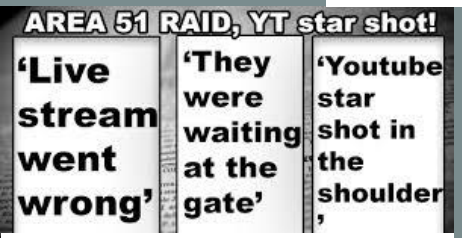
Billie Eilish



Kylie Jenner



Tekashi 6ix9ine



Youtubers

A reflection of the teen mindset: a spectrum of influencers...

## Influencers: youth culture

- Dark themes: gang violence, killing/murder; drugs and sex, prison (boys)
- Glorifying drug dealing
- You Tubers: millions of views; influencing the mob; opportunities to fame & fortune for young people
- Beauty icons (girls)

## Influencers: creating change

- Technology
- Environment
- Equality
- Animal rights



Elon Musk



Chrissy Teigen



David Attenborough



Greta Thunberg



Emma Watson



Brian May



# Social media remains central to their lives (with isolated exceptions)

TODAY

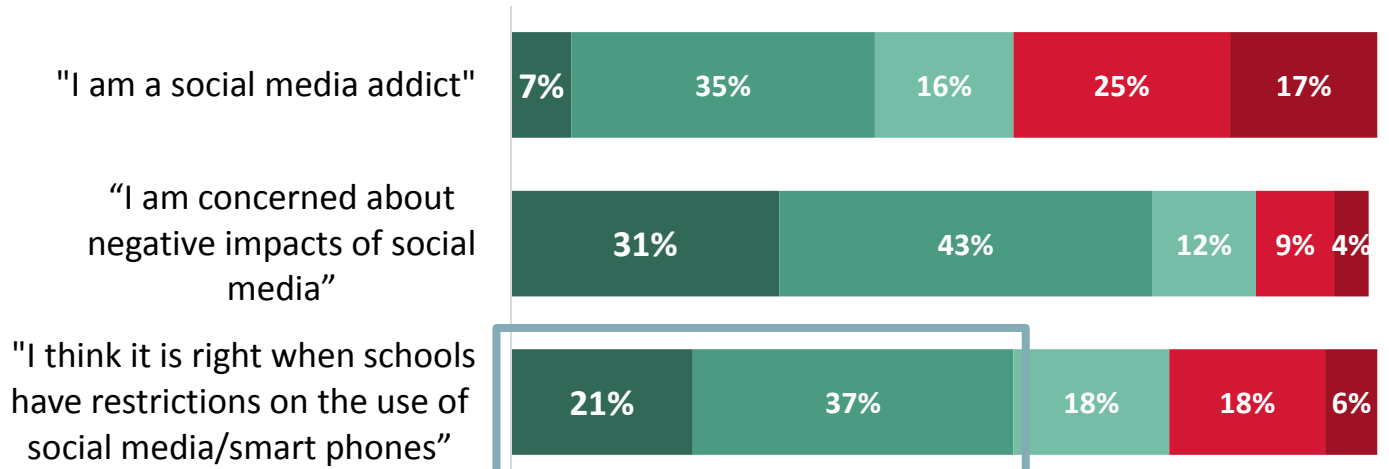
*I kind of wish it didn't exist sometimes: If we'd never had it we wouldn't miss it*

*I had a real obsession with Snapchat so I deleted everything and now I don't have any social media. I don't miss it*

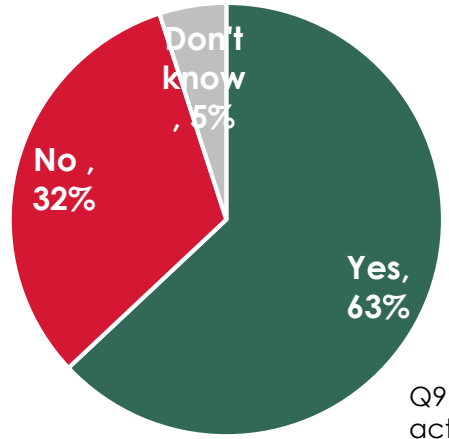
*I had no tech in Africa for a whole month. I felt so much happier without it*

As in previous years, nearly 2 in 3 have taken a break from social media, while still 2 in 5 identifying as an 'addict' and 3 in 4 expressing concerns about the impact. All of which are leading to higher acceptance of school restrictions than 2018 survey.

■ Agree strongly 
 ■ Agree slightly 
 ■ Neutral/don't know 
 ■ Disagree slightly 
 ■ Disagree strongly



Q10: How strongly do you agree or disagree with the following statements? (703)

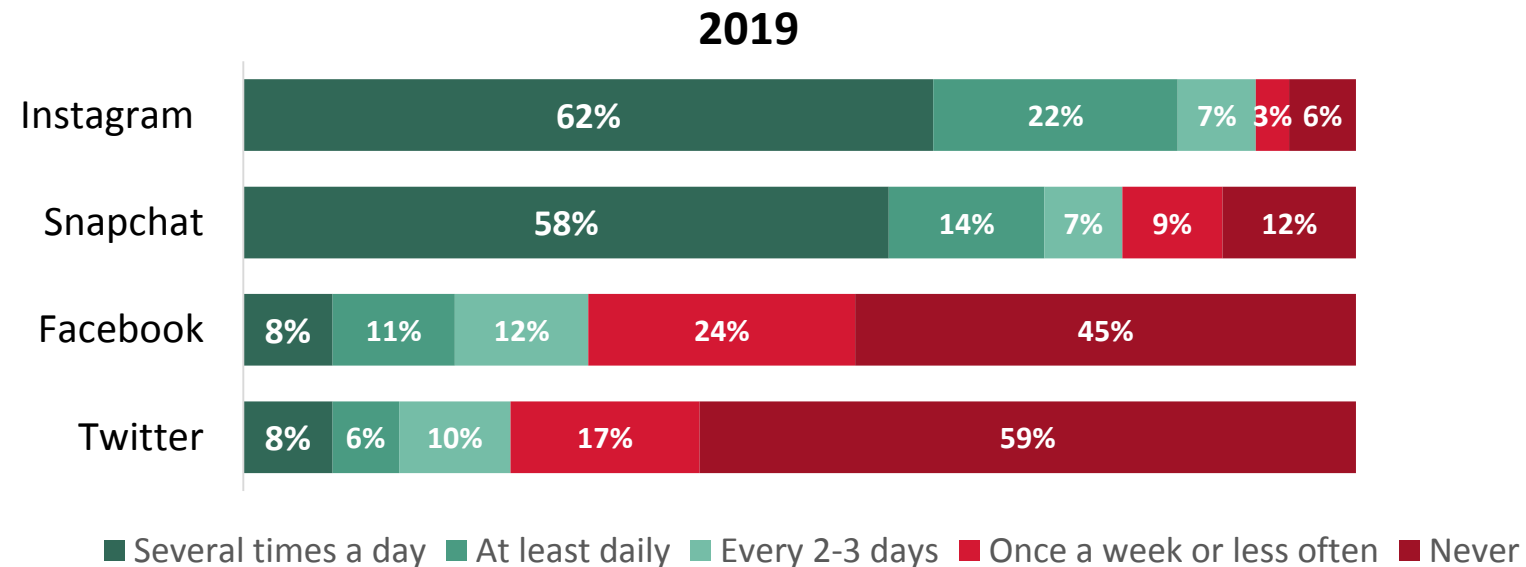
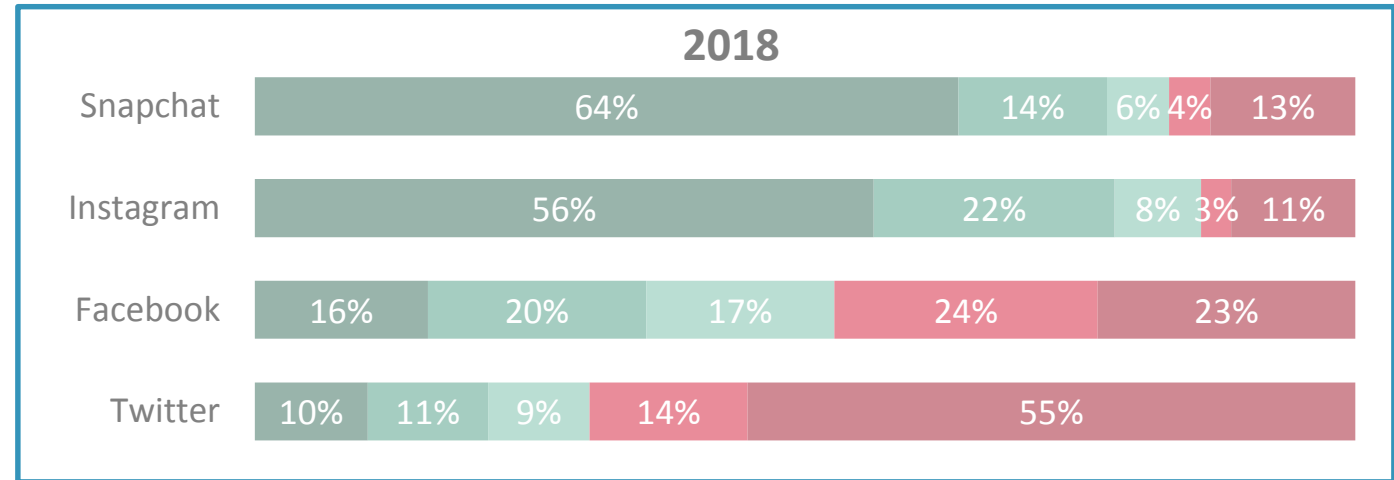


Q9: Have you ever taken a break from using social media generally i.e. actively chosen not to use it for a period of time? (703)

Taken a break from social media

Instagram has taken over Snapchat as this generation's primary social media channel.

- Instagram has recently adapted more features and functions (e.g. stories, close friends)

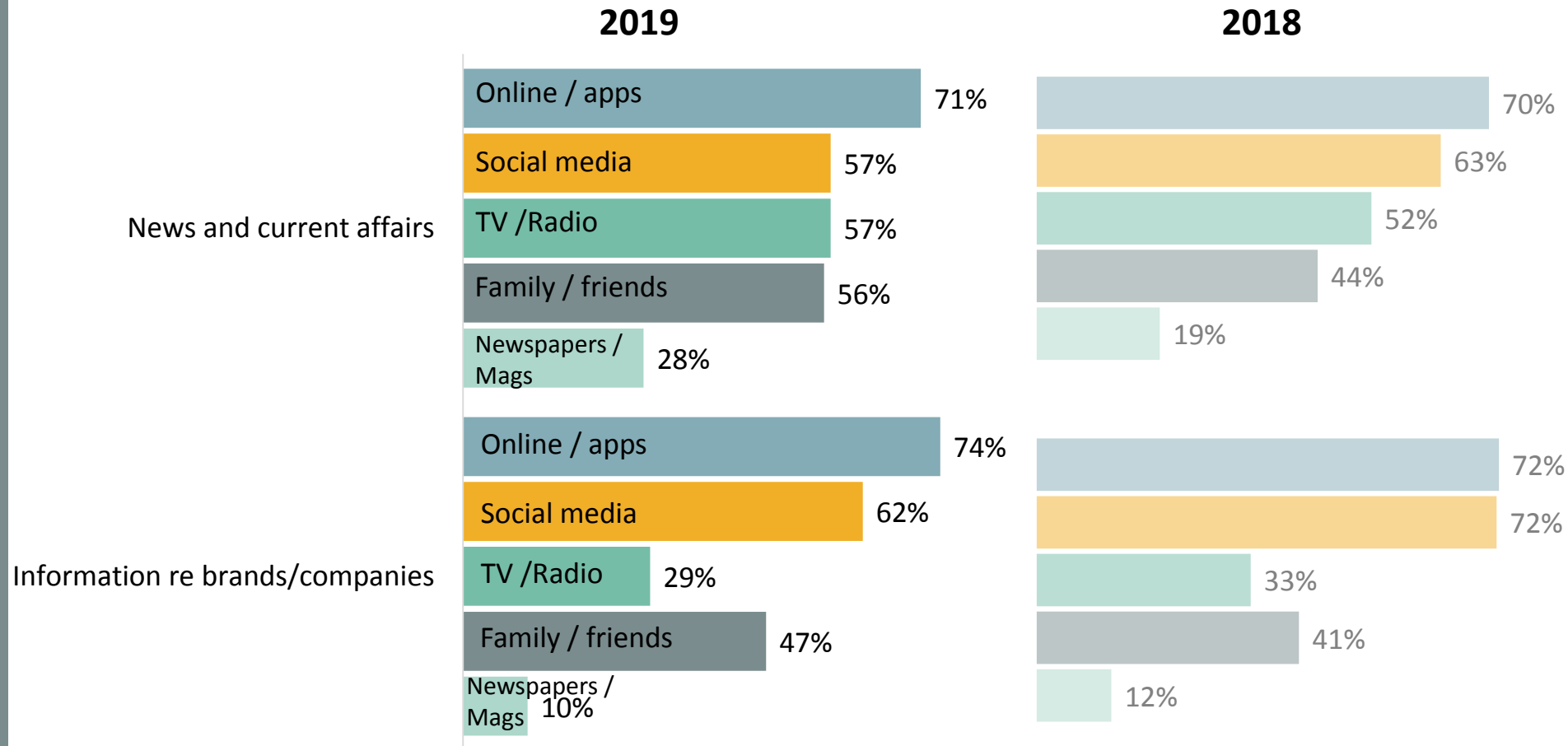


TODAY



Online is still the primary source of information for this generation, but print is making a return as a source for news and current affairs.

Is social media is waning during the era of 'fake news' and misinformation?

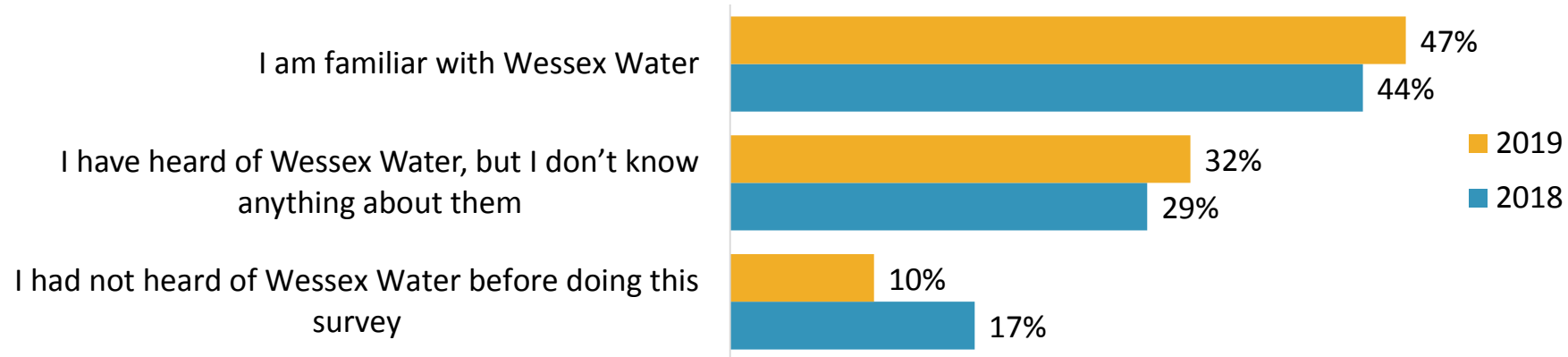


Q7: So thinking about where you get various types of information from, where do you go to get information on a) news and current affairs b) information about brands / companies? Base: All respondents (703)

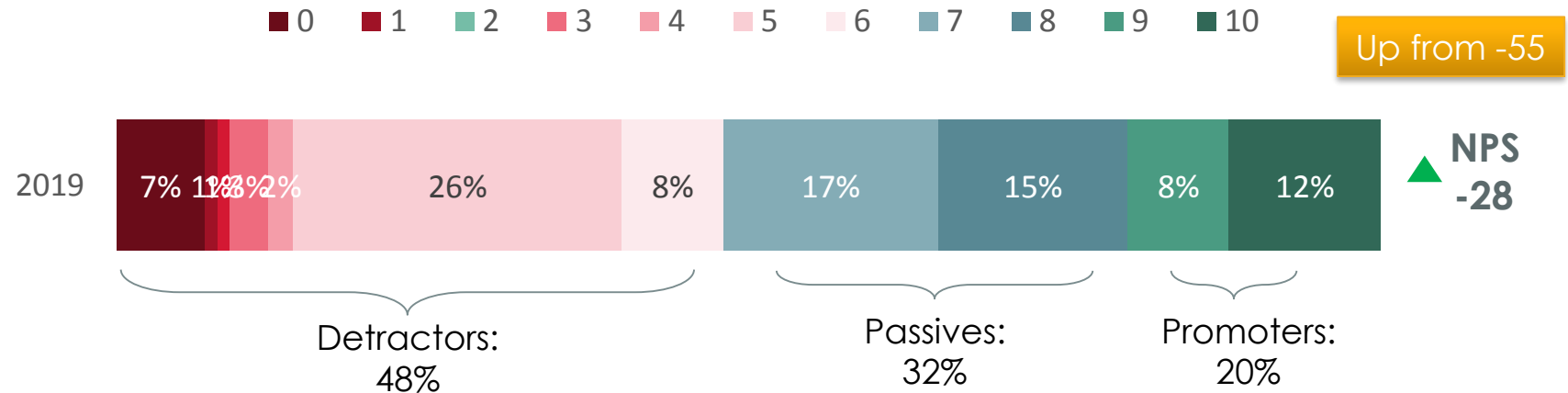
# What do future customers know about Wessex Water?



Awareness of Wessex Water is slightly higher this year, but a third of teens still know nothing but the company name



Teens are more likely to describe Wessex Water as 'a good company' this year: Only half of views show a negative tendency with a third indifferent and a fifth positive.



Q17: Which of the following reflect your views about Wessex Water? Base: All respondents (703)

Q18: Imagine someone you know asks your views on Wessex Water, how likely would you be to describe it as a good company? Base: All respondents (703)

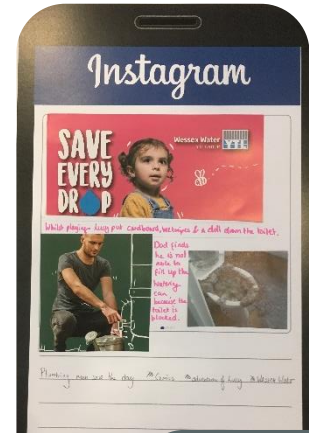
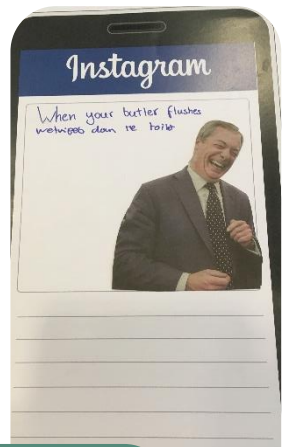
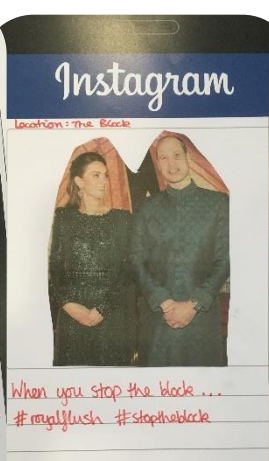
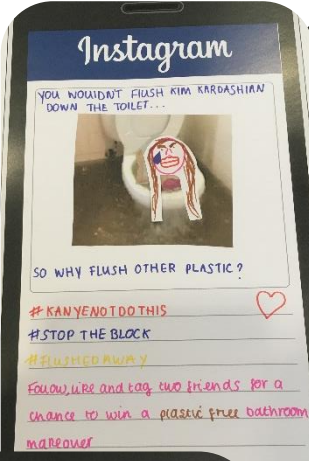


The winning idea

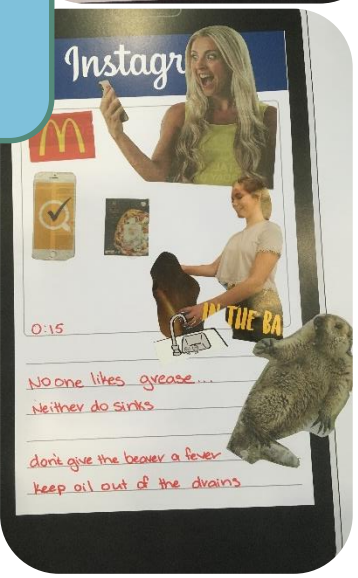
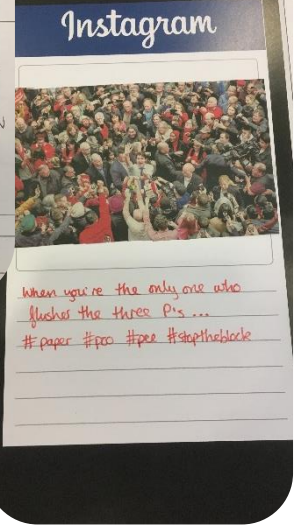
Instagram post exercise highlights what resonates with their generation and would grab their attention:

- Humour
- Short, pithy captions
- Relevant / timely
- Memes
- Confrontational / political  
(...not all suitable for the Wessex Water brand)

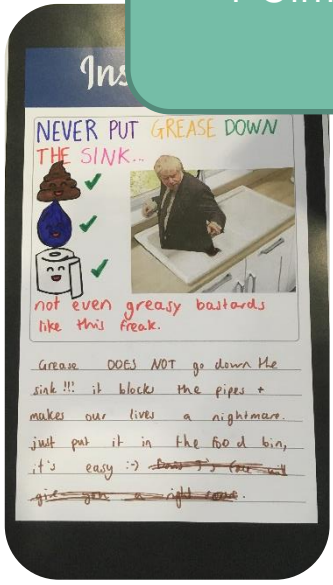




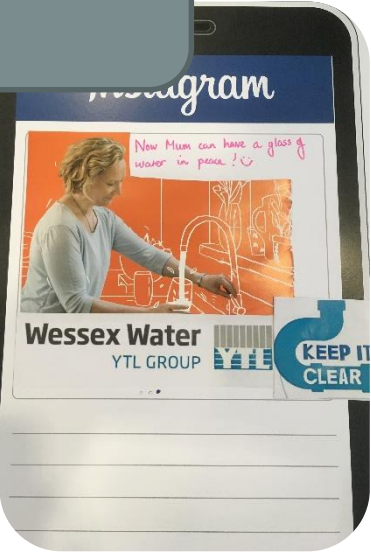
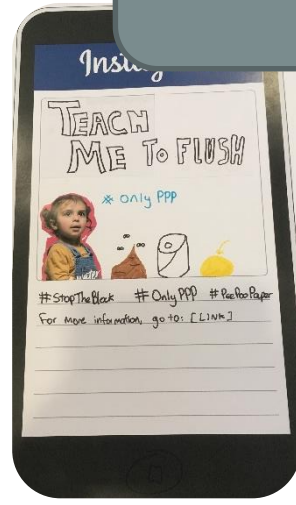
Humour / memes



Political



Educational



TODAY



Greta Thunberg addressed the UN Climate Action Summit the day before the YPP groups

*They raise awareness but they are not actually doing anything (about XR)*

*People just attend to post on Instagram*

A new environmental urgency and protest movement has been a feature of the last year. YPP 2019 gives an insight into complex views and feelings about their generation's role.

- Top of mind – very current and important issue
- Confusion about urgency: *'some people argue our generation is screwed, others argue we are not...'*
- Greta receives mixed views: some saying they 'love Greta' - some questioning her target (UN); others non-committal
- Concerns about Extinction Rebellion using the wrong tactics
- Minority have attended school strike – some cynical about motives/hypocrisy of others

Some new habits forming, but aware and open about disconnect between their attitudes and behaviours

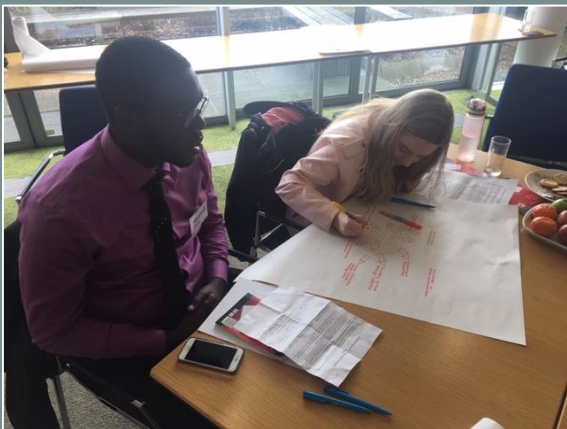
- Cutting down meat
  - Conscious fashion ASOS Monki; H&M Conscious
  - Cycle to school
  - Recycling more at home and at school
- But
- Big/sacrificial changes are hard
  - Strong view that governments and companies need to adapt

TODAY

*I had a go at my dad when he said Greta Thunberg was stupid for going by boat. My dad is wrong about a lot of things.*

*Grandparents....a lot of them don't care...it is literally not their problem*

*My mum is so good she literally doesn't use any plastic or anything; she's better than me*



## Generational differences are not clear cut

- Environmental beliefs and actions – hard to draw out themes
  - Some feel 'in accord' with their parents
  - Some feel parents are *more* aware and active...others would say the reverse
  - Some subtle differences in behaviours e.g. parents not wasting food; teens more careful about single-use plastic
- Economic difference: perceive Gen X (parent generation) as more 'capitalist' than their Gen Z offspring?
  - They see themselves growing up in an age where consumerism can't carry on
- Some are keen to paint a realistic view of their generation: contesting 'received wisdom' or stereotypes

*The older generation are more capitalist than us. They think of themselves rather than the environment*

*We should be a generation that is more open-minded but people are set in their opinions*

*We struggle to listen to each others points. As a generation we are stubborn*



TODAY

Don't put the responsibility on us!



▶ A generation that is acutely aware of the urgency of climate change - but appear reluctant to take on the burden of environmental responsibilities

- They might admire Greta – but they are not Greta
- They didn't create the problem
- They don't want to be making all the sacrifices
- They want corporations to act

*Our generation is perceived as environmental but we take for granted that someone else (in our generation will do it) so individually we don't have to*

*We might be more aware but we are not necessarily willing to change our lifestyles*

*We don't want to give up luxury*

*Are we the environmental generation? To some extent: but we still use Starbucks while preaching about single use plastic*

*Our generation is not mentally capable of solving it. We are down too big a hole.*

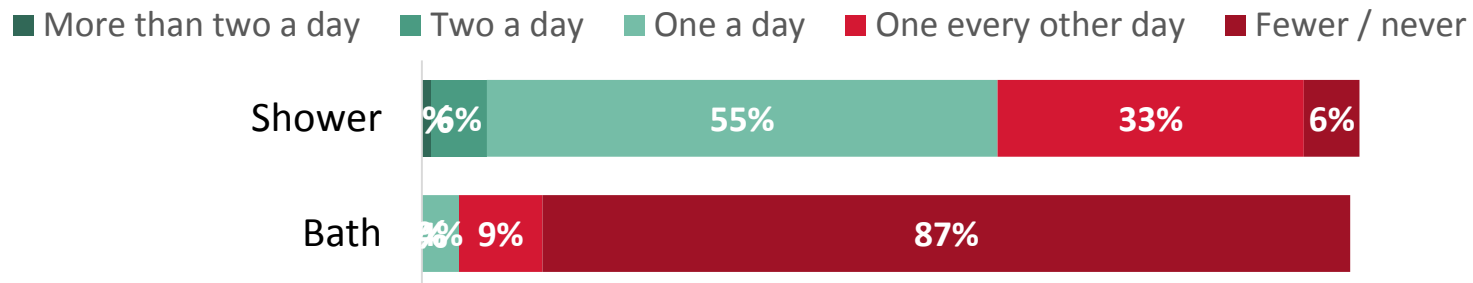
# How do attitudes shape water behaviour?

TODAY

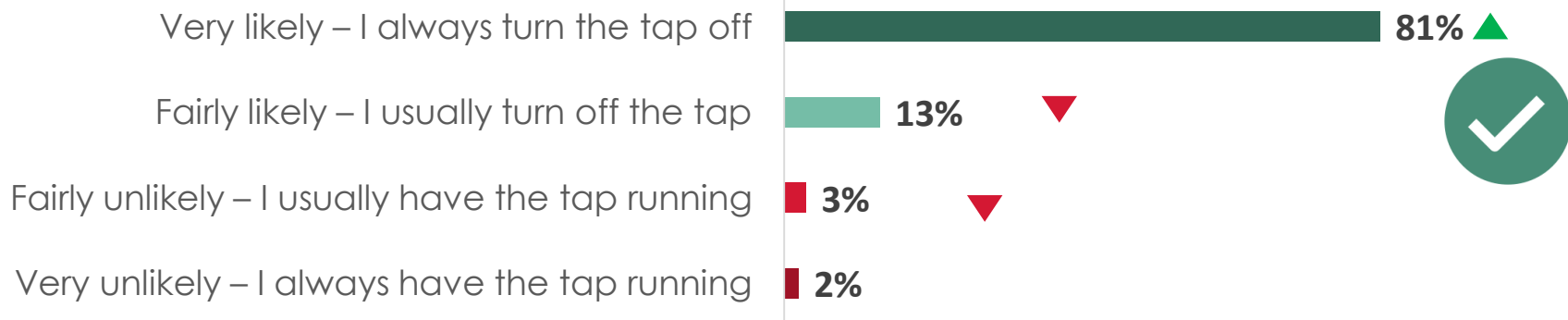
Showers and turning the tap off appear to be normal behaviours



▶ As before, showering daily is the norm for this generation / their life stage. Save water messages may be most effective on best shower practice (e.g. how long; turning on and walking off)



▶ Accuracy of self-reported data in question still; but confidence in following 'the right behaviour' is growing highlighting that turning off the tap whilst brushing has become a social norm



Q11: Now thinking about the way you use water, over the last few weeks, on an average day how many showers have you taken?  
 Q12: Thinking back over the last few weeks, on an average day how many baths have you taken? Base: All respondents (703)  
 Q13: When cleaning your teeth, how likely are you to turn the tap off when cleaning your teeth? Base: All respondents (703)

TODAY

Parents with meters clearly trying to moderate teen excesses. Though some see their parents as the wasteful ones...



However, in qualitative discussions, few claim to be actively water conscious: we hear about long showers and / or multiple showers per day among this age group

*I like long showers but dad doesn't like it as we have a meter*

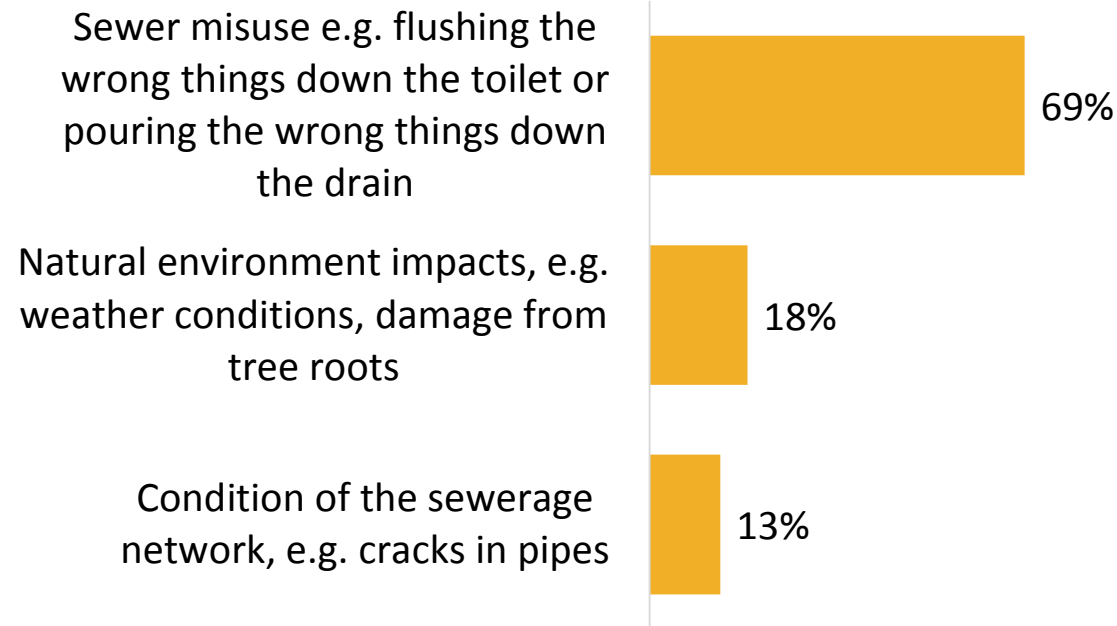
*He [dad] hates spending money and after we got the water meter fitted he was on it*

*My dad uses so much water to wash up, it's ridiculous. The other day he filled the whole washing up bowl to wash like one knife!*

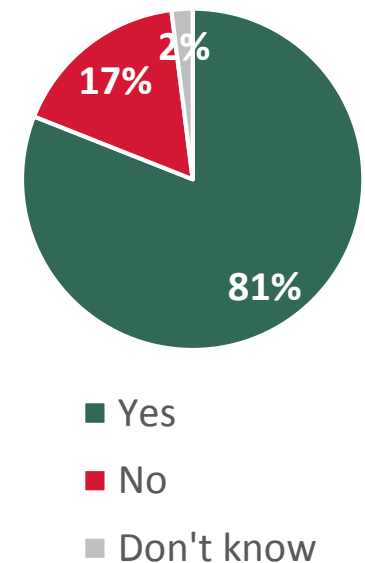
*My parents have just got a hot tub, it's so much water with a shower before and after and filling it'*

The majority recognise 'human error' as the main cause for sewer flooding. Far fewer associate with natural impacts.

## Reasons for flooding



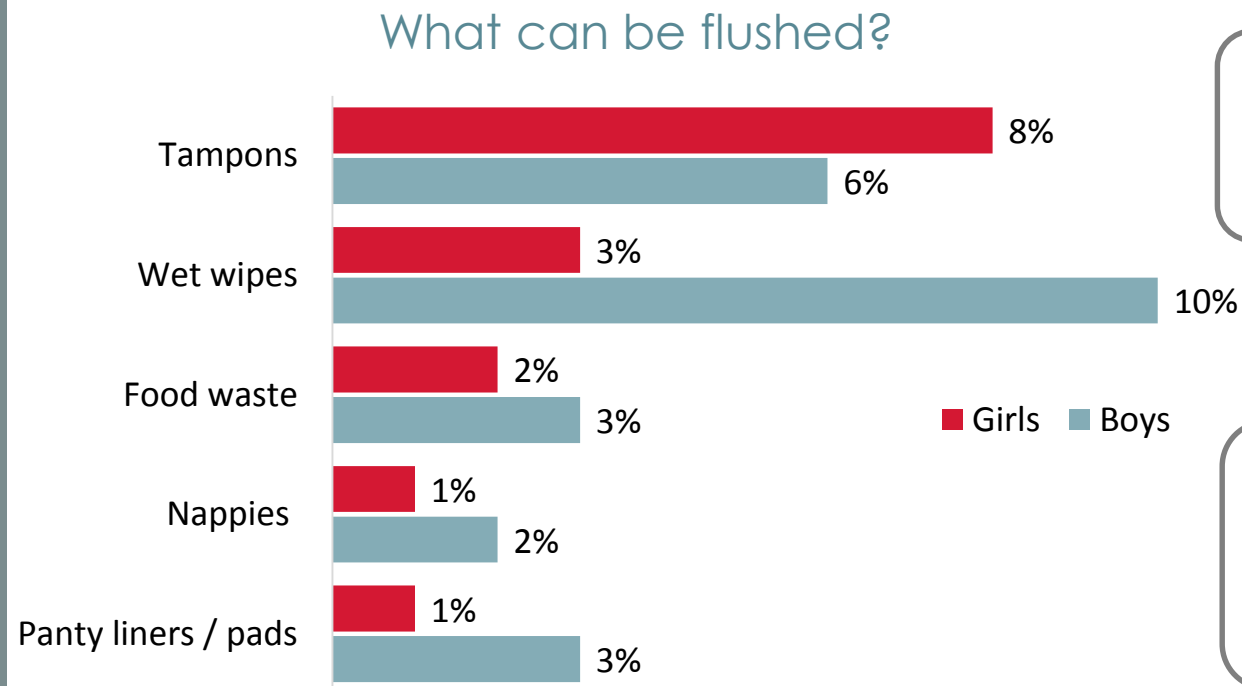
Four in 5 claim to have a kitchen caddy for their food waste.



Q14: Now thinking about other aspects of water services...What do you think is the main reason for sewage flooding?

Q16: Does your household have a food waste bin in the kitchen? Base: All respondents (703)

...yet 8% of girls still don't know not to flush tampons and 10% of boys think it's ok to flush wet wipes (though less likely to be user this may not be an issue)



*'I'd been flushing them (tampons) until there was a big blockage and my dad told me'*

*I've been flushing cotton buds, wipes everything, I hadn't thought about it until today. It just goes away, like a bin*

Q15: Which of the items below do you think should be flushed down the toilet? Tick all that apply. Base: All respondents (703)

Qualitative insight suggests wider confusion: it is not always obvious not to flush tampons:

- Tampons look bio-degradable (more so than sanitary towels which have more plastic)
- Not always a bin – what choice do you have?
- Few believe they have actively been told not to flush tampons: more signalled by bins in public loos
- Little signposting in school toilets



Ideas to develop a water efficient, waste savvy smart home of the future in a sustainable community



# Core task: meeting of 2 worlds

## CORE TASK



Following a day's immersion and a full briefing presentation on the business problem behind the core task, 4 teams prepared solutions and presented to the judging panel.

Investigate existing smart solutions and concepts for sustainable communities

- Research approaches taken and why
- Key results (Use pictures, graphs, quotes to bring your findings to life)
- **What this news means for Wessex Water**

Develop a water efficient and waste savvy smart home in a sustainable community

- Identify how your findings from part 1 have fed into your approach for tackling part 2
- Be clear about specifically which solution you will implement, what it means for the home and for the wider community
- Provide examples of potential partnerships, e.g. tech companies, academics, other specialists for development
- Provide examples of campaigns or interventions that you would design to drive take-up of the new technology.

# Presentation highlights

## Team Yellow

Task

1

### Investigate existing smart solutions / sustainable communities

- Researched existing Wessex Water campaigns; including previous YPP material
- Identified key issues of wastage and appliances, tools and gadget to combat these
- Used behavioural theory to identify ways of engaging with customers through and app

Task

2

### Develop a water efficient and waste savvy smart home in a sustainable community

#### Provide [information], don't nudge

- App providing information on where water is wasted and what it costs consumers
  - Intended to lead to behaviour change (invest in eco devices)
  - Competitive leader boards for water usage
- Free leaky loo strips to all customers, annually
- Non-flushable logo (legislation)
- Fines and incentives for non-sustainable behaviour, as people are irrational

#### OUR APPLICATION



- Our application will clearly show each household's water efficiency each day
- The current banners from the website will also show on the app's homescreen
- Sections on the competition leaderboard, a breakdown of where you use the most water, and a place to report any issues
- A way to access your account and pay bills



Proposed government scheme for non-flushable logo to be on all toiletry items



banner and video to be displayed on the weather

"What to flush?" game







## Team Green

### Task 1

**Investigate existing smart solutions / sustainable communities**

- Creative thinking, desk research
  - Identified further smart gadgets
  - Highlighted features of a sustainable community
- Conducted a survey

### Task 2

**Develop a water efficient and waste savvy smart home in a sustainable community**

- AI and community engagement**
- 'Genius' meters using new AI which adjusts to customer behaviours
  - Drain filters
  - 'Sustainable systems', e.g. waterless toilets, bag showers
    - Identified industry partners for sustainable systems
  - Comms campaign 'save water today to let kids play', based on survey insights
  - Discussed benefits to Wessex Water

#### Examples of Smart Home Devices

1. Nest - doorbell and thermostat
2. Eve Aqua smart water controller
3. Grohe sense guard smart water controller

#### "Save Water Today, To Let The Kids Play"

In response to the surveys and research, we have created a campaign that Wessex Water could form to create community engagement and involvement in saving water...

#### Our Smart Community:

1. Will have a strong focus on education
2. Use sustainable methods to preserve water usage
3. Use sensors and to monitor and reduce congestion and carbon emissions
4. Automated irrigation systems in public parks to regulate water usage
5. Only use of electric vehicles including public transport, available charging points
6. Green systems, including planting trees and preserving parks
7. A grey water waste system

**Survey Answers:**

1. Education
2. Reducing wastage.
3. Surveying the community to see what people's intentions are and if they are the same

#### Examples of Existing Smart Community Progress:

1. More unified and measured energy consumption (smart energy meters, incentives)
2. Controllable street Lighting (adjustable, timely, improves safety)
3. Sensors in public places (park irrigation systems, traffic flow control for transportation)

#### Brand new AI

- Set limitation and restrictions to your usage
- 'Eco model' and 'Eco buddy' with integrated functionality
- Chose the name and activation phrase
- AI learning energy trader

#### Our Future Smart House...

1. A Smart Tap (suggested in the survey)
2. Sustainable Systems (discussed later)
3. Video doorbell, and controllable thermostat
4. Smart Shower control, for water usage
5. Our own Smart meter
6. Electricity monitors
7. Solar powered systems
8. Electric systems mobile controlled

# Presentation highlights

## Team Blue

Task 1

Investigate existing smart solutions / sustainable communities

- Researched smart home features and identified smart communities (Watton Village, Bridport)
- Reflected on reasons to save water; identified 'problem areas' of waste water in the house
- Compared Wessex Water bills to other regions
- Drew on behavioural theory
- Survey among 6<sup>th</sup> formers to measure appeal of their ideas and importance of water saving

Task 2

Develop a water efficient and waste savvy smart home in a sustainable community

- Household app & community greywater**
- Family / household app – presenting a detailed wireframe of functionality
    - Custom advice; HH usage summary; personal progress & rating
    - Identified a local app developer to partner with
  - Greywater storage with community overflow installed by Wessex Water

### Research and Statistics

**Facts**

- In the UK every person uses roughly 150 liters of water a day
- UK has less available water per person than most other European Countries
- A dripping tap can waste 15 liters of water a day
- People in England are facing water shortages by 2050 unless we save water and fast
- Save 30% water by using low-flow or aerated shower heads
- Toilets account for 30% of water usage
- Water usage can be reduced by up to 40% with water saving devices

**Water Efficiency** - minimisation of the amount of water used to accomplish a function, task or result. -Vickers

**Water Conservation** - beneficial reduction in water loss, waste or use. -Vickers

### Wessex Water App

**Accessible** - Most people have mobile phones

**Cheap** - Setup costs and small amount of maintenance

**Drives community** - Competition will link towns, cities and counties

**Changes mindsets** - Using economic nudges will alter people's decisions for the better

The App will give advice to users to on how to save water, some examples are:

- Turn off the taps
- Shorter showers
- Always wash a full load
- Get a low-flush toilet
- Eat less meat
- Reduce food waste
- Time your gardening

There will be a rating system (e.g. RAG) that will show when customers have made substantial progress. This may be implemented to the Community Statistics page.

This area will give each household an overview of the progress they've made over a certain timescale (this may will be changeable in settings to switch between days, weeks and months)

### Possible Collaborations

**HIVE** The international smart home firm

**nuvola** A local app and website development company.

Household Statistics	Community Statistics	Kids Made
Your Household Summary:		
Compared to last month you have used ___% less water. Your best improvement was in _____. This has saved you a total of £ _____	This gives you a rating of: _____	

# Presentation highlights

## Team Red

Task 1

**Investigate existing smart solutions / sustainable communities**

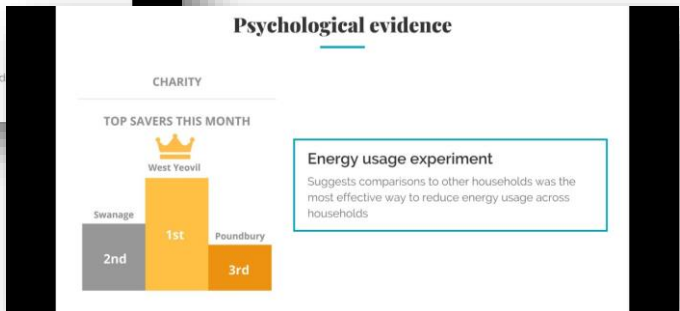
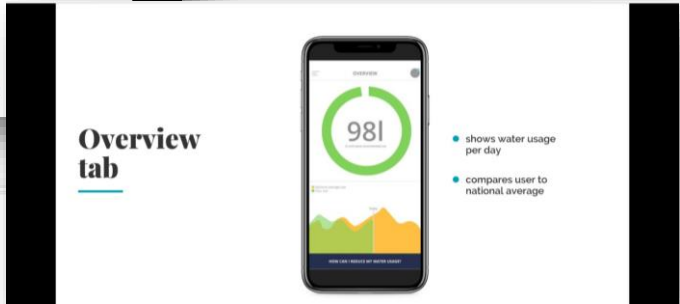
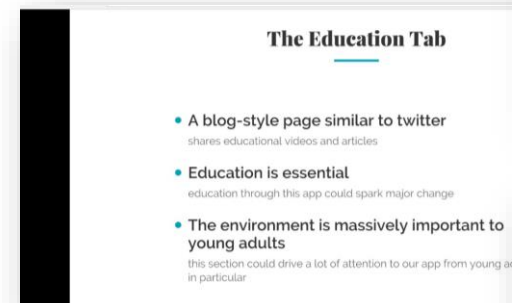
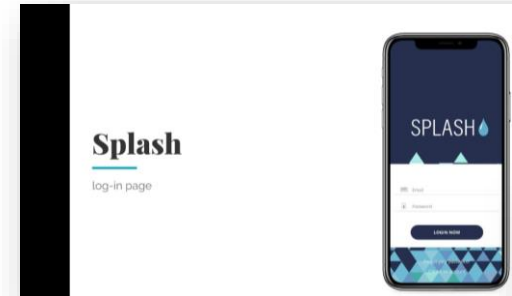
- Desk research on historical water usage
- Understanding reasons for increase (societal & psychological) & influence of regular metering on behaviour
- Research with future and current customers (18-25; 30-50 year olds)
- Drawing on success stories (e.g. 'sweat coin')

Task 2

**Develop a water efficient and waste savvy smart home in a sustainable community**

### Feedback & charitable incentives app

- Splash App
- *Feedback*: smart meter readings showing daily usage and comparing national average; tracking usage day-by-day
  - *Rewards*: earning coins for water / environmental charity purpose
  - *Education*:
    - blog posts 'Twitter-style' with relevant environmental content (targeting young people)
    - Simulation game + quiz



# Presentations overview summaries

Drawing on behavioural theory to identify effective ways to behaviour change through industry and governmental intervention and creating community engagement through competitive smart meter dashboard and implementing existing WW resources

Comprehensive strategy developed using consumer insights, incorporating emerging technologies, innovation and community engagement with a thorough understanding of smart homes and connected communities

Detailed concept of a household app and a greywater community network developed with local partners in mind and tested with a survey of other future customers

Visual app concept featuring smart meter usage feedback, a charitable rewards scheme and educational resources including a simulation game and quiz built on desk research and verified with survey findings

# Core task: what are the insights and opportunities?

Focus on the 'pull factors'

- Technological: engaging, interactive, accessible
- Rewards/incentives
- Easy to do / low customer barrier

Overcome barrier

- Smart meters required to provide data feeding into the apps



## Common themes



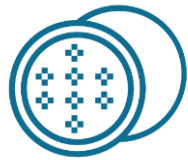
### Smart meters

Taken for granted by future customers; where usage is captured (metered); the expectation is to interact with your own customer (usage) data (in real time!)



### Apps

Preferred channel for receiving messages (nudges, alerts) and managing behaviour and consumption. Proposed app concepts imply the existence of accessible smart meter data



### Cheap fixes

Recognising the barriers of behaviour change, future customers have identified easy, cheap (for customers), but effective tools to improve wastewater or leakages



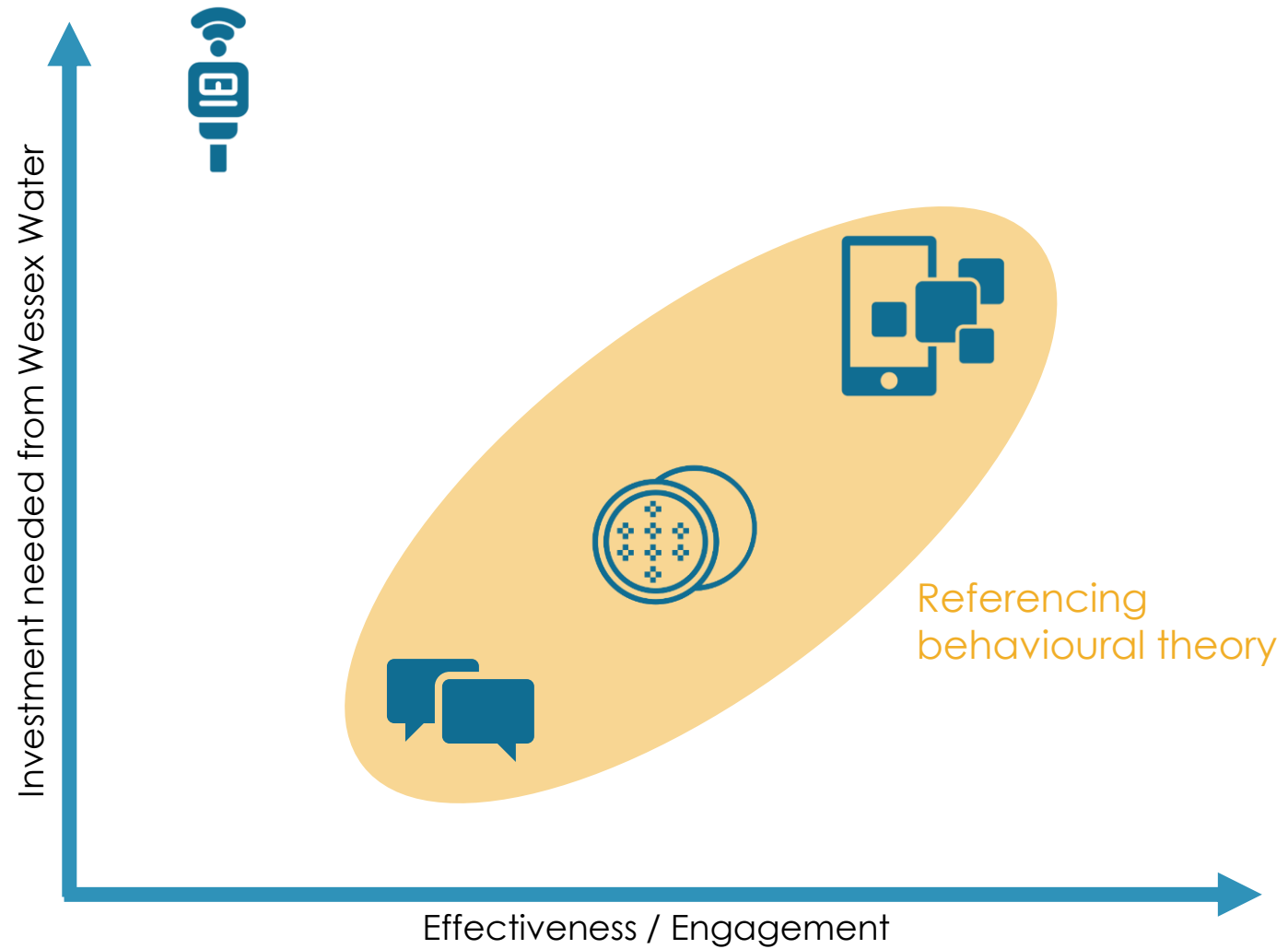
### Campaign messaging

Feature in some ideas but are supplementary to future change. Focal point is preservation for future (younger than them) generations

# Core task: what are the insights and opportunities?

## Key insight

Smart meters are a given and an app is expected as a customer interface to make use of the smart meter data





Reflections on the day  
Implications for Wessex  
Water



# Reflections on the day – 1

Excellent

Ave 8.9

Score (21 panellists)	
10	6
9	8
8	5
7	2
6	-
5	-
4	-
3	-
2	-
1	-
0	-

Terrible

Very positive experience for all the panellists



*Really well organised with a variety of different tasks, which were engaging and informative.*

*Very nice atmosphere, where everyone felt comfortable to state their opinion.*

*Very nice people, nice vibe. No one was judgemental*

*Given a great insight into Wessex Water's operation*

*Plenty of opportunities to meet new people and work with everyone*

*Nice to get an insight into the business and understand what the company offer and how it looks to the future*

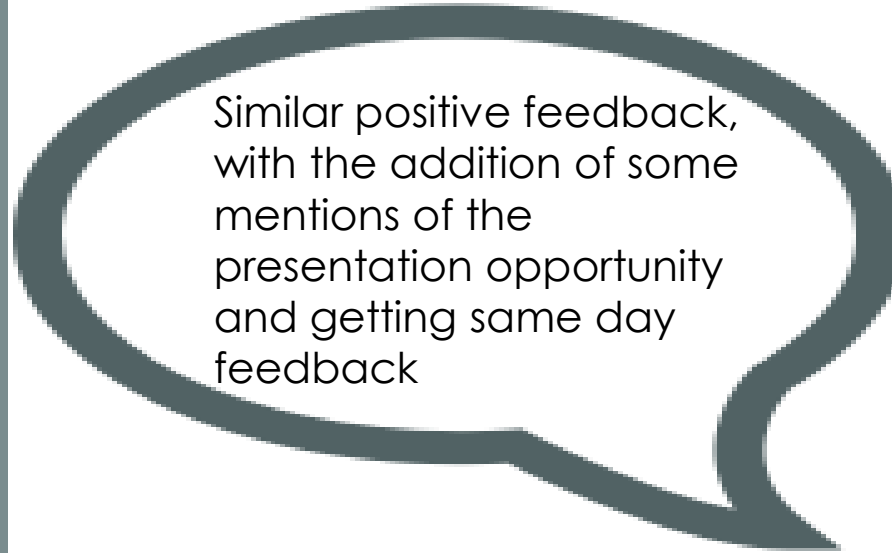
*I have learnt a lot more about the business and how much they value our opinions*

- ✓ Learning experience
- ✓ Well organised
- ✓ Feeling valued
- ✓ New people & teamwork
- ✓ Creative, challenging
- ✓ Business insight



# Reflections on the day – 2

...continued through the second day



Excellent

Ave 8.7

Score (19 panellists)	
10	1
9	12
8	6
7	-
6	-
5	-
4	-
3	-
2	-
1	-
0	-

Terrible

# Reflections on the day

If anything, panellists were left wanting more time with Wessex Water after Day ; and the main let-down on Day 2 were technical difficulties during the presentations

## How could the day be improved?

Recommendation – Day 1	Mentions
<ul style="list-style-type: none"> <li>• More time 'speed dating' / with WW staff</li> </ul>	5
<ul style="list-style-type: none"> <li>• More time with other panellists / outside of team</li> <li>• Explain value of (pre-)task</li> </ul>	3
<ul style="list-style-type: none"> <li>• More time on core task</li> </ul>	2
<ul style="list-style-type: none"> <li>• Invite more people</li> <li>• Larger groups</li> <li>• More info on company</li> <li>• Transport instructions</li> <li>• Talk about pathways into careers at / similar to WW</li> <li>• A morning break</li> <li>• More time in focus group</li> <li>• Ice breaker</li> </ul>	1

Recommendation – Day 2 / overall	Mentions
<ul style="list-style-type: none"> <li>• Prepare for tech issues / resolve WiFi issues</li> </ul>	4
<ul style="list-style-type: none"> <li>• Learn about careers at WW</li> <li>• Wider / better brief</li> <li>• More time on core task</li> <li>• Equal team size</li> </ul>	3
<ul style="list-style-type: none"> <li>• More time with WW staff</li> </ul>	2
<ul style="list-style-type: none"> <li>• Introduction to WW / what they do</li> <li>• Later start for far travellers</li> <li>• Make task instructions less wordy</li> <li>• Magnetic name badges</li> </ul>	1

## YPP 2019: insight into future customer perspectives

- All the ideas for 'smart communities' centred on an App connected to smart water meters
  - Neither (we understand) are near-term (2020-25) initiatives for Wessex Water which might surprise future customers
- Climate change and environmental action is the issue of their generation – but they do not want to take responsibility for it: instead a strong emphasis on innovation and legislation
  - Review the balance of communications: behaviour change vs. corporate image (as an innovator, environmental champion)
- Social media is the route to this generation but the strategy (platform, message and tone) will need to be different to current comms
- While reassuring, self-reported data on 'good' water behaviour may mask more wasteful habits
- A quick win: potential for better communication (in school cloakrooms) about tampon flushing (link comms to period poverty?)





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