

12th January 2017

Severn Trent: Customer Needs Research

Pen portrait report: Customers in Wales

Final

britainthinks.com

Overview of all available reports

- **Customers in Wales**
- General Customers, Customers with High Engagement with the Waterways & Customers from Faith & Cultural Groups
- Customers in health and wellbeing vulnerable circumstances
- Customers in financially vulnerable circumstances
- Customers who have suffered service failures
- Future Customers & Shared Bill Payers

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01 Key findings and overview

Introduction

- Severn Trent wants to ensure it continues to have a **positive impact** on all of its customers' lives, including those deemed to be more vulnerable.
- As part of PR19, Severn Trent wants to engage with customers, understand their priorities and deliver outcomes that matter to them in the long-term.
- Severn Trent commissioned independent research and strategy consultancy, BritainThinks, to conduct qualitative research with a range of their customers to understand:
 - who these customers are, their **needs and priorities** as they relate to water
 - their current **views and experiences** of Severn Trent, including core services - and, in the case of some customers in Wales, their views of Dee Valley Water
 - how well Severn Trent (and Dee Valley) are meeting their needs, and where they could do more to **improve their services**
- This report focuses on **50 customers in Wales** served by both Severn Trent and Dee Valley, including five who are deemed to be financially vulnerable and 10 who have a long-term health condition or disability.
 - Reports for other audiences we spoke to as part of this research are provided separately.

Overview of the research programme



Research programme: rationale for approach

Why deliberative?

- Customers were taken on a 'journey' so that we could explore the things that mattered most to them and their priorities (both spontaneous and then, again, when informed further about Severn Trent/ Dee Valley services).
- Deliberative approaches allow us to provide information and **build participants' knowledge** so they can make **informed decisions** about issues they may not have previously considered... which helped them to really engage with the topic and give Severn Trent a helpful steer.



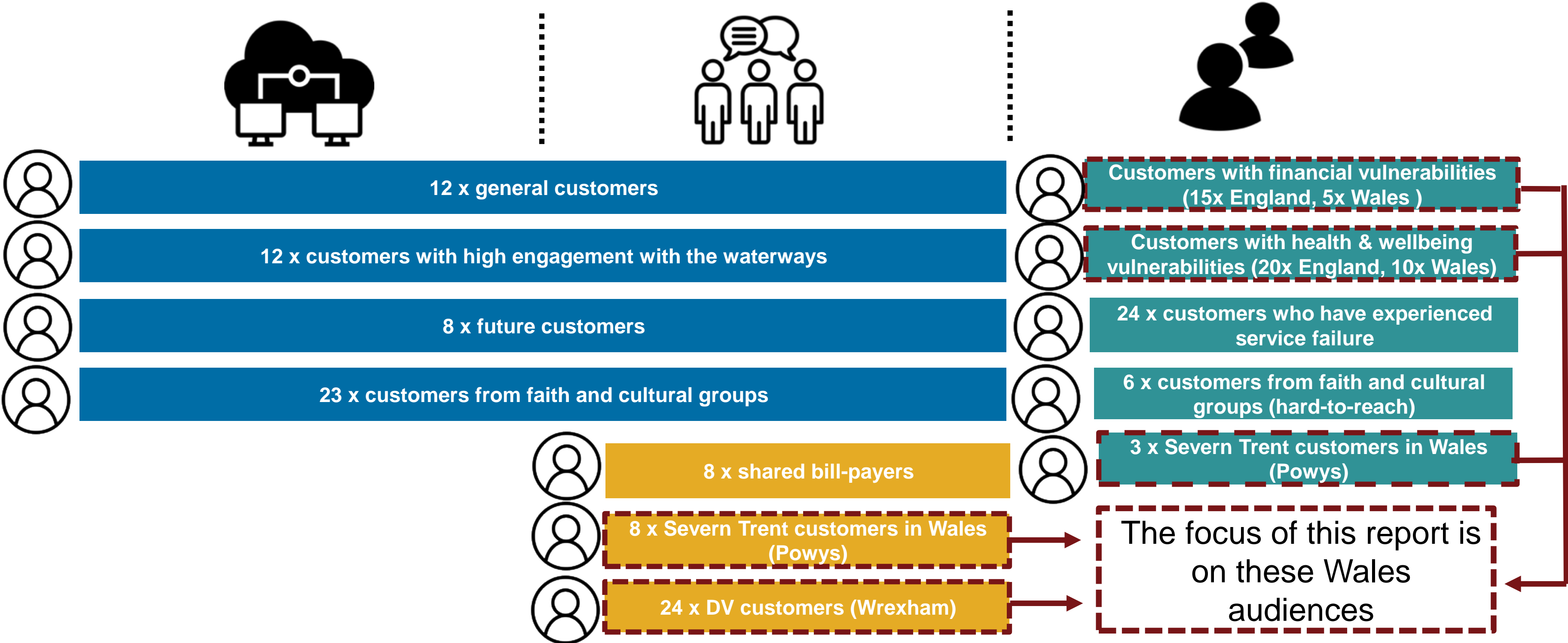
Why an online community?

- The best way to understand customers was to **immerse ourselves in their lives**, allowing us to see first-hand what customers' needs and priorities were, rather than simply relying on reported behavior.
- The online community enabled us to understand customers' **daily lives and priorities**, including how they use water and frustrations and challenges they face.
- It also facilitated the setting of participant tasks, with either written, film or photographic responses, which help to generate **rich visual outputs**.

Why depth interviews?

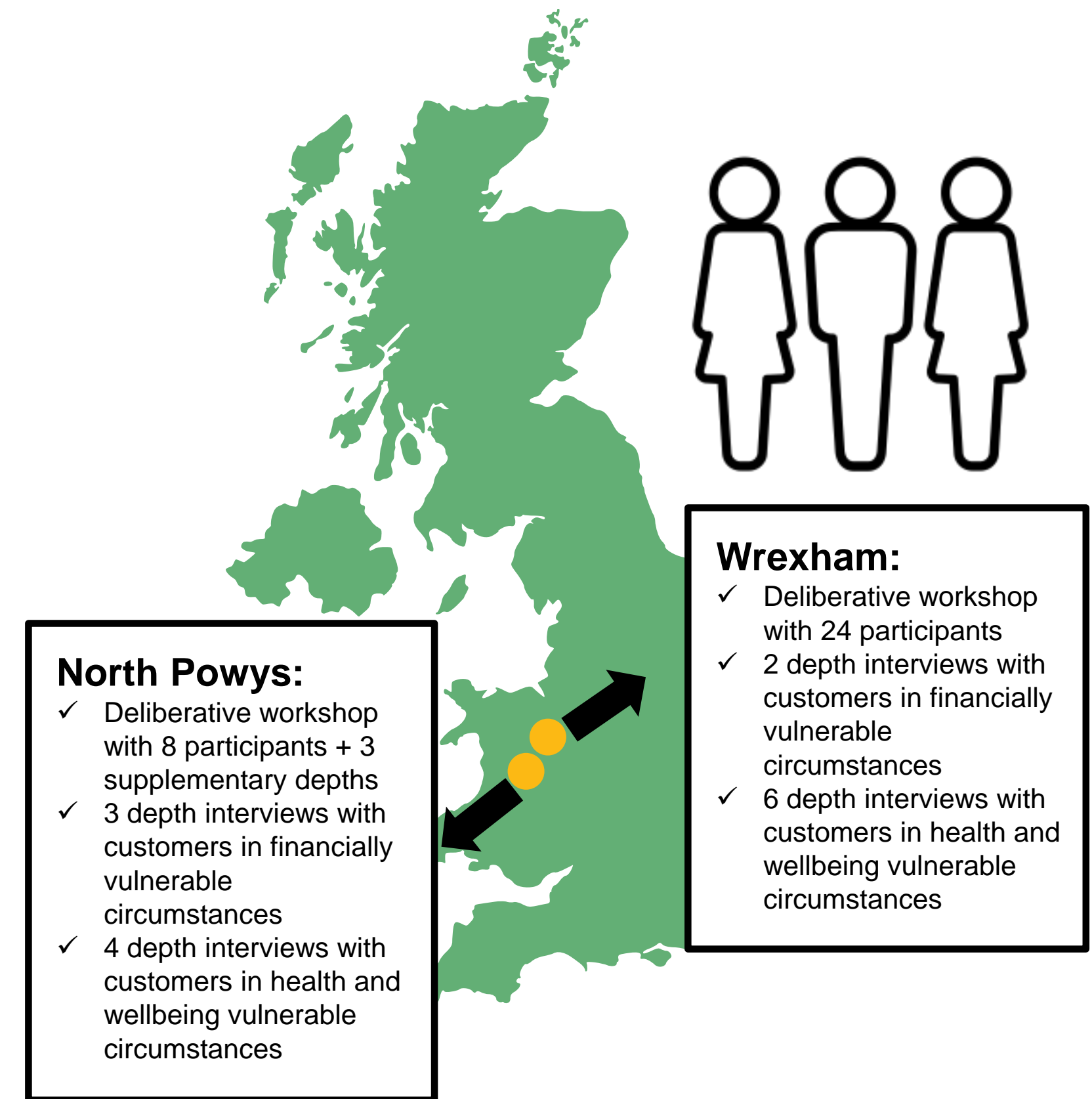
- **Vulnerable audiences**, including those with a health condition, disability or financial vulnerability, may not be digitally enabled and so are less able to take part in an online community. They may also feel less comfortable talking about their experiences in a group setting.
- Conducting depth interviews allowed us to overcome these barriers and also gain **detailed, first-hand understanding** of these customers' living situation and daily lives.
- As depth interviews also allow for detailed understanding of **specific, individual circumstances and situations**, they were also used with customers who had experienced service failure.

Overview of audiences we engaged with



Customers in Wales: our approach

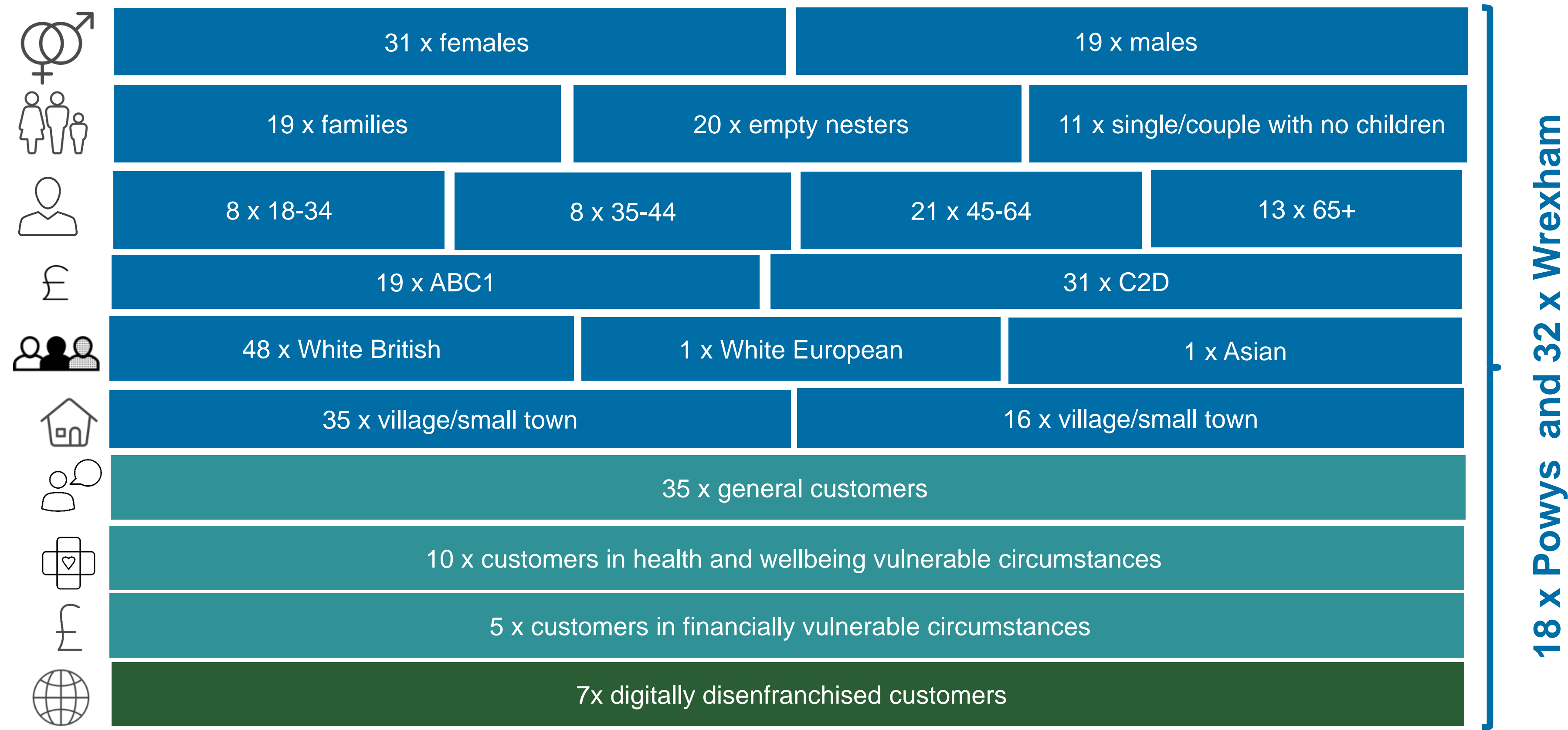
- BritainThinks conducted **two deliberative workshops**.
 - 8 customers in North Powys on 25th October 2017, plus three supplementary in-home depth interviews.
 - 24 customers in Wrexham on 26th October 2017.
- **15 in-home depth interviews** (up to 3 hours long) were carried out across North Powys and Wrexham with vulnerable audiences between the 18th October and 14th November 2017:
 - 10 customers in health and wellbeing vulnerable circumstances, to reflect a full range of health conditions.
 - 5 customers in financially vulnerable circumstances.
- *It is important to note that qualitative research is illustrative, detailed and exploratory. It offers insights into the perceptions, feelings and behaviours of people rather than quantifiable conclusions from a statistically representative sample. Owing to the small sample size and the purposive nature with which it was drawn, findings from this research cannot be considered to be representative of the views of all Severn Trent and Dee Valley customers.*



Who we spoke to...

General customers	Customers in financially vulnerable circumstances	Customers in health and wellbeing vulnerable circumstances
<ul style="list-style-type: none">For all groups, a spread of demographic characteristics representative of the local area, including gender, age, ethnicity, socio-economic grade, work status, household status (i.e. those with children living at home, those with children living away from home, and those with no children) and housing tenureIn addition, a spread of frequency of internet usage, and a mix of customers with and without water meters		
<ul style="list-style-type: none">Some to have a long-term illness or health problem or impairmentMix of urban / rural customersMix of environmental engagement	<ul style="list-style-type: none">Help paying water bill: Mix of those receiving help and those notIn receipt of benefits: Mix of those in receipt and not in receiptHousehold income: All on low incomes (defined according to size of household)	<p>A range of conditions that impact customers' lives:</p> <ul style="list-style-type: none">Visual disability and hearing disabilityPhysical disabilityLearning, concentrating or remembering disabilitiesMental health problemsSocial or behavioural issues including Autism and Asperger's SyndromeLong-term health problems, including diabetes, cancer, epilepsy, arthritis and dementiaChronic kidney failure, needing dialysis

An overview of the customers we spoke to – customers in Wales...

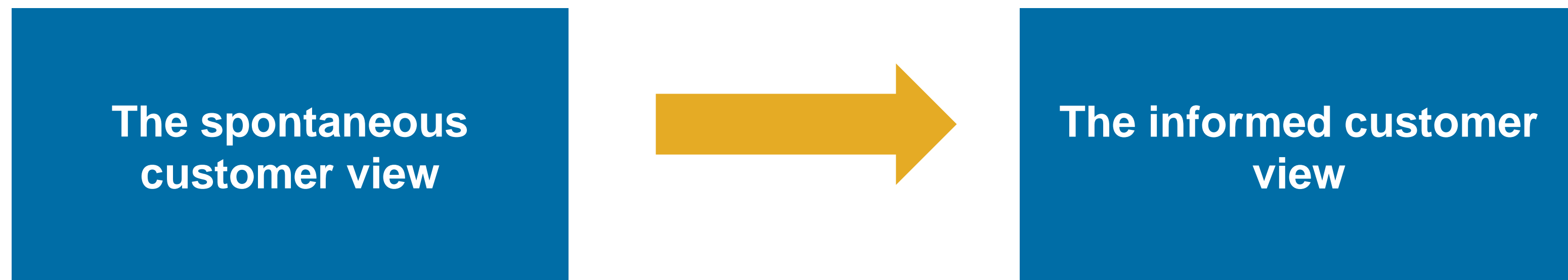


... and here are some of the customers we spoke to!



We used a deliberative approach to explore views and attitudes of customers in Wales

- Customers were **taken on a 'journey'** so that we could explore the things that mattered most to them and their priorities (both spontaneous and then, again, when informed further about Severn Trent/Dee Valley services).
- Deliberative approaches allow us to provide information and **build participants' knowledge** so they can **make informed decisions** about issues they may not have previously considered... which helped them to really engage with the topic and give Severn Trent/Dee Valley a helpful steer.



This was about taking your customers on a journey: Gauging their spontaneous vs. informed views...

2. Which of these areas is not in the STW region?

- A. Welshpool, Powys (Wales)
- B. Cheltenham, Gloucestershire
- C. Scunthorpe, Lincolnshire
- D. They're all in the STW region

The STW service area covers... Wales to the East Midlands.



Key
○ Water and waste
● Waste water services only

1. Roughly how many people does Dee Valley supply water to?

- A. 158,000
- B. 258,000
- C. 358,000
- D. 458,000

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Providing water that is good to drink



- STW treats water that is abstracted from rivers, groundwater sources and reservoirs so that it is good to drink.
- This involves making sure that the water is safe to drink and meets stringent drinking water standards.

BritainThinks | Private and Confidential

ern Trent Water undertakes a number of activities outside of its service, including:

- Educational visits
- Visitor sites
- Reservoir activities

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Helping customers out

We are supporting 13% of our customers via social tariffs and flexible payment schemes



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What was covered...

WORKSHOPS		DEPTHS
<div>Wrexham You and your life: exploring customers' lives and their priorities and understanding the role water plays in this Water in your world: spontaneous associations with water - how customers think about it and how they use it in their homes What a water company does: getting spontaneous thoughts, before sharing information on the water cycle and Dee Valley (through a quiz) Dee Valley core services: exploring these core services Dealing with Service Failure: presenting six hypothetical service failure scenarios and gauging customers' expectations for how Dee Valley deals with incidents Dee Valley as a local company: gauging whether customers see Dee Valley as a local company and why this is important</div>	<div>North Powys You and your life: exploring customers' lives and priorities and understanding the role water plays in this Water in your world: spontaneous associations with water - how customers think about it and how they use it in their homes What a water company does: getting spontaneous thoughts, before sharing information on the water cycle and Severn Trent (through a quiz) Severn Trent's core services: exploring these core services alongside additional activities and the CSR programme</div>	<div>You and your life: exploring customers' lives and priorities Water in your world: spontaneous associations with water - how customers think about it and how they use it in their homes Household's water use: how the household uses water What a water company does: getting spontaneous thoughts, before sharing information on the water cycle About Severn Trent/Dee Valley: sharing information about Severn Trent/Dee Valley services and capturing reactions My experience: exploring experiences with Severn Trent/Dee Valley Customer specific feedback: getting specific feedback related to financially vulnerable and health and wellbeing vulnerable issues</div>

Other Wales-specific questions you asked us to explore...

1

Are there any key differences or similarities between English and customers in Wales?

2

Are there concerns about lead piping, and how would customers like this to be dealt with?

3

Do customers in Wrexham see Dee Valley as a local company? If so, what are the benefits?

4

What are the views and particular needs of those with financial and health and wellbeing vulnerabilities? Is the support available to them adequate?

Key findings

1

Customers in Wales are **satisfied with your service**. Bills are seen to be reasonable, few have experienced issues with your service, and where there have been issues you are seen to respond well.

2

Awareness of the full breadth of Severn Trent/Dee Valley activities, outside of the core service, is low. Customers think more should be done to communicate about the great services you offer.

3

The **environment is more front-of-mind for customers in Wales** - particularly those living in more rural areas like Powys. Your work here is important. Customers also believe more can be done to promote responsible water usage among the general public.

4

Customers want to hear more about the **full range of support schemes and services** they may be entitled to – including support for vulnerable customers, and financial support for those struggling to pay their bills.

5

For customers in Wrexham, it's important that Dee Valley retains its feel as **a local company**, with a strong focus on good customer service and a greater local presence.

02 Understanding the priorities of customers in Wales

Key priorities of customers in Wales

- An important part of the research involved assessing key customer priorities and where and how water fits in with these priorities.
 - Broadly the three audiences (general customers, financially vulnerable and health and wellbeing vulnerable) had the same priorities.
- **Family and friends** are spontaneously mentioned by most customers as their most important priority.
- **Health and wellbeing** also comes quite high up the list of priorities - becoming more important over time, and particularly for older customers.
- The **environment** is a key consideration for this audience, particularly for those living in more rural areas where the natural environment plays more of a part in daily life.
- Customers are concerned about **future security** – be it their education, jobs, or finances – particularly in the uncertain current economic and political climate.
- Other priorities revolve around quality of life more generally, like having time for hobbies, seeing friends, eating out and travelling.

“My son is my most important priority and it's also important for me to make sure we have a cosy home - everything revolves around him.”

(Customer in a financially vulnerable circumstance)

“I have no long term plans - live for today!...I have had several friends who have passed away suddenly and that also makes you think - 'we've got to do this'.”

(General customer)

“We're just trying to get on as best we can... It's a very steady pace of life here.”

(Customer in a health and wellbeing vulnerable circumstance)

03 Water in your customers' world

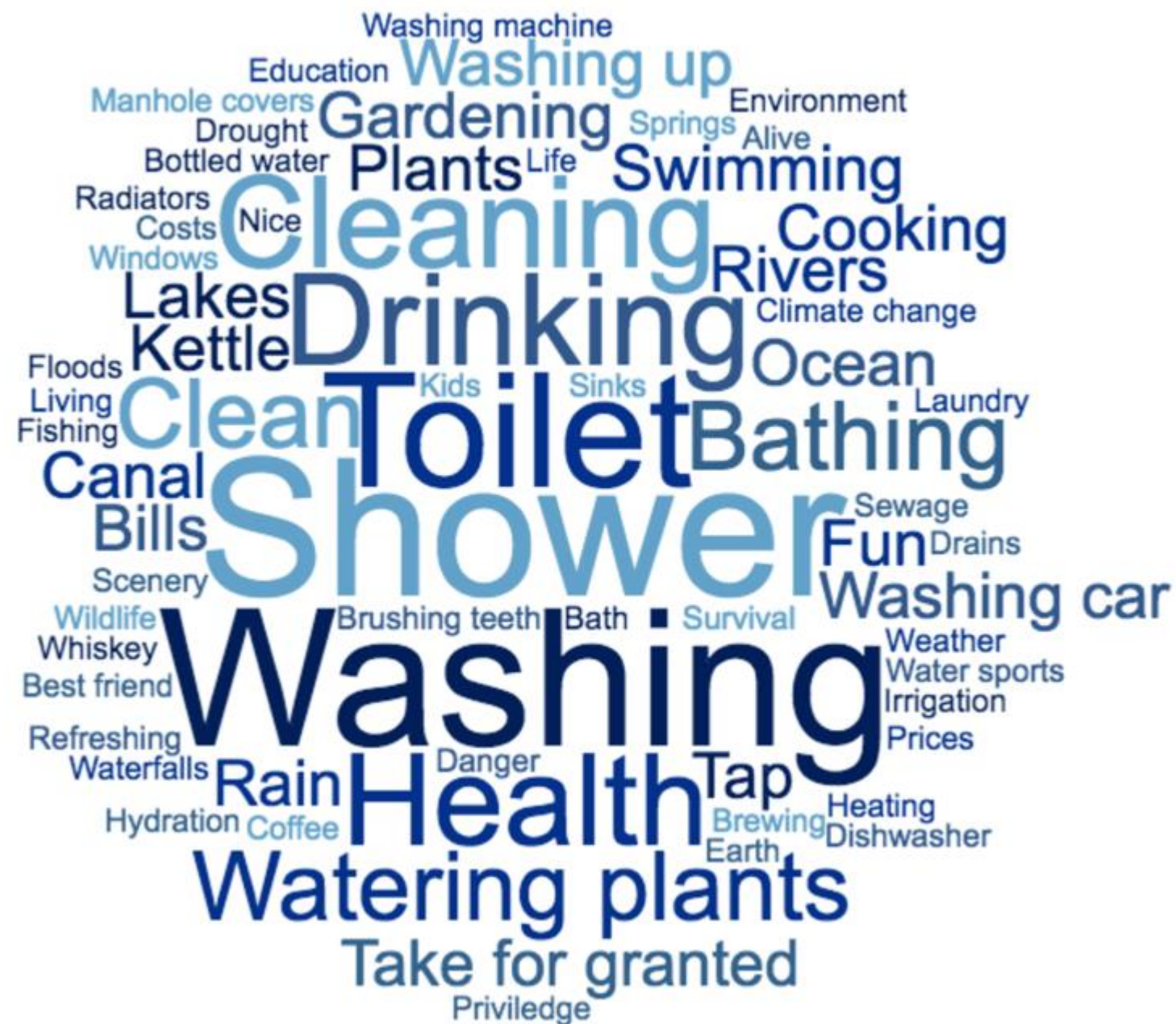
Customers feel that water is an essential part of their lives, but one they rarely think about

- Water is a **low saliency issue** for your customers – but this shouldn't be seen as a problem.
- Spontaneously, customers describe water as being very important to them – *“we can't survive without it”* – but it is something they **rarely think about**.
 - This is due to the consistent supply of water, meaning that for most it has ‘never not been there’.
 - Furthermore, few customers engage with their water supply in the same way they do with the suppliers of other utilities, due to the “lack of choice”.
- However, we found customers to be really engaged when we got them thinking about the topic of water.

“It's only when you lose water service that you realise how much of a big deal it is, and how much we rely on it.”
(General customer, Powys)

“You can't get on without water, it's an impossibility... We're one of the few countries where you can drink water straight from the tap.”
(Customer in financially vulnerable circumstance, Wrexham)

Customers' associations with water focus on drinking, washing and water in the natural environment



"It'd affect me very much [not to have water]. I wouldn't be able to shower or flush the loo or any of those things."

(Customer in a health and wellbeing vulnerable circumstance, Wrexham)

"I don't drink water from the tap, it's horrible...the smell of bleach...and the taste of it... the only thing it's good for is cleaning the floor."

(General customer, Wrexham)

“Generally we try to be careful with water because of the environment - we don't overuse water - I think we're quite careful.”

(Customer in a financially vulnerable circumstance, Wrexham)

Customers' associations with water focus on drinking, washing and water in the natural environment

- Top of mind associations for customers include drinking, bathing, toilets, kettles, cooking, baths and showers.
 - On further probing, they are likely to consider other uses, such as washing the car, watering the garden, using the washing machine or cleaning the house.
- Due to their relative proximity to nature and countryside, many customers **think of water in an environmental context**, mentioning beaches, rivers, lakes, ponds and wildlife; this was particularly the case for customers in Wales, compared to other audiences.
- Recreational activities are also likely to be mentioned spontaneously, including canoeing, swimming and surfing.
- Some do also think of water in context of the **water cycle** (reservoirs, drainage, sewage, pipes and infrastructure).

*"I drink it. I wash in it. Swim in it.
Laundry."*

(Customer in a health and wellbeing vulnerable, Wrexham)

"Especially in this area, it's a vast farming area here and into Shropshire, so you do think about water. On a nice day you can see the cattle drinking from the River Severn."

(Customer in a health and wellbeing vulnerable circumstance, Wrexham)

"I put that water is fun. Just thinking about the joy my children get when the paddling pool comes out in summer. And also, we're surrounded by reservoirs around here."

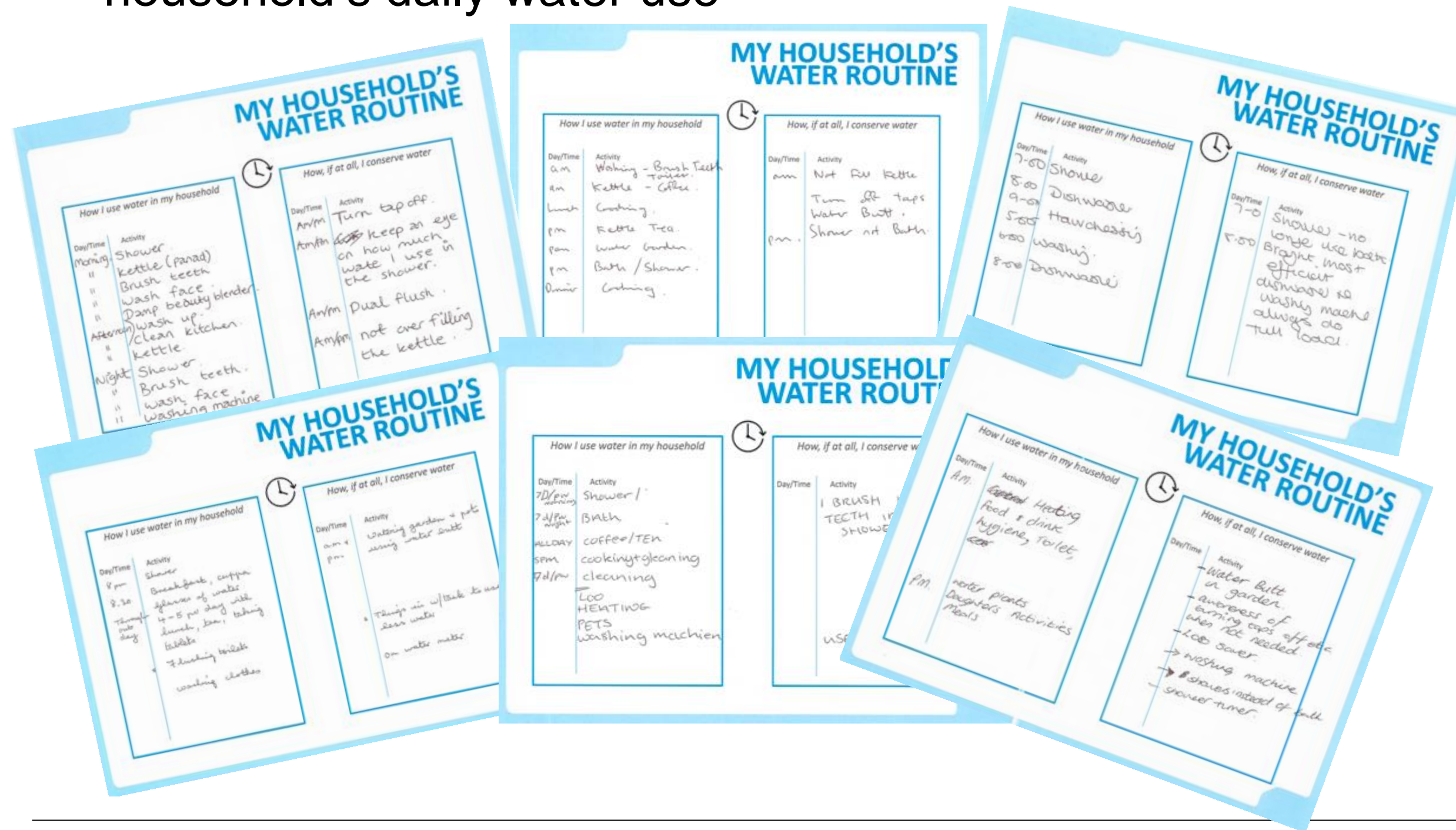
(General customer, Powys)

How customers use water, in their own words...

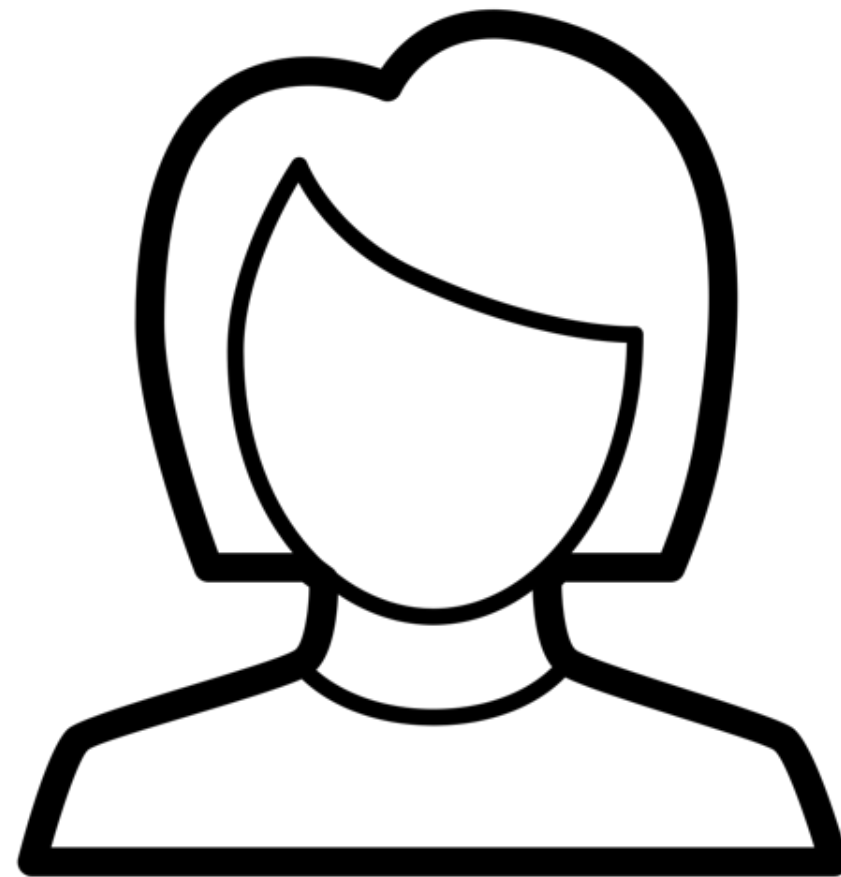
- This exercise involved respondents reflecting on their household's daily water use

Key findings

- Common uses of water:
 - Showers and baths
 - Washing hands
 - Toilet
 - Washing up
 - Dishwasher
 - Tea and coffee
 - Cooking
 - Laundry



INDIVIDUAL PEN PORTRAIT: North Powys General Customer



Cath* is 53 and lives in Newtown with her partner and 14 year old son in a house they rent from the Council. In her spare time she is a keen cyclist and enjoys outdoor activities (*"If it's sunny – I'm camping"*) – including with her grandchildren and younger son. Cath's priorities are her family and her job. She has no plans to change things, although would love to get a camper van and tour around in it. Being active in outdoor pursuits means she is actively interested in the environment and gets involved in local clean-up activities. **Her view of Severn Trent is positive – believing they have strong customer service, which she regards as meaning that Severn Trent is able to rapidly solve problems when they arise.**

One concern that Cath does have is with the bitter **taste** of the water. This seems to have gone on for the past 12 months. It leaves a ring on her cups, and she needs to use sterilising tablets in the washing up bowl to remove this. Her son drinks a lot of water, but won't drink the tap water, due to the taste, so she needs to buy bottled water for him to drink.

Cath has a meter for both gas and electricity – she can see what devices are using energy and has changed her behaviour as a result. Despite this **she wouldn't want a water meter** – because she feels that water is used quite a lot in the house – with washing up, showers and baths and using the hose to clean the car and bikes and on the garden in summer. As a result she is concerned that a water meter would result in an increase in her bills. This is not to say that Cath isn't careful with water, and **she does try to ensure it is used carefully**. Cath has always been careful with avoiding any waste since childhood and thinks it is an important thing to teach the younger generation. She is also very **careful about what goes down the toilet - a neighbour's flushing of wet wipes had led to a blockage on the street in the past**. Cath has a separate bin in the toilet to stop anything going down the loo.

The water cycle was of interest to Cath as she hadn't initially considered that Severn Trent releases water back into rivers – and this is a place she often is, playing with her grandchildren. It is reassuring to know that Severn Trent is cleaning it, and that in general Severn Trent does more than she realised. Looking after the environment is important to her, and she sees it as Severn Trent's job to take responsibility. She isn't aware of what activities Severn Trent is doing when it comes to the environment and feels that Severn Trent could do more to inform customers. However, **specifically around increasing biodiversity, Cath wonders if this is outside of Severn Trent's role ("they're there for the water, really")**.

Where water has been cut off for maintenance, Severn Trent has written to let Cath know, giving them warning to store some water. She has no concerns about water not being available. Communications have been by letter, which is her preferred option, although she isn't averse to emails or calls. **Cath wasn't aware of the 2015 water strategy around lead pipes, which was a bit of a concern for her** – *"if it got in our water, it's poisonous isn't it, lead?"* She does want to know what Severn Trent is doing to remove the pipes, by sending her a letter explaining what is happening, in what timescale, and what the implications are for their household. If there was a local meeting about this, she would probably attend.

"If any of us have problems with the water, fair play to them, they are here straight away and they solve it."

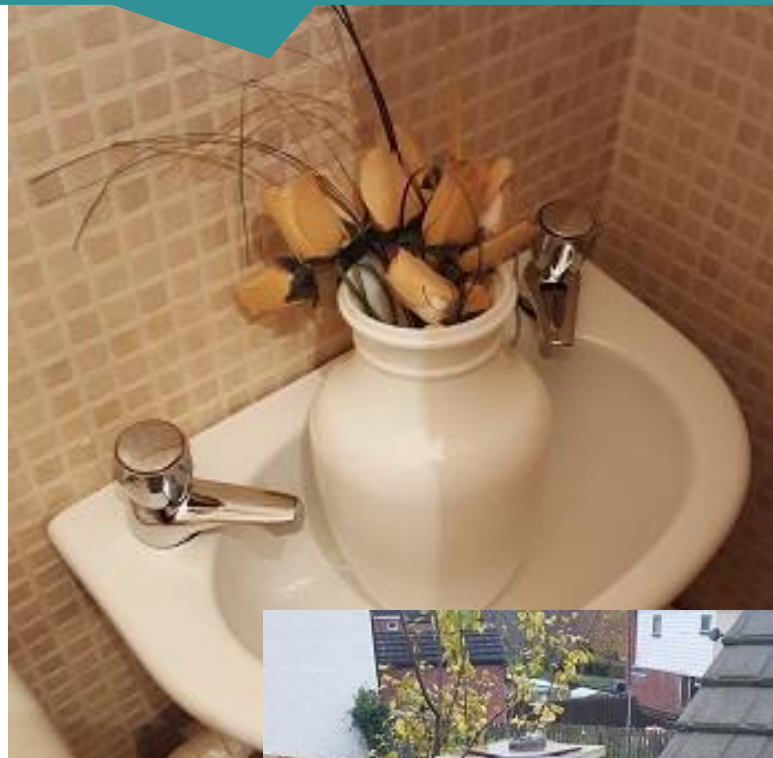
"If you make a cup of tea and leave it to stand...you can see the chlorine building around the cup...it's metallic when you drink it, so I try not to drink too much tea here – I go to work and drink it, because it tastes better."

"I was brought up in the army, so it's been drummed into us [about] wasting, and not only that, you're wasting the electric as well...I don't like waste...just for the sake of wasting it."

"I spend a lot of time in the river – especially with the grandkids. [And Severn Trent make me feel alright] because they're cleaning it."

INDIVIDUAL PEN PORTRAIT: North Powys General Customer

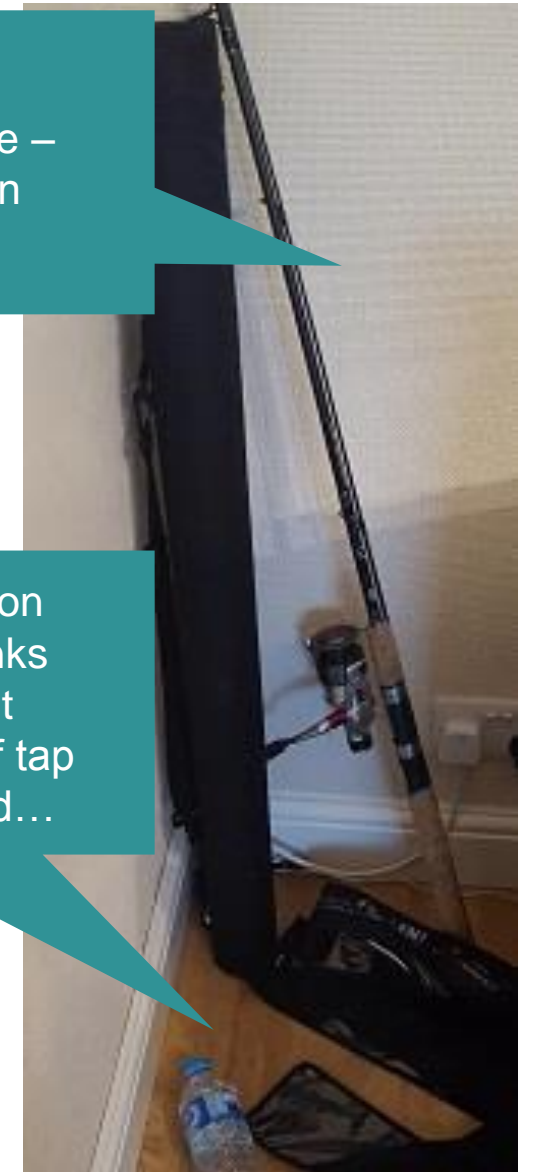
To stop taps being left on wasting water and leading to a potential flood, the sink is “blocked” with a bowl of flowers



A water butt for the garden also stops water being unnecessarily wasted



The outdoor life is important to this house – Cath’s* son is a keen fisherman



Her son is also keen on healthy living and drinks plenty of water – but doesn’t like the taste of tap water so drinks bottled...

Cath* isn’t concerned about the *safety* of her water, but is frustrated by the *taste* – and she believes that the chlorine is leaving rings on her cups – so she needs to use sterilising tablets to clean them



The energy smart meter is a new arrival – it has helped Cath* understand what uses lots of energy in her house. She wouldn’t want a water meter though as she thinks she uses quite a lot of water (but doesn’t waste it)



There is limited evidence of pro-active water saving, beyond the obvious... but, most are motivated by saving money, rather than the environment

A very small number of customers admit to ‘wasting water’ by having baths instead of showers, or leaving the tap running whilst they brush their teeth. These customers tend to feel it is their right to use as much water as they need to as they are “paying for it”.

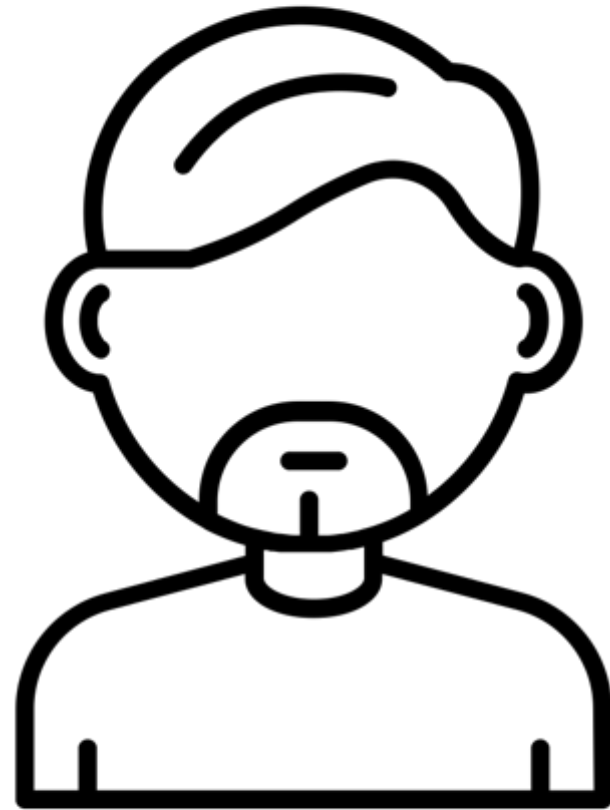
The majority of customers are not actively saving water, but do take steps to not ‘waste’ water – i.e. by showering instead of taking baths, making sure to turn the tap off when brushing their teeth or not overly filling the kettle. They may also have adopted water-saving measures ‘by default’ such as having a dual-flush toilet due to living in a newer house.

A small number of customers are actively saving water, by using water-saving devices (often provided by Severn Trent or Dee Valley) in showers and toilets, by and other means (such as outdoor water-butts). These customers are more likely to have water meters (and be financially motivated to save water), although a number of these customers are environmentally motivated too.

Actively wasting water

Actively saving water

INDIVIDUAL PEN PORTRAIT: Mobility difficulty



David* is 65 and lives in Welshpool with his wife in a bungalow they rent from the Council. They have lived in this house for five years, but he has always lived in the area, except when he was in the merchant navy when he was much younger. He retired six months ago from his job as a machine operative. David's priorities are his family; his wife, sons, his daughter and his four grandchildren. He would also like to lose weight and get a bit fitter. He thinks the most important things for Severn Trent to do is to supply water, treat water and sewage, and to store water in reservoirs for when it is needed.

Although they do not have any specific water saving devices and they do not have a water meter, David and his wife are **very careful with water, because they see it as a resource that shouldn't be wasted**. They have a walk in shower and no bath, and they only have showers two or three times a week. They have a washing machine in the kitchen, but they only use it every one to two weeks. **David only uses half a bowl of water when he washes up;** he says it's not necessary to use more. They **use washing up water on the plants** to save water, and David also **collects rainwater in a bucket and uses that on the plants outside**. They have a tap and hosepipe outside, but only use this when it is really hot. They usually drink orange squash rather than water, and make up bottles of squash and keep them in the fridge.

David has a good knowledge of the water cycle, and has been to the reservoirs and visitor sites at Clywedog and Lake Vyrnwy. He's seen lots of activities going on at there too; people running, sailing, etc. He believes that people in this area, which is rural and dominated by farmland, **think about water more than people living in cities do**, and are more likely to have been to the reservoirs.

They have had their water turned off a couple of times, but they had notifications from Severn Trent that this would happen. On one of the occasions they were told that the water would be turned off for 12 hours, so they filled up the bath (this was in their previous house). **They have never had any problems with Severn Trent** and David thinks that **the bills are fair and the service is good value**. He knew that Severn Trent had taken away a lot of lead pipes in Welshpool years ago. He didn't know there were any left in Wales, and was glad they were being replaced.

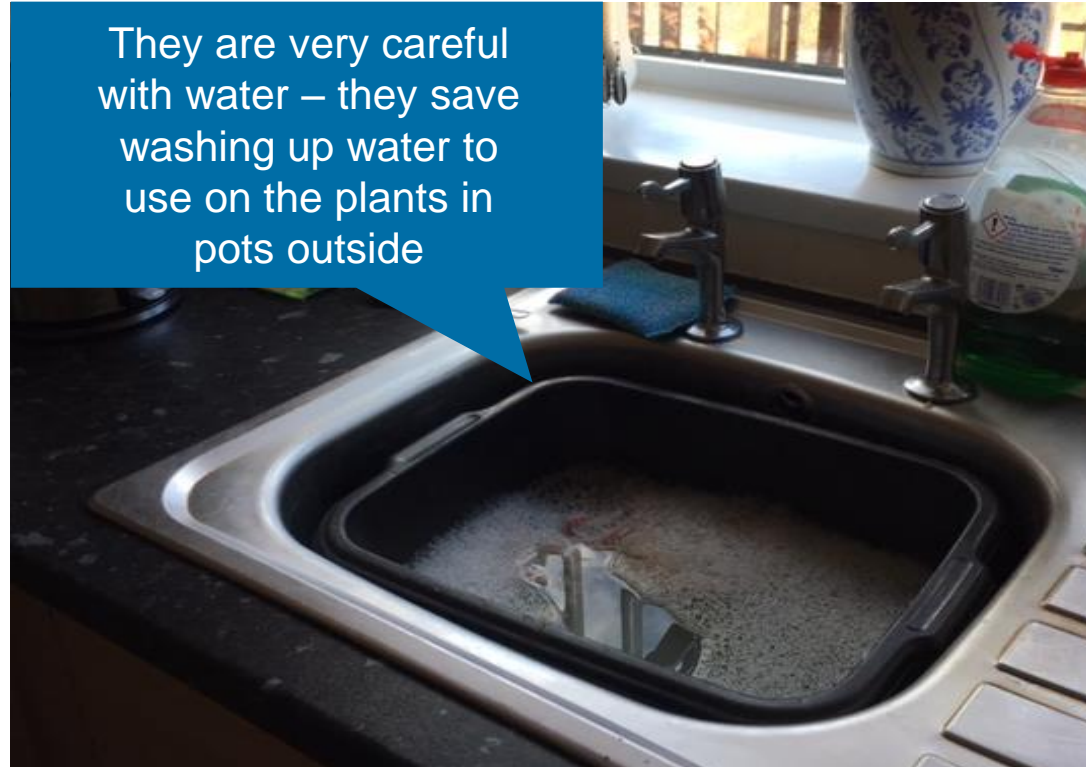
David has **mobility difficulties, diabetes and breathing difficulties**, but as he can drive his car to the shops, **he doesn't think he has any specific needs that Severn Trent should understand or address at this point**, although that may change in the future. He is happy for Severn Trent to keep records, and thought that contacting people regularly is the only way to keep these up to date. He doesn't think he needs to be on the Priority Services Register at the moment, but he was glad to know it was there in case they needed it in the future.

"We use water quite sparingly, just as much as we need to use... Why waste it? It's hard to get in the first place."

"Water is one thing I don't mind paying for one bit. They don't overcharge us for the good service they do. Not like the other two [gas and electricity], they charge an arm and a leg."

INDIVIDUAL PEN PORTRAIT: Mobility difficulty

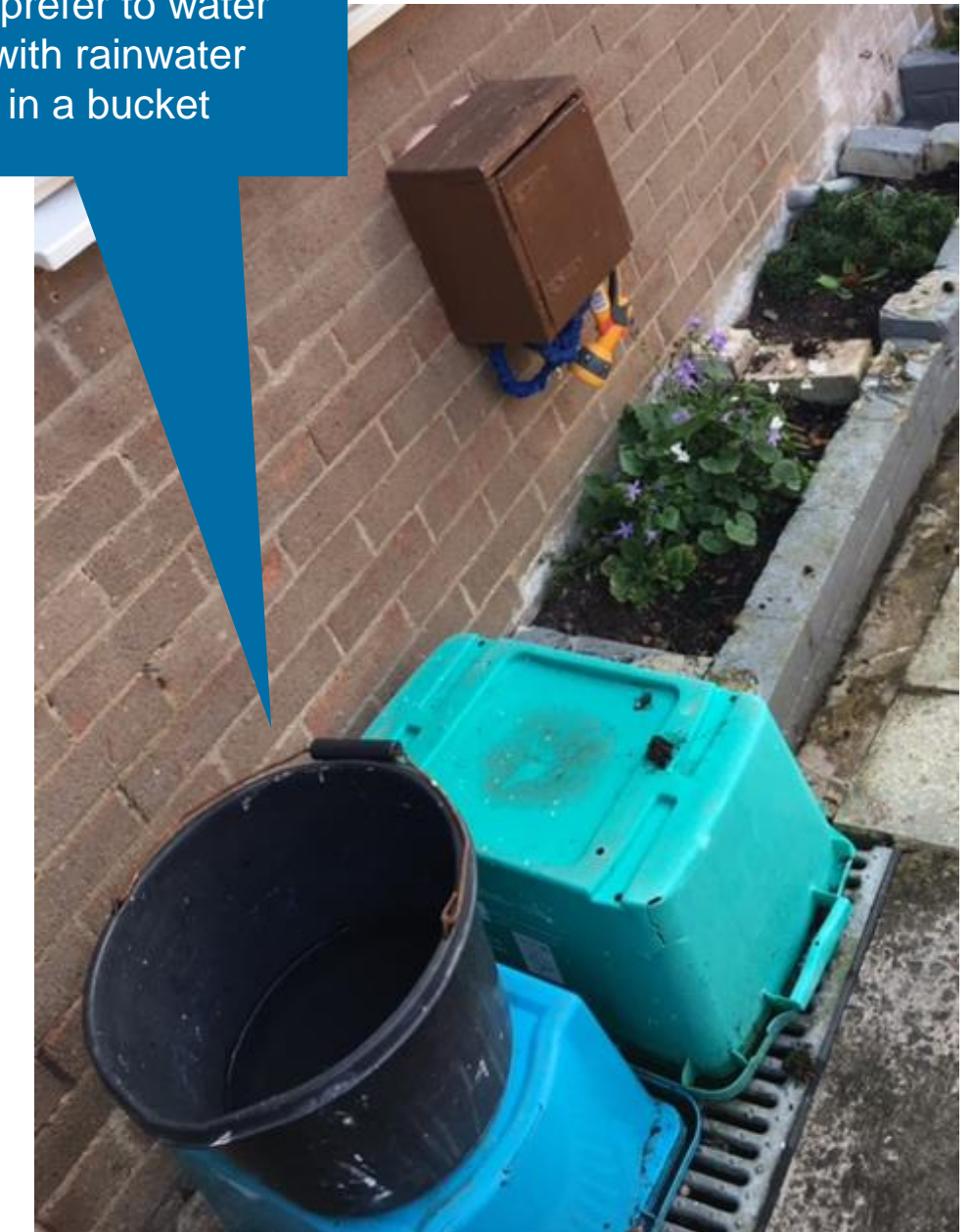
They are very careful with water – they save washing up water to use on the plants in pots outside



David* has always lived in the area and has a keen awareness of the surrounding countryside and farmland. This is the view from the front of his house



They have a hosepipe outside, but prefer to water the plants with rainwater collected in a bucket



They keep a supply of orange squash made up in the fridge



04 Customers in Wales' understanding and experience of Severn Trent/Dee Valley services

Spontaneously, customers express relatively high levels of satisfaction and trust with Severn Trent and Dee Valley

- This positive feeling was driven for the most part by a **lack of negative experiences** with customers' water service – with most feeling that it's a good thing to never hear from you.
- Customers who had experienced some kind of service failure viewed the response of Severn Trent/Dee Valley positively, mitigating potential negative impacts on future satisfaction and trust.
 - Service failure experiences included leakage, supply interruption and sewage incidents.

Mean average:

4 out of 5

Satisfaction with Dee Valley overall*

Mean average:

4 out of 5

Satisfaction with Severn Trent overall*

Mean average:

4 out of 5

Trusting in the drinking water Dee Valley provides*

Mean average:

4 out of 5

Trusting in the drinking water Severn Trent provides*

Prior to taking part in the research or being shown information on the water cycle, customers had a low awareness of the role of water a water company

- Top-of-mind associations with what a water company does relate primarily to providing customers with clean drinking water.
- Few customers had thought in depth about the processes 'behind the scenes' which are necessary to provide this service, but some had a vague idea of the work involved in maintenance, and dealing with sewage.
- Customers in Wrexham were aware that Dee Valley is only responsible for supplying their water, and not dealing with sewerage.

"I don't know how much they do [on the environment]. I'm sure they think about it."
(General customer, Powys)

"I don't really know - I probably did [learn] something about it at school...it's something you take for granted, your water's in the tap...you turn it on, you don't think about the process, how it gets there."
(Customer in a financially vulnerable circumstance, Wrexham)

After discussing their spontaneous expectations of a water company, we showed participants a range of information about Severn Trent and Dee Valley

2. Which of these areas is not in the STW region?

A. Welshpool, Powys (Wales)
B. Cheltenham, Gloucestershire
C. Scunthorpe, Lincolnshire
D. They're all in the STW region

The STW service area covers a large part of the Midlands, supplying water services to from the Bristol Channel to the Humber and from mid-Wales to the East Midlands.

1. Roughly how many people does Dee Valley supply water to?

A. 158,000
B. 258,000
C. 358,000
D. 458,000

Severn Trent Water undertakes a number of activities outside of its core service, including:

1. Educational visits
2. Visitor sites
3. Reservoir activities

There are some activities that STW is not obliged to do, but could decide to do or do more of under its CSR programme

These could include:

Improving skills in the STW region
Supporting customers' health and wellbeing
Further action on the environment
Improving access for everyone

In support of WaterAid

Providing water that is good to drink

• STW treats water that is abstracted from rivers, groundwater sources and reservoirs so that it is good to drink.
• This involves making sure that the water is safe to drink and meets stringent drinking water standards.

Helping customers out

We are supporting 13% of our customers via social tariffs and flexible payment schemes

Water Direct
Help2Pay Plans
Additional Services
Watersure
Here2Help scheme

Customers were pleasantly surprised by the scale and scope of their water company's operations

- Overall, the further information was positively received.
- The core services were received well and aligned with customers' expectations.
- The things that stood out were:
 - The scale of their water provider's responsibilities (for Severn Trent customers in particular, the overall number of customers and size of region).
 - For Severn Trent customers:
 - The number of sewer blockages cleared each year.
 - The proportion of Severn Trent's energy that is generated by renewables.

"Wow they do a lot - especially considering what we pay - it puts it into perspective"

(Customer in a health and wellbeing vulnerable circumstance, Wrexham)

"I'm surprised that they make a third of their energy from renewables. It's a very high number."

(General customer, Powys)

Customers’ informed views on Severn Trent and Dee Valley’s core services (1/2)

Core service	Dee Valley	Severn Trent
Distribution of water	<ul style="list-style-type: none">Customers expected their water service to be constant and reliable in normal times, and for good communication when there are supply interruptions. Generally, Dee Valley and Severn Trent were seen to meet these expectations, although a few customers commented on the disruption caused by roadworks and would welcome more information on planning for future infrastructure work.Customers are pleased that lead piping is being replaced, but did not feel it was a hugely urgent concern.	
Maintaining water quality	<ul style="list-style-type: none">This is viewed as the most important core service. Customers expect their water company to provide a safe, clean and reliable source of water that tastes and smells good (without excessive chlorination).Customers were generally happy that their water is clean and safe to drink and trust Severn Trent and Dee Valley to provide this service. Some did comment on the taste of their water, and their concerns with levels of chlorine in their water supply, but this was by no means universal, nor was it a particular issue to Wales.	
Waste water	N/A	<ul style="list-style-type: none">Customers expected waste water to be taken away safely and reliably, with no negative impacts on the environment.Customers were happy with this element of the service and felt that if there had been any issues, they would have heard about them.

"133 litres per person per day - good grief. If you think about 133 litre bottles of water stacked next to each other - that's a crazy amount!"
(Customer in a health and wellbeing vulnerable circumstance, Wrexham)

"If it's an emergency [supply interruption], that's completely understandable. But if it's planned, I'd like more notice."
(General customer, Powys)

"The sewage just goes away. It's reliable. No complaints."
(General customer, Powys)

Customers’ informed views on Severn Trent and Dee Valley’s core services (2/2)

Core service	Dee Valley	Severn Trent
Not adversely impacting the environment	<ul style="list-style-type: none">Customers felt that it is very important to protect the environment for future generations, and that their water providers should aim to avoid <u>any</u> adverse impacts on the environment.There was support for water companies going above and beyond their statutory responsibilities, as they were felt to have the size and stature to take action by themselves (and the bill impacts felt manageable).There is room for more information on your positive environmental impact, as well as the chemicals put in the water to treat it.	
Affordability for all	<ul style="list-style-type: none">Customers were broadly happy with the cost of their bills, but would like to see more of a breakdown within them to show where their money goes.There was little detailed knowledge of the targeted support on offer, but customers were surprised and pleased by the range of services available.It was seen as important Severn Trent and Dee Valley are proactive in offering targeted support to those who need it, rather than wait for customers to ask.	

“I think they should be proactive on this. Rather than just saying ‘we provide this service’, they could be proactive and actually contact the people who are struggling to pay. I don’t know if they do that or not, but it would be a good idea.”

(General Customer, Powys)

Customers’ views on Severn Trent and Dee Valley’s additional services

Additional service	Dee Valley	Severn Trent
Educational visits	<ul style="list-style-type: none">Customers were very enthusiastic about these, and would welcome more information.<ul style="list-style-type: none">The most important issues were good water saving behaviours, information to help avert sewer misuse (not flushing the wrong things down the toilet), and promoting visitor sites and reservoirs.It was seen as most important to focus on children (to teach good water habits for later life), but there was also appetite for educational visits for adults.	
Visitor sites and reservoirs	<ul style="list-style-type: none">Many customers had visited a Severn Trent or Dee Valley owned visitor site or reservoir and were positive about them (nice spot to relax, exercise, and spend time with family).<ul style="list-style-type: none">There was a feeling that water companies should do more to promote their role in managing these (so that customers could see where the money from their bills is going).DVW customers were keen to have underused spaces turned over the local community.The possible bill impact of doing more was seen as acceptable.	
Corporate social responsibility	N/A	<ul style="list-style-type: none">Customers had a vague idea that Severn Trent might be doing some of these activities, but not specifics. All were well received, and there was licence for Severn Trent to be doing more or all of them.Improving jobs and skills emerged as the top priority for any further action.

“I think it’s a good thing. Kids turn on the tap and run a bath to the top, and they need to think about where their water comes from.”

(General customer, Powys)

“It’s good to make a play park - it’s bad to have unused spaces - well done to Dee Valley.”

(Customer in a financially vulnerable circumstance, Wrexham)

“For me, apprenticeships is the highest priority...We don’t have much unemployment here, but we have very low wages because it’s unskilled work.”

(General customer, Powys)

Customers are particularly satisfied with Dee Valley as a local company

- Customers see Dee Valley as offering **good value for money** and are pleasantly surprised by the services offered and the size of operation.
- **Local knowledge**, of both the Wrexham area and the water supply, is seen as a real benefit of Dee Valley's service – and makes them more trustworthy.
 - Customers like the fact Dee Valley is “just up the road”, even if they haven't needed to contact them directly.
 - Customers feel a local company like Dee Valley provides customer service which better understands them.
- Most customers have been to a reservoir or visitor site and see a real benefit to Dee Valley **turning underused spaces over** to a local community.

"For me a local company is up the road, and is there straight away if there are problems. It's quite important that the company is local - it makes it more trustworthy."

(Customer in a health and wellbeing vulnerable circumstance, Wrexham)

"It's very important to know the customers and the area - you don't want to deal with someone based on the other side of the country who doesn't have a clue."

(Customer in a financially vulnerable circumstance, Wrexham)

... and there is an opportunity for Dee Valley to be taking this further

- There is an opportunity to make more of **The Hatch** – customers are not aware of its services and would like more information about how they can access it.
 - Other customers felt there could be a greater local presence - for example, having a local area representative, a presence at local/community events and updating local websites like Wrexham.com with information on services and upcoming works.
- Customers feel it is important for a local company to play a part in the **local economy**.
 - To this end, local contractors should be given local jobs - customers might think less favourably of Dee Valley if this didn't happen.
- Some customers are worried about the impact **Severn Trent's acquisition of Dee Valley** will have on them as customers – that their service will become less personalised as customers of a larger and “less local” water company, and that their bills may increase.

“Keep Dee Valley local to the local people of Wrexham.”
(General customer, Wrexham)

“I didn't know that there is a local place [you can go for assistance] – it's called The Hatch, in Wrexham.”
(Customer in a financially vulnerable circumstance, Wrexham)

05 Service failure

In Wrexham, Dee Valley customers were presented with six hypothetical service failure incidents to discuss

- **Do Not Use Notice:** customers cannot use water for anything, including flushing the toilet.
- **Do Not Drink:** customers are told they are not able to drink the water from the tap.
- **Large Supply Interruption:** a large number of customers have no water supply.
- **Pipe Burst:** customers are left with no access to water after a pipe bursts.
- **Leakage:** customers experience a leak on their property.
- **Low Pressure:** customers are unable to take a shower because there is not enough water coming out of the shower head, or water trickles through from the tap.

<p>The scenario:</p> <ul style="list-style-type: none">• One of the main pipes bringing water to a local town ruptured in the early hours of a Sunday morning, leaving 20,000 customers without water.• While 5,000 customers got water back within a few hours, the size and nature of the repair – there was a 7ft piece of pipe blown away by the force of the failure – meant that supplies weren't returned to normal until the Wednesday afternoon.	<p>What impact, if any, would this have on you and your family? no heating, no hot water, no washing power</p> <p>What impact, if any, would this have on your community? effect local businesses, no cars, buses, no public houses, no schools, no community centres</p> <p>What response, if any, would you expect from Dee Valley Water to this scenario? Water Trucks in every area, Water based Radio on emergency helpline</p> <p>How, if at all, would you want Dee Valley Water to communicate to customers in this scenario? Local radio, TV or radio</p>
<p>The response:</p> <ul style="list-style-type: none">• Deliveries of bottled water were arranged to two central points in town, with the first opening at 4pm on the Sunday.<ul style="list-style-type: none">• Further collection points were later opened up as it became clear that customers were finding the journey too difficult.• Vulnerable customers were contacted proactively and had bottled water delivered to their door.• Dee Valley engineers worked to return water supply to thousands of customers, but at lower pressures than normal, meaning water was on and off for a day or two.• Dee Valley paid compensation of £25 to all customers who had been affected (roughly equivalent to a month's water and wastewater bill).• Throughout, Dee Valley Water communicated with customers in the following ways:<ul style="list-style-type: none">• Text messages were sent to customers' mobile phones and voice messages to landlines (where had numbers)• Regularly updated the website with details about affected areas, as well as updating social media accounts• Spoke regularly with local media, carrying out interviews	<p>What did you think of this incident? they should have done the</p> <p>What, if anything, would you expect from Dee Valley Water to this scenario? Information when water is</p>
<p>The scenario:</p> <ul style="list-style-type: none">• One of the main pipes bringing water to a local town ruptured in the early hours of a Sunday morning, leaving 20,000 customers without water.• While 5,000 customers got water back within a few hours, the size and nature of the repair – there was a 7ft piece of pipe blown away by the force of the failure – meant that supplies weren't returned to normal until the Wednesday afternoon.	<p>What impact, if any, would this have on you and your family? inconvenience, washing clothes, drinking, washing, cleaning house, Sanitation (toilet)</p> <p>What impact, if any, would this have on your community? people moaning, F/O explosion, community helping each other</p> <p>What response, if any, would you expect from Dee Valley Water to this scenario? Apology, keep up to date with public announcement, Reg. TV, Radio, Text, E-mail, Road Signs, possible alternatives</p> <p>How, if at all, would you want Dee Valley Water to communicate to customers in this scenario?</p>

Service failure: impact and expectations

- The degree to which customers felt they might have been impacted by service failure depended on the **type of service failure**.
 - Service failure types, including Do Not Use, Do Not Drink, Large Supply Interruption are seen as having the most substantial negative impact.
- In terms of **customer expectations** in the face of service failure, there are several findings common across the different types of service failure tested, including:
 - Prompt reaction and apology.
 - Transparent timeframes for fixing this issue.
 - Regular updates.
 - Clear and immediate information.
- The main difference between small-scale and large-scale incidents is the **type of communication** expected and deemed most appropriate.
 - For large-scale incidents this includes: local news alert, social media, radio, TV, tannoy system alerts, partnership working with local services.
 - For small-scale incidents this includes: social media, texts, emails, calls.

Having looked at these service failures, customers developed three key principles for Severn Trent/Dee Valley when dealing with service failure incidents

1.

Resolve issues as quickly as possible

2.

Communicate with customers about what action you are taking – with regular updates throughout

3.

Offer more support to customers, where needed

Service failure: what went well and areas of improvement

- Overall, it was felt that service failure incidents were dealt with **positively and proactively**, by Severn Trent/Dee Valley and customers were broadly impressed.
- The main areas of improvement revolve around **communication, response time and tailored responses**.

COMMUNICATION

- Tailored communication and communication through customers' preferred contact method was seen as being more productive, efficient and cost-effective.
- Customers also expected to see more communication through social media channels, local news channels, text messages and signs at the individual sites.

RESPONSE TIME

- Where possible, immediate response was preferred, and certain wait times (e.g. 12 hours for bottled water) were deemed to be too long.

"They should have been there earlier".
(General customer, Wrexham)

TAILORED RESPONSE

- Customers want to see that vulnerable customers are taken care of in event of service failure and are appropriately cared for.

"Elderly, vulnerable people should have been called."
(General customer, Wrexham)

Individual service failure: impact and expectations

		EXPECTATIONS	
		Incident - specific	General
<div>↑</div> <div>Do Not Use</div> <div>Do Not Drink</div> <div>Large supply interruption</div> <div>Leakage</div> <div>Low Pressure</div> <div>Pipe Burst</div>	IMPACT		
	<ul style="list-style-type: none">Major negative impact – unable to carry out essential daily activitiesMight involve needing to stay elsewhereIncreased cost due to buying waterEarly school closureBusinesses affected	<ul style="list-style-type: none">Bottled waterRefund/compensation for water	<ul style="list-style-type: none">Prompt reaction and apologyTransparent timeframe for fixing the issueRegular updatesImmediate notification and information<ul style="list-style-type: none"><i>Large scale incidents:</i> local news alert, social media, radio, TV, Tannoy system alerts, partnership working with local services<i>Small scale incidents:</i> social media, texts, emails, calls
	<ul style="list-style-type: none">Increased cost due to buying waterGeneral inconvenience	<ul style="list-style-type: none">Bottled water	
	<ul style="list-style-type: none">Alternative routes and delayed journeyGeneral temporary frustrationLocal businesses affectedLong-term positive benefits: improved service and lower risk flooding	<ul style="list-style-type: none">Appropriate diversions & planningCompensation for local businessesOvernight works where possibleAdvance notificationWater trucks (where needed)	
	<ul style="list-style-type: none">Alternative routes and delayed journeyPublic safety endangered	<ul style="list-style-type: none">Assessment of responsibility/damage	
	<ul style="list-style-type: none">Longer showers and low-level inconvenienceBigger impact on Dialysis patients and emergency services	<ul style="list-style-type: none">Prompt investigation	
	<ul style="list-style-type: none">Low-level inconvenienceBigger impact on Dialysis patients and emergency services	<ul style="list-style-type: none">Alternative sources of water	

Individual service failure: what was done well and areas for improvement

Customers identified some specific areas of improvement relating to individual service failure incidents. These areas of improvement broadly revolve around **time of response, type of communication and compensation**

"They should let us know when water gets turned off so we can fill up on water before hand"
(General customer, Wrexham)

INCIDENT	IMPROVEMENT
Do Not Use	<ul style="list-style-type: none">Ensuring vulnerable customers are taken into consideration
Do Not Drink	<ul style="list-style-type: none">Quicker provision of bottled water - 12 hours too long
Large supply interruption	<ul style="list-style-type: none">More protection of businessesAsking customers' preferred method of contact
Leakage	<ul style="list-style-type: none">Increased communication and regular updates
Low Pressure	<ul style="list-style-type: none">Quicker overall resolution – 24 hours to get in touch too long
Pipe Burst	<ul style="list-style-type: none">Compensation relative to length of service interruptionMore road signs

"There doesn't seem to be any communication or signs up."
(General customer, Wrexham)

"It took too long to investigate and too long to start fixing the issue."
(General customer, Wrexham)

06 Priorities for improvement

Prioritising services: Hierarchy of need

- Customers are broadly very happy with the service Severn Trent and Dee Valley provide them. In line with our findings in England, the priorities of customers in Wales reinforce the existing hierarchy of needs:



1.

Differences between customers in Wales and England



- The **environment** is more front-of-mind for customers in Wales - particularly those living in more rural areas like Powys.
 - Customers place high value on Wales's natural assets, seeing them as an important and cherished local resource.
 - Customers are keen to know more about Severn Trent and Dee Valley's positive impact on the environment
 - ... and what water-saving behaviours customers could adopt to be as environmentally-friendly as possible.
- Many of the customers we spoke to had **visited a reservoir or visitor site; they value the role you play providing visitor sites and amenities.**
- Water is seen as an important resource for Wales, and one that **needs protecting** – and customers would like greater transparency about where their water goes and who uses it.
 - In particular, there were questions raised about the export of water from Wales to England.

"I'd be willing to spend a bit more if it was going to promote biodiversity."
(General customer, Powys)

"I would like them [Severn Trent] to do more with renewables and solar power. Maybe put solar panels on the sides of the sloping dam walls, if that's possible?"
(General customer, Wrexham)

2.

Customers in Wales' views on lead piping



In 2015 the Welsh Government published a water strategy for Wales, which included working towards removing all lead water pipes in Wales. We wanted to understand what customers thought about the removal of lead piping.

- There was some awareness of the issue of lead water piping, but this tended to be vague and was rarely linked to Severn Trent.
- Customers are **not overly concerned** about the presence of lead pipes, but are pleased they are being removed.
- However, they do think it is important this work is done as there is a perception lead pipes in the system do have an **impact on health** and are “poisonous”.
- Customers expect lead pipes to be replaced, if they haven’t been already – although they want **advance notice** of works and an idea of the disruption caused, and information on what they are being replaced with.

"I think it's a good thing to get rid of lead piping. Lead is a metal I don't trust at all."

(Customer in a financially vulnerable circumstance, Wrexham)

"On the one hand I'm not that keen to have lead in children, but on the other I'm not sure it should be something Severn Trent should be doing. It should be the Welsh Government."

(General customer, Powys)

3. Dee Valley as a local company



- Wrexham customers feel that Dee Valley is a good local company – and that it is **important it stays local**, maintaining its current identity.
 - Some customers questioned whether Severn Trent’s acquisition of Dee Valley will mean their service becomes less personalised
 - ... or that their bills may go up.
- Good **customer service**, including face to face contact, is seen to embody the local company spirit.
 - There is an opportunity to **make more of The Hatch** – customers are not aware of its services and would like more information about how they can access it.
 - Some customers felt there could be more a **greater local presence** (e.g. Dee Valley attending local community events and updating local websites with information).
- It is seen as important that a local company plays a part in the **local economy**, and customers feel hiring and contracting decisions should reflect this.
- Most customers have been to a **local reservoir or visitor site** and see a real benefit in Dee Valley turning unused spaces over to a local community.

“Very happy it's on the doorstep and you can go in and see them - it makes Wrexham a better place.”
(Customer in a financially vulnerable circumstance, Wrexham)

“We're only about four fields away from the River Dee and we know a lot about it...it's nice that it's so local.”
(Customer in a financially vulnerable circumstance, Wrexham)

4.

Vulnerable customers (1/2) – those with a long term illness or health condition

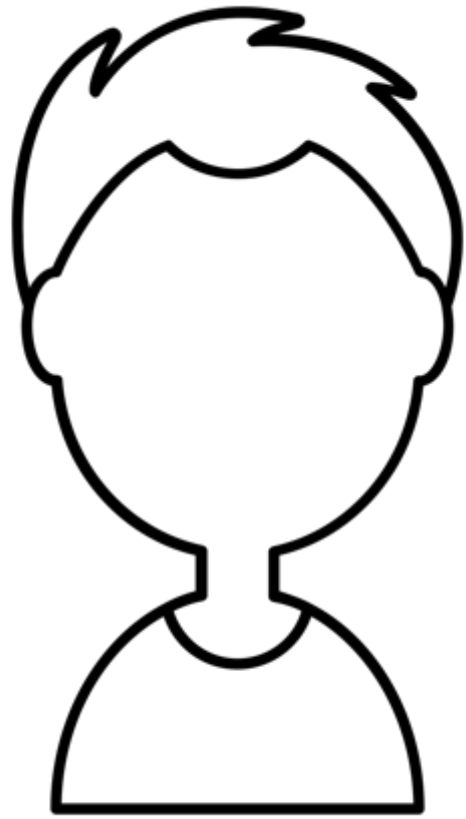


- For the most part, these customers do not see themselves as having specific needs – nor do they want to be treated ‘differently’.
 - It is important to balance raising awareness of the services and support available to these customers, without appearing overly intrusive or condescending.
- There is **limited knowledge of the support services** available (including the Priority Services Register), and who is entitled to them - customers are frustrated by this.
 - More pro-active promotion of the PSR is needed – matched with a broader consideration as to who should be captured by this.
- Communication with this group needs to account for their specific needs – which do differ.
 - Focus on more **tailored communications** and different formats for this audience, depending on specific health needs – and where they already exist, promote them further.
 - For example, large print or over the phone rather than online.

"I'd be surprised, because it's not the sort of thing you expect from a water company, I never knew they supplied the help that they do."
(Customer in a health and wellbeing vulnerable circumstance, Powys)

*"My gas and electric provider send **bills in large print** - it would be useful if Dee Valley could do the same."*
(Customer in a health and wellbeing vulnerable circumstance, Wrexham)

INDIVIDUAL PEN PORTRAIT: Dialysis and multiple health conditions



Liam* is a 36 year old former day-care nursery manager, who is on dialysis, has **an ileostomy and is partially sighted**. He has had Type 1 diabetes since he was 26 years old, has been on and off dialysis for five years. He had his ileostomy surgery one month ago. Liam has lived in Wrexham all his life and currently divides his time between his flat and his girlfriend's home. They both have children from previous relationships, and between them they have three children.

Liam currently undergoes **dialysis treatment three times a week** which leaves him very tired, but in his spare time he enjoys spending time with the children and studying for a children's psychology course at the Open University. Liam is currently unemployed, but he hopes that one day his health will improve and that he will be able to return to work and provide a comfortable life for his children.

Liam uses water for many daily tasks and activities, including washing, cleaning, toilet flushing, drinking and cooking. Liam also **uses water for his dialysis treatment**, which currently takes place at the hospital, and he also uses water to **clean his ileostomy wound and bag and take his medication**. He tends to use more water in the winter for hot baths and hot drinks, as his health problems mean that he tends to get cold very quickly.

However, Liam is **very careful with water**. He has a water meter, has a separate bin, a dual flush, water saving shower-head, a rain water butt and fat collecting pots. The main reason for being careful with water is to **keep the costs down**, as Liam is currently unable to work.

Liam has always been a Dee Valley customer and has been **very happy with the service** he has received. At one point he thought he was paying too much for his water bill and he phoned Dee Valley to get a water meter installed. They were really friendly on the phone, they were efficient and got everything sorted right away. Liam is also aware that having no access to water would have an immediate life-threatening impact on him, and he would be very happy for Dee Valley to customise the service he receives based on his health needs, by **keeping records of his health vulnerabilities**, accommodating his health needs in case of emergencies and sending bills in large print due to his poor vision.

"Not having water would have massive impact on my health issues - I need water for dialysis, for my medication, to clean my ileostomy and the ileostomy bag, and to drink."

"It's great that the PSR flags the issue right away - Dee Valley can act better if they know there is a vulnerable person who needs help."

INDIVIDUAL PEN PORTRAIT: Dialysis and multiple health conditions



Liam keeps all of his medication and ileostomy supplies in the bathroom where he does his cleaning and treatment of his ileostomy

The bathroom is fitted with special aids for better access and mobility in the bathroom



Liam is careful with water when doing the dishes

As well as a dual flush and a rain water butt, Liam also has a water-saving shower head – he doesn't want to spend more than he needs to on water



4.

Vulnerable customers (2/2) – those in a financially vulnerable circumstance

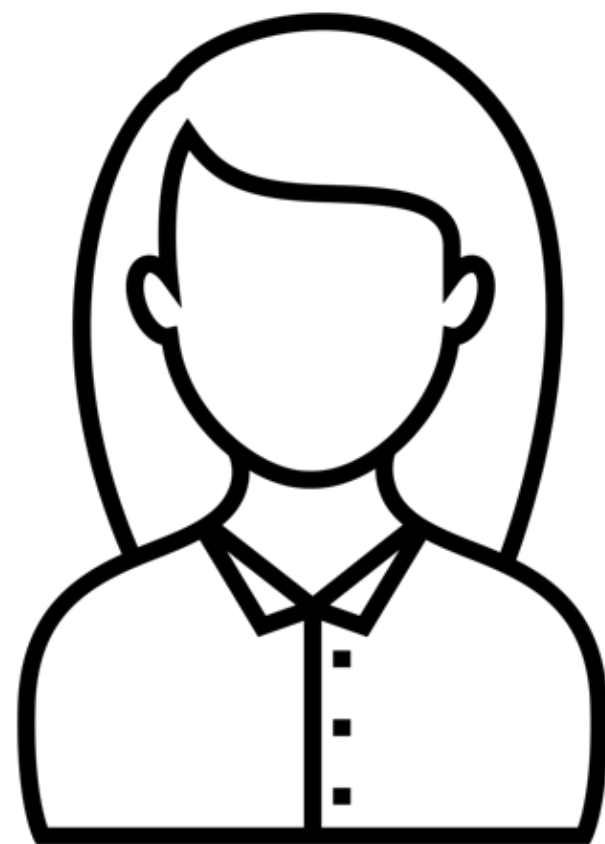


- While they acknowledge Severn Trent and Dee Valley bills present good value, increased focus **on water affordability** is a priority for this groups.
 - These customers are more likely to be incentivised to save water where they see it can save them money.
- There is **little to no awareness of financial support services** offered by Severn Trent/Dee Valley.
 - More communication and clarity on the financial support services offered to this group is needed.
- While they may need (and welcome) financial support, these customers **don't want to be made to feel 'different'** to other customers.
 - Careful communication and inclusive language is needed when sharing information on financial support.
- Some feel **restricted introducing water saving measures** due to their living circumstances (e.g. not being able to install a shower rather than a bath due to living in social or rented housing).
 - Further investigation into how these particular customers could be supported may be warranted.

*"There are lots of reasons why someone might be unable to pay the bill - I don't know if you get cut off or not actually - it would be nice to know if you didn't."
(Customer in a financially vulnerable circumstance, Wrexham)*

*"Didn't know anything about the services or help that is available - but this is great - there seems to something here to me."
(Customer in a financially vulnerable circumstance, Wrexham)*

INDIVIDUAL PEN PORTRAIT: Young mum of two children



Niamh is a 22-year old mother of two children, aged five and one. She lives in Powys with her partner and their dog. In the past, she juggled part-time work at nearby supermarket with studying at her local college, but has been a full-time homemaker since the birth of her first child. One day she hopes to go back to studying, and eventually her dream is to become a mental health support worker or midwife. Niamh has struggled with **mental health problems** for a long time, and when they were at their worst she fell heavily into debt.

Niamh continues to **struggle with the household finances** and is currently 18 months behind on her water bill. She prioritises her other bills (particularly the gas and electrical bills) over her water bill because of a perception that her water supply is less likely to be cut off. **“It is one of those bills they can’t take off me. But it does make me feel guilty: I’d like to be on top of it!”**

Niamh uses water for the essentials – cooking, washing and cleaning for herself, her two children and the family dog. She and her partner also **rely heavily on their water supply for leisure activities**. They have a paddling pool in the garden which the children love to use in the summer, and a tropical fish tank in the living room (which needs to be regularly cleaned out and refilled with fresh water).

Environmental issues and sustainable water use are important to Niamh, and she is pleased at the extent of Severn Trent’s activities in this area. **“It’s a positive,”** she says. **“They’re obviously thinking about different lifestyles and the environment”**. One way that she conserves water is by taking showers every other day rather than daily, although this is largely because of cost rather than environmental reasons.

In addition to reliably supplying safe water, Niamh thinks that Severn Trent should **prioritise environmental sustainability** and **providing support for customers who can’t afford to pay the bills**. Personally, she is **very satisfied with the service** she has received from Severn Trent, and thinks they have been sympathetic and understanding about her problems paying her water bill. However, she has friends who have experienced **service failure** in the past, and felt that Severn Trent could have been quicker and more responsive to deal with the problem.

Although Niamh has been informed about the **Water Direct scheme** in the past, she was surprised and impressed to find out about the range of support that Severn Trent offers to financially vulnerable customers, and thinks that **these schemes should be promoted more** energetically.

“I do think money makes you happier. It just takes the stress away.”

“[My water service] has been completely fine. I’ve never had to go without water...I think they’ve been so lenient.”

*Please note: photos for this respondent are unavailable

07 Conclusions

Conclusions

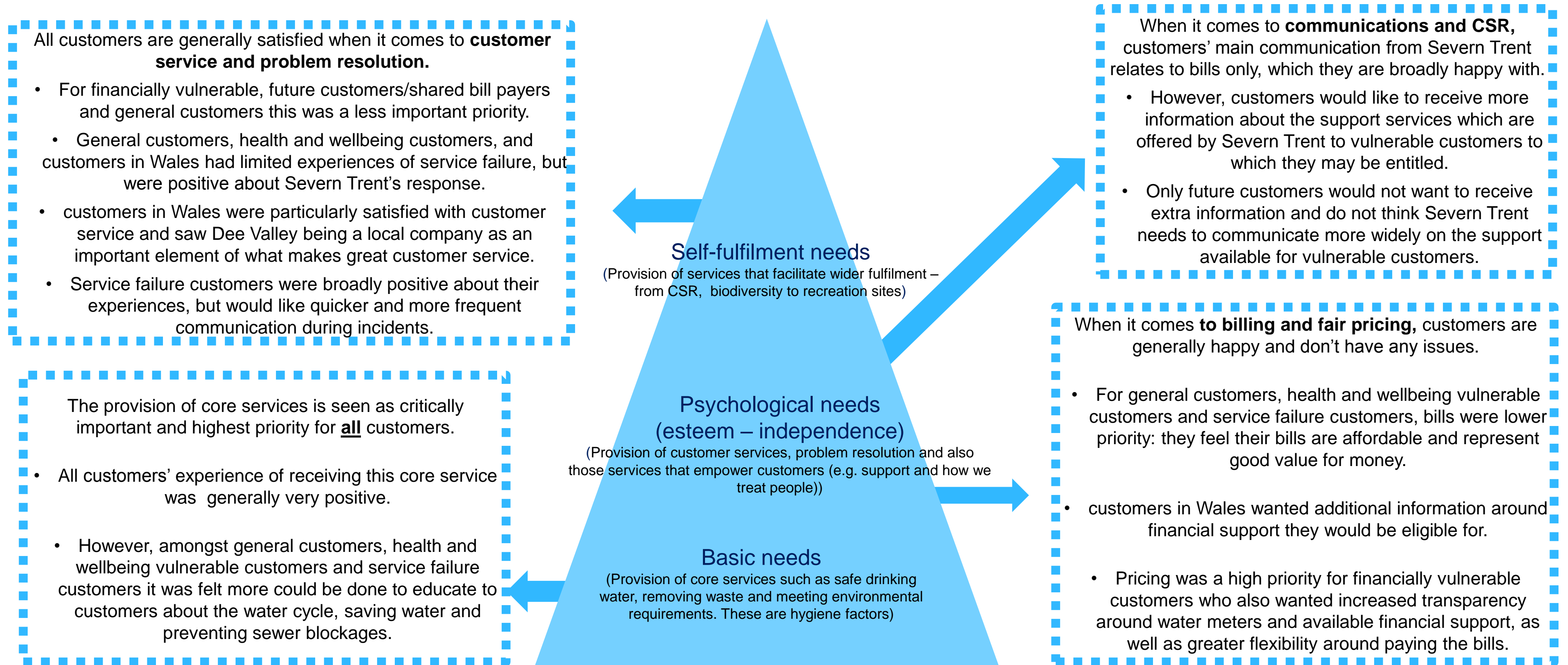
- Severn Trent and Dee Valley should be encouraged by the insight generated from customers in Wales – they are **positive about the services** they receive, and think you provide **good value for money**.
- Awareness of the water cycle and the full breadth of Severn Trent/Dee Valley's activities, outside of the core service, is low. Customers are happy to let you - and trust you - get on with the job.
- Customers are impressed at the **scale of your operation**, and think you should do more to promote your services.
- They also value the role you play in **protecting the environment** and providing visitor sites and amenities.
- Severn Trent and Dee Valley are seen to deal well with any **service failures** that arise.
 - The findings reinforce the importance of resolving issues as quickly as possible, communicating with customers about what action you are taking, and offering support to customers, particularly those deemed to be more vulnerable.

Conclusions

- Some of your customers are already taking active steps to actively save water - but there is clearly appetite to do more of this, and to receive more information on how to go about it.
 - There is a clear role for Severn Trent and Dee Valley to better educate customers and help them be more water-conscious.
 - For the most part, the most effective motivator would be saving money.
- Customers want to hear more about the **full range of support schemes and services** they may be entitled to – including support for vulnerable customers (the old and young, those struggling with bills and those with health and wellbeing vulnerabilities).
- For Wrexham customers, it's important that Dee Valley **retains its feel as a local company**, with a strong focus on good customer service and a greater local presence.

08 Appendix

Prioritising services: Hierarchy of need, reflecting all audiences



Report ends.

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