



# Pennon Youth Boards Report March 2023

**Future customers provide a different perspective with a number of implications for the Pennon Group**

**Future customers talk a lot about current concerns and uncertainties in their own lives and in terms of the wider economic and political context.** They are developing adult perspectives on political and corporate structures in a turbulent period. Building trust and legitimacy for water companies may be harder with this generation.

**Their engagement with water is very low. While aware of climate and societal changes they have not linked these to water services.** Water companies will need to make the challenges they face more tangible to future generations if they want to build participation/behavioural change into their plans.

**There is cognitive dissonance with this age group in terms of their environmental beliefs and their usage behaviours.** Perhaps contrary to the general view that young people are more committed to protecting the environment, they are realistic about the barriers they face in adopting eco-behaviours and in using less water specifically. For water companies, the challenge of reducing PCC may be greater with this generation than older consumers.

**The cost of living crisis has put the spotlight on the cost of essential resources for future customers (despite not being bill payers):** this presents an opportunity for water companies to communicate about saving water, installing meters etc. However a focus on cost risks diminishing the message for a cultural shift to valuing water and long term sustainability.

**Bathing water quality is a very real touchpoint for future customers living in coastal areas:** the process of learning about the water and wastewater service was a positive experience for some participants who were very critical of water companies as polluters. Communications about why it happens and plans to upgrade are vital for this future customer cohort too.

**Future customers are digital natives:** their expectation is to deal with companies via digital means and as such they support the customer journey initiatives.



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# Overview of the Pennon Group Youth Boards 2023

## 46

Sixth Formers represented their age cohort as they collaborated with Pennon Group to inform future planning and decision making.

## 4 events:

- **Truro** on Thursday 2<sup>nd</sup> Feb
- **Exeter** on Friday 3<sup>rd</sup> Feb
- **Bristol** on Thursday 9<sup>th</sup> Feb
- **Bournemouth** on Friday 10<sup>th</sup> Feb



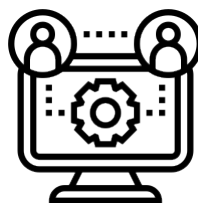
### Profile of panellists

- Students drawn from **27 schools** across Pennon Group's regions
- Gender: **22 females, 24 males**
- A mix of **Year 12 and 13 students** (16-18 year olds)



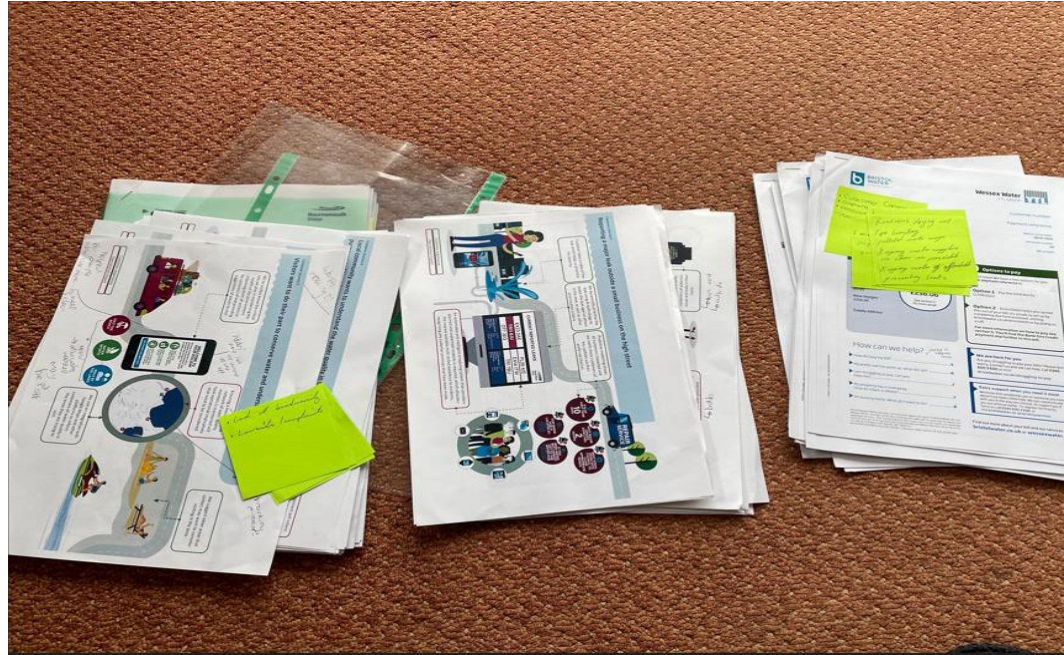
### The sessions covered the following:

- Bills: feedback on water bills, and assessing participants' knowledge (gaps) around water industry and Pennon Group
- Group discussion: a 60-minute discussion about:
  - Students' lives and their outlook on the wider world
  - Challenges for the water sector and pennon group
  - Water usage/and use of the environment and rivers and coasts
  - Customer experience and use of apps
- Customer journeys: 4 x 25 minute group discussions around specific Customer Journeys and how they could be implemented in the future
  - Reporting a leak
  - Understanding consumption, affordability options, and contribution to water conservation
  - Helping visitors to play their part in water conservation and bathing water quality
  - Working with the local community



# A combination of presentations, group discussions and tasks throughout the day

Presentations delivered by both Blue Marble & Pennon Group representatives



We asked students to annotate materials throughout the day

And used that in our analysis in addition to notes and recordings

# Overview of the Pennon Group Youth Boards 2023

## Bristol Water Youth Board Survey

\* Required

### Introduction

1. Which of these applies to you \*

- In school year 12
- In school year 13
- Other

2. What is your gender? \*

- Male

5. How are you currently feeling about the following issues in relation to life after education?

	Very positive/optimistic	Quite positive/optimistic	Neutral	Quite negative/pessimistic	Very negative/pessimistic
Employment prospects in the next 10 years	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial prospects in the next 10 years	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prospect of getting on the housing ladder in the next 10 years	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>



### Post event: school survey

- Survey circulated amongst panellists' schools seeking to understand Sixth Formers' priorities for future water companies (completed by 274 students)



### Location breakdown

- Exeter: 170
- Bristol: 55
- Truro: 38\*
- Bournemouth: 11\*\*

\* Low base size, results to be treated as indicative

\*\* Very low base size, too small for sub group analysis



### Topics covered in the survey included:

- Future plans after finishing school.
- Attitudes to saving water and energy
- Levels of environmentalism
- Use of rivers and coasts, and beliefs about water quality



# Future Customer perspectives



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Apart from **exams**, students are preoccupied with balancing their time commitments and the continuing impact of **Covid** and (for the less economically affluent) **the cost of living crisis** on their lives.

Respondents had varied political opinions on tackling the cost of living crisis, but **pessimism about current politicians was a key thread** connecting their views.

**University is the most popular short term future plan**, with students more worried about the long term e.g. financial prospects and chances of getting on the housing ladder.

Most students are **aware of environmental issues**, but this doesn't always impact their behaviour, and some question whether their actions will make a difference.

Parental **concern about the cost of living crisis** means that young people are being encouraged to be more efficient with **utility usage**, but efforts to save energy are more common than saving water (due to its higher cost).







## Pressures at school

- Height of pandemic has passed but Covid disrupted education due to online learning and missed exams.
- Covid has also left a mental health legacy in terms of feelings of isolation and stress.
- Students have to balance pressure to do well at school with social life, university applications, and paid work.
- Mentioned in Truro specifically, strikes affecting education



## Cost of living

- Some students (especially the more affluent) had largely experienced the issue through the news.
- Others were directly affected:
  - Rising food and energy costs causing stress at home & affecting family relationships, mental health
  - But also: disrupted travel and education (teaching and transport strikes) & missing out on activities that would benefit their UCAS statements.



## A broad range of political views

- Students in each location had a broad range of political opinions on the cost of living.
- Some felt it was down to their generation to lobby an ineffectual government.
- Others defended the government, who they felt were unfairly slandered on social media.
- Some were confused about the role political parties had to play.
- Pessimism about politicians was widespread, among both engaged and unengaged students.

**In addition to exams, students were preoccupied by the dual impact of the Covid-19 pandemic and cost of living crisis on their lives and futures.**

'The time you would be working, you're at college, so you can't earn money while you're there.' -  
*Bournemouth*

'My family was really struggling before the cost-of-living crisis, so the cost-of-living crisis on top of everything, it's not only put stress on my parents, but I feel it now as well.' - *Bristol*

'I think silly people are in charge. That's why everything's gone wild'  
*Bournemouth*



## University

Bristol 86%  
Truro 90%  
Exeter 78%

## Apprenticeship

Bristol 9%  
Truro 8%  
Exeter 10%

## Work

Bristol 1%  
Truro 2%  
Exeter 9%

## Other

Bristol 4%  
Truro 0%  
Exeter 3%

### Students are fairly certain about their short term future plans

- The majority of students in this age group are expecting to go to university.
- Around 1 on 10 are choosing the apprenticeship route.
  - Some describe a change in student interest in this route due to the expense of university.

'I think people's perspectives on university have changed drastically now that there's more apprenticeship routes than there were 10, 15 years ago.' - Bristol

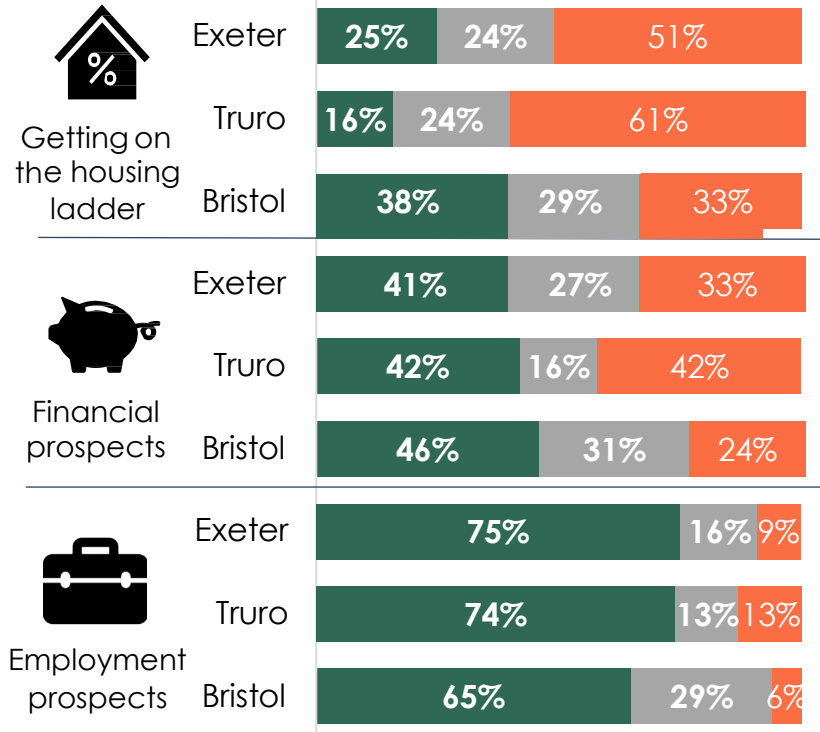
### Group discussions reveal widespread pre-university worries

- Getting the right exam results/completing UCAS was top of mind for many, with some finding this particularly stressful.
- Students affected by the cost of living were concerned about weakening their applications by reducing costly extracurricular activities.
- The impact of the pandemic is also still being felt:
  - This cohort didn't sit GCSEs: feel unprepared for A levels and university.
  - University experience perceived devalued due to the continuing trend for online learning.

'The experiences I could be getting I can't get anymore, because we're so focused on the cost of living crisis... it kind of limits my opportunities for going to university, because I won't have those things for an application.' - Bournemouth .



## Feelings about the next 10 years



■ Very/quite positive  
■ Neutral  
■ Very/quite negative

Q: How are you currently feeling about the following issues in relation to life after education? Base 55 (Bristol), 38 (Truro), 170 (Exeter)

## Pessimism increased as students thought about the next ten years of their lives

- The majority of survey respondents were relatively positive about employment prospects but less confident about financial prospects.
- The survey showed extreme pessimism about getting on the housing ladder.
- In group discussions, students affected by the cost of living expressed concern about reaching adulthood due to the financial stress their parents are currently experiencing.

‘Quite scared to progress to be an adult, I’d say, because obviously when your parents struggle you kind of see that and you kind of feel stressed.’ - Bournemouth

## Regional differences in levels of optimism

- **Truro** respondents worried about being priced out of the area on housing/having to move away to find higher paying jobs.
- **Bournemouth and Bristol** respondents felt more pessimistic about the future of the economy – reflecting their more personal connection to the cost of living crisis.

‘With the mixture of Covid and this cost-of-living crisis... we are definitely now never going to be able to afford a home in Cornwall, and be part of South West Water in any sort of shape or form.’ - Truro



## Students held a range of environmental attitudes

- Some saw themselves as very environmentally conscious, but 'admitted' their beliefs didn't always translate into eco-conscious activities.
- For others, the environment wasn't front of mind, despite feeling like they should be doing more.
- Key factors motivating behaviour/views included:
  - Generational identity: the belief that Gen Z are more aware of environmental issues than their parents.
  - Finances: those affected by the cost of living crisis mentioned parental pressure to save money on energy bills.
  - Participation in protests and campaigns: linking this to higher awareness of environmental issues.



## Most popular eco-conscious behaviours to protect the environment

- To **reduce waste**: recycling, using reusable products, avoiding disposable products, and avoiding littering
- **Environmentally friendly consumption habits**: shopping locally and buying clothes second-hand, and making food at home
- To reduce their carbon footprint: using public transport, turning off lights, and walking and cycling more.



## Key barriers to adopting eco-conscious behaviours

- **Affordability**: the cost of environmentally friendly options was a major concern, particularly for students more affected by the cost-of-living crisis.
- **Sense of responsibility**: some thought that the government and companies were also responsible, or that their actions were more important than individual behaviour.
- **Collective impact**: some students felt that individual behaviours only make a difference if everyone is doing them, which they thought could demotivate some individuals

Although most students were aware of environmental issues, this didn't always impact their actions and some questioned whether their actions would make a difference

'I think, my parents when they were our age, it was very different, there wasn't so many protests or campaigns for the environment and Covid didn't happen, so they were out more, when we were inside.' – *Bournemouth*

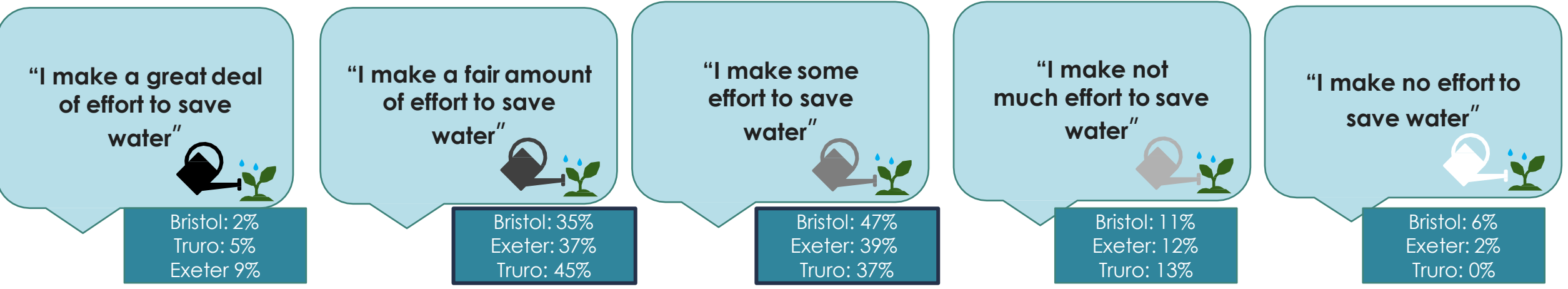
'That's the problem with environmental stuff to me, is that to be as eco-friendly as possible, it costs so much money... and society is not moving forward to make it cost-effective to be eco-friendly.' – *Truro*

'I feel like actively trying to change your personal environmental impact is good, but in my opinion, it's mainly legislation and companies that involve the majority of climate pollution.' – *Bristol*

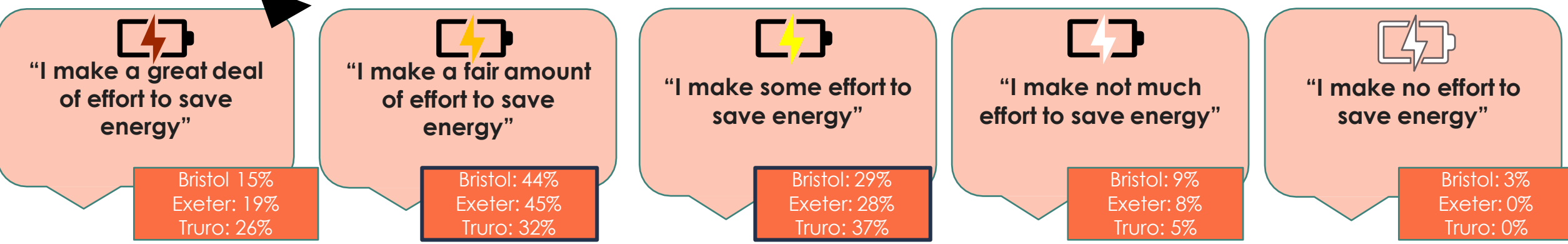


# Survey data reveals that a higher proportion of respondents make a great deal of effort to save energy compared to water

## Effort to save water and energy



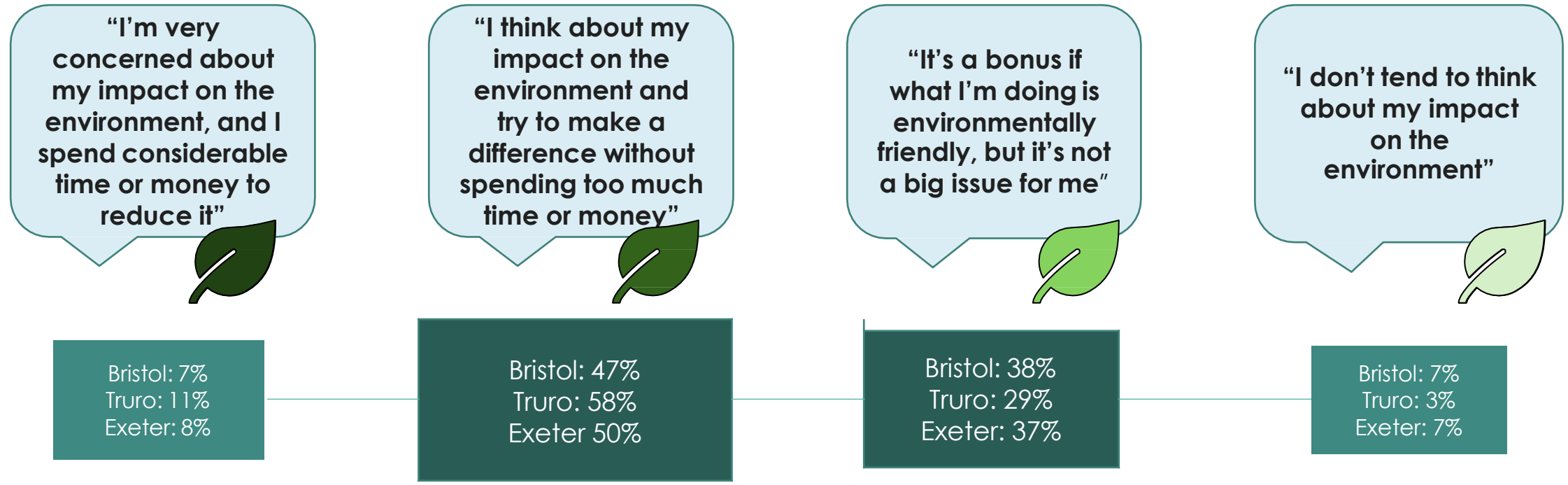
This difference in effort corresponds to the greater cost of energy, especially in light of the cost of living crisis



Q: Thinking specifically about water/energy: how much effort do you make at home to save water? Base 55 (Bristol), 38 (Truro), 170 (Exeter)

# Survey data reveals that most respondents favour low/medium effort environmental behaviours

## Concern about impact on environment



'In our household, it feels like all we do is talk about the length of a shower.' - *Bournemouth*

- Students were most likely to agree with survey statements describing medium environmental effort.
- The most popular environmental behaviour spontaneously mentioned during group discussions was reducing shower length.

Q: Thinking about what you buy, how you travel and how you live your day-to-day life, which of these best describes you?  
Base 55 (Bristol), 38 (Truro), 170 (Exeter)

# Views on water, water usage and water industry



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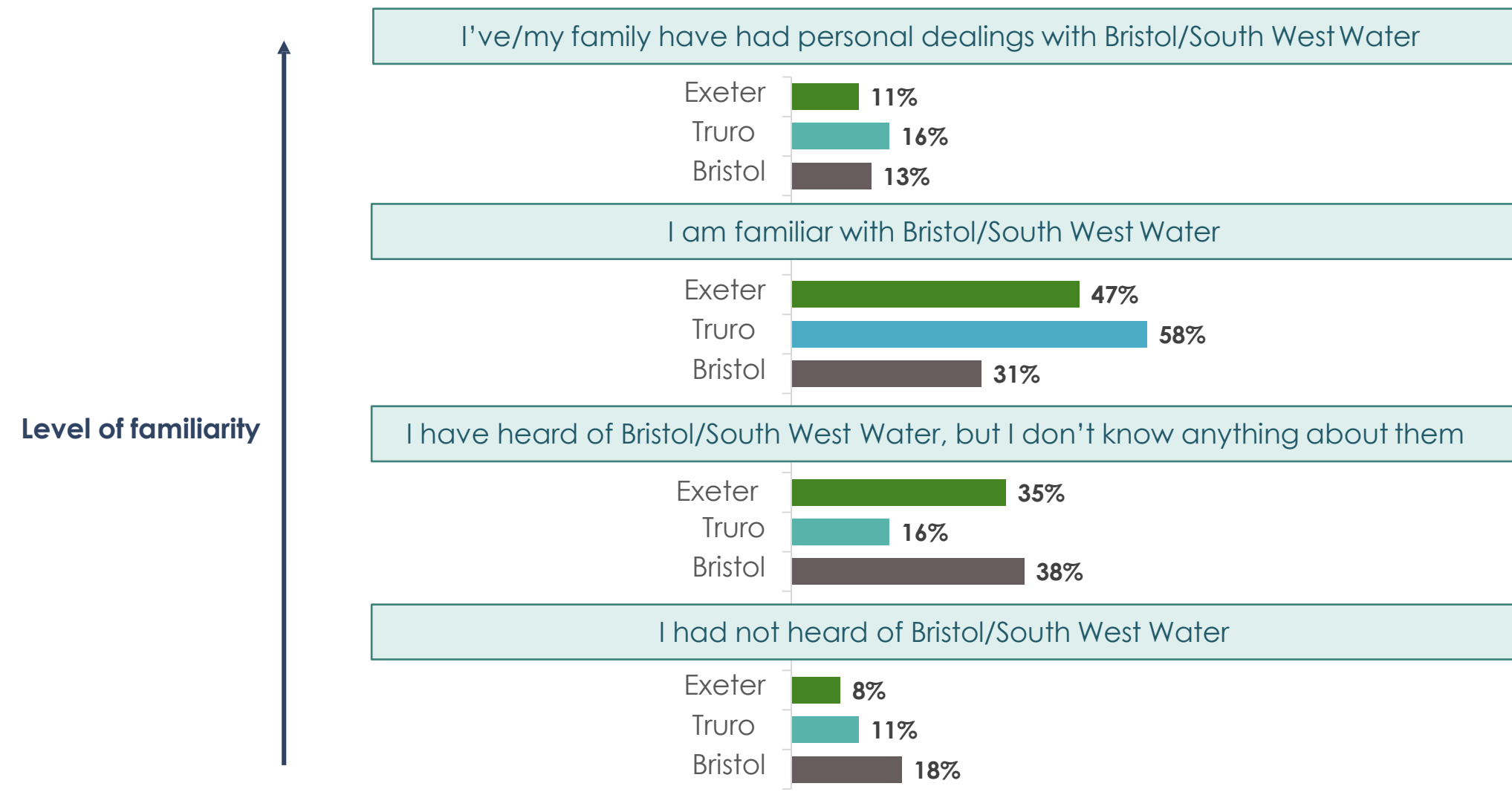


- 1 Survey data shows that most students had **some awareness** of Bristol Water and South West Water but only few had had personal (family) dealing with them – data from session in Bournemouth indicates a similar level of awareness there
- 2 Awareness of specific **challenges a water company faces** was relatively low but, once informed about the impact of, for instance, climate change and growing population, they seemed **logical and believable** to future customers.
- 3 **Location** influenced prioritisation – keen coastal water users in Truro and Exeter felt that **water quality** was key, whilst more urban respondents felt **overpopulation** (Bristol) and **cost** (Bournemouth) were bigger challenges.
- 4 Students were **open to cutting back on showers and baths**, but other measures were more controversial and knowledge of the broader issues seemed more limited. Students in Truro and Exeter were more open to changing their behaviour due to concerns about water quality than students in Bournemouth and Bristol





Awareness levels highest among Truro students



Q: Which of the following reflects your awareness of South West Water?  
Base 55 (Bristol), 38 (Truro), 170 (Exeter)



**Protect & enhance environment**



**Reducing demand for water**



**Fast track to net zero**



**Rising sea levels**



**Climate change**



**Urban development**



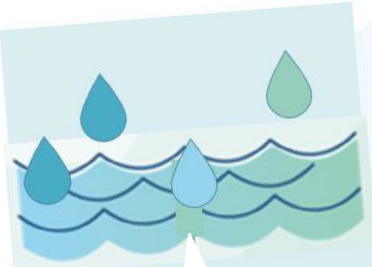
**A growing population**



**New government policies**



**Cost of bills**



**New water sources**



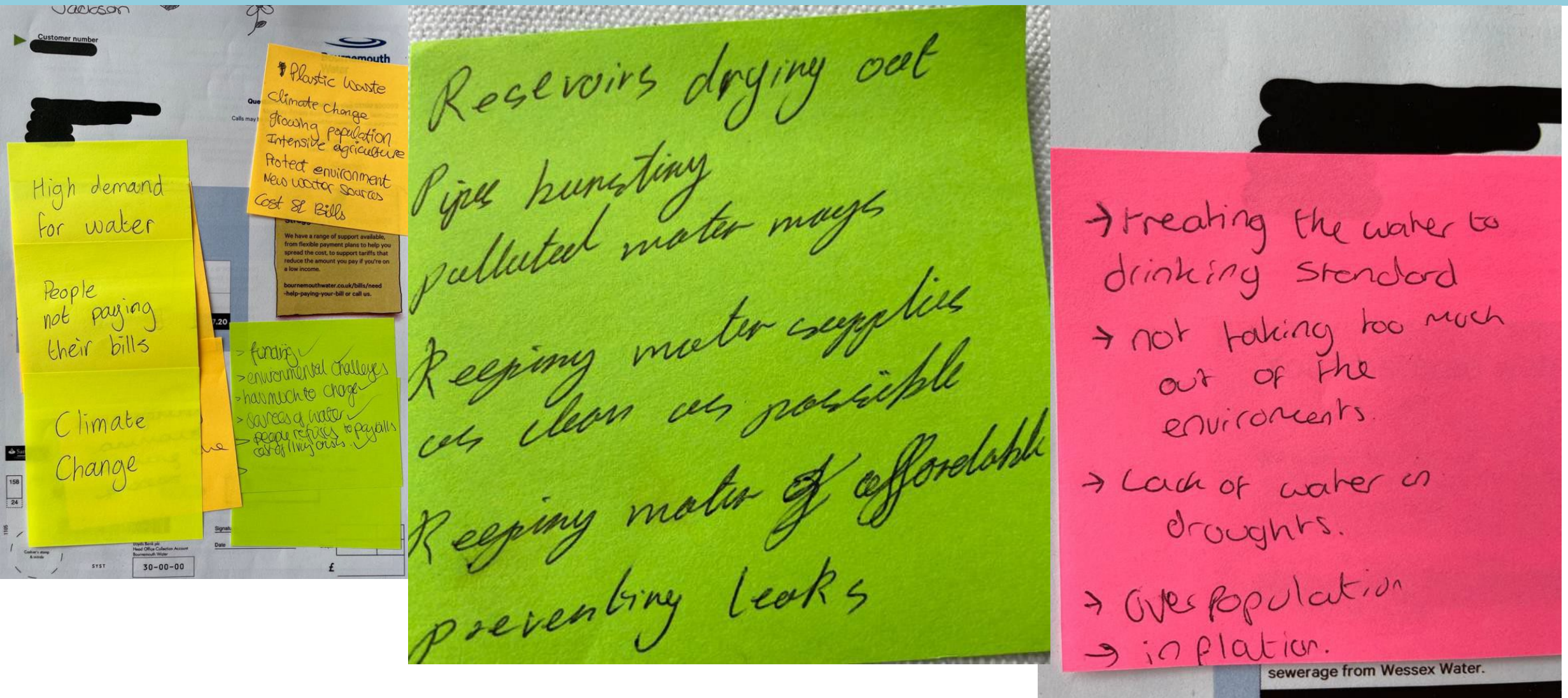
**Intensive agriculture**



**Ageing infrastructure**

# Challenges facing water companies

We asked students to write down challenges on post-it notes, before presenting an overview



Students found it difficult to connect challenges to water companies – even if they understood the challenges at a higher level (for instance, climate change, growing population, intensive agriculture)

## Lack of awareness and difficulty prioritising

- Challenges students were most aware of were generally those with direct impact on their lives or values
- Many lack understanding or awareness of the challenges facing the water sector and were surprised to learn about them
- Some acknowledged that if they took the time to actively think about the water sector, they might be able to identify key challenges
- Truro and Exeter participants were unaware of what SWW was doing to address sewage issues and thought these responses should be publicised more
- Some participants found it difficult to prioritise challenges because they thought they were all important and interconnected

## Environment, water quality, sewage

- Sewage and water quality were key concerns that had a direct impact on participants in Truro and Exeter
- Bournemouth and Bristol participants felt that climate change, protecting the environment, and water quality were important challenges, though these issues were often less tangible for them
- Environmental challenges were seen as long-term issues that should be weighed up against the shorter-term impacts of increasing bills or investing in infrastructure

## Cost of bills

- For many the cost of bills was an immediate priority
- Energy companies were seen as the main 'culprits' for rising costs
- Reflecting on increasing bills to meet challenges: doing so in the middle of a financial crisis would be the wrong time; or any increases should be gradual
- Conversely, some worried that prioritising the cost of bills would leave less money for infrastructure investment and have a negative impact on the environment

**Although many students were unaware of all the challenges or found it difficult to prioritise, environmental and financial concerns were the most common priorities**

'It's not something I actively think about, but if I did go and think about it, I would understand those were the challenges.' – *Bournemouth*

'The environment, that's where we live, that's where we grow things, that's how we produce water to begin with. Our environment is our biggest asset and I think that needs to be protected, so I think that's the biggest challenge.' – *Bristol*

'The cost of bills... I think that's the one that has the most immediate impact on the customers.'  
– *Bournemouth*



The well-known measures for reducing water usage (shorter showers, turning taps off) were uncontroversial but beyond that there was more discussion. This was also related to low levels of awareness about continued drought.

## Current behaviours

- Taking shorter showers the most common step to reduce water use
- Others using low power showers, choosing showers over baths, limiting depth of bath, reducing amount of water in kettles, and turning off the tap while brushing teeth/washing hands
- Water butts were relatively common in participants' households
- More affluent participants more likely to express need for large amounts of water at home, e.g. natural pond, power hose, microbrewery

## Awareness and education

- Attitudes to saving water often depended on parental influence
- Cost-of-living crisis, and specifically energy bills, an important factor driving awareness of water usage
- Many unaware of drought risk and thought water companies should do more to publicise
- Mixed awareness of hosepipe bans; some knew what they were but weren't sure why they were needed
- Education about how and why to limit usage was seen as important

## Response to being asked to limit usage

- Future customers generally felt that being asked to limit their showers was fair and not a major inconvenience
- Hosepipe bans were more controversial: some thought it was fair for unnecessary activities, others did not
- Students said that their responses to water bans would depend on the severity of the limits
- Some felt that reducing water usage would only be effective if everybody did so

**Students were open to cutting back on showers and baths, but other measures were more controversial; and knowledge of the underlying reasons for reducing usage seemed more limited**

'I could probably cut down on how long I spend in the shower, it's not a massive inconvenience.' – *Bournemouth*

'Everyone thinks, 'well it doesn't matter if I don't do it, because no one else is going to do it'. It's a cliché, but it's definitely true.' – *Exeter*

'In a period of drought, everyone having drinking water is more important than one person having a hot tub.' – *Bristol*



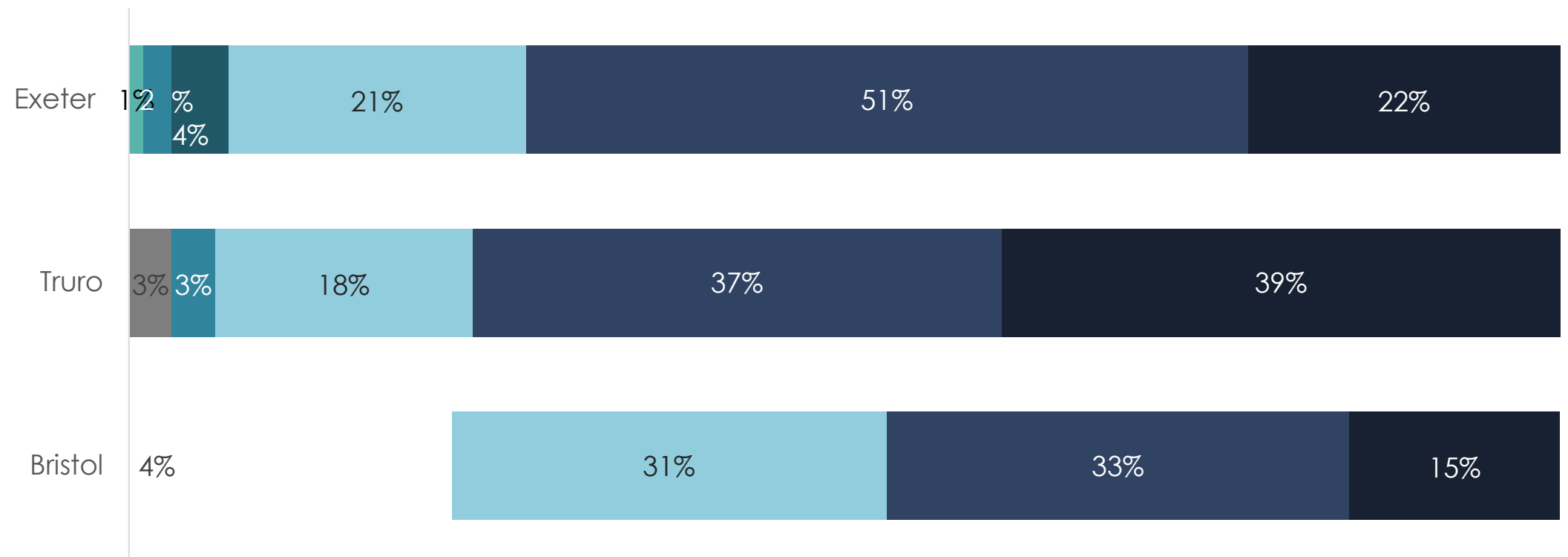
# Those in Truro and Exeter are more likely than Bristolians to visit the beach/ivers regularly – with about 3 in 4 saying they visit the beach/ivers on a monthly basis

Paddling/swimming in, and relaxing/exercising by a river or the beach are most popular – but students in Bristol area least likely to swim in rivers or the sea (but at the same time, least likely to think pollution is a big problem)

- Students in Bristol also have lower expectations about the quality of the water, compared to their counterparts in Exeter & Truro.

## Frequency of visiting rivers and beaches in your region for recreational purposes

■ I'm not sure ■ Never ■ Over 12 months ago ■ Once in the last 12 months ■ Once or twice in the last 6 months ■ Once or twice per month ■ Several times a week



Q: How often you have visited rivers or beaches in your region for recreational purposes?  
 Base 55 (Bristol), 38 (Truro), 170 (Exeter)

## Water quality affecting behaviour

- Most students had some awareness of water quality issues in their region from the news, social media, and word of mouth
- Some were avoiding using rivers/coasts because of: past experiences of falling ill after using them; mining activity that was affecting the water; or unpleasant smells from the water
- Participants from Truro used coastal waters most frequently and were most concerned with water quality and sewage spills
- Awareness of water quality concerns was less of an influence on whether Bournemouth and Bristol participants used the sea – they generally didn't think that water quality issues would affect them; however Bournemouth participants avoided rivers specifically

## Litter and pollution

- Bournemouth and Bristol participants were concerned about litter and pollution on beaches and in the sea
- The issue of litter was linked to tourism and a lack of education about recycling, rather than water companies

**Students in Truro and Exeter were more likely to change their behaviour due to concerns about water quality than students in Bournemouth and Bristol**

'I probably wouldn't go down to the sea near my house very often because I went down to the beach near me once, and I'm pretty sure I got ill from it.' - *Truro*

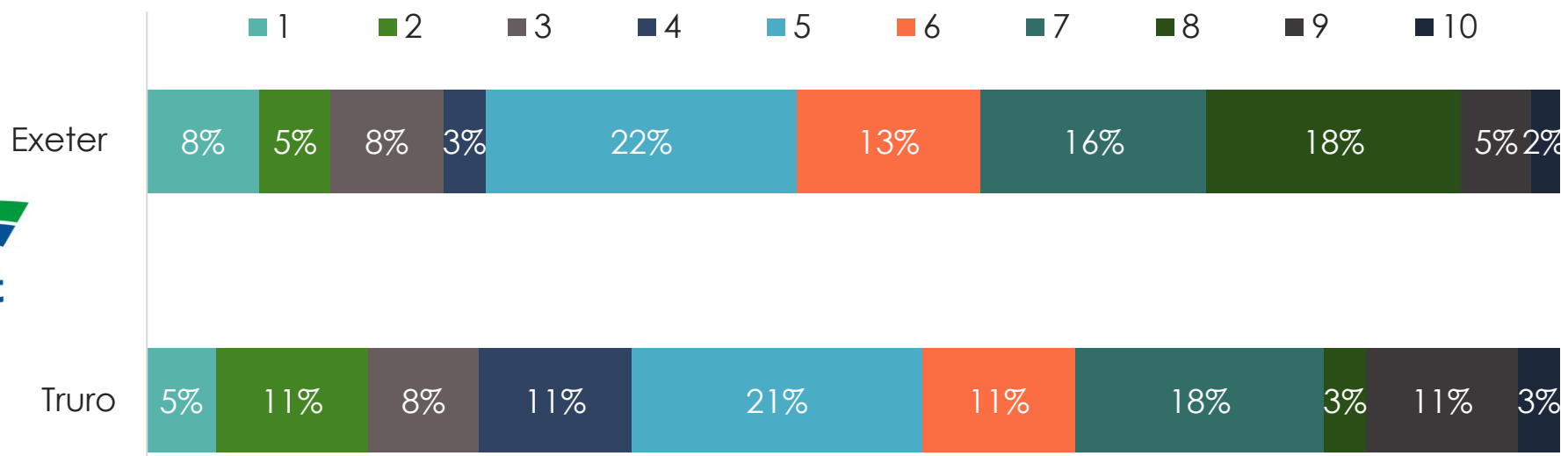
'I think it's fine swimming in it... you don't want to drink the sea or river water, but you're not going to stink of sewage after getting out the of sea, so it's not really a big concern.' - *Bournemouth*

'I think a lot of the pollution in the sea and in the rivers comes from humans... the amount of rubbish in the sea, you can't say that's naturally occurring... I think we do need to take responsibility.' - *Bristol*



# On the whole, few differences in the likelihood to describe Bristol Water / South West Water as a good company

## Advocacy of Bristol/SWW as a water company



Average rating  
**Exeter:**  
5.62

Average rating  
**Truro:**  
5.32



Average rating  
**Bristol:**  
5.85

Not at all likely ←————→ Extremely likely

Q: How likely are you to describe Bristol/ SW Water as a good company to someone you know? 1 is not at all likely and 10 is extremely likely ?  
Base 55 (Bristol), 38 (Truro), 170 (Exeter)



# Customer Journeys





**Customer Journey 1 – reporting leaks:** leaks not top of mind for this age group, but on consideration seem like an important thing to prioritise. Positive feelings towards use of **AI**, the **prioritisation** of leaks, and informing customers that **action is being taken** to fix them. Could the customer be more involved/better informed?

**Customer Journey 2 – consumption & affordability:** immediately felt **relevant** in reducing bills/spotting leaks. Would have to make sure that customer **data security** is protected, and that **comparison data is relevant** i.e. adjusted to account for household composition.

**Customer Journey 3 – visitors:** felt to be the **least useful**/interesting – tourists **lack knowledge/motivation** to download the app (especially if they live abroad). Idea of **real time water quality data** is useful, and Cornish respondents reacted positively to encouraging **responsible tourism**.

**Customer Journey 4 – community:** a very effective way of **engaging communities** and **working with consumers**. Need to provide incentives to encourage data contribution. Could it be linked in with school education programmes?

**Popular ideas across the customer journeys:** encouraging **consumer input**, enabling **customer choices**, providing **tailored (relevant) data** about usage/water quality, **innovation**/new technology, **lowering cost**.



Widespread use of social media like TikTok, Instagram etc, but equally widespread acknowledgement of the 'darker' sides of social media use

## Apps

- The ideal app is simple, accessible, intuitive, and easy to navigate
- TikTok, Instagram, Facebook, Twitter, Snapchat, BeReal, YouTube are all popular, but some worried about the time they spent on them
- Banking apps e.g. NatWest, Monzo, HSBC and Lloyds used and liked: track spending; access information in one place; make easy transfers
- Other popular apps: Spotify, Strava, GiffGaff.
- Suggest a water company app should facilitate payments, show the effects of saving of water and include queries and complaints

## Websites:

- Need to be secure/legitimate
- Some avoid using websites that are difficult to navigate / incompatible with phones

## Engaging with companies

- **Admired brands:** Renaissance Technologies, Gymshark, SpaceX, Chilly's, Doc Martens because of their innovation, entrepreneurship, sustainability, and friendliness.
- **Feedback and dealing with problems:**
  - Many felt more likely to leave feedback about a company after a negative experience
  - Completing surveys depends on incentives, trusted source and what the feedback will be used for
  - Responding to and resolving complaints was important; eBay, Vinted, Amazon were examples of companies that do this well
  - Whether participants wanted to resolve a complaint using online chat or the phone depended on the severity of the complaint

Ease of use and convenience were some of the major factors affecting customer experience

'I think online banking apps are really useful because it's a 10 second process to get to all of your key financial information.' – Bristol

'With Doc Martens, I see them as sustainable because if you buy a pair of boots, they're going to last you for such a long time, and although the upfront costs can be considered to be quite a lot, it lasts you so much longer.' – Exeter

'The layout of the website influences how you use it. Zara's website it awful, so I wouldn't go on there unless I really needed something.' - Bristol



# Customer Journey 1: Reporting a leak (1)

Leaks not top of mind but felt to be important to prioritise. Positive feelings towards use of AI, the prioritisation of leaks, and informing customers that action is being taken to fix them. Could the customer be more involved/better informed?



## Comprehension / relevance

- Understand the principle: reporting leaks
- But can't envisage doing this themselves (leaks rare; parent would do it)
- Some wouldn't know how to report a leak – and would likely assume someone else would do so



## Positive aspects

- Visible evidence that problem is being addressed
- Hub information is good
- Prioritising leaks
- Using AI (future focus) – but want to know how it works
- Tracking information (2 hour update etc.) seems reasonable to some but too slow to others

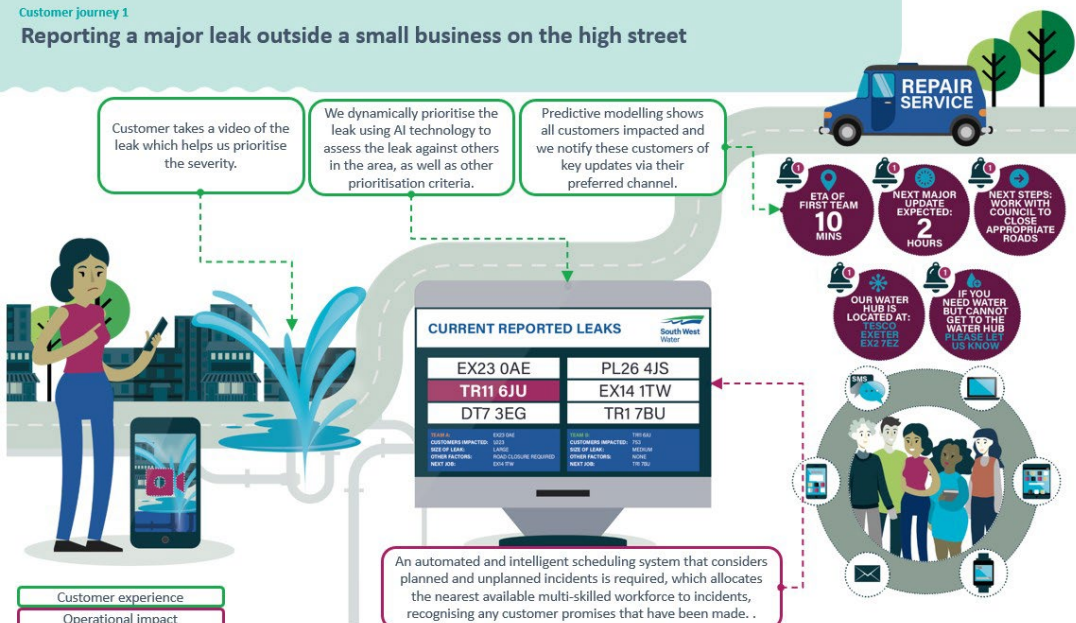


## Issues / concerns

- Can't see themselves downloading
- Lack of mobile connection
- Video takes up lots of data / time to upload
- Potentially overcomplicates a simple idea
- GPS won't be enough: what 3 words?
- Too many notifications

Customer journey 1

## Reporting a major leak outside a small business on the high street



## Improvements

- Text box with photo to add context
- Add a severity rating for the leak
- Link to CCTV?
- Being able to see if someone else had reported this leak
- Monitor status in real time
- Have e.g. FB pop up notifications to alert of leak/incident
- Feedback / follow up info on cause and impact of leak
- Needs to be UK wide



# Customer Journey 1: Reporting a leak (2)

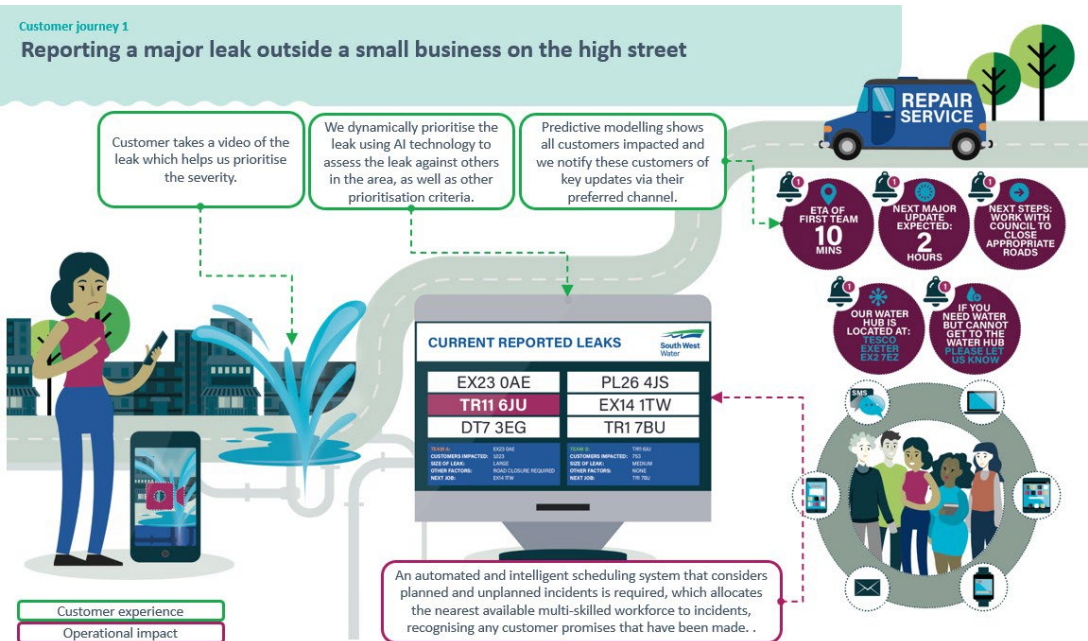
"I think it's good that there're updates, because people like to know what's going on. Having it available is really good"

"I think it's just trying to overcomplicate something that's really simple"

"Signal, wifi, big issue"

"If they (Bristol Water) are already one of the best, is it really required?"

"An app for the whole company, so you can see like you bill impact and then at the bottom there could be a section 'report a leak' then all we have to do is to click on it, record the video with the app, and then report it, that'd be pretty good"



# Customer Journey 2: Understanding consumption, affordability options and water conservation (1)

Immediately seen as relevant in reducing bills/spotting leaks. Would have to make sure that customer data security is protected, and that comparison data is relevant i.e. adjusted to account for household composition.

## Comprehension / relevance

- Understand the idea of smart meters and generally think this is a good idea
- Especially where have experience of a (costly) leak at home
- More personally relevant than the other journeys
- What about offline customers (alternatives?)
- Will help company forecast demand

## Positive aspects

- Online booking service
- Anticipate it will help people to use less water
- Leak notifications
- Desire to use it to manage use and cost
- If data seems wrong/atypical (e.g. 3 baths yesterday) might indicate a leak

## Issues / concerns

- How accurate/useful will comparisons be (household composition varies so much)
- Data security issues
- Potentially asking for information that is too personal (e.g. number of showers)
- Street averages less relevant to rural customers
- How does it know there is a leak?

Customer journey 2

Bill payers want to understand their consumption, affordability options and contribution to water conservation



## Improvements

- Tailor information to what you want to achieve e.g. goals for water saving or how helping environment
- Tariffs that offer cheaper water at certain times
- Make sure comparisons account for household composition
- Moderate the number of notifications (could feel intrusive otherwise)
- Link to energy smart meter
- Integrate with Alexa/Google Home



"I think this one's really clear as well, and on the app it gives tips rather than just telling us to reduce water consumption... and it shows against the whole street, so it puts into perspective what you're using, which I thought was really good, it's very informative, the whole idea of it"

"I like the idea of having an app like that – where it shows the stats like that and then it also says what it thinks that you did with your water. And then down here where it says 'your toilet's leaking', I think that's a clever idea of how it detects like that and notifies you"

"I think it'll change our behaviour definitely. Because we'll know more how it actually works, what we're actually doing, which a lot of people aren't"

"Because it'll change your usage, which a lot of people are trying to limit their money at the moment. So being to see it daily you're more likely to be aware of what you're using"

"That could bring a lot of stress and anxiety for lower-income people"

Customer journey 2  
**Bill payers want to understand their consumption, affordability options and contribution to water conservation**



# Customer Journey 3: Helping visitors to do their part to conserve water and understand bathing water quality

Support for the idea, but not seen as the water company's job to act on. Also, concern it would not reach the right people (tourists). Real time water quality data useful, Cornish respondents positive to encouraging responsible tourism.



## Comprehension / relevance

- Most relevance in Truro (but also most contentious)
- Other areas see as less relevant (esp. Bristol) – even confusing (and not worth investing in)
- Why from a water company (not the council or tourist board)



## Positive aspects

- Like idea of tourists being encouraged to look after the environment (Truro)
- Real time water quality data
- Good for specific groups e.g. lifeguards, surfers
- Google integration



## Issues / concerns

- Lack belief that tourists would use this
- Backlash in Truro: region overwhelmed with post Covid visitors... would tourists care enough to download/use?
- Beach businesses will suffer if app flags concerns
- Concern tourists will be directed to the locals' hidden gems
- Signage exists (and doesn't require signal)

### Customer journey 3 Visitors want to do their part to conserve water and understand bathing water quality



## Improvements

- Add in lifeguarding info to beach info
- Link it into Cornwall County Council webpages
- Would need to be multilingual
- Integrate into Google maps (don't want another app)





"I just don't think people would use the Bristol water app. If I go on holiday, I just won't check I'd check"

"I think it'll be more used in the booking stage of holiday. Once you're there, when you're actually on the beach with the water, it's fairly easy to tell water quality"

"Maybe if they provide the information to something like Google Map, like they provide the information about water quality... the rest already exists, Google map already has location you can go, things you can do, so that's not really Bristol water's job, what's the point of them doing that"

Customer journey 3  
Visitors want to do their part to conserve water and understand bathing water quality



"I wouldn't go to somewhere and get an app"

"I don't think a lot of people would use it. When you go on holiday it's like you're relaxing and you don't think about it"

# Customer Journey 4: Working with the local community

Considered an effective way of engaging communities and working with consumers. Need to provide incentives to encourage data contribution. Could it be linked in with school education programmes?



## Comprehension / relevance

- Some areas especially saw potential for community engagement (Truro)
- Most not very involved in local communities – less relevant
- Unclear of wider benefits of this proposition



## Positive aspects

- Transparency: able to fact check and hold company to account
- Community-level consumption data
- Consumer input, working with communities met positively
- Humanises the company: builds better public perception



## Issues / concerns

- Reliability of data (if being submitted by public)
- Won't reach people from outside the area
- Do people care enough
- What is the benefit for the company?



## Improvements

- Link to school resources
- Add explanations of poor water quality
- Link to community FB/social media
- Need to highlight why this is useful 'What's the so what?'

“I think you'd have to make it really big for people to care about it”

“I think you just got to show consequences again. Because causes without consequences aren't really go anywhere. So you're seeing it and not knowing what's the problem. Especially with younger people who aren't in the water industry they won't know what the problem is on the top of their head.”

“I think it'll cause problems with extreme germ phobias, they'll see there's like 2% - not 100 clean drink water and that could cause more problems”



“Opens up trust: tells us where the money is going”

“Some information might be misinterpreted – like quality of water stuff, they might not know what it's meant to be. If it's slightly not good enough, then they might get quite upset about it.”



# Bills



BLUE MARBLE



Language, abbreviations, credit balances and direct debits were a source of confusion: future customers represent a relevant audience to identify where to improve readability for new (and existing) customers

**Paper bills are unfamiliar:** they are struck by the quantity of information, number of pages, level of detail that is involved (but are unlikely to opt for paper bills in their future dealings)

This said, most reacted positively to **bill presentation**, with colour design elements and graphic devices such as 'post-it's' highlighting key information and giving bills a friendly tone. The headline bill amount is easy to see – but the bill breakdowns are difficult to follow.

They want bills to be **concise and easy to scan**. Having one combined bill and reducing text/replacing it with links or QR codes is preferred, as is the presentation of key information e.g. payment deadlines, amount owed, in large, bold text.

Bills should **clearly explain difficult topics**. Areas highlighted included how direct debit works (and what 'CR' means) and any calculations lacking contextual information. The 'small print' was generally praised for detail, clarity and answering their questions.

They highlight elements of the bill that offer customers **choice** e.g. between online/paper billing, direct debit/on receipt of bill, opportunities for support.



Overall the front page requires more clarity while the detailed parts were very clear

### Front page summary:

superficially clear (and Post-its have a friendly feel), but actually very confusing:

- Meaning of CR
- Who owes whom? E.g. is £85 being added or taken?



**The £50:** not understood (assumed a cost of living support payment). NB new customers won't understand the logo

**Page continuation:** almost blank – a waste

**Letter:** gets a little lost in all the pages – but clarified confusion on front page summary

**Accompanying information** generally seen as useful, clear, covers all questions/eventualities: esp. what to do if struggling to pay

**Your water bill**  
For services 29 May 2022  
Balance before this bill £757.54 CR  
On this bill  
Water charges - see details £259.24  
Sewerage charges - see details £296.04  
Government Contribution - see details £25.00 CR  
Total charges on this bill £630.28  
Bill total £127.26 CR

**The details**  
20 May 2022 to 16 December 2022  
Total bill reduction £25.00 CR

**Water charges**  
Old meter - 20 May 2022 to 26 Jul 2022  
Usage charge £129.77  
Fixed charge £58.71  
New meter - 27 Jul 2022 to 16 Dec 2022  
Usage charge £107.63  
Fixed charge £16.13  
Total water charges £197.64 CR

**Sewerage charges**  
Old meter - 20 May 2022 to 26 Jul 2022  
Usage charge £199.33  
Fixed charge £8.84  
New meter - 27 Jul 2022 to 16 Dec 2022  
Usage charge £156.67  
Fixed charge £27.26  
Total sewerage charges £259.24

**Government Contribution**  
Reduction amount £25.00 CR

**Useful information**  
If you have problems paying, please call us as soon as possible on 0800 083 033. We'll be happy to:  
- Check to see if you're entitled to help with your bill  
- Set up a payment plan to spread the cost  
- Suggest ways you can reduce your bill.  
Please call us if you would like a free copy of our Code of Practice on Payment and Debt Recovery. If you get help with your water bill by qualifying for one of our WaterCare or WaterCare tariffs, other criteria will apply. Call 0344 346 1010 to find out more or go to southwestwater.co.uk/helpwithbills.  
Moving house? Please read your meter on the day you move out and give us details at southwestwater.co.uk or call 0344 346 1010.  
If you can't read your meter, please call us for help. If you don't, you may have to pay extra for you - if you do, you may have to pay extra charges, go to southwestwater.co.uk/on-the-move.  
Every customer matters to us.  
Have you heard about our Priority Services? You can register to receive your bill in large print or Braille, have your bill sent to a nominated person or arrange for us to talk to you through your bill over the phone.  
You can also request your meter to be read up to 4 times a year and receive water deliveries if there's an interruption to supply, such as a burst pipe.  
Register online at southwestwater.co.uk/priorityservices and then 0344 346 1010 or Mincorn service 0800 169 8665.  
We may request credit reference and fraud prevention agencies to help us make decisions on your account. If you would like to know more details go to southwestwater.co.uk or call 0344 346 1010.  
The Consumer Council for Water (CCW) is the Consumer Council for Water (CCW) list. If you have followed our complaints process but are still unhappy, the Consumer Council for Water offers free independent advice. You can visit their website www.ccw.org.uk, call them on 0200 024 2222, or Plover, Victoria Square House, Victoria Square, Birmingham, B2 4LJ.

**How to get in touch**  
Visit our website southwestwater.co.uk/contactus  
Web messaging and WhatsApp southwestwater.co.uk/contactus  
Monday to Friday 9am to 6pm  
Saturday 9am to 5pm  
Monday to Friday 9am to 6pm  
Emergency only at any other time  
Call us in any free minutes in a mobile or landline phone contract  
24 hours, 365 days a year

**How to Pay**  
By Direct Debit  
Direct Debit is a quick, convenient and safe way to pay your bills. To set up a Direct Debit, please call us on 0344 346 1010.  
To pay by card, please either:  
- go to southwestwater.co.uk/myaccount  
- call 0800 230 0760  
By telephone or online banking  
- our customer number is 0344 346 1010  
- our sort code, which is 20-00-00  
- our account number, which is 0299 7455  
By payment plan  
You can pay monthly, fortnightly or weekly. You can pay by cash or cheque at any bank. Please take your bill with you. If you pay by cheque, make it payable to South West Water Ltd. Please note that some banks may charge you.  
At a bank  
You can pay by cash or cheque and there's no charge. If you pay by cash or cheque, please make your cheque payable to South West Water Ltd. and write your customer number on the back. Then send your cheque and payment slip to South West Water, PO Box 4762, Worthing, BN11 9NT. Please don't send cash through the post.  
At a Post Office  
Please make your cheque payable to South West Water Ltd. and write your customer number on the back. Then send your cheque and payment slip to South West Water, PO Box 4762, Worthing, BN11 9NT. Please don't send cash through the post.  
By post  
You can pay in cash at the Post Office, or at any branch of Lloyds Bank. Please take your bill with you. Paying in cash is free as the Post Office, but if you pay in cash at the bank, you'll need to pay a fee of 50p.  
If you don't have a bank account

Well laid out with useful signposting, diagrams and visuals. But very lengthy.

Front page summary: Total due easy to see but:

- As new customers, not clear what sewerage charge is
- Explanation on what paying for / why does it cost this...

Format & design: positive comments on design and layout

- But this generation question paper bills, want to see option for online bills – with QR codes/links to reduce info on the page

Repetition of water use advice: useful but could be provided as a link

Accompanying information: language easy to understand

- Some surprise that Wessex Water provides services too – but useful to have just one bill

**1 Amount due**  
Charges for: 29/01/2022 to 27/01/2022  
Amount brought forward: £0.00  
New charges: £256.06  
Supply address: [Address]

**2 Options to pay**  
Great news! We have a few options for you. Your payment reference is: [Reference]

**3 Your bill explained**  
Account summary  
Previous Balance: £219.60  
Total payments made: £219.60 CR  
Amount brought forward: £0.00  
Charges for 29 Jan 2022 - 27 Jul 2022  
Water use: meter no. 12/11/0512  
Recent reading: 627 (27/07/2022 actual)  
Previous reading: 558 (26/06/2022)  
Total used: 69m<sup>3</sup>  
Water charges  
Charges for: 29 Jan 2022 - 31 Mar 2022  
Daily Charge: 128.98p (per m<sup>3</sup>) for 24m<sup>3</sup> = £30.95  
Daily Charge: £43.40 (per year) for 62 days = £7.37  
Charges for: 01 Apr 2022 - 27 Jul 2022  
Daily Charge: 139.70p (per m<sup>3</sup>) for 45m<sup>3</sup> = £19.16  
Daily Charge: £44.92 (per year) for 118 days = £11.80

**4 Contact us**  
Your bill or account  
☎ 0345 600 3 600 (Monday to Friday - 9am to 6pm, Saturdays 9am to 5pm)  
💬 LiveChat at [bristolwater.co.uk](http://bristolwater.co.uk) or [wessexwater.co.uk](http://wessexwater.co.uk)  
✉ Submit an enquiry via our website  
Automated information services  
Select a meter reading or request information leaflets about charges, surface water drainage or Pension Credit discount.  
☎ 0345 600 6 000 (Select appropriate option)  
We welcome calls via Relay UK

**5 Ways to pay**  
Payments should be made to Bristol Wessex Billing Services Limited, Quorn Park, Quorn, Leicestershire LE12 7JG.  
Payment reference: [Reference]  
☑ Direct Debit  
☑ Internet/mobile banking  
☑ Bank & Post Office  
☑ Payzone  
Credit or debit card  
☑ [bristolwater.co.uk/paynow](http://bristolwater.co.uk/paynow)  
☑ Telephone 0345 600 1 028 (Automated 24 hours)

**6 Your water use**  
What is a cubic metre (m<sup>3</sup>)?  
A cubic metre of water is 1,000 litres or 220 gallons of water. It's the equivalent of 13 bathtubs.  
How do you compare to the national average?  
Average daily use is 13 litres per day.  
Save water, save money  
Small changes to how you use water in your home can save you money and help the environment.  
How long do people in your household spend in the shower?  
A minute less in the shower could save you 12 litres a day for showers of five times a week.  
Do you use...  
A washing machine always do it to save water.  
For water save, understand [bristolwater.co.uk](http://bristolwater.co.uk)  
Your meter  
Reading your own pre-paid water meter.  
The water meter is the private responsibility of the customer.  
Check for leaks  
Look for any dripping taps, overflows or leaking toilets. Leaking toilets can be hard to spot but waste over 200 litres of water a day. If you think you have a leak please visit: [bristolwater.co.uk/leaks](http://bristolwater.co.uk/leaks)  
More people at home  
Changes at home, even for a short period, can have an impact. Such as:  
Working from home  
Having a baby  
Having guests  
Household appliances  
If you have new machines make settings. A new water meter  
Time of year  
Some people use water differently at different times of the year.  
Additional water use  
Certain medical conditions  
Check if you're eligible for section 7.

**7 Additional help, just for you**  
Help to pay your bill  
Don't worry if you're struggling to pay, talk to us today. We will try to help you.  
Priority Services  
If you, or anyone you know, needs extra support, we can help you to help you.  
• Spread the cost of your bill.  
• Pay us directly from your benefits.  
• Reduce your bill with one of our low rate tariffs.  
• Repay your debt.  
Visit [bristolwater.co.uk/helptopay](http://bristolwater.co.uk/helptopay) or call us.  
Options such as Citizens Advice, StepChange and National Debtline offer free, independent and confidential debt advice.  
Priority Services  
• Additional assistance in the event of water supply interruptions.  
• Disabled toilets in braille, large print or a language other than English.  
• A secure password system to protect against bogus house calls.  
It's free and easy to register today at [bristolwater.co.uk/priorityservices](http://bristolwater.co.uk/priorityservices) or [wessexwater.co.uk/priorityservices](http://wessexwater.co.uk/priorityservices) or call us.  
And you'll find energy companies offer a similar service.

**8 Contact us**  
We are here for you: should be more prominent

**Your water supply**  
Your water is proudly supplied by Bristol Water.  
Did you know Bristol Water has the lowest leakage rate in the country? Leakage is one of our top priorities so that makes it one of our... because we're currently the best doesn't mean we're going to stop there, we've committed to reducing our leakage by 15% by 2025. There are loads of ways you can help reduce water leakage at home. A great way to start is by installing a water meter. Meters can help you spot leaks in your home, which means you can get them fixed a lot faster.  
What to do if you have a leak on your pipes  
We both share ownership for the pipes getting water into your home. You're responsible for the upkeep of all plumbing inside your home, so things like:  
• pipework  
• water tanks  
• taps  
• overflow  
You're also responsible for the 'service pipe', this is the pipe that leads from your home to the outside boundary of your property. In some cases, your service pipe might travel across third party land. When this happens, you're responsible for the pipe from the point it leaves your water main in the road. A plumber will happily sort any issues on your pipework.  
Spotted a leak?  
If you spot a leak please report it on our leak line 0800 801011. If you'd like to read more about our Leakstop policy and how we can help you with a leak, read our handy guide at [bristolwater.co.uk/leakage](http://bristolwater.co.uk/leakage)  
Need a plumber?  
Find a local approved plumber at [waterfinders.org.uk](http://waterfinders.org.uk) or call 0333 207 9030.  
What to do if your water tastes, smells or looks unusual  
There are a few things that can make your water taste, smell or look unusual. In fact with most of these issues, you can solve them yourself without having to phone us. Take a look at our guide on what to do if your water tastes, smells or looks unusual at [bristolwater.co.uk/problems-with-my-water](http://bristolwater.co.uk/problems-with-my-water)  
Be stronger owners  
Unwarranted callers often target elderly or vulnerable people by pretending they work for Bristol Water to trick their way into homes. All of our staff carry photographic identification and we operate a password system where requested. If it doesn't keep them out.  
Be stronger owners  
Unwarranted callers often target elderly or vulnerable people by pretending they work for Bristol Water to trick their way into homes. All of our staff carry photographic identification and we operate a password system where requested. If it doesn't keep them out.

**Your sewerage service**  
Wessex Water provides your sewerage service. Every day we take away your sewage and wastewater, treating it so it can be returned to the environment.  
Your region  
We work 24/7 to deliver your essential sewerage service and we're also investing to make things even better.  
Your local community  
Your local community is important to us which is why we provide a range of support to help you and others.  
Your home  
We work hard to ensure you have a reliable sewerage service and protect the environment from pollution - but we need your help. When it comes to your drains, be sure to only flush the three P's - paper, poo and pee - to prevent sewer blockages from polluting your home and the local environment. Wet wipes and other common bathroom items should be disposed of in the bin. And in the kitchen, once cooled, wipe away cooking fat, oil and grease, and dispose of it in your bin or foodwaste recycling. You can do your bit by swapping wipes for reusable items, such as washable face pads instead of make-up wipes, or coating coats and sprays instead of surface wipes.  
Your drains  
While we're responsible for maintaining public sewers, you are responsible for maintaining your private drains - that's the section of pipe which serves only your property and is inside your property boundary. Where your private drains or other pipework from neighbouring properties it becomes our responsibility. To find out more about sewer coverings visit: [bristolwater.co.uk/wessexwater.co.uk/pipework](http://bristolwater.co.uk/wessexwater.co.uk/pipework)  
Need help?  
If you're finding it hard to manage your bills, we have a payment plan that could help you out. You may be able to pause or discount your bill depending on what you need. Contact us online to find out if you're eligible.  
Visit [bristolwater.co.uk/struggling-to-pay](http://bristolwater.co.uk/struggling-to-pay) or chat to a member of our team on 0345 600 3600  
Your drains  
While we're responsible for maintaining public sewers, you are responsible for maintaining your private drains - that's the section of pipe which serves only your property and is inside your property boundary. Where your private drains or other pipework from neighbouring properties it becomes our responsibility. To find out more about sewer coverings visit: [bristolwater.co.uk/wessexwater.co.uk/pipework](http://bristolwater.co.uk/wessexwater.co.uk/pipework)  
Typical detached property  
Our pipework  
Your pipework  
Important information  
Your comments  
If you have any comments or complaints about the services we provide, our customer information for enquiries and complaints shows how you can get in touch.  
If you are unhappy with the response you receive, you can then contact CCW - the services for our businesses in some cases, the Water Services Regulation Authority (Ofwat).  
Your view matters  
We value your opinion so please join our online customer research panel. You can tell us what you think of our services. How we can improve and help us plan for the future. Visit [www.wessexwater.co.uk/feedback](http://www.wessexwater.co.uk/feedback)  
www.wessexwater.co.uk  
www.wessexwater.co.uk  
or call 0345 600 3 600 (Monday to Friday, 9am to 6pm; Saturday, 9am to 5pm) for an offer.  
For a full list of our premises, visit [www.wessexwater.co.uk/premises](http://www.wessexwater.co.uk/premises) or call 0345 600 3 600 (Monday to Friday, 9am to 6pm; Saturday, 9am to 5pm).  
For more information visit: [www.wessexwater.co.uk](http://www.wessexwater.co.uk)

**Payment Slip**  
Trans Cash  
Check number: [Number]  
Check amount: £ 256.06  
Date: [Date]  
Barcode: [Barcode]

"I feel like there's some repetitions. Like 'how to use less water', then there's a whole section about how to cut down your water usage later on" "I feel like some of it could just be a webpage that say, this is the website that could help"

Eventual consensus was for combined bills 'so you don't miss one and can see in one go how much everything costs'

### Front page summary:

Mostly clear and easy to understand, they liked the layout, the clear sticky note and the option to split the cost, but 'Please pay the instalment in 14 days' should be bigger.

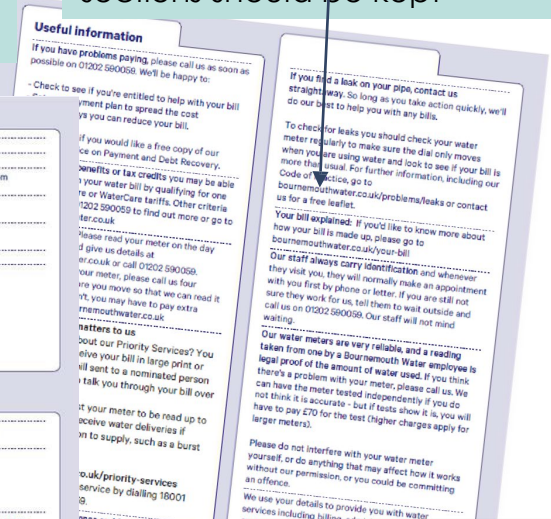
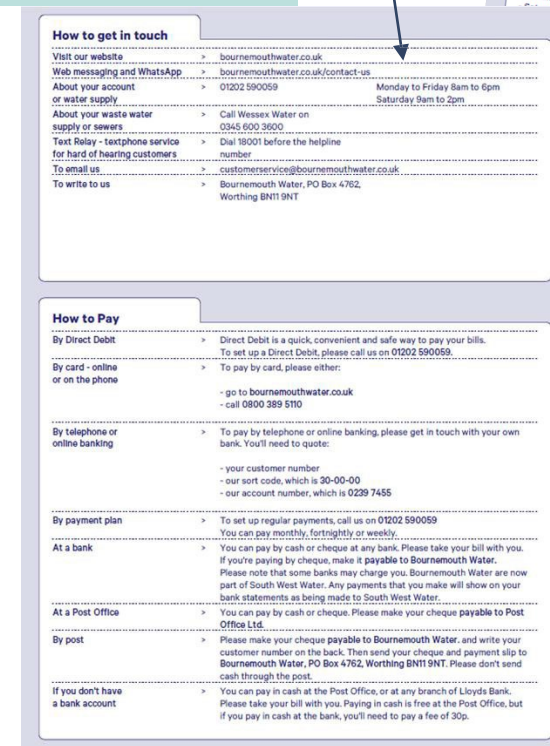
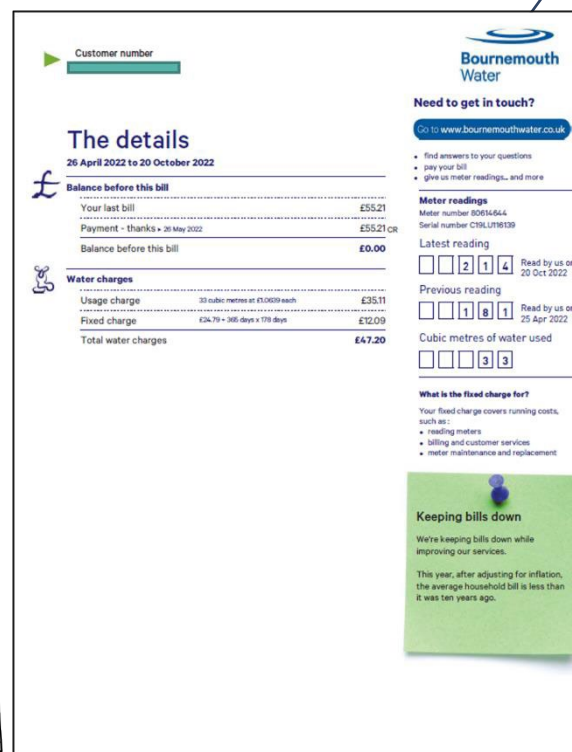
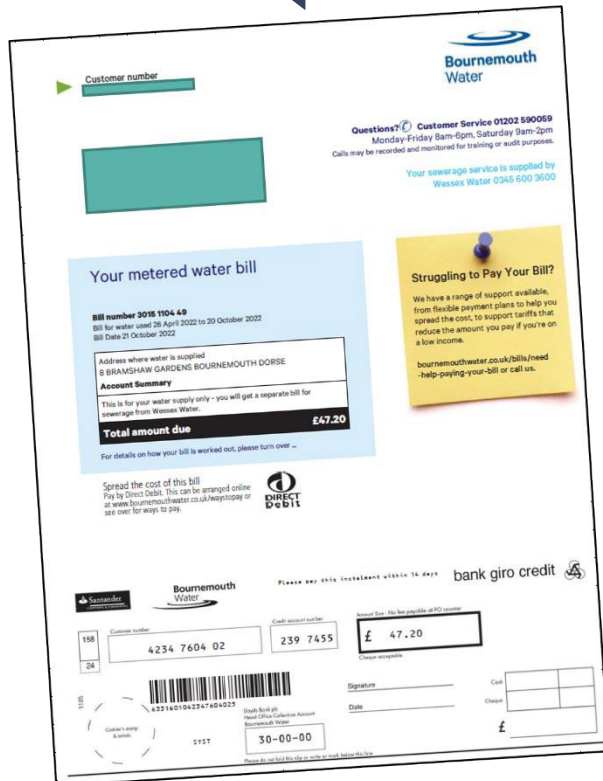


**Format & design:** Students were happy to receive the bill through email but thought paper copies should be available for older customers. No one thought about sewage charges when asked if something was missing. One student said the language the bill is in could be chosen in advance.

**Page continuation:** there was some confusion about the calculations and what a fixed charge is, they wanted more explanation. The green sticky note was too dark and didn't jump out. The empty space at the bottom could be used for a monthly breakdown.

**Letter:** Students liked being given different payment options.

**Accompanying information,** such as the water meter reliability section, could be condensed or replaced with a link/Qr code, but the 'If you have problems paying' and 'Our staff always carry identification' sections should be kept



"It's quite simple. It says how to pay it, how to get in touch, if you can't pay it, etc"





**The 2023 Pennon  
Youth Boards point  
to some insight  
gaps for  
consideration**

**Building trust and legitimacy in their water company:** What do future customers need to know or experience to develop this? Specifically to counter reputational damage of CSOs

**Behaviour change strategies for young consumers:** understanding e.g. washing and showering habits to build insight-led campaigns

**Communications strategy for future customers:** building understanding of the imperative for behaviour change

**Reviewing customer journey concepts:** developing these further in light of future customer insight and testing with a wider customer sample

**Bill design review**

- Specifically the front page is not intuitive to 'uninitiated' future customers – and some icons not understood
- Focus on online billing channel





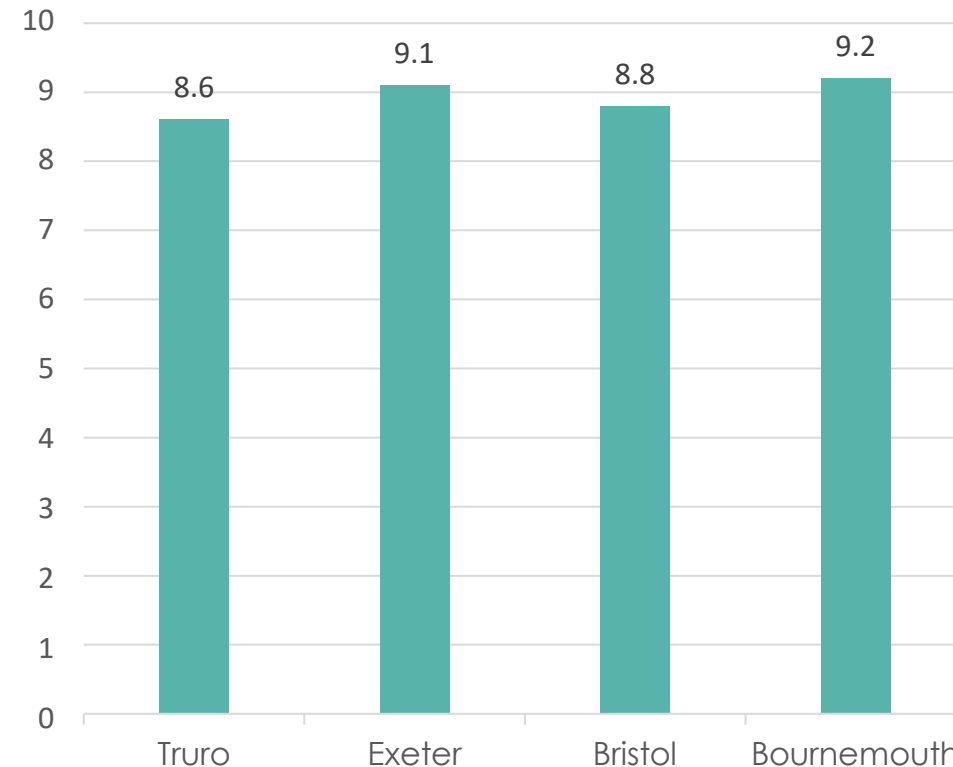
# Appendix



BLUE MARBLE

The majority of students (93%) rated the experience an 8 out of 10 or higher. The positive feedback was consistent across all four locations. Across all locations, the average rating for the Youth Board was 8.9.

Average score participants from each location gave to the Youth Board



Q. Overall, how would you rate the South West Water's Truro/South West Water's Exeter/Bristol Water/Bournemouth Water Youth Board out of 10? (Where 0 is terrible and 10 is excellent). Base: 11 students in each location.



Most commonly, students found the day informative and said they enjoyed learning about the Pennon Group, the challenges it is facing, and its plans for the future. They also found the group discussions interesting, inclusive, and friendly, with many participants feeling that their ideas were being listened to. Participants from Bournemouth enjoyed the site visit.

- *“At the start I was under the impression that SWW were not taking measures to reduce pollution and increase long term sustainability of our water resources. It is reassuring to know that both of these are highly valued by the company which is taking steps to improve transparency and education around these issues.”* – Truro participant
- *“Very informative and eye-opening. I felt very involved and my opinion felt recognised. SWW's plans for the forthcoming years felt mostly positive, and I found it very useful as I am soon to be paying bills. A generally well-structured day with extremely friendly and helpful staff.”* – Exeter participant
- *“The day was very thorough and informative and was engaging throughout. The questions asked were good and you could expand easily on your answers.”* – Bristol participant
- *“I learnt a lot today, it was highly informative and I understood the growing challenges faced by the company and therefore the implications as a consumer. It was really friendly.”* – Bournemouth participant



Students thought the Youth Board could be improved through including more interactive presentations, more time for questions, and a greater variety of activities, such as practical activities. Some suggested that the breakout groups should be smaller or mixed up more frequently. Others would have liked to receive more information about the Pennon Group or for the event to cover a broader range of topics.

- *“At times there were long periods of being talked to followed by long periods of debate. I feel that this could potentially be mixed up a bit more so that there is more interaction in the presentations.”* – Truro participant
- *“It may have been worth mixing up the groups once or twice more.”* – Exeter participant
- *“I think more engagement and information from the Bristol Water employees themselves would be helpful.”* – Bristol participant
- *“Due to my lack of info about SWW, perhaps an overview of key information about the business at the start would have benefited me.”* – Truro participant





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

