



The Supply of Strategic Direction Research

A PROPOSAL FOR WESSEX WATER

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P10311 The Supply of Strategic Direction Research

Wessex Water

YTL GROUP



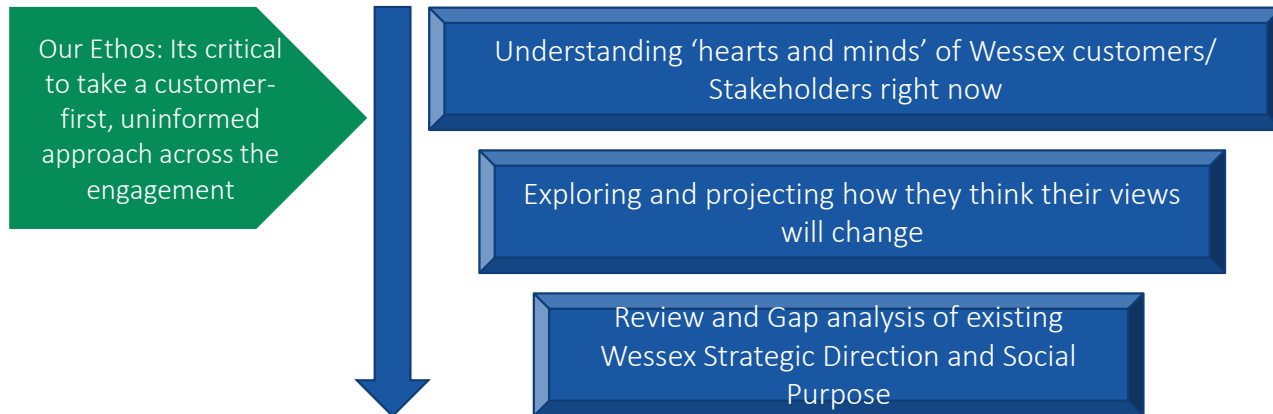
THE BRIEF

WESSEX WATERS LONG TERM PLANS NEEDS TO BE ROOTED IN CUSTOMER AND STAKEHOLDER'S CURRENT VIEWS AND PRIORITIES

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

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

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.

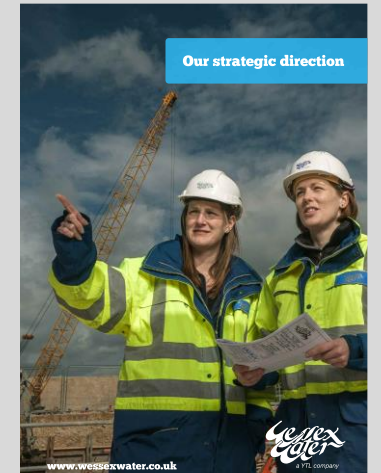


- Snapshot of their lives
- Customer POV on what matters to them
- Exploring the big topics - Political, Economic, Social, Technology
- Identifying who they admire/why
- Understanding how this relates to Wessex Water
- Exploring their horizon
- Loose projections through guided future

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



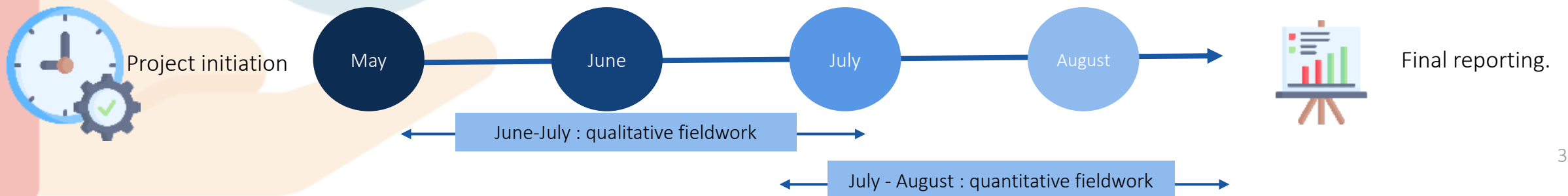
Strategic Direction sets out what Wessex Water aim to deliver for customers, wider society, and the environment over the next 25 years. First published in 2016.



Our **KEY CONSIDERATIONS** when designing the research programme

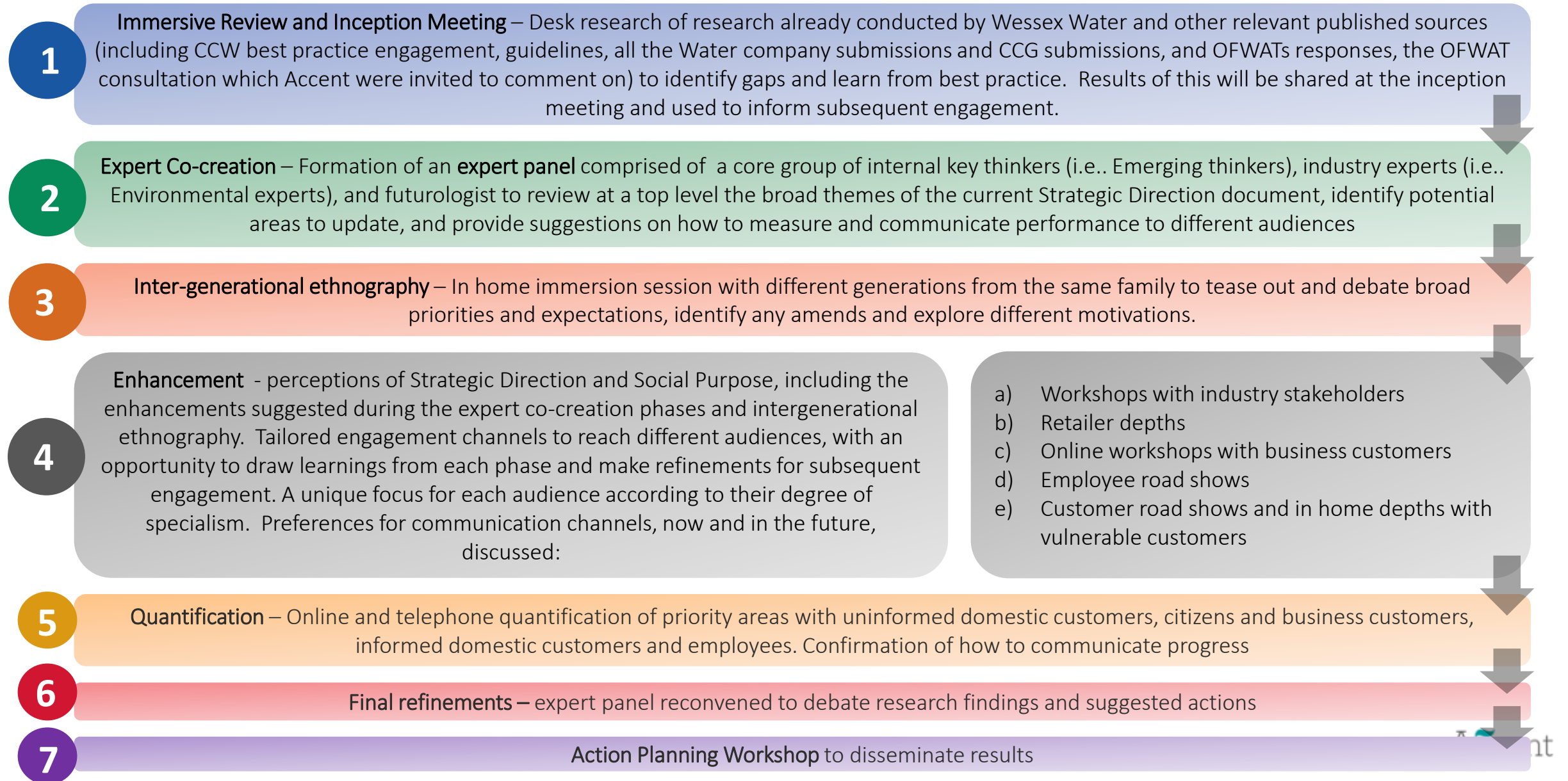
- ✓ Providing input from customers and stakeholders that will help drive the strategic focus of Wessex Water
- ✓ The need to **engage with a full range of customers and stakeholders**, with differing levels of understanding on the role of Wessex Water and the water industry
- ✓ **Engagement across all regions** to identify if views differ according to geography and whether the customer experiences a dual service (supply and waste) or single service.
- ✓ Overcoming the challenge of guiding customers and stakeholders to **think long term**
- ✓ Incorporating innovative engagement techniques to **uncover rich and engaging insights**
- ✓ The need to **draw upon existing data** with previous studies
- ✓ The need to **include a range of Wessex Water customers** including those who are less able to pay and future customers

Overall timelines



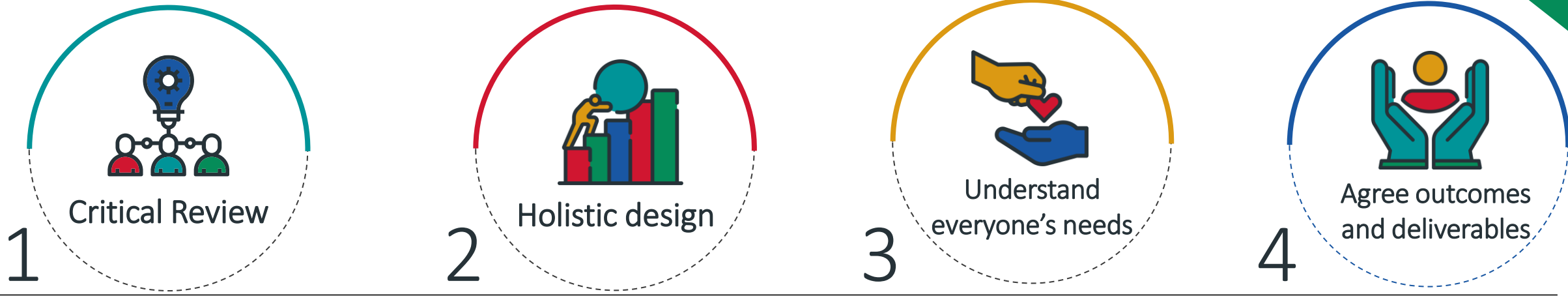
APPROACH OVERVIEW

Iterative phases of research creating depth of insight



1

INCEPTION WORKSHOP AND LITERATURE REVIEW **GETTING IT RIGHT FROM THE START**



- Lead a **review of previous engagement**, including that around the development of the social purpose and strategic direction.
- **Identification of any gaps in insight** to be addressed by this research.
- A **summary document** produced and circulated ahead of the inception meeting



All key stakeholders to take part in **Inception meeting** (via Zoom/Teams).

We **welcome attendance** from representatives from **the Customer Challenge Group**, if Wessex Water feel this is appropriate



The inception meeting provides the opportunity to **understand all specific issues and needs of different parties** and factor these into the design of the project materials and outputs. Key timings will be discussed in detail.



Following the meeting, we will **provide summary notes and actions** involving the lead Wessex Water team members

2

EXPERT CO-CREATION

IDENTIFICATION OF POTENTIAL REFINEMENTS

Overview



- Many of the topics to be discussed as part of this research are complex in nature and input from informed and experienced stakeholders will be beneficial.
- Accent will create an **expert panel** who will meet at least twice over the duration of the project and also review key material (for example the educational material for the quantitative questionnaire)'.
 ▪ The expert panel will be comprised of a mixture of internal key thinkers from Wessex Water and industry experts (for example Environmental Experts).
- Accent will work with Wessex Water to identify the most appropriate stakeholders to include, including employees from Wessex Water known for their future focus (for example employees from the innovation team), and industry contacts for example from the Environment Agency.
- **Optional extra: inclusion of a futurologist to provide contextual trend and prediction information**



Format



- In the first instance, the expert panel will take part in an online group discussion to review the current SDS, identify any missing gaps and provide suggestions for enhancement
- The SDS and social purpose will be circulated to the panel members in advance, and some broad question topics for review so that all attend the discussion ready to contribute
- This meeting will be held online and last 90 minutes
- Accent moderators will lead the conversation, and encourage the free flow of ideas using task based exercises as appropriate.
- This audience will also provide suggestions on how to measure performance.

Output



- **Summary report** highlighting broad feedback on the SDS and social purpose, suggested amends and measurement metrics
- Accent will review this in a workshop with key Wessex Water personnel, and feed the findings into subsequent stages of research



**Objectives
answered: 1,3**

3

INTERGENERATIONAL ETHNOGRAPHY

EXPLORATION OF MOTIVATIONS AND PRIORITIES AMONG DIFFERENT GENERATIONS

Overview



- 3 different generations from the same families will debate current priorities and expectations for a water company for the next 25 years.
- The blend of generations ensures that some participants can look retrospectively, drawing on experience and change over the past 25 years, whilst others are likely to be more future focused.
- Differences in priorities across the different age groups will be debated in a safe and familiar environment, and the familial connection will facilitate an appreciation of the views of others.

Format



- 6 sessions**, each comprised of between 3 to 6 members of the same family, across 3 different generations (for example future citizen, bill payer, grandparents). These can be conducted in home or via video calling, depending on participants preference (conscious of the current ease of social restrictions and many people's preference to reduce face to face contact). Incentives of £50pp
- A mixture of rural/urban and SEG customers** will be recruited across Wessex Water, including households with a dual service (supply and waste) and households with a single service.
- A moderator** (either Rachel Risely or Nancy Curzon) will lead the sessions, and observational and behavioural tasks can be included
- All participants will be asked to **complete a homework task** before the sessions which will comprise
 - My life priorities – understanding what's important in their words
 - Look to the horizon – hopes/dreams to explore where they focus e.g. self-focused, community-focused, global-focused
 - Water usage diary – explore how water conscious
- In order to focus attention on the future and avoid the potential biases of customers favouring the status quo we will use gestalt room techniques to go to different points in the future – the room of 2030, the room of 2040. Customers will talk about their age at that time, what they imagine life to be like and how they would want Wessex to work for them in these different moments

Output



- Accent will conduct **thematic reviews on the outputs** and **provide a summary report** of key learnings, discussed with core members of the Wessex Water team
- Transcripts



Objectives answered: 1

ENGAGING WITH INDUSTRY STAKEHOLDERS, WATER RETAILERS AND BUSINESS CUSTOMERS

Overview



- A breadth of stakeholders will be engaged with to understand how priorities differ among different stakeholder type.
- A bespoke topic guide will be created for each stakeholder type, so the discussion will focus on their perspectives of Wessex Water, their priorities for the next 25 years and feedback on current SDS and vision
- All will be provided with some background reading ahead of the engagement, we envisage a summary of the current SDS.
- Our Accent moderators will guide the conversations at each stage.

Format



- Online 90 minute discussion groups will be held with a mix of stakeholders associated with the industry.
 - We recommend engaging with existing stakeholder groups such as the Wessex Water Partnership and Catchment Management Panel. Assume Wessex Water provide named contact information.
 - Option for 1 or 2 groups
 - Assume no need for pre task or incentive with this audience
- Industry stakeholders**
- Online or telephone depths with water retailers who currently have a relationship with Wessex Water. Groups not appropriate for this audience due to their competitiveness
 - We assume that Wessex Water will provide named sample for this
 - Option of 4 or 6 depths, 90 mins long
 - Assume no need for pre task or incentive with this audience
- Water Retailers**
- Online 90 minute discussion groups with 5-6 business customers from across the Wessex Water region. £75 incentive (can be charitable donation)
 - All will be business decision makers involved in company decisions about utilities.
 - We assume that Wessex Water will provide named sample
 - Option of 1 or 2 groups
- Business Water Customers**

Output



- Accent will conduct **thematic reviews on the outputs** and **provide a summary report** of key learnings, discussed with core members of the Wessex Water team
- Transcripts



Objectives answered: 1,2,3,4

4

ENHANCEMENT ENGAGING WITH EMPLOYEES

Overview



- Employees provide a unique insight into Wessex Water priorities and SDS, and will ultimately have responsibility for delivering the vision for the next 25 years so are a key audience to engage with at this stage.
- We can discuss with Wessex Water how to allocate employees to groups, but recommend dividing groups into managerial and non – managerial to encourage free flow of information. We also suggest dividing into office based and non – office based, as based on our experience in similar organisations these employees may have unique perspectives
- We will also convene a group of staff who focus on wholesale
- Accent will liaise with Wessex Water on recruitment to these employee groups and assume Wessex Water will provide a list of contact names

Format

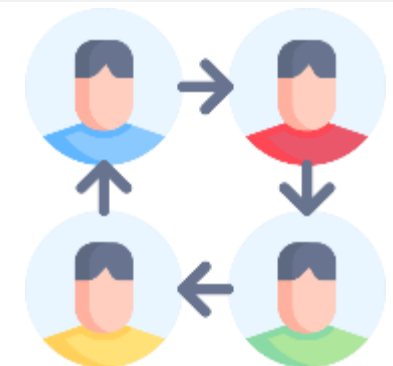


- 2 -hour, weekday lunch time or evening sessions
- Covid-Safe: held online with 6-7 employees in each. This is also easier for non-office based employees to attend
- Our moderator (Rachel Risely or Nancy Curzon) will lead the conversations and facilitate the group activities
- Homework task to pre-read a summary version of the current SDS and provide some initial opinions (surprises, good and bad elements, anything missing). We envisage that not all employees will be aware of the document so this will ensure the discussion starts on a 'level playing field'
- After a short introduction there will be a number of brainstorming activities to think about all the different issues they would expect to see included in Wessex Water's long term strategy with a focus on branding, positioning, their role, values of company, future aspirations etc.

Output



- Transcripts
- Post engagement highlight summary report after completion of each workshop phase identifying the key themes and implications for future engagement
- A combined report summarising the key thematic outputs taking insight from all stage 4 engagement, discussed in an action planning workshop



**Objectives
answered: 1,2,3,4**

4

ENHANCEMENT ENGAGING WITH CUSTOMERS



Overview



- 3 x Customer road shows: 1 held in the Wessex area (supply and Waste) and 1 in the each of Bournemouth and Bristol (waste only) .
- Option for 1 extra roadshow focused on Gen Z citizens to supplement the future view from our intergenerational groups and future projections
- Mixture of large group information exercises and smaller, task focused, break out groups
- A pre-task with live minds will ensure we build a picture of customers lives, attitudes and priorities and capture uninformed views
- A post task will also be completed to test understanding of purpose statements, and confirm these are aligned with their group discussions
- Wessex Water personnel are invited to view the sessions and can support with the delivery for example delivering the introduction to Wessex Water section. Representatives from the Customer Challenge Group are also invited to attend*.

**Objectives
answered: 1,2,3,4**

Format

- 3-hour, weekday evening sessions (5.30pm arrival 6pm-9pm) held face to face (assuming COVID restrictions permitting, ability to conduct via Zoom if necessary)
- 16 participants at each roadshow representing a cross-section of age, SEG. Potential to include three sub groups at each location and at this stage we're suggesting 1 x AB, 1 C1C2, 1 x DE. All to be a mix of ages to maximise inter-generational discussions. Rural and urban customers will be represented. Ethnic minority and faith group quotas will be set to reflect the local population.
- An optional extra 'Gen Z Citizens Roadshow' will include a mix of Y12/13, College/Uni and First Jobbers
- Results will be cross checked by demographic grouping for broad differences and verified in the quantitative work
- Two moderators (Rachel Risely and Nancy Curzon) will attend all roadshows to run plenary and large group based exercises, and observe the self moderated, task based breakout sessions
- Plenary sessions will provide rapid immersion and reiterate the final LiveMinds task. Following this all participants would rotate around break out rooms where the self moderated tasks would be set
- There will be 3 different 'rooms' 1 x Wessex Ideas Room, 1 x Future Room, 1 x Social Purpose Room
 - **Wessex Ideas Room** – Exploring Priorities for Wessex Water around affordability, resilience, customer service, cleaner environment – roulette chips tasks to determine priorities and rationale
 - **Future Room** – Walking into 2040, short presentation of Future Scenarios – explore priorities for the future. Customers write a 'Future25' pledge detailing what they would want Wessex Water to do differently in the next 25 years
 - **Social Purpose Room** – Think about responsible companies you admire (pre-task), core qualities, apply to Wessex, review Social Purpose. Each group will appoint a spokesperson who will feed back to the main group during plenary sessions

4

ENHANCEMENT

ENGAGING WITH CUSTOMERS (THE BENEFITS OF A PRE-TASK)

Using output from LIVEMINDS HOMEWORK EXERCISE

CUSTOMER HOMEWORK EXERCISE:

Five tasks set for participants to complete in the run up to attending the roadshow



WORLD: What matters to you AND household purse (pie chart exploring affordability of utility bills)



REGION: what matters to you in your region - £, Planet, People



WATER: what matters to you from Wessex Water – *UNINFORMED PRIORITIES sheet of service, bills, resilience, environment*



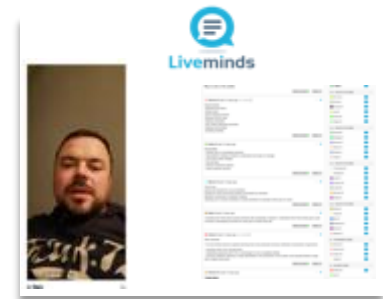
RESPONSIBLE COMPANIES: : who do you most admire for being responsible company – *Brand and Brand diamond self-complete sheet with 4 reasons why*

A BIT ABOUT WESSEX: Immersion into Wessex Water – infographics/videos highlighting background and challenges for Wessex to allow everyone to hit the ground running at the Roadshows

**COLLECTION METHOD**

We will use an interactive platform

- Use Live Minds interactive platform for completion of all homework exercises
- Video introductions
- Easy to use
- Allows different tasks to be released across a week vs. overwhelming
- Real time access for research team and clients



Output will be summarised and shared with the core Wessex Water research team prior to the roadshows. This will allow the Accent and Wessex Water to use the pre-task insights to drive the development of the roadshow materials

4

ENHANCEMENT

ENGAGING WITH CUSTOMERS (AGENDA)


We will work with the team on the final Roadshow agenda after the full briefing but would look to use the following timeline

- 
- | | |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5.45pm | Welcome and Introduction to Wessex Water (overview of the organisation size, role and remit, which will vary by region) |
| 6.00pm | Plenary – Replaying the Final LiveMinds task to Refresh memory (Introduce Wessex Water, their Social Purpose and introduce the core elements of the Strategic Direction : affordability, resilience, customer service, a cleaner environment) |
| 6.15pm | Sub-Group move into first room for tasks/discussion (3 x sub-groups rotate) |
| 6.45pm | Sub-Group move into second room for tasks/discussion |
| 7.15pm | BREAK |
| 7.30pm | Sub-Group move into third room for tasks/discussion |
| 8.00pm | Plenary discussion of group tasks |
| 9.00pm | Thanks and close |

Wraparound post task via **LiveMinds**: short survey to complete to confirm understanding of purpose statements and confirm they align with their road show discussions. Participants will also be asked to complete the priority chip exercise again, to confirm any changes upon reflection/further consideration

In addition to the roadshows, we will conduct 10 depth interviews with vulnerable customers. These will be in home and include an element of behavioral ethnography. A cut down version of the discussion guide will be followed.

Output

- 
- Post engagement 1 page highlight summary report after completion of each roadshow phase identifying the key themes and implications for future engagement
 - A combined report summarises the key thematic outputs taking insight from all stage 4 qualitative engagement, discussed in an action planning workshop
 - Transcripts (depths only)

Accent have undertaken numerous day/evening engagement events across water, utilities and for organizations like Citizens Advice



QUANTIFICATION CONFIRMATION OF PRIORITIES

Overview



- In order to **quantify customer priorities**, we will conduct a survey among customers and businesses in Wessex, Bournemouth and Bristol, **using a prioritisation exercise** adapted to whether they are water and waste, or waste only
- **Most of the interviews will be conducted online** among Wessex Water domestic customers from our panel partners and from sample provided by Wessex Water. We will also free find some business customers (and customers in vulnerable circumstances) using this approach
- This will be **supplemented with face to face interviews to ensure coverage amongst hard to reach, vulnerable and digitally disengaged customers, and potentially citizens.** Interviews will be conducted where customers feel most comfortable - in garden or in home.
- In order to engage with a representative number of business customers, we will follow a phone- email- phone approach
- We also see value in understanding employee prioritization, as working with employee values is fundamental to driving the priorities through the organization. **A modified version of the survey will be completed by employees.**

Format



- **Accent will work with Wessex Water to develop background educational information**, which will be reviewed by the Expert Panel prior to the survey launch
- The **quantitative survey will be piloted** to ensure that respondents understand what we require them do, and to ensure that there are no discernible biases in the way questions are answered.
- **In the Max Diff prioritization exercise, customers are presented with 5 priorities and are asked to pick the most and least important.** This is repeated several times with different priorities
- **Presentation of draft vision statement will measure acceptability.** This will enable further refinement. Communication preferences will also be checked

Output



- Raw data – A full dataset of the respondent level and analysed quantitative data will be provided in Excel
- A combined PowerPoint report which summarises insight from all customer and employee groups engaged with



**Objectives
answered: 1,3,4**

QUANTIFICATION

SAMPLE SIZE CONSIDERATION

Example Max Diff exercise

From the four options below please select the one you think is the most important for South Staffs Water to focus on and the one which is the least important:

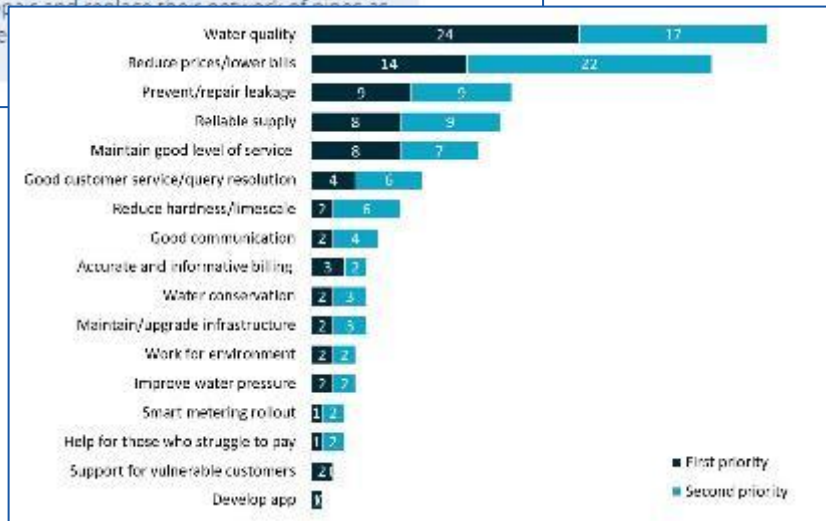
Least important Most important

They have a website that allows you to find the answer to any queries quickly and easily

They provide financial grants and/or sponsorship and their employees spend time volunteering to support local community schemes in the areas they supply

The water always comes out of the taps at a pressure that does not impact on the way you use water at home - e.g. taking a shower/bath, using a hose

They quickly respond and resolve the amount of issues needed to reduce



Example Max Diff outputs

	OPTION 1	OPTION 2	Employees
Sample size	600	800	500
Subgroups	Domestic 500 SME 100	Domestic 700 SME 100	Natural fall out representative of employee base
Domestic Supply	250 Wessex, 125 Bournemouth Water, 125 Bristol Water	350 Wessex 175 Bournemouth Water 175 Bristol Water	
Method	60 phone-email-phone 470 online (400 panel and 70 cust sample) 70 F2F	60 phone-post-phone 600 online (400 panel and 200 cust sample) 140 F2F	Online

- We have allowed for a sufficiently robust sample to draw conclusions at a total level with a margin of error of 2-4%
- Both options will allow for breakdown analysis of main segments i.e., Region (Wessex, Bristol, Bournemouth) Demographics, Key Behavioural splits etc., where the sample size is a minimum of 50 respondents
- We will use quota's during fieldwork to ensure representivity of customers. We will weight the data only where we see a deviation of greater than 5%

We also recommend completing the same exercise with the Wessex Water customer panel, to triangulate uninformed and informed views (we have not costed for this as assume that Wessex Water would run this internally)

WORKSHOP AND DELIVERABLES

A SUITE OF DELIVERABLES TO MEET DIFFERENT NEEDS

6

Final refinements

The expert panel will be reconvened to debate research findings and suggested actions



Post engagement 1 page highlight summary report after each engagement which summarizes the key findings and any actions needed in bullet points. Provide Wessex Water with quick and immediate feedback and will be produced after the **intergenerational ethnographic** and each of the **qualitative enhancement** phases.

7

Action Planning Workshop

Accent will lead a final workshop, summarising the results across each phase of research. A PowerPoint summary report will be produced and circulated in advance

PowerPoint summary reports will be produced after each phase of engagement, which will be circulated ahead of workshop discussions. These highly visual PowerPoint reports will summarise key insights and draw conclusions and recommendations to facilitate debate. A combined report will be produced for all **qualitative enhancement** and **quantification stages**, summarising the key take outs across all stakeholder and customers groups engaged with.

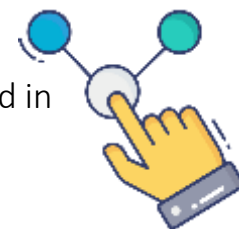


Workshop discussions will be held at the end of the **qualitative enhancement** and **quantification stages**.

These will be led by senior members of the project team and designed to be highly interactive. Our experienced team are happy to **present research findings** and attend meetings with the Customer Challenge Group and other stakeholder groups

A final full **technical report** covering all phases of research.

Raw data – A full dataset of the respondent level and analysed quantitative data will be provided in Excel. Qualitative transcripts can also be provided.



All our outputs are produced to a high standard so can be used to support the Business Plan submission for PR24 and or communicated via Wessex Water (for example on the website or newsletters)





ACCENT MARKET RESEARCH

WATER EXPERIENCE



30
YEARS

Southern
Water

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

south
east
water

South Staffs Water

b

BRISTOL
WATER
It's what we're made of.

Thames
Water

love every drop
anglianwater

30 years and counting..... that's how long the Accent team have been working together on mixed methodology studies in the water sector. We have worked on countless fascinating and challenging projects – many mixed methodology pieces integrating stated preference and economic modelling insights, ethnography and qualitative and quantitative research.

Our team have worked extensively across the water sector (and beyond). Projects have included behavioural change (working with ex-No 11 nudge team from BIT), price reviews, communication development, long term resilience – to name a few.

Some recent examples of our work in the water sector include:

- DCWW (community assemblies, reconvened discussion groups and stated preference)
- South East Water (comprehension clinics, community resilience workshops and stated preference)
- Southern Water (reconvened discussion groups and stated preference)
- South Staffs (stated preference)
- United Utilities (revealed preference)
- Ofwat (C-MeX and D-MeX)

We also draw on our expertise in other sectors, including energy, transport and health care



ACCENT MARKET RESEARCH

WATER EXPERIENCE

EXPERIENCED
AND
COMMITTED

30 years PLUS in water means **we are trusted, dedicated and reliable specialists**. We have supported water companies with strategic engagement since PR99. **Ofwat consult us for best practice customer and stakeholder engagement**. Our MRS credited moderators have proven track record in the water sector, utilities, finance, retail...



TRUSTED
PARTNER

We have **Qualitative experts and Quantitative masters**. Our full-service capabilities means we can provide methodologies tailored to the needs of the audience (and fully COVID safe). We are also ISO20252 certified.

- Unrivalled ability to **mesh insights across qualitative and quantitative methods**.
- Our **sector knowledge** ensures we **triangulate and contextualise research insights**.
- **Draw in innovation and experience from work in other sectors** to really paint the best picture.

FRESH

- Pioneering **new methodologies such as Intergenerational ethnography**.
- Incorporation of gestalt room techniques to provide **future focus**.
- Task based exercises allowing a customer led response to the key issues.
- Potential to **include futurologist**.
- **Vox pops to engage audience and communicate key content**



ACCENT TEAM

WATER EXPERIENCE

Strong team of insight specialists with cross sector experience and ethnographic, qualitative and quantitative expertise:

Rob Sheldon



TECHNICAL CONSULTANT

Rachel Risely



QUANT LEAD

Nancy Curzon



QUAL LEAD

Dawn Mulvey



ACCOUNT DIRECTOR

Kayte Ashton



ADVANCE ANALYTICS

Julian Hollo-Tas



FIELD SUPPORT

Omar Shareef



FIELD MANAGER

Angeline Depaty



TELEPHONE UNIT
MANAGER

Yasamin Mehraj



PROJECT SUPPORT

Paul Metcalfe



ADVANCE ANALYTICS

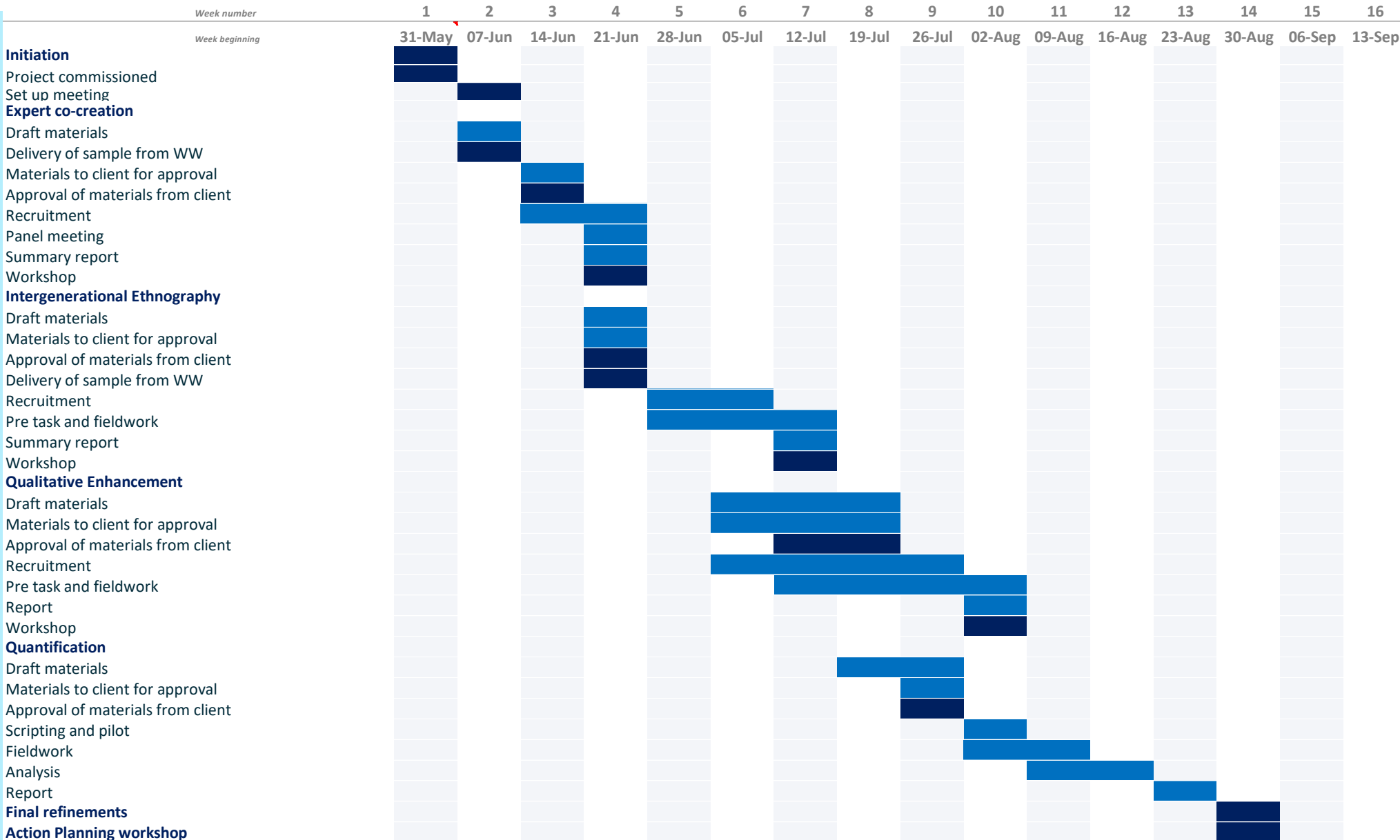
TIMINGS DELIVERING INSIGHT WHEN IT'S NEEDED



Wessex Water requires this project to be completed and fully reported before the end of August 2021. This will be challenging, but our timeline highlights the key dates for each milestone of the project, with responsibilities assigned.

This includes time for the Wessex Water Customer Challenge Group to review and comment on key research materials, such as questionnaires and topic guides

We will engage with Wessex Water regularly throughout the duration of the project, and schedule weekly project catch ups where progress can be reviewed. In addition, our **post engagement 1 page highlight summaries** ensure you receive timely updates on key findings after each engagement point.



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THANK YOU!



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