

# Reviewing Strategic Direction and Social Purpose

Final Report

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# Objectives and Approach



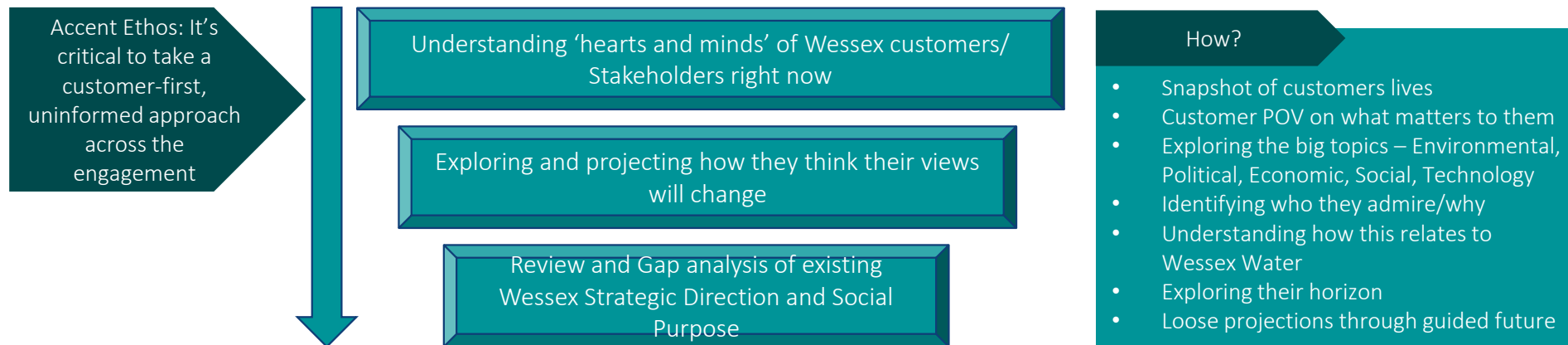
# THE BRIEF

## Wessex Water's long-term plans need to be rooted in customer and stakeholders' current views and priorities

Wessex Water aims to be a 'world leading water and sewerage company' whilst continuing to meet customers' increasing expectations in a sustainable and affordable way.

In anticipation of future environmental, social, technological and economic changes, Wessex Water is reviewing its **Social Purpose** and **Strategic Direction**.

Engagement with a range of customers and stakeholders will ensure that their Social Purpose and Strategic Direction align with customer and stakeholder long term priorities and will also feed into PR24 proposals.



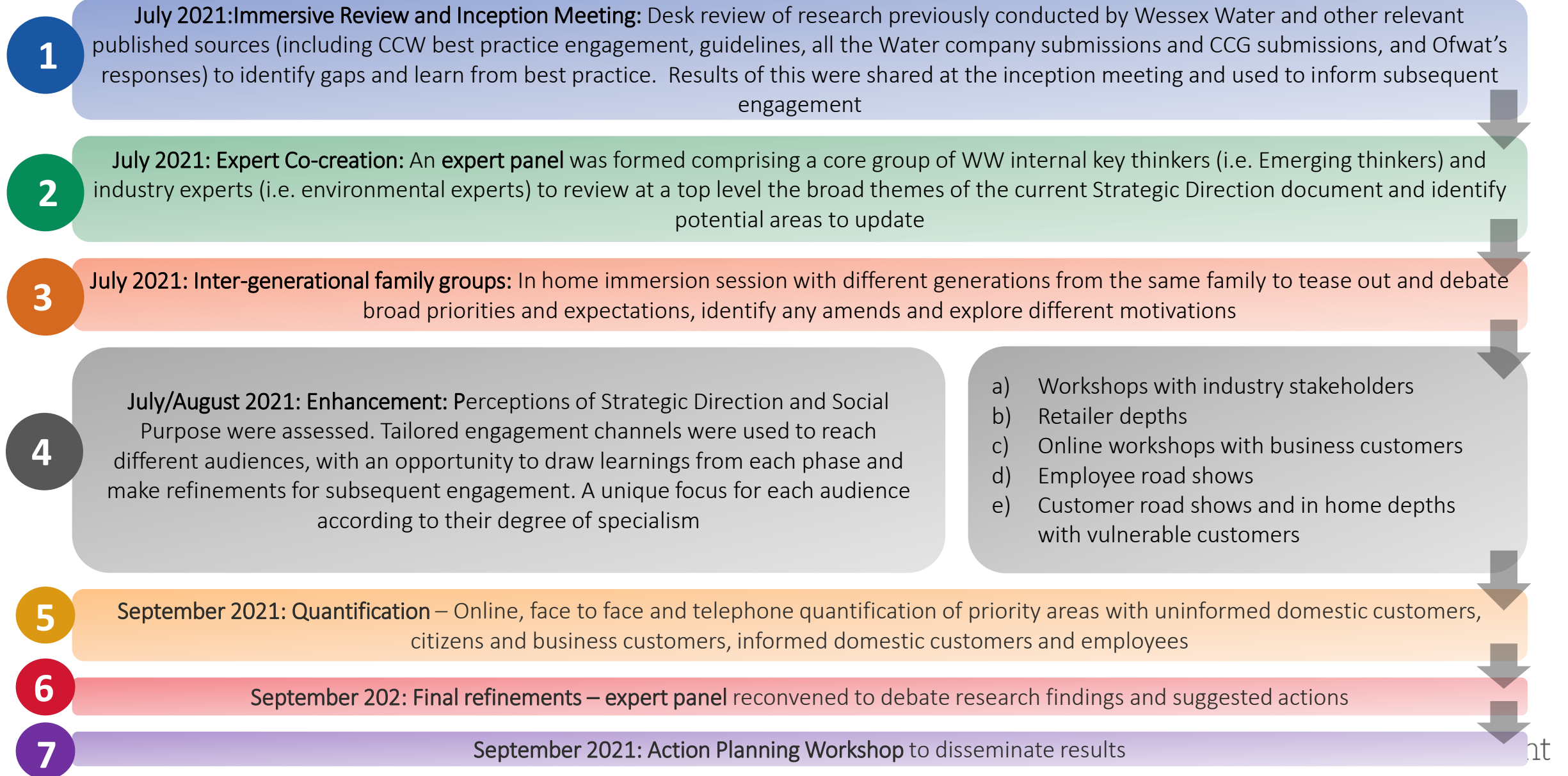
Strategic Direction sets out what Wessex Water aim to deliver for customers, wider society, and the environment over the next 25 years. First published in 2016.



Social Purpose outlines the reason why Wessex Water do what they do.

# OVERVIEW OF ACCENT'S APPROACH

## Iterative phases of research creating depth of insight



# State of the Nation

The challenges Wessex Water need to address

What's important to Wessex Water's stakeholders, customers and employees

What's changed over the last 5 years



# The starting point for customers = little knowledge about Wessex Water And in other sectors where customers can choose their supplier, choice for the majority is unrelated to environmental and social concerns



Implications for SDS / Social Purpose:

Lack of information PLUS backdrop of mistrust of corporate companies creates opportunity for stronger brand visibility



In other markets, primary reason for brand choice is unrelated to environment or social conscience



Youth



Parents & Grandparents



- Quality product/range
- Longevity of brand
- Brand expertise and visibility
- Top customer service (multi-channel)
- Influencers
- Fashionable/current
- Affordable (minority of brands)
- Sustainable (minority of brands)

- Quality product/range
- Frictionless service
- Speedy delivery and fulfilment
- Brand expertise and visibility
- Top customer service (multi-channel)
- VFM
- Brand trust
- Progressive
- Innovators



Implications for SDS / Social Purpose:

Customers expect leading customer service across touchpoints (digital, telephone), brand expertise and influence, continual innovation

# A number of key challenges emerged that stakeholders, customers and employees feel Wessex Water need to consider when developing the next iteration their Strategic Direction Statement

Challenges identified across engagement with stakeholders, customers and employees were consistent with those in the current version of the SDS. However, headlines need updating to reflect new areas that have emerged since the 2016 publication. And other areas need stronger emphasis to reflect their growing importance:

- **Environment challenges:** seen to have increased in nature and severity. Awareness has increased due to:
  - increasing nature of extreme weather events (not confined to other countries but seen within the UK, and within Wessex Water’s region)
  - impact of CSOs which (were referenced quite heavily in the media at the time of the research; the spotlight on several companies through EA fines; campaigns led by The Guardian; documentaries on BBC and Channel 4; and the first live documentary, Riverside)
  - impact of pandemic lockdowns led many to use (and appreciate) the local environment with a focus on river and beach quality
  
- **Supply/demand challenges:**
  - population growth and increasing development were evident in all areas
  - the impact of changing rainfall patterns means water supply could be under threat even in areas that were previously seen having abundant rainfall
  - changing work patterns accelerated by the pandemic makes it difficult for Wessex Water to plan for where future needs lie. Uncertainty on whether the changes in home/office working will become permanent
  
- **Internal industry challenges:**
  - the water industry is seen as being fairly conservative and slow to innovate, which has left it behind in a number of areas (ie: customers having been calling for the introduction of smart meters for some time)
  - customer and stakeholder expectations in the use of technology are significantly higher than the current state of play in the water sector and this gap has been identified as a significant challenge for Wessex Water.



**Supply/Demand Challenge**

*In 25 years we might not have any water left and I don't think people talk about not having any water*

**Internal Industry Challenge**

*The industry is conservative in terms of adapting and innovating and going for new technologies*



# A number of key challenges emerged that stakeholders, customers and employees feel Wessex Water need to consider when developing the next iteration their Strategic Direction Statement

- Regulatory challenges:** taking a five year approach is not sufficient to address a number of challenges. A more holistic approach to planning was called for ensuring multiple regulators are working to the same agenda. Water companies need a degree of influence on Government policy.
- Health challenges:** the impact of the CV-19 pandemic represents a new challenge. Consideration needs to be given to the financial hardship caused to customers (household and non household) as well as a potential mental health crisis for customers and employees.
- Customer “ownership” challenges:** need to ensure customers take responsibility for their water usage and drainage behaviours. In a sector that has low salience for a majority of customers Wessex Water needs to work with customers to help them understand the implication of their actions (ie: what you put down the drains ends up in rivers).
- Brand/communication challenges:** Wessex Water need to overcome a lack of brand visibility and generally low communication engagement.
- Talent challenges:** water employees are viewed as key workers. However, in a very competitive market place there is a need to raise awareness of the range of opportunities available in the water sector, requiring employees with different talents and backgrounds (from chemists to marketers). Wessex Water has a challenge of ensuring their employees reflect the diversity of the communities it serves.



### Communication Challenge

*We can't beat customers up for not changing when nobody's telling them that they shouldn't drink bottled water*

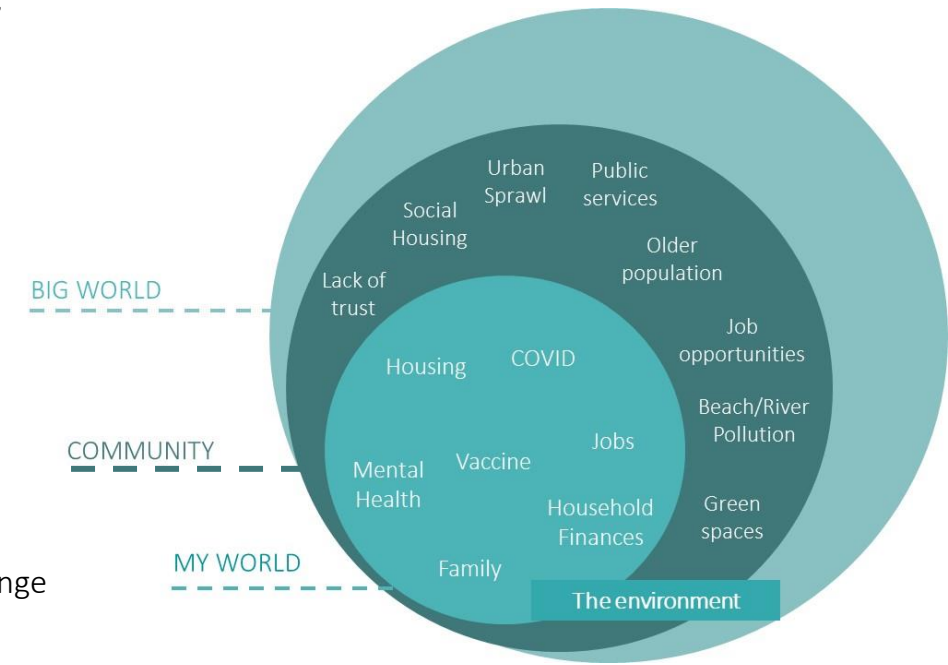
### Talent Challenge

*There's a shortage of skilled workers and a war on talent across the market*



## What's important for customers, stakeholders and employees is broadly consistent with the themes identified during early PR19 engagement, but with some notable changes in emphasis

- A greater focus on “my world” across all age groups with customers focussing on their immediate lives (homes, communities, family, neighbourhoods, etc).
- Less concern about the wider world (“big world”) caused by CV-19:
  - very immediate short term focus (getting through this) and a greater focus on the local/community environment
  - no real international travel which narrowed the lens to focus on domestic issues
  - much less focus on wars/terrorism/global politics/refugees
- Less of an EU focus given that Brexit had happened and the majority (at the stage of the research) had not experienced any negative impacts
- Some areas have grown in emphasis since PR19 (note: details on what's driving this shift are shown on the following charts): **the environment, health and wellbeing, social justice and trust**
- Some areas have remained consistent:
  - **Monopoly market:** no customer choice means there is a disconnect with water as a utility and Wessex Water as a brand
  - **Water usage:** most are still unconscious about the water they use. There is some stated behavioural change but the majority are unaware of their usage. Lack of good consumption information adds to this disconnect.
  - **The economy:** concern about the long term financial impact of the pandemic. There's a need to ensure water bills are affordable, with support needed for those who can't afford to pay
  - **Surprise:** customer are often amazed by the complexities of running a water company. Understanding what's involved in the water/waste water processes raises trust and value perceptions. As does learning more about the work Wessex Water undertakes in the communities it serves
- And there were areas that, whilst still important, had diminished in emphasis:
  - **Customer service** which is seen as a hygiene factor
  - **Nationalisation:** the political debate has moved on from that heard in last general election
  - **Leakage:** this had been superseded by wider discussions on the environmental challenges and seen as part of the solution to tackle resilience
  - **Technology**
  - **Water scarcity**



# Areas that have increased in importance: the environment

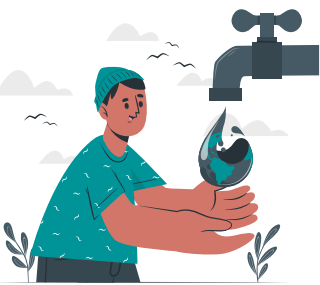
- Everyone is now conscious of “climate change” and environmental issues although levels of understand vary across customers
- A majority have a broad understanding of environmental issues and are familiar with phrases such as: climate change, plastic crisis, carbon neutral and net zero. But there’s a limited understanding about what these actually mean and the potential implications on customers, communities and the environment
- Media coverage of extreme weather events is increasing salience and making climate change relevant to countries in northern Europe (such as flooding in Germany and Belgium along with extreme heat warnings in the UK during the summer of 2020).
- However, there is a limited sense of urgency amongst the majority of customers which is in contrast to the views expressed by the Expert Panel, who talked about the need to address the climate crisis immediately:
  - Expert Panel members felt there was a need to not cause further environmental damage before the industry can start to talk about enhancing the natural environment
- And whilst environmental awareness is growing for the majority of customers, most are still choosing convenience over actions that take some effort
- A minority have a deeper understanding of environmental challenges and reflect the gravity of the situation expressed by the Expert Panel. They’re making lifestyle and brand choices that reflect their environmental beliefs
- There is a major disconnect between climate change, rainfall and the water cycle:
  - Perceptions are that rain falls from the sky, is collected and then comes out of the taps
  - Changing weather patterns that lead to extreme rainfall is seen as a good thing in ensuring water will always be available
  - This disconnect with the water cycle together with very limited experience of TUBs amongst Wessex Water customers reinforces the narrative that water is in abundance
- The perception that water will remain in abundance diminishes the value of water although many recognise that this needs to change
  - Although this view is driven by a dislike of waste and a desire to control bills rather than fear of shortages or to help the environment

## Implications for SDS / Social Purpose:

Customers need to feel that Wessex Water is committed to environmental change, they want to see ambitious and specific outputs

The majority of customers are just not engaged enough with the water conversation to commit to water conservation. There is an opportunity for more communications and water hacks to promote behavioural change

Customers tend to defer to educating children (through partnerships with schools to elevate the value of water) rather than consider there would be value in educating all consumers of the value of water. Wider engagement is needed to increase the value and ownership of water



# Areas that have increased in importance: the environment

- There were some environmental tensions identified across the generations through the intergenerational work

## Youth

- Educated at school about climate change
- Understand the complexity of issues
- Aware this is *their future* being discussed
- HOWEVER, behaviour doesn't always reflect attitudes e.g. buying fast fashion, 20 minute showers



## Parents

- Learning from their children, work policies, changes to recycling rules, listening to news agenda
- Most appear to embrace the issue and take small actions



## Grand Parents

- Split with some embracing the issue, concerned for future generations, reading around the subject and taking action
- However, others challenge the issue, unconvinced about climate change claiming it's cyclical and disproportionately reported in the media



- To help understand the differences between customers in terms of environment and water attitudes and behaviours, three distinct segments were identified in the qualitative work which were measured in the quantitative study through factor analysis around three themes:

ENVIROMENTAL CONSCIOUSNESS	EVERYDAY USAGE	WATER QUALITY CONCERNS
I would be willing to change my habits to reduce my water usage	I try to control the amount of water I use	I am concerned about the quality of the drinking water I receive
I should do more to save water and reduce the amount of water I use	I don't really think about what happens to the wastewater I flush down the loo and wash down the plughole	I'm concerned about the quality of water in the rivers in our local area
Water will become a scarcer resource in our country in the future	I don't worry about how much water I use	The quality of river and coastal waters is better now than it was 10 years ago
We're losing the battle when it comes to climate change	My water supply and sewage services are something I take for granted	

- Each of the three segments broadly represents a third of customers:

**DON'T KNOW DON'T CARE: 33%**

- Not very water conscious
- Unwilling to compromise on water usage
- Reluctant to engage

**ON MY AGENDA: 33%**

- Water aware
- Environmentally active
- Willing to engage
- Care about themselves and others

**ME & MY WORLD: 34%**

- Not very water conscious
- Care about quality for ONLY them
- Reluctant to engage

## Areas that have increased in importance: social responsibility and injustice

- A strong sense of social injustice across the different cohorts included in this research piece but heard particularly strongly from future customers
- Customers and stakeholders expect policies and practices from companies like Wessex Water that support the most vulnerable in the communities they serve and ones that acknowledge the growing wealth gap
- Covid-19 has widened gaps in society across a number of different factors:
  - Lower social grades hit the hardest:
    - Higher social grade customers talked about having “a good pandemic” – they are still in employment, working from home and not taking as many holiday. This has led to lower spending costs and higher levels of savings
    - Lower social grade customers are experiencing greater financial pressures, losing employment, visiting food banks and struggling to pay bills
  - Increasing racial pressures have been heightened by the pandemic with scrutiny of ethnic minorities contracting Covid-19 and a spotlight on groups to get the vaccine
  - The wealth and opportunity gap has widened across different age groups:
    - Gen Z – having to pay for education with the risk of university fees increasing and the rules on student loan repayments potentially changing. Working zero hours contracts with limited job security. Limited opportunity to save for property deposits and the difficulty of securing a mortgage. Having to deal with the environmental crises. Paying for Covid-19 through increased direct and indirect taxation
    - Baby Boomers – already have property with high values/equity, protected pensions and missing out on the worst of the environmental crisis
  - Increased number of customers in vulnerable situations. And more severe vulnerable situations. Leading to a need to support the elderly, large families, low income households and those with mental health issues

*Loneliness used to be something that we would associate with the elderly but it has become apparent that loneliness is something that is affecting lots more age groups as a result of Covid*

*Equality for genders and race are my main concerns at the moment. If I had the opportunity to invest it would be in the education of minorities and the less well off*



### Implications for SDS / Social Purpose:

Customers want to see Wessex Water outcomes and purpose reflect the need to protect and support the most vulnerable members of the communities it serves

There's a sense that future customers will be burdened with the costs of Covid-19 through rising inflation, increased taxation and property costs. It's important that future customers are adequately represented in future willingness to pay/investment studies

## Areas that have increased in importance: health and wellbeing

- Unsurprisingly, health focus is even bigger than it was before. Covid-19 has created universal health concerns as well as escalating health concerns, especially amongst, and for, future customers
- Families and younger people are concerned about a mental health epidemic which drives a need for an holistic “well being” approach to health and wellness
- Customers are looking for companies like Wessex Water to be responsible and look after colleagues



### Implications for SDS / Social Purpose:

Referencing Wessex Water’s commitment to public health as one of the key strands for the core purpose fits with concerns but needs dialling down and qualifying to ensure it’s manageable and achievable

## Areas that have increased in importance: trust

- The previous SDS work highlighted green/corruption of banking (2012) and underlying cynicism but no mention of political mistrust
- A big contextual issue in 2021 is widespread political/media/corporation mistrust which has been exacerbated over the course of Covid-19, driven by:
  - A perceived mismanagement of CV-19 and lockdowns (too early/too late/too short/too long.....)
  - Politician hypocrisy (Hancock saga, Boris Johnson’s dad going on holiday during lockdown, etc) and lack of transparency of Government contracts which elevated the sense of injustice already being felt due to the impact of the pandemic
- There’s confusion on the impact of Brexit – has it made individuals/households/businesses/communities better or worse off? What were the lies and truths?
- Large corporations are seen to be getting away with tax avoidance whilst individuals are experiencing a higher tax burden, which will increase in order to pay for Covid-19
- The rapid and wide spread of “fake news”
- Wessex Water is not seen as being untrustworthy but the brand is invisible:
  - Positives of being invisible = sense that the company is efficient/doing the job it’s supposed to do, there’s no bad PR and there’s no need to contact
  - Negatives of being invisible = lack of awareness of the positive projects the company is involved with, no brand connection, no ownership of water, lack of transparency, Wessex Water trying to stay under the radar

### Implications for SDS / Social Purpose:

Continue with the positive work in education, university partnerships with potential for stronger promotion. Ongoing transparency through bills/apps. Strong promotion of Wessex Water’s best in class status in the water market



## Some differences were seen amongst business customers who were very focused on their immediate world after a very difficult 18 months

- The pandemic had an impact across all business customers. Even if business revenue was unaffected (or increased in certain cases), uncertainty around the economic impact of the CV-19 meant all businesses have been focussed on survival
- Short term (“my world”) challenges identified by business customers included:
  - Changing local and international business practices; business customers had to remain vigilant and agile
  - Accessing financial support: time spent on administration was time that couldn’t be spent on core business activities
  - Some organisations were still reeling from Brexit after shocks which led to additional stress
  - Labour shortages are a key concern
  - Majority of businesses were feeling overwhelmed and felt they lacked the time and headspace to plan for the longer term or engage in wider
- Some were able to identify longer term/bigger challenges which need to be addressed once the shock from the CV-19 pandemic and Brexit has subsided. These were consistent with some of the challenges identified by stakeholders and household customers, but were not as wide ranging
- The key challenges related to:
  - The environmental challenges that will affect everyday business such as; using less energy, cutting emissions on site, using sustainable products, using local suppliers, protecting endangered species on sites
  - Keeping up with technology in a fast paced world, business customers are concerned about the cost and time it takes to innovate and remain relevant
  - Data security including GDPR and cyber threats
- In developing the Strategic Direction Statement, Wessex Water need to demonstrate they recognise the challenges faced by business customers and ensure a continuous supply of clean water and waste water services are delivered to avoid any disruption, leaving customers to focus on running their businesses. Wessex Water also need to be proactive in providing efficiency measure to support affordable bills
- Once these primary needs have been met, then business customers are open to engaging on wider issues such as Wessex Water’s environmental work and community projects.

*Everything is out the window – my whole business plan. The order book just went overnight and we could have gone bust*

*We just can’t get the workforce – there’s such a shortage of staff*

*We were one of the lucky ones. Because of what we do people wanted more because they were stuck at home. But it was still a worry, there’s just so much uncertainty and everyone is worried*



# Colleagues talk openly about pride in Wessex Water but recognise the industry challenges are diverse and onerous for the business in the SDS timeframe

- The environment dominates current and future challenges for Wessex Water:
  - Need to address CSOs (under a media spotlight at the time of fieldwork). Colleagues talked about the difficult balance of managing CSOs (ie: minimising the risk of customers experiencing sewer flooding). There's a recognition that CSOs need to be addressed but it's not a quick fix. There would be some benefit in customer education in this area
  - Enhancing biodiversity
  - Responding and adapting to the changing climate
- Other challenges highlighted by colleagues included:
  - Balancing supply/demand will becoming increasingly difficult with population growth and less effective rainfall/climate change
  - Dealing with ageing assets
  - Communicating with customers to ensure greater ownership of water
  - The need for innovation and to keep up with technology
  - An increasing regulatory burden and the challenges of dealing with multiple regulators (sometimes seemingly contradictory agendas)
  - The need for investment whilst also recognising that customer bills need to be kept affordable
  - Departmental budgets

### Implications for SDS / Social Purpose:

Understand industry narrative has shifted to wastewater driven by press/regulators but need to ensure environmental focus across business; want to see maintenance of unique Wessex Water internal culture/pride, innovative projects (Covid water testing) and commitment to local communities

*Maintaining our high position in a lot of the Ofwat tables or whatever they are is something we can all be proud of I think*

*There's not much trust in the industry at the moment - we were described as the Redrum in a Donkey race*

*I think recently the company's put quite a lot of focus on culture, independent and diversity. I think we're heading in the right direction really in terms of that.*





# Retailer's concerns about the water industry often focus on market margins, customer service/data/technology vs. environmental or social issues

## Challenges for the water industry:

- Environmental e.g. resilience to climate change
- Maintaining infrastructure/assets
- Improving 'value of water'
- Communication with customers (HH and NHH) – joint communications with Retailer for NHH would be good
- Lack of innovation
- Cost of bills (predict these will increase with wholesale environmental challenges)
- People – skill shortage

## Challenges for retailers:

- Industry is still new – lags behind energy practices e.g. data/technology
- Ability to deliver high customer service when relying on information from Wholesaler
- Lack of centralised databases for meter locations; Wessex portal crashes
- Poor information recorded about meter readings; site feedback needs to be improved
- Number of 'long unread meters'
- Clunky enquiry process (from Retailer to Wholesaler)
- Lack of sharing of long term plans (Wholesaler to Retailer)
- Providing water efficiency information

*There is a need to move forward with smart meters and improve data – they are the big things for us*

*Wessex are the best of a bad bunch – innovation, customer engagement and environmental action is better than others*

*Wessex are pretty good and you can reach out with a question without filling in a long form*

## Implications for SDS / Social Purpose:

Focus on embracing technology to deliver efficient flexible customer service, deliver more recycling solutions for businesses to reduce bills, develop co-branded communications to engage NHH customers AND improving data/access to data



# WHAT IS IMPORTANT NOW TO STAKEHOLDERS, CUSTOMERS AND COLLEAGUES?

## Key metrics in perceptions of Wessex Water

% participants



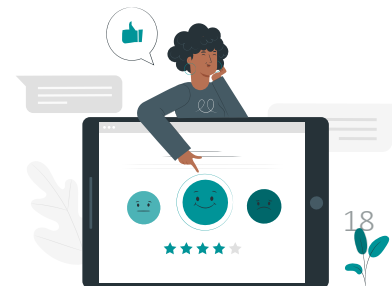
Mean score **8.1/10**



Mean score **7.8/10**



Mean score **3.9/5**



Q32. How satisfied would you say you are with the overall service provided by Wessex Water? (11 point scale) n=1,514

Q33. How much do you trust Wessex Water? (11 point scale) n=1,514

Q34. How satisfied are you with the value for money of the services you receive? (5 point scale) n=1,514

Outcomes



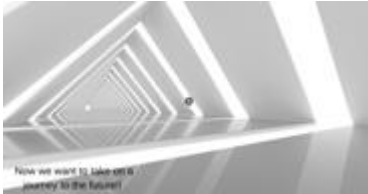
Games and exercises were played in the qualitative work to determine future outcomes for SDS: Newsletter, Tomorrow's World Video, Input/Output/Outcome

**WESSEX WATER NEWS**

BREAKING NEWS FROM YOUR WATER PROVIDER      DATE

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**Wessex Water**  
YTL GROUP



WHAT WESSEX WATER SHOULD FOCUS ON FOR THE NEXT 25 YEARS		
INPUT	OUTPUT	OUTCOME
community engagement	fewer wet wipes flushed and so fewer sewer blockages	less sewer flooding
repairing water mains	less leakage	not taking too much water from the environment

Newspaper headlines spotlight on education/technology to support conscious usage, innovative practices to support environment, responsibility for river/seas, bill affordability, neighbourhood projects and pollution/wastage

**WESSEX WATER NEWS**  
 BREAKING NEWS FROM YOUR WATER PROVIDER      DATE

**ENVIRONMENT:** What you can do to help save the environment (using less water)

**RIVERS:** We will clean up river pollution in Bridgewater and stop stealing water from habitats

**EDUCATION:** Find out more about where's your water from?

**CONSCIOUS USAGE:** WW give advice on sustainable water use

**AFFORDABLE:** Stop drips to reduce bills

**ENVIRONMENT:** Fossil free by 2050

**COMMUNITY:** Wessex help local families in need (and abroad)

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Future Customers

**WESSEX WATER NEWS**  
 BREAKING NEWS FROM YOUR WATER PROVIDER      DATE

**ENVIRONMENT:** WW announces ideas for bathwater recycling and sustainable energy

**RIVERS:** Locals flock to open water spaces due to Wessex investment in beach/river clean-ups

*Solution found for cleaner seawater at Boscombe and farmers fined for river pollution*

**EDUCATION:** WW educate kids with river walks & flushing games

**CONSCIOUS USAGE:** WW launch app to reward lower usage AND Free BUTTS

**AFFORDABLE:** WW slash bills for all

Mr Big gives up his bonus/reduces shareholder dividends

**ENVIRONMENT:** WW prevent and fix leaks in record time

**COMMUNITY:** WW introduce people power letting customers vote for local projects

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Pre-Kids/Families

**WESSEX WATER NEWS**  
 BREAKING NEWS FROM YOUR WATER PROVIDER      DATE

**ENVIRONMENT:** WW use biosolids in agriculture and fuel and design state of art water capture process

Partnerships: WW develop builder relationships to design water friendly, eco homes

**RIVERS:** Clean enough to drink

*WW invest in work experience, apprenticeship scheme and streamline management*

**CONSCIOUS:** Use our water saving products to reduce water/sewerage bill

**ENVIRONMENT:** We will reduce leakage and help you reduce leakage in your property

**AFFORDABLE:** Reduce prices for those in need

GLOBAL: WW sponsor first water pump in Africa

**EDUCATION:** WW go top of class to educate children

**ENVIRONMENT:** Lead way in education to hit carbon neutral by 2040

**COMMUNITY:** Local projects combat impact of Covid on physical and mental wellbeing

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Empty Nesters/Retired

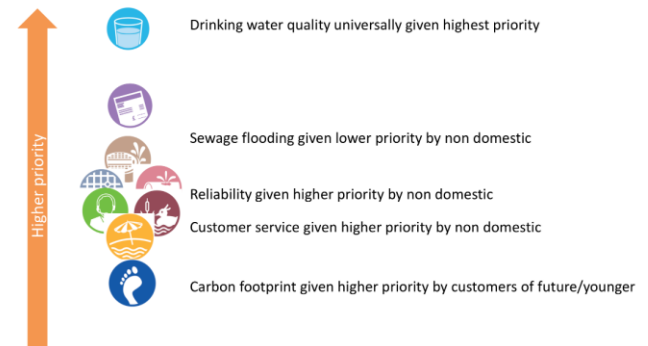
## 12 outcomes were derived during the qualitative work. Outcomes were identified through a spontaneous process and were customer led

1. Safe, quality drinking water
2. Continued water supply
3. Affordable and fair bills, for everyone
4. Improve value for water perception
5. Keep sewerage system working effectively
6. High customer satisfaction
7. Improve brand visibility/community connection
8. Reduce need to take water away from local habitats
9. Protect and improve river/beach water quality
10. Improve nature/wildlife (ecosystems/biodiversity)
11. Improve impact on local community e.g. tourism, wild swimming spots
12. Net Zero by 2040/50

NB. Not in priority order

During the PR19 work customers were prompted with 9 “goals” making direct comparison difficult given the different approaches adopted

Experts were pleased and reassured to see an increase in the number that focused on environmental issues (vs PR19 engagement).



## Hygiene Factors: 12 outcomes were derived from numerous activities that customers/ retailers/colleagues want to see in the SDS

Inputs (Activities)	Output (Result)	Outcome (End Benefit)
Purification/filtration of water to remove chemicals Regular testing of water	Clean/safe/high quality drinking water	Safe, quality drinking water (1)
Protection of assets from cyber threats	Clean/safe/high quality drinking water	Safe, quality drinking water (1) Continued water supply (2)
Engagement activities that control usage: Smart meters, price packages, practical devices, education of value of water Compulsory metering (with safety net for families/elderly)	Enhance value of water Change behaviour Meet supply/demand	Continued water supply (2) Affordable and fair bills, for everyone (3) Improve value for water perception (4) Reduce need to take water away from local habitats (8)
Education on what to flush	Fewer blockages/Less CSO	Keep sewerage system working effectively (5)
Infrastructure investment/fix pipework Improved drainage/storm overflow systems	Reduce leakage Improve drainage	Affordable and fair bills, for everyone (3) Keep sewerage system working effectively (5) Reduce need to take water away from local habitats (8) Protect and improve river/beach water quality (9)
Capture/store water e.g. build reservoirs, desalination plants	Increased storage/supply	Continued water supply (2)
Multiple customer service channels Invest in technology Keep customer service centre	Accessible customer service	High customer satisfaction (6) Improve brand visibility/community connection (7)
Work with farmers/EA to avoid agricultural seepage Incentivise farmers to be more responsible e.g. new pesticides Stop sewerage seepage Volunteer days to clean up rivers/beaches	Less pollution in rivers/waterways	Protect and improve river/beach water quality (9) Improve nature/wildlife (ecosystems/biodiversity) (8) Improve impact on local community e.g. tourism, wild swimming spots (11)
Support tariffs for most vulnerable	Protect those in vulnerable situations	Affordable and fair bills, for everyone (3)
Use renewable energy across supply chain	Reduce carbon footprint	Net Zero by 2040/50 (12)
Transparent bill communications Paperless bills/app	Enhance value of water	Affordable and fair bills, for everyone (3) Improve value for water perception (4) Net Zero by 2040/50 (12)
Plant trees around treatment plants	Neutralise smell around treatment plants	High customer satisfaction (6)

## Enhancing Factors: 12 outcomes were derived from numerous activities that customers/ retailers/colleagues want to see in the SDS

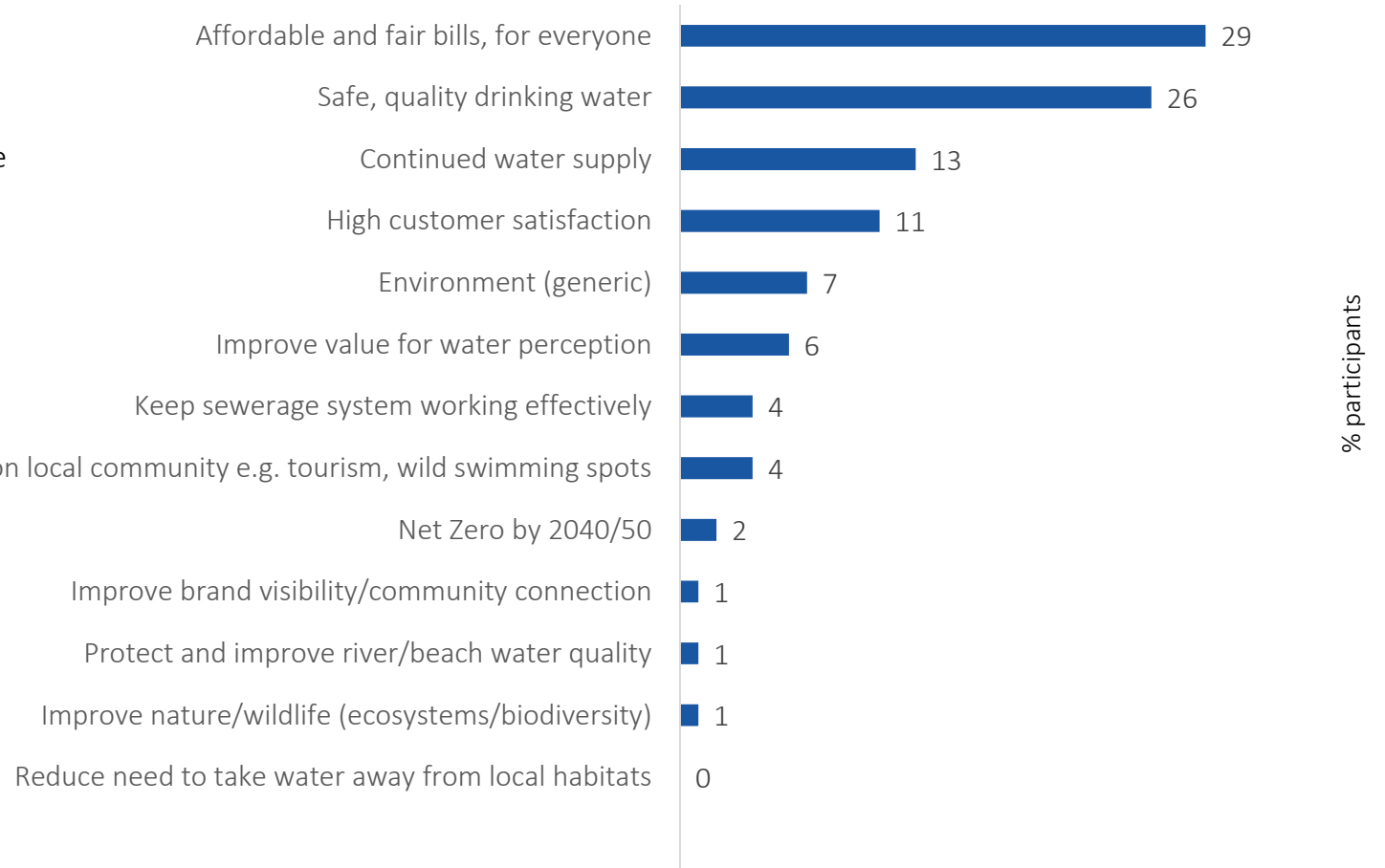
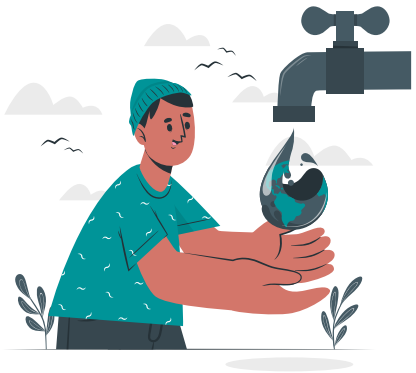
Input (Activity)	Output (Result)	Outcome (End Benefit)
Rewards for reduced water usage	Change behaviour Meet supply/demand	Continued water supply (2) Affordable and fair bills, for everyone (3) Improve value for water perception (4)
Innovation and research into new technologies Research into desalination	New storage capture	Continued water supply (2) Reduce need to take water away from local habitats (8)
Work with partners (farmers, builders, manufacturers) Reduce microplastics, eco-houses, education on wet wipes, etc	Fewer blockages/less CSOs Meet supply/demand	Continued water supply (2) Keeps sewerage system working effectively (5)
Educate schools/customers about water conservation	Reduce consumption Less wastage	Affordable and fair bills, for everyone (3) Reduce need to take water away from local habitats (8) Improve value for water perception (4)
Coordinating with partners e.g. utilities, local authorities	Less duplication of resources Reduce disruption Reduce flooding on roads	Affordable and fair bills, for everyone (3) Improve impact on local community e.g. tourism, wild swimming spots (11)
Encourage/enable grey water recycling Promote water butts	Less wastage Less sewer pressure	Affordable and fair bills, for everyone (3) Improve value for water perception (4) Keep sewerage system working effectively (5)
Advertising/communications about WW local activities, about bill breakdown e.g. TikTok, Influencers	Enhance value of water Change behaviour	High customer satisfaction (6) Improve brand visibility/community connection (7)
Water softeners In-home water purification taps	Less limescale	Safe, quality drinking water (1) High customer satisfaction (6)
Invest in specific community projects e.g. public water fountains to reduce plastics, beach clean ups	Various/Improve community life/local environment/education	Improve impact on local community e.g. tourism, wild swimming spots (11)
Offer skilled apprenticeships to local people	Reduce local unemployment/crime Boost local communities	Improve brand visibility/community connection (7)
Invest in local reservoirs for recreation e.g. sailing, pop up cinema, pop up bars	Boost local communities	High customer satisfaction (6) Improve brand visibility/community connection (7) Improve impact on local community e.g. tourism, wild swimming spots (11)
Use sewage to generate energy	Lower carbon footprint	Net zero by 2040/50 (12)
Bio solid fertiliser	Lower carbon footprint	Net Zero by 2040/50 (12)



**Participants in the quantitative study were asked to provide the number one priority they want Wessex Water to deliver - this could either be now or over the next 25 years. These were then mapped against the outcomes derived from the qualitative work to assess whether there were any gaps**

**Spontaneous customer priorities identified through the quantitative work:**

- The majority mapped across to the qualitatively derived outcomes
- There were some generic environmental comments that couldn't be mapped directly to one of the more specific environmental outcomes
- There were no gaps identified between the qualitative and quantitative outcomes





## 11 of the outcomes were grouped into three broad areas

### Serving every customer, by doing things such as:

- Delivering safe, quality drinking water
- Providing a continued, reliable water supply
- Providing high quality customer service so that any customer can easily access their services and support
- Ensuring bills are fair and affordable for all
- Keeping the sewage service working

### Protecting and enhancing the environment, by doing things such as:

- Reducing the amount of water taken from local habitats
- Improving ecosystems and increasing biodiversity
- Reaching net zero by 2040
- Protecting and improving river and beach water quality

### Serving Wessex Water's communities, by doing things such as:

- Improving the impact on local communities for example volunteering to support community schemes
- Improving customers' perceptions of the value of water

### In the quantitative survey participants were then asked:

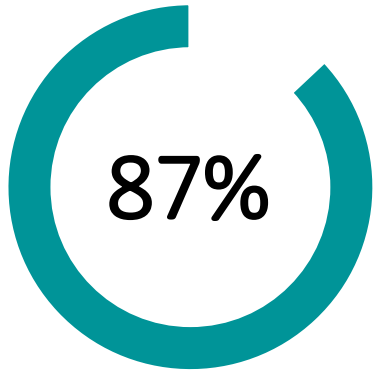
- Whether they would exclude any of the outcomes listed
- Whether there was anything missing and if so, what

The outcome *Improve brand visibility/community connection* was not included in this exercise

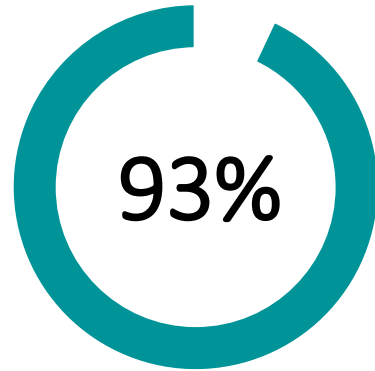
## The majority of customers agreed the outcomes around Serving Every Customer are complete and should all be included

### SERVING EVERY CUSTOMER

- Delivering safe, quality drinking water
- Providing a continued, reliable water supply
- Ensuring bills are fair and affordable for all
- Keeping the sewage service working
- Providing high quality customer service so that any customer can easily access their services and support



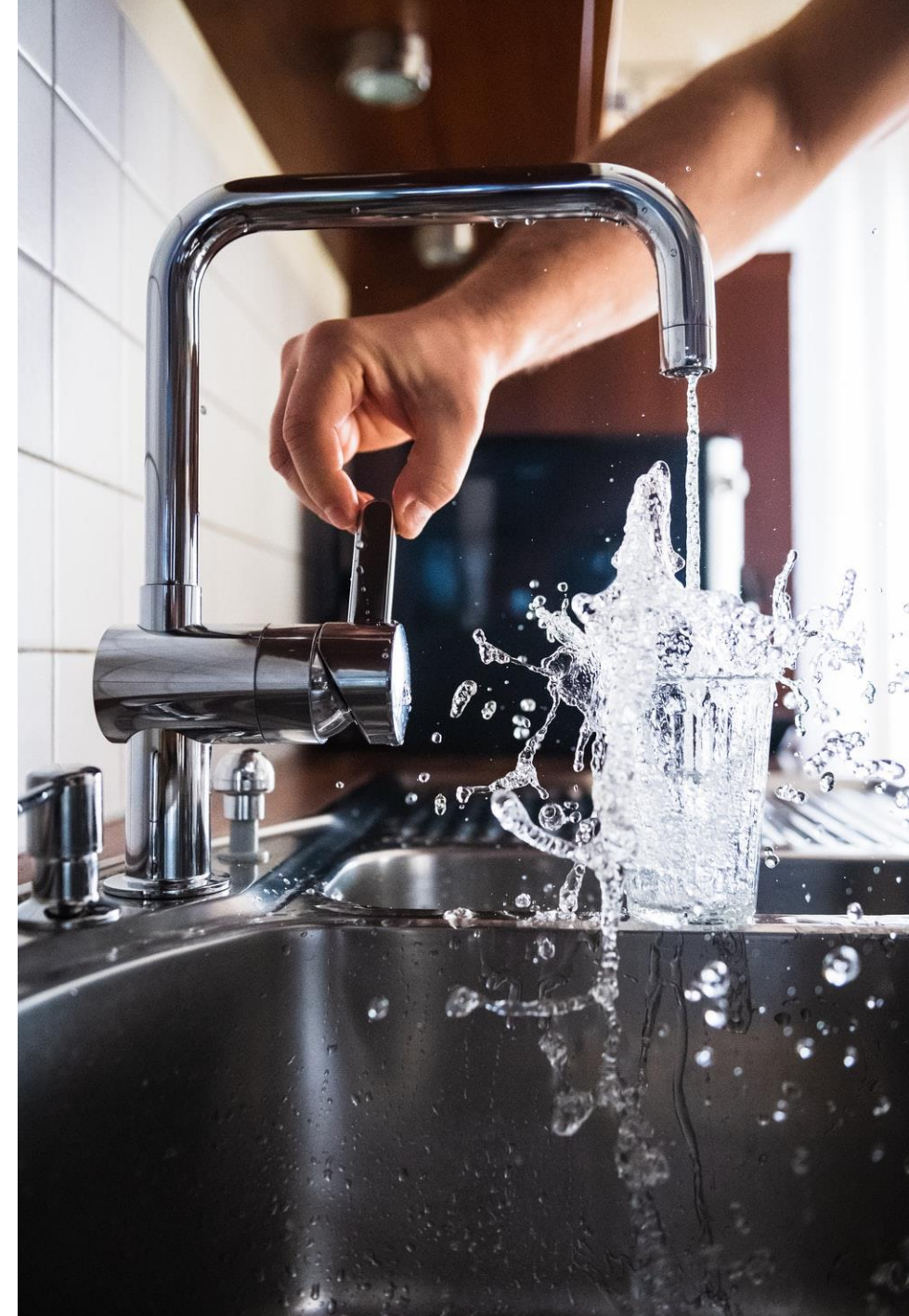
of participants thought  
the list of outcomes for  
this area is complete  
(nothing missing)  
(Q41)



of participants  
would not exclude  
any of the  
outcomes listed  
(Q42)

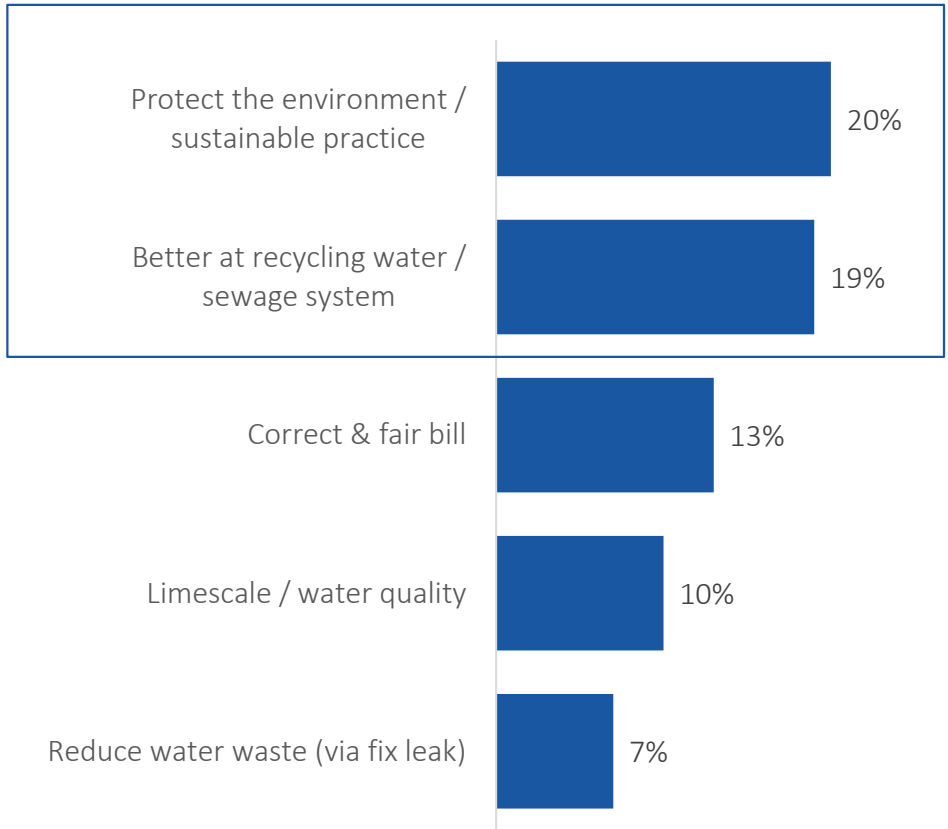
Q41. Is there anything missing from this list that you would like Wessex Water to deliver? n=1,627

Q42. And would you exclude any of these? n=1,627

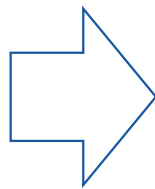


# 13% didn't feel the outcomes mentioned in Serving Every Customer were complete, although when asked what they would include, most areas were already covered in other areas or included under a main heading

## What's missing?



Top 5 reason, from 242 comments



<b>Sustainable solutions, practice</b>	<ul style="list-style-type: none"> <li>• The possibility of looking at micro hydro in smaller communities</li> <li>• All the above are great but should be pursued at zero cost to the environment,</li> <li>• Protect the consumers' environment</li> <li>• Helping us all to be more aware about micro plastics damage</li> <li>• Take more green initiatives, where possible</li> <li>• More emphasis on green initiatives...grey water usage, rainwater usage etc</li> </ul>
<b>Better at water recycling, reduce harmful discharge</b>	<ul style="list-style-type: none"> <li>• Within 'Keeping the Sewerage Service Working' continued education of customers as well as lobbying Govt for increased awareness of what can/can't be flushed, and within Delivery safe, quality drinking water, changing all customers over to a water meter</li> <li>• Ensuring that all water discharged into water courses is drinkable quality</li> <li>• Remove the need for septic tanks by providing mains sewers for all</li> <li>• Sort out drainage and water levels in Poole Park</li> </ul>
<b>More effort to reduce pollution</b>	<ul style="list-style-type: none"> <li>• Keep water environment clean and safe and not polluted</li> <li>• Ensure no spillage of pollution into the sea</li> <li>• Ensuring less pollution to rivers</li> <li>• Doing this in an environmentally friendly way, i.e.. minimising water use overall, minimising pollution, maintaining rivers, etc</li> <li>• Improve reduced pollution from sewage</li> </ul>

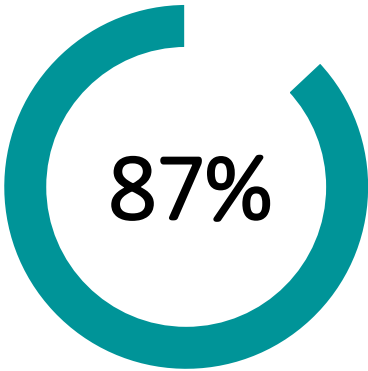
### Implications for SDS

In most cases when customers felt something was 'missing' they are looking for more granular detail from Wessex Water in the outcome areas already identified

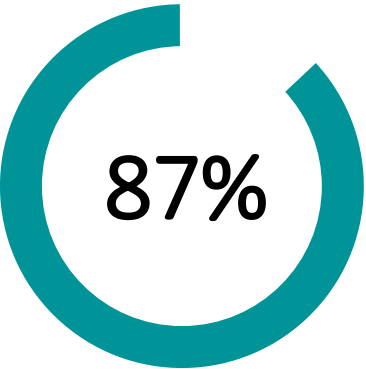
Q41. Is there anything missing from this list that you would like Wessex Water to deliver? n=242

# The majority of customers agreed the outcomes around Protecting and Enhancing the Environment are complete and should all be included

- PROTECTING AND ENHANCING THE ENVIRONMENT
- Reducing the amount of water taken from local habitats
  - Improving ecosystems and increasing biodiversity
  - Reaching net zero by 2040
  - Protect and improve river and beach water quality



of participants thought the list of outcomes for this area is complete (nothing missing)  
(Q43)



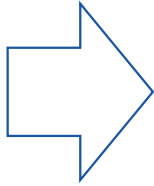
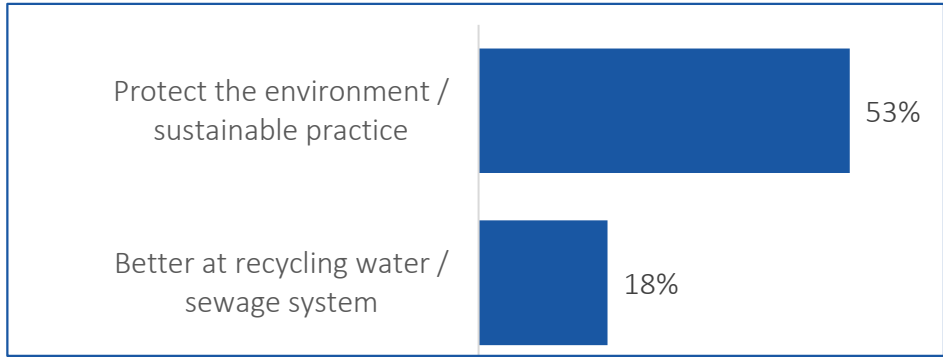
of participants would not exclude any of the outcomes listed  
(Q44)



Q43. Is there anything missing from this list that you would like Wessex Water to deliver? n=1,627  
Q44. And would you exclude any of these? n=1,627

# 13% didn't feel the outcomes mentioned in Protecting and Enhancing the Environment were complete, often as they wanted more ambition around Net Zero or Sustainability

## What's missing?



<b>Need to be more ambitious about Net Zero by 2040</b>	<ul style="list-style-type: none"> <li>• Could 2040 be improved upon?</li> <li>• We have signed off on being net zero by 2030 not 2040</li> <li>• Our net zero target is 2030!</li> <li>• I think the goal should be more ambitious than 2040 net zero, even if it is just a provisional target. This should be a leading priority</li> </ul>
<b>Sustainable solutions, practice</b>	<ul style="list-style-type: none"> <li>• Increasing the number of environmentally sustainable solutions in treatment processes</li> <li>• Stop producing the quarterly magazine that gets delivered to every household presumably at great cost financially and paper wise.</li> <li>• processing sewage to provide cheap energy sources for heating to take any form of sewage AWAY FROM BEACHES.</li> <li>• Planting more trees on Wessex Water sites e.g. near reservoirs</li> <li>• Invest in bio fuel technology</li> </ul>
<b>More effort to reduce pollution</b>	<ul style="list-style-type: none"> <li>• Look to other sources of pollutants in watercourses not just farmers</li> <li>• Take legal action against polluters.</li> <li>• Work closely with the EA to prosecute every water pollution incident</li> <li>• Severely fine farmers for their constant use of pesticides that leak into rivers.</li> </ul>
<b>Better at water recycling, reduce harmful discharge</b>	<ul style="list-style-type: none"> <li>• Stop discharging sewage into local rivers when it rains heavily.</li> <li>• Poor river quality is a massive issue at the moment, i no longer feel proud to tell people who I work for because of the negative feelings about CSO spills</li> <li>• Investment into more effective and robust wastewater treatment processes.</li> <li>• No untreated discharges; resilience of infrastructure to extreme weather events</li> </ul>

### Implications for SDS :

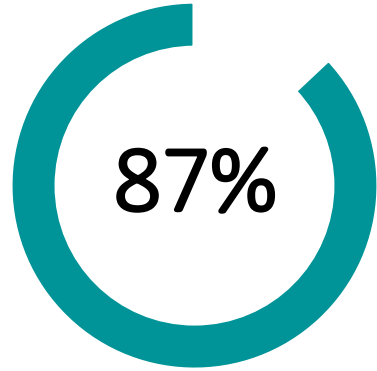
In most cases when customers felt something was 'missing' they are looking for more ambition from Wessex Water in the outcome areas already identified

Top 5 reason, from 225 comments

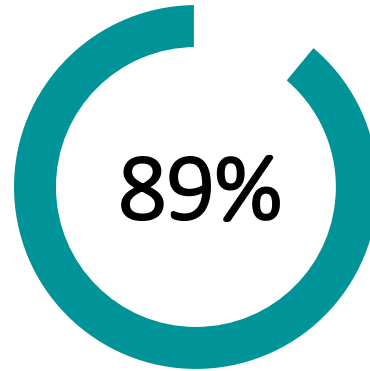
## Similarly, the majority of customers agreed the outcomes around Serving Wessex Water's Communities are complete and should all be included

### SERVING WESSEX WATER'S COMMUNITIES

- Improving the impact on local communities for example volunteering to support community schemes
- Improving customers' perceptions of the value of water



of participants thought the list of outcomes for this area is complete (nothing missing) (Q45)



of participants would not exclude any of the outcomes listed (Q46)



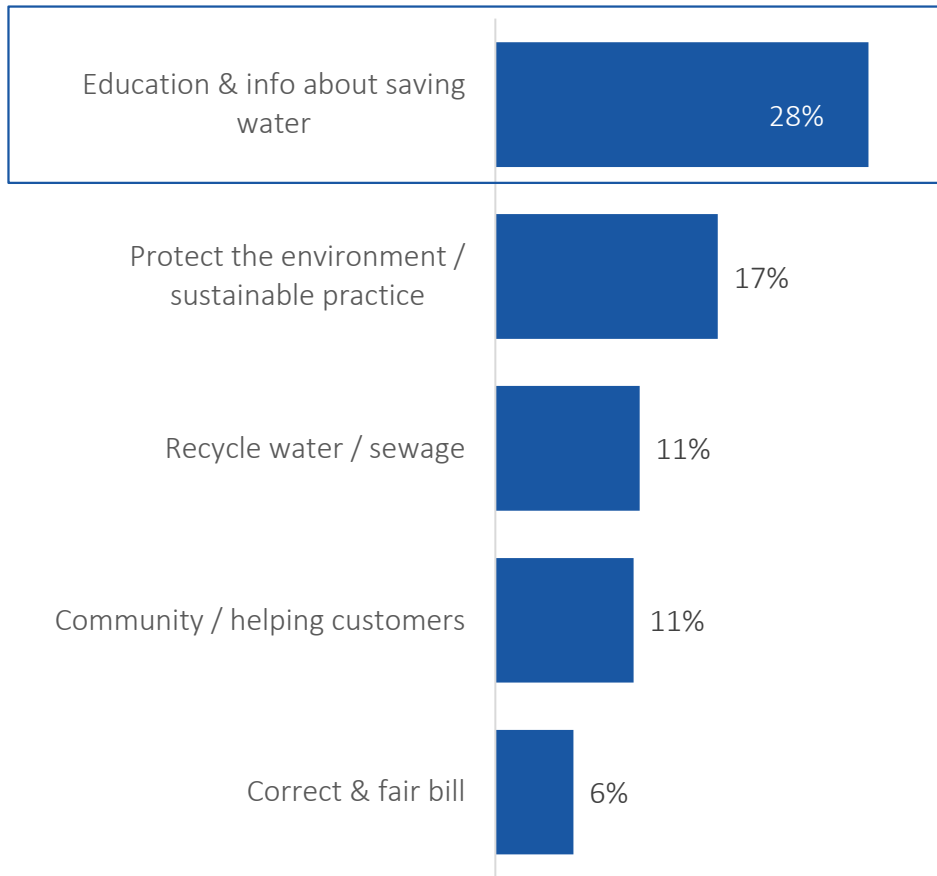
Q45. Is there anything missing from this list that you would like Wessex Water to deliver? n=1,627

Q46. And would you exclude any of these? n=1,627

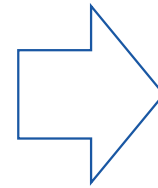


# 13% didn't feel the outcomes mentioned in Serving Wessex Waters community were complete, though again in most cases the outcomes customers requested to be added had already been covered in other areas

## What's missing?



Top 5 reason, from 229 comments



<p><i>Improve education of the sewage life cycle</i></p>	<ul style="list-style-type: none"> <li>• Educating communities on the water lifecycle so they can properly understand the impact of water overuse</li> <li>• improving communities perceptions on value of sewage treatment</li> <li>• Educating customers on the importance of sewage treatment to the environment and how their actions can affect this</li> </ul>
<p>Real life experience - opportunity for learning</p>	<ul style="list-style-type: none"> <li>• Encouraging children to get out and see where their water comes from.</li> <li>• Educate the young school trips to sewage plants so they can see the value of recycling and follow the course of water to and from the home and back into the water course</li> <li>• Offer more water-based amenities for the public to visit (eg like Chew Valley Lake)</li> </ul>
<p>In school education</p>	<ul style="list-style-type: none"> <li>• In-school education on what Wessex Water provides to the community as a whole</li> <li>• Offering education to school and other groups on the ways we depend on our excellent water and how to keep standards up</li> <li>• Education programs, sponsorship within schools</li> </ul>
<p>Involve customers in water-saving projects</p>	<ul style="list-style-type: none"> <li>• Perhaps get customers to support in some projects to make them aware of the work undertaken.</li> <li>• Education - get children involved to learn how to reduce wastage and ensuring our rivers and seas are clean</li> </ul>
<p>At home water saving support via water butt &amp; kits</p>	<ul style="list-style-type: none"> <li>• Promoting use of water butts, especially in blocks of flats for communal areas</li> <li>• Linking in with water butts, supply at cost to customers of Wessex, water butts, draining systems to the butts, diversion kits to enable grey water to be used, all at cost to Wessex. Wessex must have huge buying power where they can offer their customers such items. Water butts, drain diversion kits and other items that would save water and also protect the environment in the long term</li> <li>• More secondary water butts</li> </ul>

### Implications for SDS :

Customers want Wessex Water to directly engage when it comes to education and gave practical suggestions on how this could work

Social Purpose



# The top level response to Wessex Water’s proposed social purpose showed general acceptance, though there was a perceived need to enhance the content

The Social Purpose was tested both qualitatively and quantitatively with the full range of stakeholders and customers.

**82%** of quantitative participants agreed that the purpose reflects what they would expect a company like Wessex Water to stand for.

Acceptance was lower among customers who had a generally more negative perception of Wessex Water, for example lower satisfaction, lower trust, and those scoring Wessex Water lower for providing value for money.

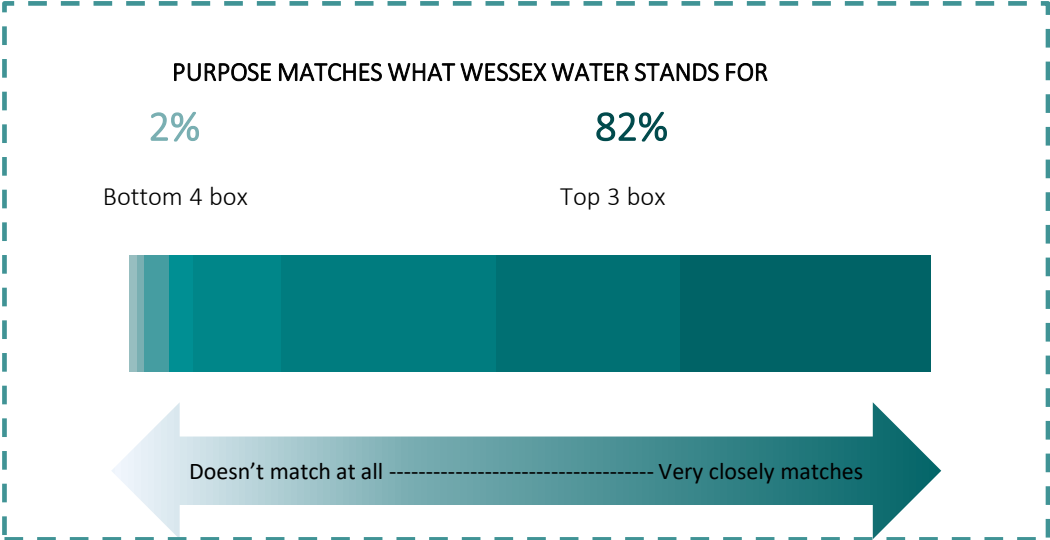
It was also lower among customers in the Bournemouth region, compared with those in Bristol or Wessex Waters dual supply customers.



In the qualitative research we conducted a deeper dive to obtain more feedback about the purpose statement. On the positive side, the purpose fits with ‘what matters’ now and the aims are high level/strategic.

However, there were a number of areas for improvement highlighted:

- The current expression of purpose doesn’t capture how well Wessex Water do things. This was particularly evident among employees, who are proud of the service Wessex Water provides and feel this should be highlighted. Experts and stakeholders agreed that the current expression of purpose doesn’t capture how well Wessex Water do things.
- For many customers, stakeholders and employees the overall purpose feels too generic, bland, boring and lacks meaning. The purpose needs to be more specific (for example about the local area and Wessex Water), braver and more ambitious. It should also talk about innovation and the future
- Any reference to providing water/sewerage services is missing
- More detailed feedback about the three ‘strands’ was also provided and is documented on the next chart.



“This feels like it’s on the right track but is it ambitious enough’ Devizes, youth”

“It doesn’t feel unique to Wessex Water and is this what they see as future’ Wiltshire, parent”

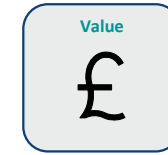
# The three key strands (health/environment/£££) are generally seen as a good fit with contextual issues



Improve public health



Enhance the environment



Creating value for the people we serve

Positives

- Improving Public Health is important and especially topical for all given the recent COVID -19 pandemic.
- All recognise that clean water/effective sewage is an enabler to Public Health and that Wessex Water has a role in this, so it is valid to reference this
- Experts link health to COVID, sewage projects, prescription work

- Environmental commitment is on the whole seen as urgent (especially by stakeholders but increasing in importance for customers) and central to Wessex Water purpose, so there was agreement that this should be highlighted
- Most also recognised the links to health and well being e.g. green prescriptions and environmental well being, and this was well captured in the social purposes

- All recognise that value is a priority for HH and NHH customers so its important that this is referenced in the Social Purpose.

Enhancements

- However, many question whether this is Wessex Water's primary purpose
  - Is the statement over ambitious?
  - Its not a core responsibility for Wessex Water, and they are not in full control of this.
  - Questions were also raised about how this would be measured?
- Customers and retailers felt the claim of 'improving public health' is too broad, unbelievable and out of Wessex Water remit
- Some felt that there was key information missing – the core purpose must include continual provision of clean, good tasting water **AND** safe removal of wastewater
- And customers stated that 'Public health' feels limiting and this should be more inclusive and reference physical/mental health/well being

- There was some debate over the use of the word 'enhancing' language. Some experts and stakeholders feel the word is too soft/gentle and out of sync with the gravity of the situation VS. others who recognise that even standing still/maintaining is a HUGE challenge given the 'environmental deficit'. Defining a starting point for the baseline measurement will be key.
- Customers often don't appreciate scale of problem and how challenging 'enhancing' is
- Stakeholders suggested that this could be expanded, and Wessex Waters purpose is to protect and improve nature, wildlife and communities, and ultimately create an environment where nature can look after itself

- Lacks clarity
- 'Creating Value' is ambiguous. Stakeholders, customers and retailers all wanted to know more about how Wessex Water are creating value? – Is this VFM for example? Or is this added value in the community?
- There was agreement among most that the emphasis should be on affordability, fairness and customer service

Implications:

Tone of the proposed purpose feels generic (any company), overly corporate, dull/flat and loses the sense of Wessex Water, a water company brand which is seen as more imaginative, sector leading and forward thinking

## RESPONSE TO SOCIAL PURPOSE : IN DETAIL

*They behave like a mutual and this isn't capturing the essence of Wessex Water, for me*

*It's not doing justice to the now, let alone the future*

*Creating value sounds like fluffy, focus groups stuff*

*The bit I don't like is the 'creating value for the people we serve.' That kind of means nothing.*

*Don't get me wrong they are a bloody lovely company like a weird social enterprise but this statement, it feels like quite a vanilla statement or purpose*

*Improving public health is just too big, how can that be the 'why they operate'*

### Experts/Stakeholders

*More value – what does that mean. For me, well more value for me is about more Balearic music!*

*Public Health – this sounds almost Victorian*

*Health thing makes sense when you think about the work they are doing with medicines in the water supply*

*Should it include the economic resilience of the region and community it serves*

## RESPONSE TO SOCIAL PURPOSE : IN DETAIL

*'9, 8, 9, 9, 8, 7' – it's great, it's fine'*

Bristol

*'It feels like something is needed on efficient customer service'*

Bristol

*'It feels a bit blah - doesn't feel like a company that get the highest service scores in the sector!'*

Taunton

*'It looks like a lot of thought has gone in to it but I want to drill down and see how – I mean public health – how?'*

Retailer

*'Something like Net Zero is good but we need a 4 by 4 to get up to some of our sites'*

Colleague

*'The idea is good but it feels like a political slogan 'public health message''*

Bournemouth

*'It just says what they already do but doesn't feel very progressive or innovative'*

Retailer

Customer (HH and NHH)  
and colleague comments

*'We do serve people and places so that's quite good – it is what we do''*

Colleague

*'It feels from this like they are embarrassed about what they do and yet they are the guardians of water – a human right'*

Salisbury

*'It's not very Ronseal – it doesn't do what it says on the tin!'*

Salisbury

*'How would we improve public health – it's not magic, healing water'*

Colleague

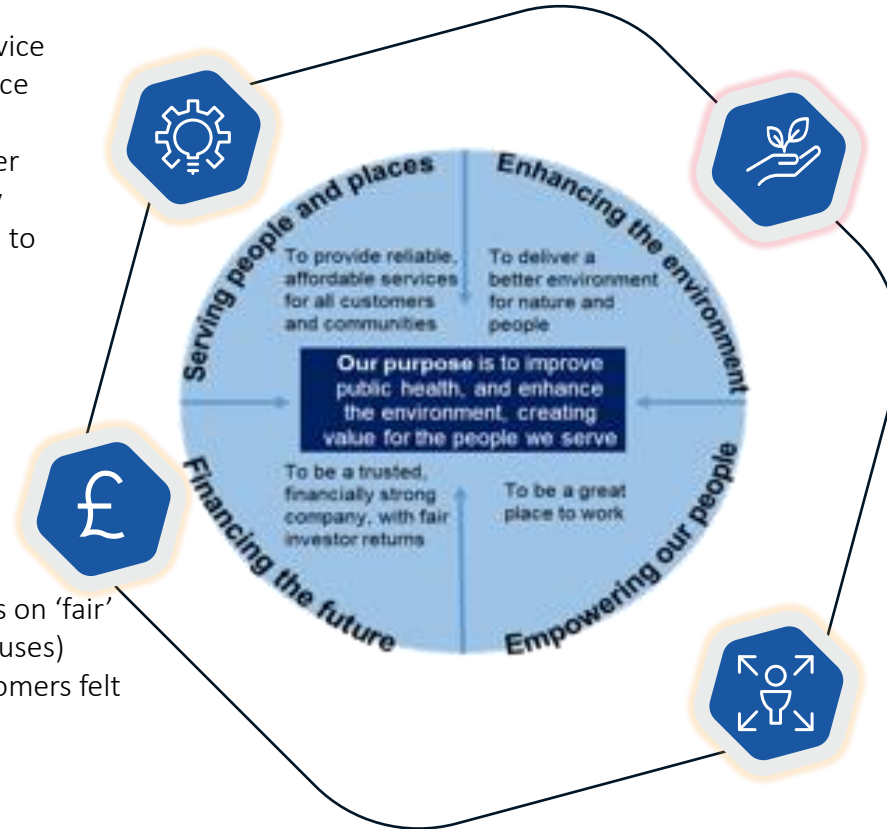
The overarching aims that sit behind the Social Purpose were explored qualitatively. Customers, colleagues and stakeholders agreed the visual is simple and straightforward. There were suggestions for improvements particularly around wording/ tone

### Serving People & Places

- The sentiment and expression of this was viewed positively
- Customers felt that 'reliable' conveys positive service aspects such as meeting supply/demand/ resilience challenges
- Affordable was understood to mean Wessex Water would be addressing issues around water poverty
- 'Customers and communities' could be enhanced to explicitly reference the diverse/rural Wessex geography

### Enhancing the Environment

- Many (especially stakeholders) are keen for this to capture joint environmental responsibilities and partnership working with other organisations.
- Customers also appreciated this would require a partnership approach for Wessex Water with other organisations (though had less recognition of the role they themselves need to play).
- Environmental well being and leisure/recreation feel part of this, could this be referenced?
- More urgency needed to demonstrate understanding of environmental crisis



### Empowering our People

- General agreement that it is critical to have something that focuses on Wessex Water talent.
- The reference 'Empowering Our People' is positive and accurately reflects colleagues views on Wessex Water
- However, colleagues and stakeholders felt that the statement 'Great place to work' is a bland expression, and colleagues feel that it undersells the experience and pride associated with working for the company
- Some (stakeholders, customers and colleagues) felt that this could be expanded to be about empowering all people, customers and communities to ensure joint ownership

### Financing the Future

- This was generally well understood. The emphasis on 'fair' should be two way (customers/shareholders/bonuses)
- All accepted that this is important but some customers felt it was less relevant for them

Implications:

Essence of the four aims that sit behind the core purpose feel right to Experts, Stakeholders, Customers, colleagues and retailers – some changes to wording/ tone feel necessary

The majority of the outcomes identified in the research do sit underneath the core aims. The explicit aim of ‘working with partners’ feels like it’s missing from the overall purpose

- ### Serving every customer and our local communities
1. Safe, quality drinking water
  2. Continued water supply
  3. Affordable and fair bills, for everyone
  4. Improve value for water perception
  5. Keep sewerage system working effectively
  6. High customer satisfaction
  7. Improve brand visibility/community connection

- ### Financing the Future
- Attracting investment to improve infrastructure/communities
  - Controlling shareholder payouts and exec bonuses



- ### Protecting and enhancing our environment
8. Reduce need to take water away from local habitats
  9. Protect and improve river/beach water quality
  10. Improve nature/wildlife (ecosystems/biodiversity)
  11. Improve impact on local community e.g. tourism, wild swimming spots
  12. Net Zero by 2040

- ### Empowering our people
- Continued diversity of workforce
  - Addressing technical skills gap
  - Attracting new talent in light of ageing workforce
  - Volunteering days to support staff
  - Offering apprenticeship schemes

Implications:

Additional aim of Social Purpose to ‘Future proofing partnerships with our customers and communities’ - increasing ‘ownership’ of water/wastewater, setting up partnerships with housebuilders, farmers, utilities, etc



# Continuing the development of the Strategic Direction Statement



## FINAL EXPERT VIEWPOINT

### Wrap session undertaken with five key Experts to share headline findings and gather comments

1. No surprises from stakeholder and customer feedback. Issues around impact of long-term austerity policies, public mental / medical health crisis and broad environmental concerns all recognised as current important issues
2. Customer attitudes change so ongoing **attitude tracking** via national surveys e.g. British Social attitudes, an effective way of getting close to how people feel, and to monitor changes over time
3. More emphasis needed on the importance of **meaningful communication** with customers as a backdrop to PR24
  - Current communications 'quite weak and passive' e.g. indiscriminate leafleting, blanket bill communications
  - Suggestions included a **personalised dashboard** style of communications (eg tailored for future customers), stronger '**dynamic feedback loops**' to heighten involvement and ensure that customers understood the impact of their actions, myth busting content
  - Urgent need to engage with customers to ensure they understand their role in the **water conservation process** – participative tone, all in this together – as there is only so much Wessex Water can do without consumer change. Need to dial up the link between customer behaviour and consequences e.g. sewer system, CSO
  - Meaningful communications could be framed within the broader environmental agenda that has captured people's attention, but important for this to be specific
4. Experts expect to see changes in customer expectations around customer service experience e.g. changes to GSOP to reflect faster resolution of queries/complaints in a digital world
5. Experts felt that stronger engagement was needed with the younger generation to harness anxiety and create a mood change – tailored communications that use appropriate language examples from relevant markets
6. Experts were unsurprised to see the strong environmental narrative and feel that meaningful communications could be framed within this broader environmental agenda that has captured people's attention

## FINAL EXPERT VIEWPOINT

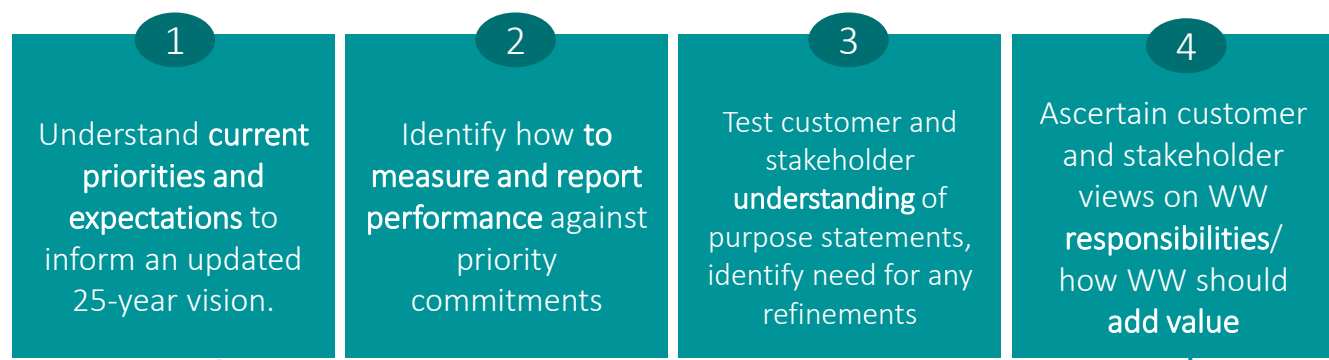
### Wrap session undertaken with five key Experts to share headline findings and gather comments

7. Water companies are seen by Experts to be the 'silent services' and using the environmental agenda to get a spotlight onto water/wastewater behaviours could be powerful
8. Experts had further feedback on the revised Purpose and there was some discussion around the difference between 'Purpose' and 'Aim' which had been covered in previous sessions with Wessex Water representatives (it is not clear that this was resolved):
  - The idea of supporting health and wellbeing is understood and better than 'public health' but not sure that water and wellbeing is intuitive
  - Unsure whether 'enhancing the environment' relates to the natural world or community
  - 'Diverse communities' feels a bit tokenistic – is this about the difference in people or geography?
9. In terms of Outcomes, Experts were pleased and reassured to see an increase in the number that focused on environmental issues (vs PR19 engagement). The Outcome list was felt to be 'taking shape' well and felt that external customers had aligned with the right Outcomes
10. There is felt to be a need for more context and specifics around the individual Outcomes. Experts keen to see something specific mentioned on the Catchment area approach, breaking away from large infrastructure issues, increased innovation, tailoring solutions to local communities, reducing the need for water treatment NB. Experts referring to activities vs Outcomes
11. Some suggestion that more ambition was needed e.g. no 5 'keep sewerage system working effectively' could be about *improving the sewerage system* through projects like reducing the need for water treatment
12. Experts reinforced the issue that working with Wessex Water is a positive experience with innovative, forward-looking teams in an industry where the regulatory framework tends to be backward looking

# Appendix: Detailed methodology



# QUALITATIVE APPROACH IN DETAILS



## Qualitative research

**BOTTOM UP APPROACH:**  
everything is customer driven and outcome based – the qual research was focussed on spontaneous generation of outcomes

- Expert Co-creation and Stakeholder Workshops – Expert panel** comprising six key thinkers (environmental, social, economic, human resources , conservation, academics):

  - Review at a top level the broad themes of the current Strategic Direction document
  - Identify potential areas to update
  - 2 x mini Stakeholder Groups to provide additional independent review of Strategic Direction and Outcome approach
- Inter-generational ethnography**

  - In home immersion session with different generations from the same family
  - Tease out and debate broad priorities and expectations
  - Identify any amends and explore different motivations
- Enhancement**

  - Understanding what matters to customers/colleagues/retailers
  - Bottom up approach to building outcomes
  - Perceptions of Strategic Direction and Social Purpose with tailored engagement channels to reach different audiences

## EXPERT/STAKEHOLDER AUDIENCE:

Diverse groups of Experts and Stakeholders with vast level of experience selected to provide broad perspective and vision

### Experts

ORGANISATION	ROLE
University of Bristol:	Academic, Social Policy Researcher
University of Bath:	Senior Lecturer, Chemical Engineering Water Innovation and Research Centre
CBI:	Economist
EA:	Environment, Planning and Engagement
Waterwise:	Managing Director
Wessex Water:	Human Resources Specialist

- External Advisors to Wessex Water e.g. Futures Panel, Affordability/Debt/Vulnerability Panel, Sustainability Panel
- Projects exploring nutrient management and emerging contaminants
- Health projects e.g. Covid tracking, life-style prescriptions
- Industry infrastructure innovation and investment
- Carbon reduction focus
- Innovation on wastewater treatment
- Price review advisor to Treasury
- WRMP
- EnTrade



### Stakeholders

ORGANISATION	ROLE
Rural England:	Representation, Research
Consultant:	Scope, Utilities
Dorset Council:	Environment, Waste Reduction
NFU:	Environment, Land use, Planning
Wessex Rivers Trust	CEO

- Advisor on PSR, Social Justice
- Championing customers in vulnerable situations
- Partnership projects on 'litter free' coast
- Waste reduction
- Consumer behavioural change
- Working on catchment projects
- Rural services and community representation
- Support/guide farmers
- Education and engagement



# QUALITATIVE PROCESS

01

## Pre-Work Exercises

- Life highs/lows
- Future focus
- Introduction to Wessex Water
- Best in Class brands
- Building outcomes exercise

02

## Digital or Face to Face Sessions

- Understanding what matters to customers
- Implications for Wessex Water
- Building outcomes
- Review of proposed social purpose

03

## Discussion & Review

- Check in with WW
- Decide what needs to be quantified
- Creating a base-line for valuing water



# BACKGROUND MATERIALS SHARED:

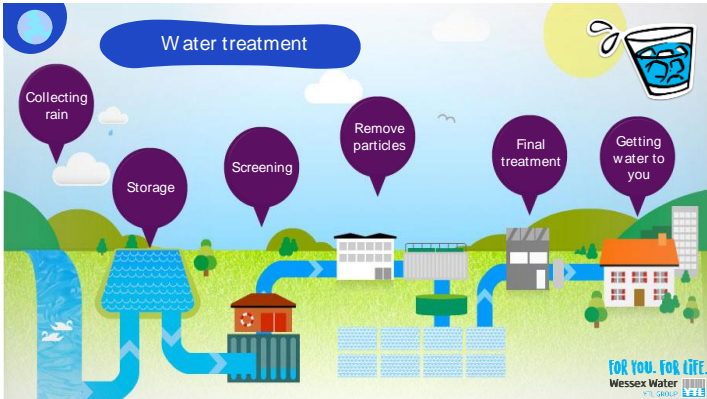
Information about Wessex Water key facts/responsibilities including emphasis on customers as partners AND local commitments to enhance ownership

## The English water Market

**Wessex Water**

- Supplies water to 1.3 million customers
- Supplies sewerage services to 2.7 million customers every day

FOR YOU. FOR LIFE. Wessex Water



### Here are a few projects we've done recently

#### Wessex water in Salisbury

Second refill point for Salisbury

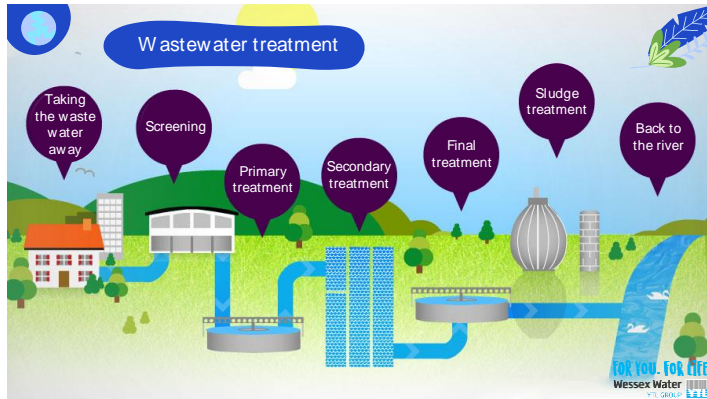
- In September 2018, Rosie Price and her Dad Dominic attended a Salisbury City Council meeting and made an appeal to the City Council to install water refill points in the area.
- A year later, with the help of Wiltshire Council and Salisbury City Council, Wessex Water has installed a second refill point in Salisbury, after a first was put in the Market Square earlier that year.
- If you're out and about in the area, bring a reusable bottle with you and give our new refill point a try!

FOR YOU. FOR LIFE. Wessex Water

## Facts about Wessex water

- Wessex Water treats & supplies 280 million litres of water a day
- It removes & treats 470 million litres of sewage a day
- It looks after 7,200 miles of water mains and 22,000 miles of sewer pipes
- Wessex gets the highest customer service scores in the industry according to the regulator (Ofwat)
- It employs 2,200 people in the region
- The Environment Agency assess Wessex to be a "leading" water company for environmental performance

FOR YOU. FOR LIFE. Wessex Water



### £230 million project - New water supply grid in Salisbury

- The new water supply grid is a £230 million project which will enable us to meet demand for water over the next 25 years without the need to develop new resources
- It comprised more than 50 individual schemes across Somerset, Wiltshire and Dorset and will allow us now to redistribute surplus water to where it is needed.
- We have built more 200km of trunk mains, 24 refurbished or new pumping stations and 12 new storage tanks.

FOR YOU. FOR LIFE. Wessex Water



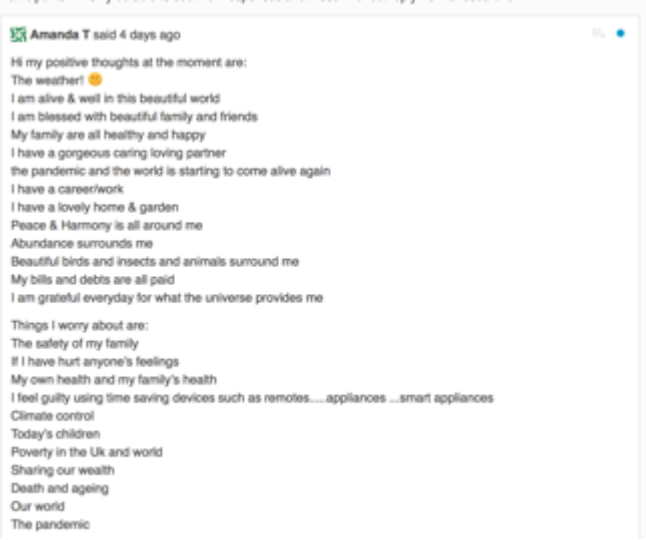
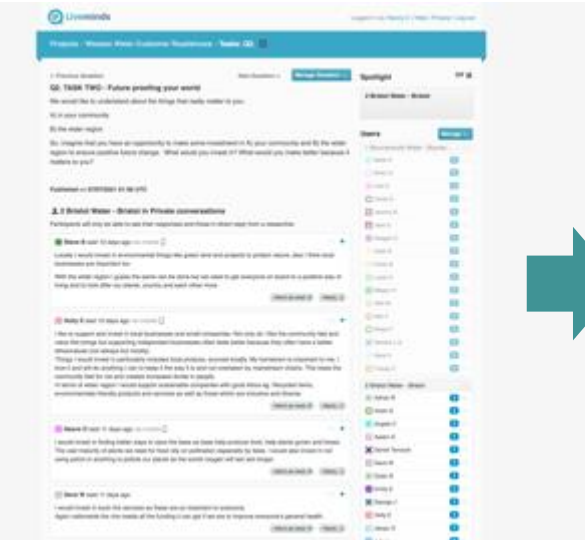
# DETAILED METHODOLOGY AND SAMPLE – ENHANCEMENT STAGE:

Households: Four ‘adapted’ face to face roadshows; six depth interviews with customers in vulnerable situations.  
Sessions rooted in home-work exercises via LiveMinds platform

# 01

### Pre-Work Exercises

- Life highs/lows
- Future focus
- Introduction to Wessex Water
- Best in Class brands
- Building outcomes exercise



# 02

### Face to Face Sessions

- Understanding what matters to customers
- Implications for Wessex Water
- Building outcomes
- Review of proposed social purpose



## DETAILED METHODOLOGY AND SAMPLE – ENHANCEMENT STAGE:

### Coverage of Wessex dual service and sewage only areas



Roadshow	Location	Customer Type		
1	Bournemouth	Future Customers	25-55	55+
2	Bristol			
3	Taunton			
4	Salisbury			

No of depth Interviews	Location	Customers in Vulnerable Situations (Overlapping Issues)
1 and 2	Bournemouth Water	Mobility, complex medical needs, 75+
3 and 4	Bristol Water	Financial, 75+, Digitally excluded, learning difficulty
5 and 6	Wessex dual	Covid vulnerable, complex medical needs, mental health, financial

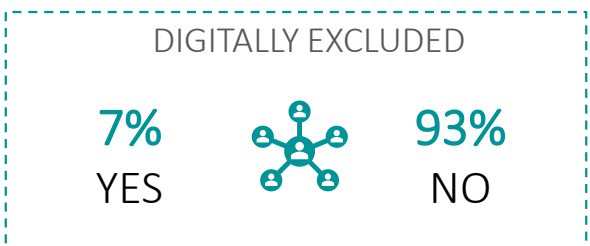
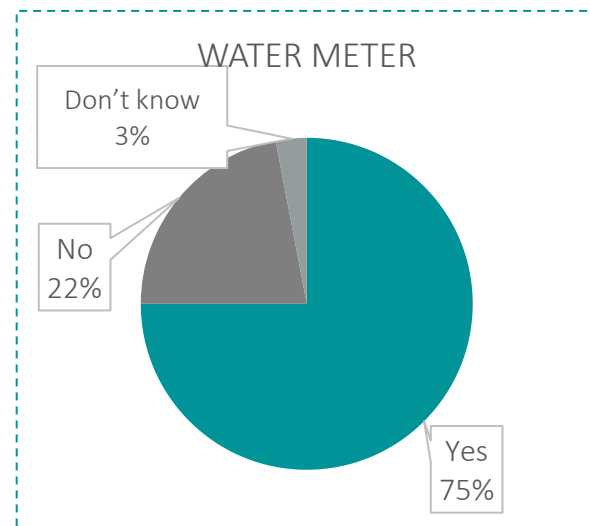
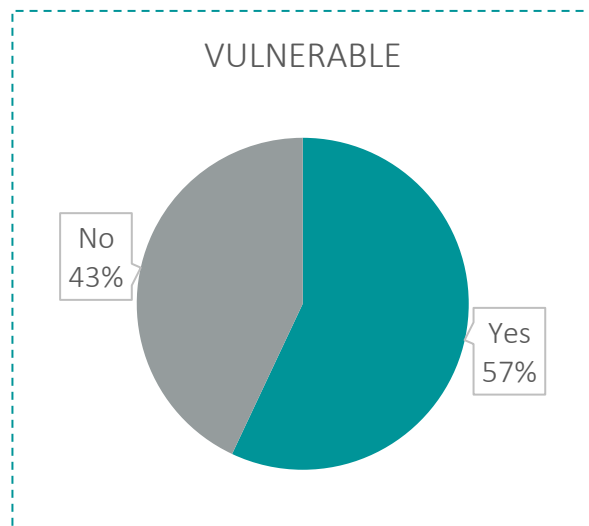
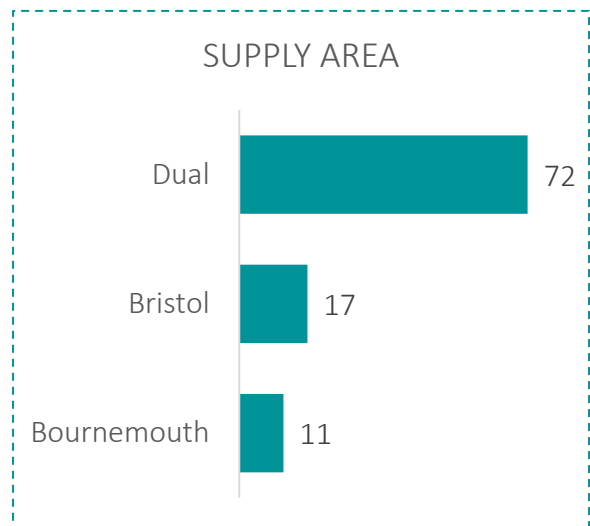
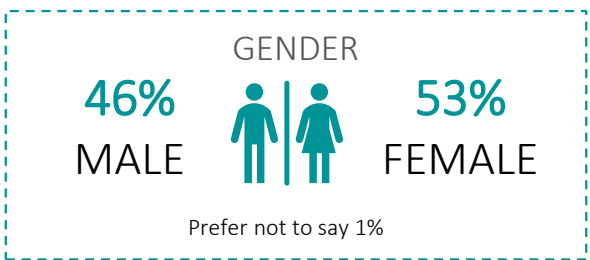
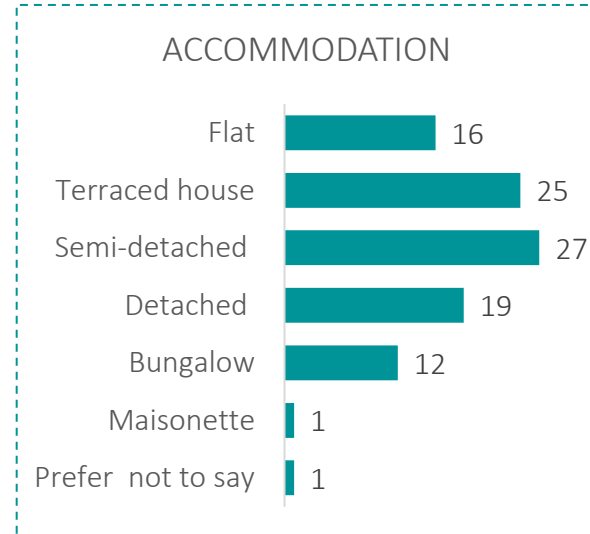
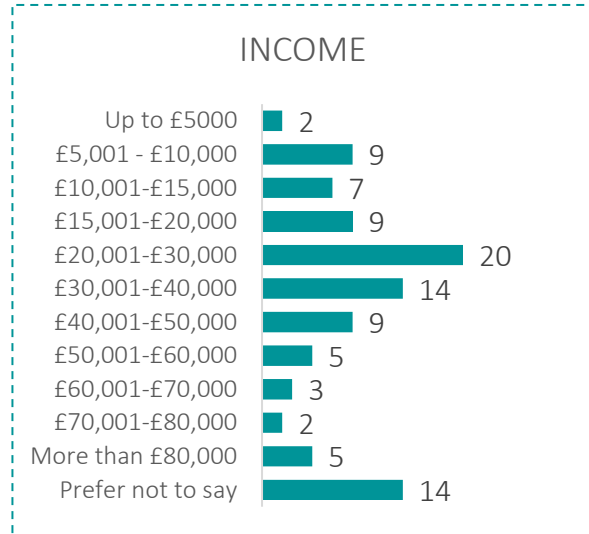
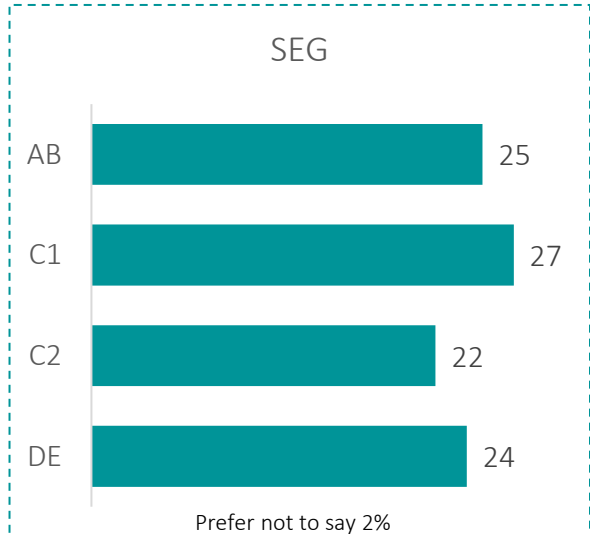
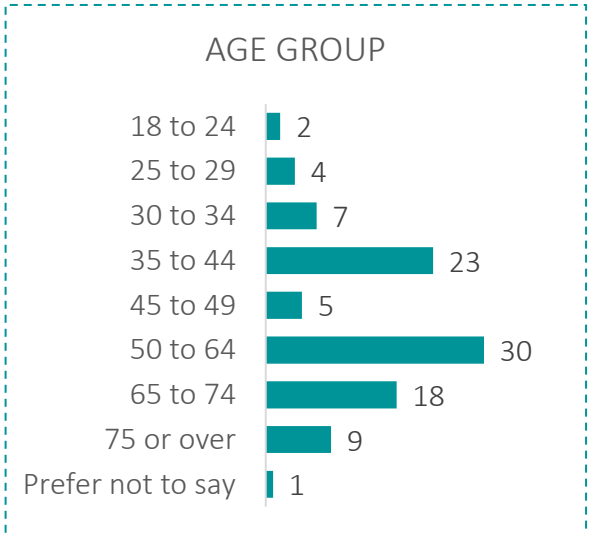
Range of SEG within age groups, representation of meter/non meter across sample

# DEMOGRAPHIC BREAKDOWN – QUANTIFICATION STAGE

## 1,379 INTERVIEWS WITH HOUSEHOLD CUSTOMERS

### SAMPLE OVERVIEW

% participants



Vulnerable = low income or struggle to pay bills, disability or illness, or special water tariff, on social security payment

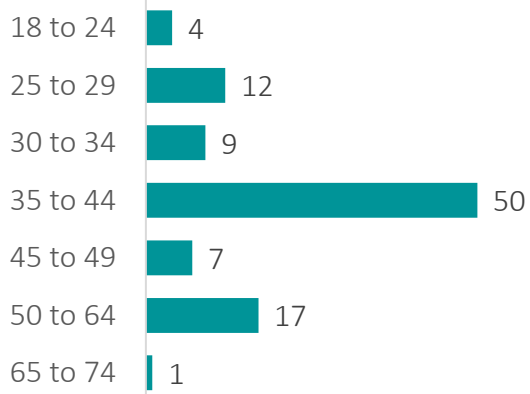
# DEMOGRAPHIC BREAKDOWN – QUANTIFICATION STAGE

## 113 INTERVIEWS WITH EMPLOYEES

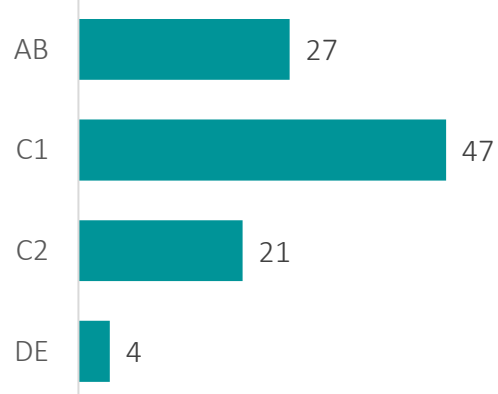
### SAMPLE OVERVIEW

% participants

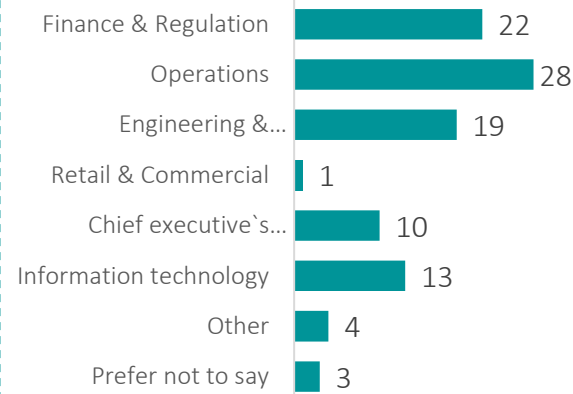
AGE GROUP



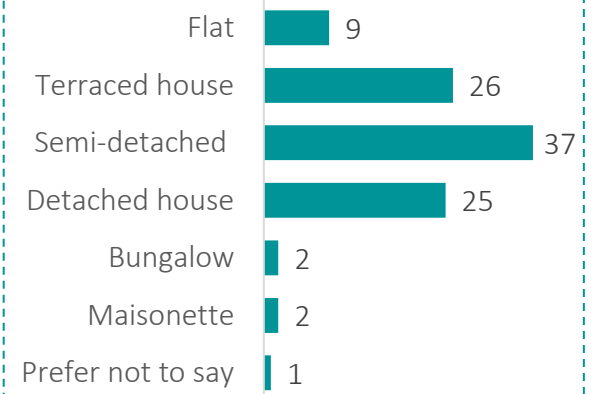
SEG



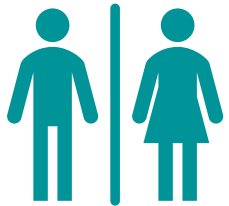
DIRECTORATE



ACCOMODATION



GENDER

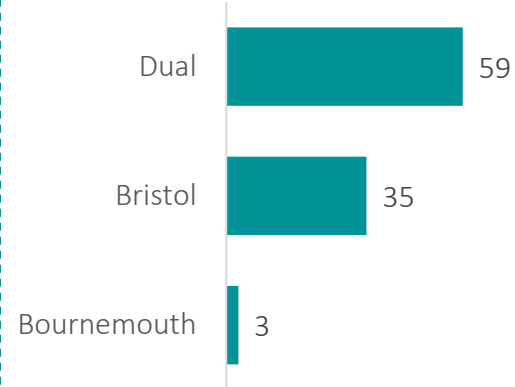


66%  
MALE

34%  
FEMALE

Prefer not to say 1%

SUPPLY AREA



MANAGERIAL RESPONSIBILITIES

71% NO 29% YES

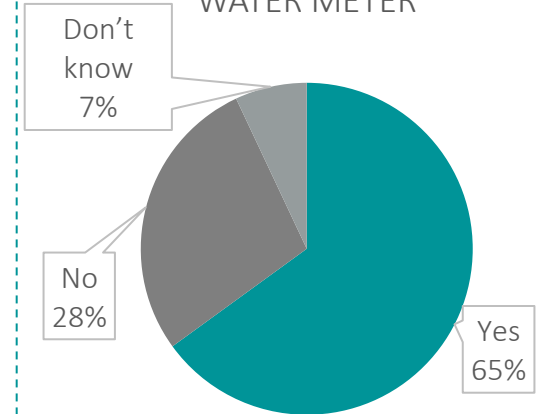
LOCATION

28% FIELD 72% OFFICE

CUSTOMER FACING

12% NO 88% YES

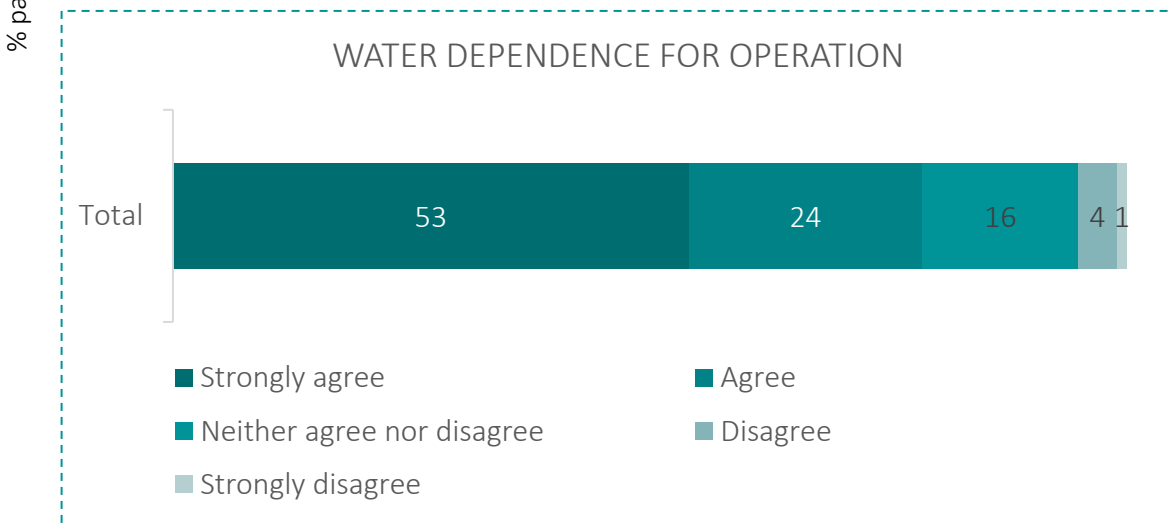
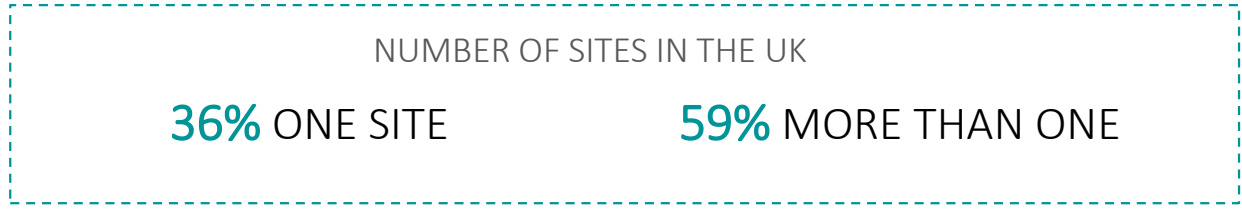
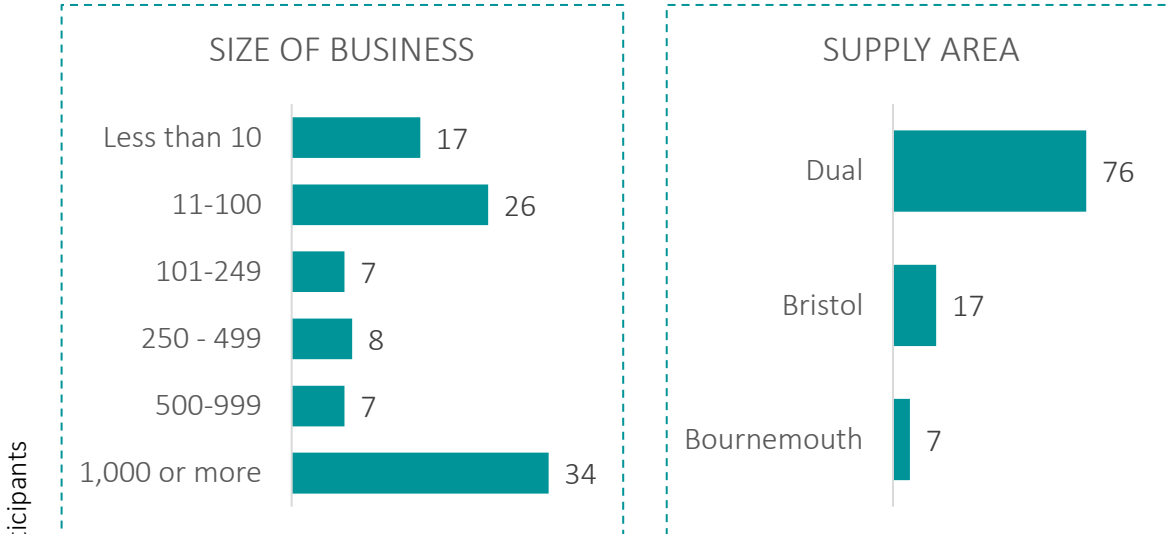
WATER METER



# SAMPLE BREAKDOWN – QUANTIFICATION STAGE

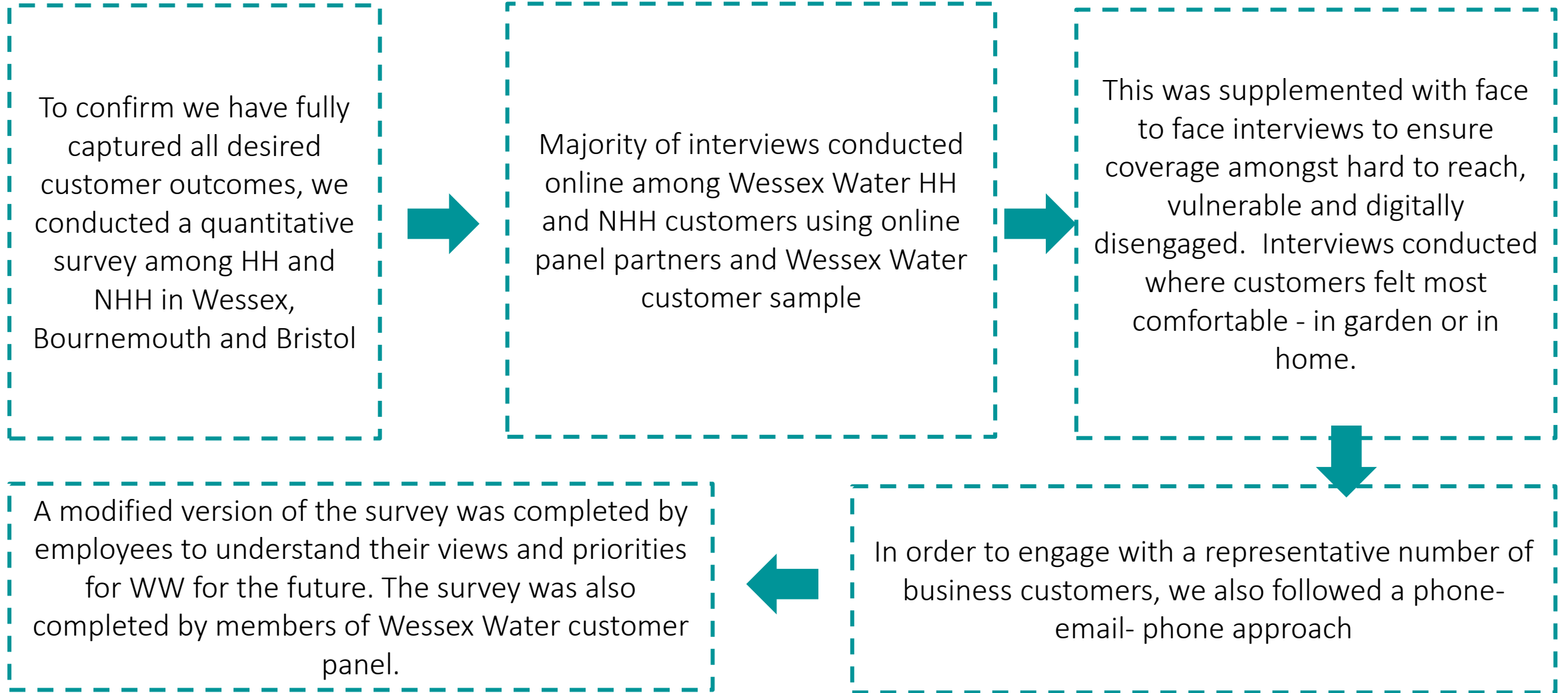
## 135 INTERVIEWS WITH NON HOUSEHOLD CUSTOMERS

### SAMPLE OVERVIEW



# QUANTITATIVE METHODOLOGY OVERVIEW

## ROBUSTNESS OF FEEDBACK



1,379 INTERVIEWS WITH HOUSEHOLD CUSTOMERS, 113 INTERVIEWS WITH EMPLOYEES, 135 INTERVIEWS WITH NON HOUSEHOLD CUSTOMERS

# WESSEX WATER STRATEGIC DIRECTION RESEARCH DESIGNED AND CONDUCTED IN LINE WITH OFWAT'S HIGH QUALITY RESEARCH PRINCIPLES

## PR24 and beyond: Customer engagement policy

### Useful and contextualised



Participants were informed about Wessex Water (WW) and the purpose of a Strategic Direction Statement.

It was clearly outlined that the research results would be used by WW to ensure their Social Purpose and Strategic Direction align with customer and stakeholder long term priorities and insight would feed into PR24 proposals.

### Neutrally designed



### Fit for purpose



Materials were designed to ensure participants were provided with facts without stating whether there was a preferred option for the company

Quantitative question scales were designed with equal weight to positive and negative responses. A neutral response was also given along with the option to decline to provide an answer.

The quantitative survey was piloted ahead of full launch.

### Inclusive



Feedback was obtained from

- Industry stakeholders and experts
- Retailers
- Employees
- HH customers (including from WW panel)
- NHH customers

A mixed method approach was utilised including:

**Qualitative:** expert panels, face to face roadshows, intergenerational triads, depth interviews

**Quantitative:** Online via a commercial panel, online with WW panel, online with employees, phone-email-phone for NHH

Face to face to reach those less well represented through online methods:

- Those over the age of 75
- Those in social grade E
- Digitally disengaged

### Ethical



Research was conducted according to the Market Research Society's Code of Conduct.

Accent is a Market Research Society Company Partner and is ISO20252 accredited.

### Independently assured<sup>4</sup>



An expert panel of stakeholders was formed to provide guidance at both the start and the end of the research process, and comment on the results obtained.