



Northumbrian Water Group

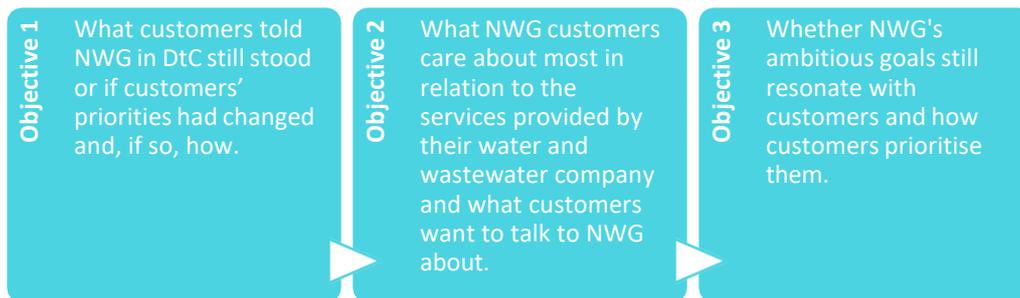
Defining the Future

Executive summary

In 2016, Explain carried out a piece of research for Northumbrian Water Group (NWG) entitled 'Defining the Conversation' (DtC) which sought to engage with household and business customers and stakeholders, to explore which areas of the organisation's strategic outcomes they would most like to influence and the best ways for NWG to engage with them throughout PR19 business planning.

This report details the findings of a follow-up research project conducted by Explain in 2021, entitled Defining the Future (DtF). It was designed to reflect the approach taken to DtC, to provide a foundation for PR24 research and engagement.

The core objectives of this project were to explore whether:



Methodology

Reflecting the approach taken to DtC, a qualitative deliberative methodology was adopted. For this research, however, an online approach was taken due to limitations and levels of comfort around face-to-face research in larger groups during the ongoing COVID-19 pandemic. Whole room and table discussions were replicated virtually using Zoom and breakout rooms.

Household customers

In total, five household customer online workshops split across NWG's two operating areas were held (**100** respondents in total – **49** NW and **51** ESW customers).

Explain recruited current household customers for the workshops via telephone from a database provided by NWG or from an external panel provider. During recruitment, respondents were asked several questions to ensure eligibility and determine demographic background. This was to allow for breakout rooms to be allocated aligned to similar demographic profiles. In addition to household



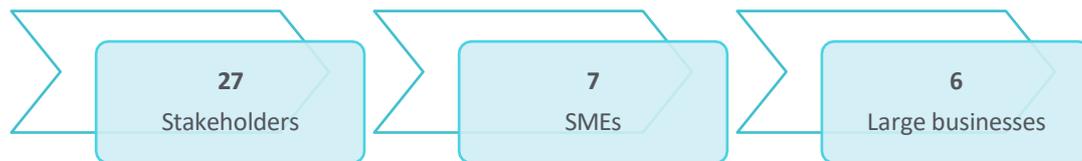
customers, in each workshop was a group of future customers. For the purpose of this engagement, future customers were defined as people living within NWG operating areas but who were not jointly or solely responsible for paying a water bill.

Each of the household customer workshops involved a combination of information sharing with the audience as a whole group and breakout discussion rooms (19 in total) for conversation and activities with smaller groups of respondents. Digital tools and techniques were used to capture information throughout the workshop.

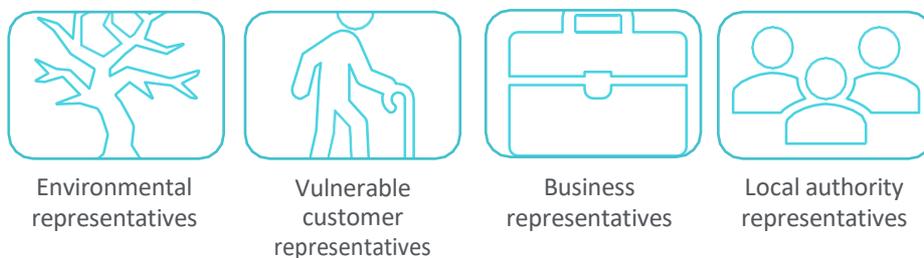
The conversations which took place were audio recorded, and the transcriptions and supporting notes were used as the basis of qualitative analysis to identify themes and distinctions in the findings along with the activities that respondents took part in.

Non-household customers

A qualitative, explorative conversation was also required with non-household customers, specifically stakeholders and businesses (large and SMEs). To engage with these customers, we adopted a telephone in-depth approach. We spoke to:



It was important that we spoke with a range of stakeholders, with a particular focus to ensure inclusivity of those representing customer groups who could be digitally disengaged to ensure representation of their views were considered, as well as those who represent those with health and financial vulnerabilities. We engaged stakeholders of the following backgrounds in the research:



Each in-depth interview was conducted via telephone call or Teams and was carried out by an experienced Explain facilitator. Respondents were asked to complete a short pre-task prior to their interview.

Results

Customer or citizen

Respondents were asked to consider their relationship with NWG and whether they preferred to be seen as customers or as citizens. Overall, household respondents most commonly both saw themselves as and wanted to be treated as customers. This was typically because they saw their relationship with NWG as predominantly transactional – paying their bill in return for their water (and wastewater) services. However, there was interest expressed in understanding NWG's sustainability practices and things the organisation is doing to support and improve the environment.

On the other hand, stakeholders and business representatives were keen for NWG to consider service users as citizens, to reflect the broader role that the organisation plays within local communities, for example, environmental protection, sustainability practices and work in supporting communities.

Pillars and priorities

When household customers were asked for any words or ideas that they associated with the concept of 'outstanding customer service'. The following key areas emerged:

- High-quality communication: communication needs to be friendly and courteous, focused on a key point of contact and framed within a local understanding
- A responsive service: communication should be timely and any action necessary be undertaken quickly and efficiently
- A personal service: the service needs to ensure that the customer feels valued and understood, with genuine care and concern shown
- A reliable service: appointments should be kept and promises fulfilled.

Whilst both the KPMG Nunwood pillars model and the NWG customer service priorities were thought appropriate by household and non-household customers, the priorities were favoured because it was considered to be the most 'personal'.



In addition to considering which of the KPMG Nunwood pillars model and NWG's customer experience priorities were the most appropriate overall, participants were asked to rank the individual priorities and pillars in order of importance to them. Within both the pillars model and NWG's customer service priorities, the reasons behind the elements considered most and least important via a ranking exercise aligned. 'Integrity' and 'keep our promises' were understood to be synonymous and the foundation of effective customer service. Similarly, 'personalisation' was understood to be the same as 'show each customer they are special', though both the need and feasibility of this was called into question.

Company outcomes

'Talk to me'

Fewer outcomes were likely to be placed in the 'talk to me' pot by business customers and stakeholders than household customers. Business customers and stakeholders were also interested in engaging with NWG themselves about the outcome relating to partnership working, whereas household customers were less interested in engaging with NWG about this

'Talk to someone'

There were two outcomes that were most likely to be placed in the 'talk to someone' pot by both household and non-household customers. The same as in the DtC research, both outcomes that were most likely to be placed in this pot across all respondents related to the environment.

'Just deal with it'

Fewer outcomes were allocated to this pot in this research than they were in the 2016 DtC research by household customers. In the DtC research, the majority of service-related outcomes were allocated to this pot by household customers, alongside people and community-based outcomes.



The table below demonstrates which pot [household customers](#) were most likely to place each outcome in. Please note, allocation numbers differ throughout as some breakout rooms allocated outcomes across more than one pot and where this was the case they were counted in both.

HOUSEHOLD	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (75%)	3 (15%)	2 (10%)	-
Our customers say we are a company they trust.	12 (63%)	1 (5%)	6 (32%)	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	18 (78%)	2 (9%)	3 (13%)	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	1 (4%)	17 (68%)	6 (24%)	1 (4%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	16 (84%)	-	3 (16%)	-
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	9 (43%)	5 (24%)	7 (33%)	-
Our sewerage service deals with sewage and heavy rainfall effectively.	2 (15%)	7 (54%)	4 (31%)	-
We always provide a reliable supply of water.	2 (11%)	2 (11%)	13 (68%)	2 (11%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	1 (7%)	9 (60%)	5 (33%)	-
Leading in innovation				
We are an innovative and efficient company.	1 (5%)	5 (26%)	11 (58%)	2 (11%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	3 (14%)	15 (68%)	3 (14%)	1 (5%)
We take care to protect and improve the environment in everything we do, leading by example.	2 (10%)	16 (76%)	2 (10%)	1 (5%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	12 (60%)	2 (10%)	5 (25%)	1 (5%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	4 (20%)	8 (40%)	6 (30%)	2 (10%)

When asked to rank the outcomes allocated to the 'talk to me' pot, it was most important for household respondents to engage on the outcome 'our customers say our services are good value for money and we work hard to keep water services affordable for all', although the other customer-service related outcomes were also ranked highly.



The table below demonstrates which pot stakeholders and business customers placed each outcome in:

BUSINESS AND STAKEHOLDERS	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (36%)	11 (26%)	13 (31%)	3 (7%)
Our customers say we are a company they trust.	15 (36%)	6 (14%)	17 (40%)	4 (10%)
Our customers tell us we provide excellent customer service and resolve issues quickly.	15 (36%)	8 (19%)	16 (38%)	3 (7%)
Our finances are sound, stable and achieve a fair balance between customers and investors.	6 (14%)	8 (19%)	20 (48%)	8 (19%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	11 (26%)	18 (43%)	9 (21%)	4 (10%)
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	8 (19%)	11 (26%)	19 (45%)	4 (10%)
Our sewerage service deals with sewage and heavy rainfall effectively.	5 (22%)	6 (26%)	7 (30%)	5 (22%)
We always provide a reliable supply of water.	10 (24%)	8 (19%)	20 (48%)	4 (10%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	8 (19%)	9 (21%)	22 (52%)	3 (7%)
Leading in innovation				
We are an innovative and efficient company.	6 (14%)	18 (43%)	10 (24%)	8 (19%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	10 (24%)	19 (45%)	9 (21%)	4 (10%)
We take care to protect and improve the environment in everything we do, leading by example.	11 (26%)	25 (60%)	3 (7%)	3 (7%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	19 (45%)	15 (36%)	4 (10%)	4 (10%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	24 (57%)	11 (26%)	4 (10%)	3 (7%)



The table below shows how allocations were made between audience types. Please consider the differing approach taken to this allocation exercise between audience types when comparing results - household customers base sizes refer to the number of breakout rooms that allocated the outcome to each pot based on the majority views of people within that breakout, whereas stakeholder and business respondents allocated outcomes individually. Please note, differing base sizes

Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)
Our customers say they feel informed about the services we provide and the importance of water.	75%	36%	15%	26%	10%	31%	-	7%
Our customers say we are a company they trust.	63%	36%	5%	14%	32%	40%	-	10%
Our customers tell us we provide excellent customer service and resolve issues quickly.	78%	36%	9%	19%	13%	38%	-	7%
Our finances are sound, stable and achieve a fair balance between customers and investors.	4%	14%	68%	19%	24%	48%	4%	19%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	84%	26%	-	43%	16%	21%	-	10%
Our drinking water is clean, clear and tastes good.	43%	19%	24%	26%	33%	45%	-	10%
Our sewerage service deals with sewage and heavy rainfall effectively.	15%	22%	54%	26%	31%	30%	-	22%
We always provide a reliable supply of water.	11%	24%	11%	19%	68%	48%	11%	10%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	7%	19%	60%	21%	33%	52%	-	7%
We are an innovative and efficient company.	5%	14%	26%	43%	58%	24%	11%	19%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	14%	24%	68%	45%	14%	21%	5%	10%
We take care to protect and improve the environment in everything we do, leading by example.	10%	26%	76%	60%	10%	7%	5%	7%
We are proud to support our communities by giving time and resources to their important causes	60%	45%	10%	36%	25%	10%	5%	10%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	20%	57%	40%	26%	30%	10%	10%	7%



The table below shows how allocations were made by [household](#) customers in this research compared with the way allocations were made in the previous DtC research. It is important to note that the list of outcomes differed between research – this was mostly wording changes but in some cases more significant changes to the sentiment of the outcomes were made, therefore this should be considered when interpreting results (the comparison can be found in Appendix 10).

HOUSEHOLD Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	DtC (tables 15–19)	DtF (allocations 13–25)						
Our customers say they feel informed about the services we provide and the importance of water.	87%	75%	-	15%	7%	10%	7%	-
Our customers say we are a company they trust.	40%	63%	7%	5%	47%	32%	7%	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	47%	78%	-	9%	47%	13%	7%	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	42%	4%	16%	68%	26%	24%	16%	4%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	67%	84%	7%	-	20%	16%	7%	-
Our drinking water is clean, clear and tastes good.	27%	43%	20%	24%	53%	33%	-	-
Our sewerage service deals with sewage and heavy rainfall effectively.	33%	15%	22%	54%	44%	31%	-	-
We always provide a reliable supply of water.	18%	11%	12%	11%	71%	68%	-	11%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	7%	7%	14%	60%	79%	33%	-	-
We are an innovative and efficient company.	40%	5%	7%	26%	53%	58%	-	11%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	11%	14%	56%	68%	33%	14%	-	5%
We take care to protect and improve the environment in everything we do, leading by example.	-	10%	69%	76%	25%	10%	6%	5%
We are proud to support our communities by giving time and resources to their important causes	27%	60%	20%	10%	47%	25%	7%	5%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	13%	20%	60%	40%	27%	30%	-	10%



The table below shows how allocations were made by [stakeholders and business customers](#) in this research compared with the way allocations were made in the previous DtC research. It is important to note that the list of outcomes differed between research – this was mostly wording changes but in some cases more significant changes to the sentiment of the outcomes were made, therefore this should be considered when interpreting results (the comparison can be found in Appendix 10). Please also consider differing base sizes.

BUSINESS AND STAKEHOLDERS Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	DtC (respondents – 16)	DtF (respondents – 42)						
Our customers say they feel informed about the services we provide and the importance of water.	-	36%	44%	26%	50%	31%	6%	7%
Our customers say we are a company they trust.	6%	36%	44%	14%	44%	40%	6%	10%
Our customers tell us we provide excellent customer service and resolve issues quickly.	13%	36%	50%	19%	38%	38%	-	7%
Our finances are sound, stable and achieve a fair balance between customers and investors.	25%	14%	13%	19%	56%	48%	6%	19%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	13%	26%	38%	43%	44%	21%	6%	10%
Our drinking water is clean, clear and tastes good.	13%	19%	25%	26%	63%	45%	-	10%
Our sewerage service deals with sewage and heavy rainfall effectively.	25%	22%	17%	26%	58%	30%	-	22%
We always provide a reliable supply of water.	13%	24%	31%	19%	56%	48%	-	10%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	38%	19%	31%	21%	31%	52%	-	7%
We are an innovative and efficient company.	13%	14%	38%	43%	44%	24%	6%	19%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	44%	24%	25%	45%	31%	21%	-	10%
We take care to protect and improve the environment in everything we do, leading by example.	38%	26%	19%	60%	38%	7%	6%	7%
We are proud to support our communities by giving time and resources to their important causes	25%	45%	13%	36%	63%	10%	-	10%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	13%	57%	31%	26%	56%	10%	-	7%



Keeping customers updated

At the end of the outcome sorting exercise, if time allowed, household respondents were asked within their breakout rooms how they thought NWG should keep customers informed about their progress towards their outcomes. In total, nine breakout rooms discussed this.

It was important to customers that the way that NWG inform customers about their progress was tailored to different generations. For example, they felt that the older demographic would be less likely to look at emails, websites and social media but that they may be more likely to listen to information provided by NWG in person, for example at events or if they had someone at their door providing them with information.

One of the most frequently mentioned channels that was suggested, was social media. This was suggested particularly by future customers, but also by other household customers of differing age profiles. There were mixed views on leaflet drops and emails. Other channels that were suggested included: TV adverts, radio adverts, independent reviews and interviews, text messages with video links and having the information readily available on the NWG website.

Long term strategy – ambitious goals

The majority of respondents across household, stakeholder, and business audiences in both operating areas agreed with NWG’s ambitious goals, with strong levels of endorsement demonstrated in the results of the polls conducted. Results for all groups are shown below.

Ambitious goal	NW agreement %			ESW agreement %		
	Overall (41-71)	Household (17-47)	Stakeholder and business (21-24)	Overall (64-68)	Household (45-49)	Stakeholder and business (19)
Deliver world class customer service	75%	81%	63%	85%	88%	79%
Give every single customer the opportunity to have a strong voice and engage with them, with at least 2 million customers participating by 2025	73%	88%	63%	68%	73%	53%



Eradicate water poverty in their operating areas by 2030	80%	87%	67%	79%	81%	79%
Have the lowest levels of leakage in the country in their water-stressed ESW operating area	77%	87%	58%	94%	91%	100%
Have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040	62%	73%	42%	67%	69%	63%
Promote confidence in their drinking water so that nine out of ten of their customers choose tap water over bottled water	83%	87%	86%	91%	93%	84%
Eradicate sewer flooding in the home as a result of their assets and operations	92%	100%	79%	N/A	N/A	N/A
Be leading in innovation within the water sector and beyond	86%	93%	71%	94%	91%	100%
Be leading in the sustainable use of natural resources, through achieving zero avoidable waste by 2025 and being carbon neutral by 2027	90%	94%	88%	88%	87%	89%
Demonstrate leadership in catchment management to enhance natural capital and deliver net gain for biodiversity	91%	96%	83%	77%	79%	74%
Have the best rivers and beaches in the country	89%	89%	88%	86%	85%	89%
Have zero pollutions as a result of their assets and operations	90%	87%	92%	88%	87%	89%
Spend at least 60p in every £1 with suppliers in their regions	75%	82%	63%	85%	83%	89%
Be the most socially responsible water company	89%	89%	88%	91%	92%	89%



Recommendations

A summary of our recommendations based on the findings of this research are as follows:

- Maintain a “customer lens” with household consumers on the whole. However, as stakeholders wanted to be treated as citizens, consider how this could best be achieved, for example with focus on engaging local people around elements of NWG’s role such as sustainability and environmental stewardship, which household customers expressed particular interest in hearing about.
- Both the six priorities and the six pillars model were endorsed, so there is support for both to be implemented. However, prioritise use of the six priorities when striving for excellent customer experience, with a lesser focus on the six pillars developed by KPMG Nunwood.
- To plan towards PR24, there are clear areas which household customers wish to influence, which should be used to guide future engagement with this audience. Engage with household customers on the following outcomes to allow them to have a say on the service going forward:
 - ♣ Our customers say they feel informed about the services we provide and the importance of water.
 - ♣ Our customers say we are a company they trust.
 - ♣ Our customers tell us we provide excellent customer service and resolve issues quickly.
 - ♣ Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.
 - ♣ Our drinking water is clean, clear and tastes good.
 - ♣ We are proud to support our communities by giving time and resources to their important causes
- In addition, engage with stakeholders and business customers on the following outcomes to allow them to have a say on the service going forward:
 - ♣ We work in partnership with companies and organisations to achieve the goals that are most important to our customers.
 - ♣ Our customers say they feel informed about the services we provide and the importance of water.



- When communicating progress towards outcomes to customers, ensure that the means of communicating information is tailored for different audiences. In particular, consider the use of social media to inform customers as this was a preference across respondents, particularly future customers
- Consider engaging with specialists on the following outcomes:
 - ♣ We take care to protect and improve the environment in everything we do, leading by example.
 - In particular, consider environmental experts.
 - ♣ We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.
 - In particular, consider environmental experts.
 - ♣ Our finances are sound, stable and achieve a fair balance between customers and investors.
 - In particular, consider vulnerable customer representatives
 - ♣ Our sewerage service deals with sewage and heavy rainfall effectively.
 - ♣ We work in partnership with companies and organisations to achieve the goals that are most important to our customers.
 - ♣ We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.
 - ♣ Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.
 - ♣ We are an innovative and efficient company.
- Customers and stakeholders supported the majority of NWG's ambitious goals, so continue to strive to progress against these targets. Review the goals which had lowest support, as follows:
 - ♣ Engage with at least two million customers by 2025.
 - ♣ Have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040.



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Introduction

An overview of the project background, objectives and methodology.

Introduction

Project background

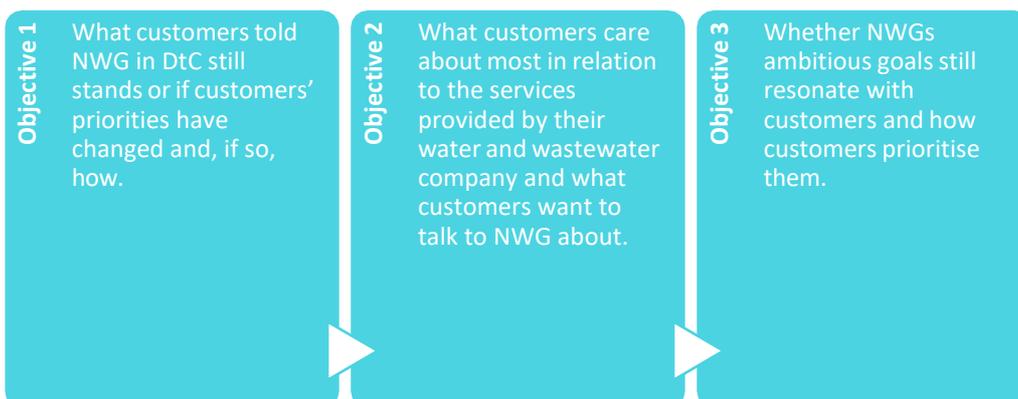
In August 2016, Northumbrian Water Group (NWG) commissioned Explain to carry out customer and stakeholder engagement in a project called 'Defining the Conversation' (DtC). The aim of the research was to engage with household customers, business customers and stakeholders to explore what mattered most to them about the services provided by NWG, which areas of the business they would most like to influence and the best ways for NWG to engage with customers and stakeholders throughout PR19 business planning. The outputs from DtC provided NWG with a strong understanding of NWG customers' needs and priorities. This understanding was used to shape the remainder of the customer research and engagement programme for PR19, and to co-create 'Living Water - Our Plan 2020-25 and beyond'.

Following on from this, NWG commissioned Explain to carry out similar research in 2021. The aim of this research, 'Defining the Future' (DtF), was to create a foundation for PR24 research and engagement. It was particularly important to NWG to ensure that this research was equally, and if not more, robust than that carried out in 2016.

The following report details the findings of the DtF research project.

Objectives

The core objectives of this project were to explore whether:



As well as providing the foundation for NWGs PR24 programme of customer research and engagement, the outputs will also be used to help inform the review of the Strategic Direction Statement (SDS).

Methodology

To reflect the approach taken to DtC, a qualitative deliberative methodology was adopted. For this research, however, an online approach was taken due to limitations and comfort around face-to-face research in larger groups during the ongoing COVID-19 pandemic. The format used within the DtC workshops, whole room and table discussions, was therefore replicated virtually using Zoom and breakout rooms.

Household customers

In total, five household customer online workshops split across NWG's two operating areas were held (**100** respondents in total – **49** NW and **51** ESW customers).

Prior to these household customer workshops, we held a 'pilot workshop' with members of the NWG wider team with the aim of testing all materials prior to using them in the workshops. Following this pilot workshop we made minor refinements to the discussion guide including improvements to how each exercise was framed and explained so the objectives were clear for respondents, and they knew what they needed to do. It was also agreed that NWG representatives should be present at each workshop to help with explaining the ambitious goals section where needed.

Once piloted, Explain recruited current household customers for the workshops via telephone from a database provided by NWG and via an external online panel provider. During recruitment, respondents were asked several questions to ensure eligibility and determine demographic background. This was to allow for each breakout room to be allocated best aligned to demographic profiles. We sought to base these on: age (20-45 or 46 and over) and socio-economic group (SEG- ABC1 or C2DE). We also spoke to some household customers in vulnerable circumstances and some who had experienced service issues. In addition, we spoke to customers across a mix of urban, rural and coastal locations. A breakdown of profiling can be found in the respondent profile section of this report.

In addition to household customers, in each workshop was a group of future customers. These future customers were people living within NWG operating areas but who were not jointly or solely responsible for their water bill. Future customers were recruited using targeted social media ads to express initial interest and a follow up call to determine eligibility.



Each of the household customer workshops involved a combination of information sharing with the audience as a whole group and breakout discussion rooms for conversation and activities with smaller groups of respondents. Digital tools and techniques were used to capture information throughout the workshop. Specifically, this included the use of Miro boards to capture information collectively in the outcomes allocation section and Zoom poll voting throughout to quantitatively understand individual thoughts. The intention of using these tools was to ensure that the workshops were as engaging as possible, whilst also gathering the insights covered within the overall objectives and remaining reflective of the approach used in DtC.

Each household workshop lasted a total of two hours and 15 minutes, and respondents were provided with a £60 Amazon voucher or BACS transfer as a thank you for their time. Online workshops were chaired by an Explain facilitator who led the main room discussions throughout the session. The chair was accompanied by a number of additional Explain facilitators who moderated each breakout discussion, and a technical support person who helped to ensure smooth running of each session from a technical perspective. Each breakout facilitator was also responsible for navigating the Miro board within their breakout session, with Zoom polling put to the whole room by the Explain chair.

The chair and all breakout facilitators used a pre-agreed discussion guide to conduct the conversations, this can be found in Appendix 6 of this document. As agreed following the pilot workshop, additional members from a range of teams throughout NWG were also in attendance, as well as representatives from the Water Forum, who acted as observers. They were also on hand to assist the conversation with expert knowledge and respond to any queries raised by customers.

The conversations taking place within the main session and each breakout room were audio recorded and notes were also compiled for each session. These transcriptions and supporting notes were then used as the basis of qualitative analysis to identify any relevant themes and distinctions in the findings along with the activities that respondents took part in.



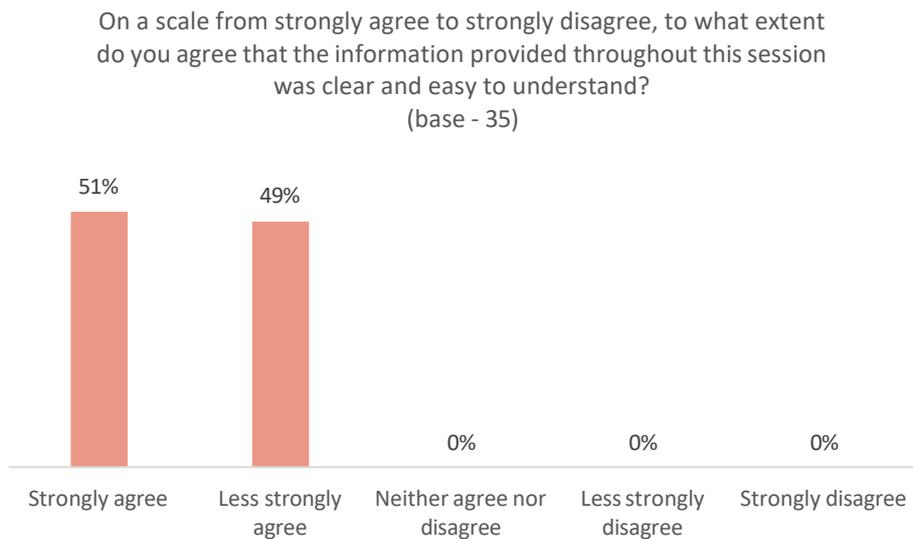
Session feedback

Where time allowed, at the end of some of the household workshops, respondents were asked to provide feedback on the session itself via two Zoom polls that were put to the whole group.

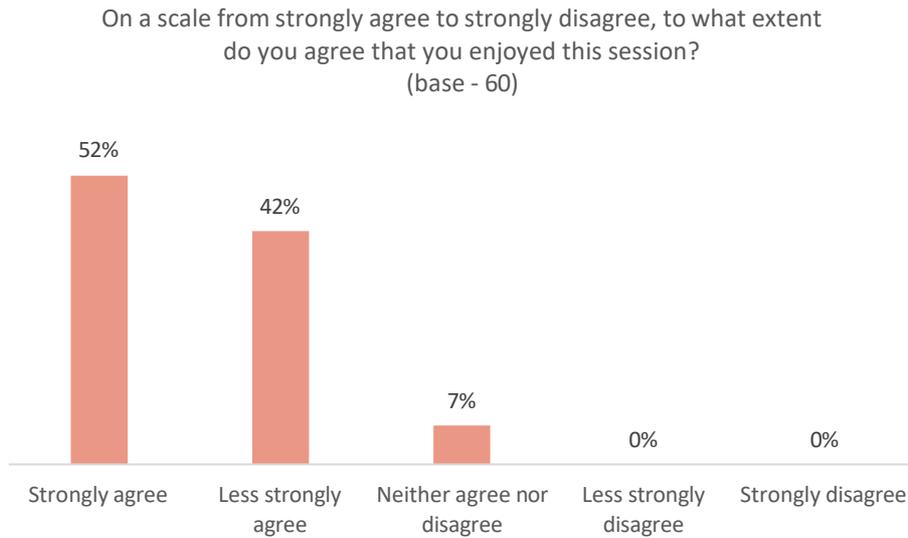
 **ZOOM POLL 1:** On a scale from strongly agree to strongly disagree, to what extent do you agree that the information provided throughout this session was clear and easy to understand?

 **ZOOM POLL 2:** On a scale from strongly agree to strongly disagree, to what extent do you agree that you enjoyed this session?

In total, 35 people were asked to what extent they agreed that the information provided throughout the session was clear and easy to understand. All respondents agreed with this statement (51% strongly agreed and 49% less strongly agreed), demonstrating the approach was successful. Please note this question was asked at one ESW session and one NW session.



In addition, 60 respondents were asked to what extent they enjoyed the session they took part in. The majority agreed with this statement (52% strongly agreed and 42% less strongly agreed). No respondents disagreed with this statement. Please note, this question was asked at both ESW groups and one NW group.



In addition to this, one attendee emailed the Explain team following attendance at the workshop expressing their enjoyment of the session and willingness to engage::

☐ *“Just a quick note to say thanks for inviting me to attend this. I found the session to be excellent and I thought it was facilitated brilliantly and pitched at exactly the right level and I really enjoyed it” (Essex, household customer)*



Non-household customers

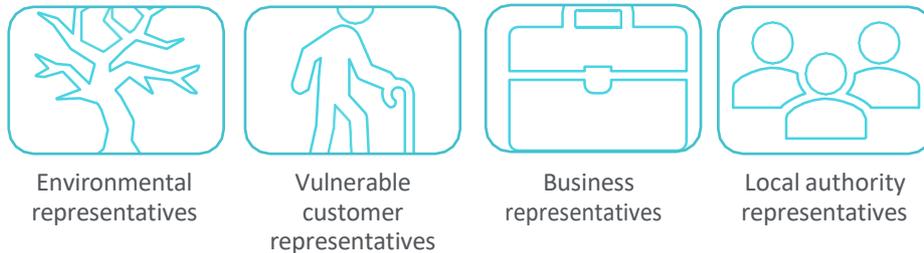
As with household customers, a qualitative and exploratory conversation was required with non-household customers, specifically stakeholders and businesses (large and SMEs). To engage with these customers, we adopted a telephone in-depth approach.

In total we spoke to:



It was important that we spoke with a range of stakeholders, with a particular focus to ensure inclusivity of those representing customer groups who could be digitally disengaged to ensure representation of their views are considered as well as those who represent those with health and financial vulnerabilities.

We therefore engaged with stakeholders of the following backgrounds:



Each in-depth interview was conducted via telephone call or Teams and was carried out by an Explain interviewer. Digital tools and techniques were not used during the in-depth interviews but interviewees were asked to complete a short pre-task (approx. 10 min to complete) prior to their interview. The pre-task was an online survey which introduced NWG's outcomes and included instructions on some short exercises that reflected the group tasks that household customers were asked to complete in the workshops, as well as the individual polling that household customers were asked to complete. An example of this pre-task can be found in appendix 9.



Each in-depth interview lasted around 30 minutes. Stakeholder respondents were not incentivised for their time but business customers were given a £30 Amazon voucher or BACS transfer as a thank you for their time.

As with the household workshops, the Explain interviewer used a pre-agreed discussion guide (which can be found in Appendix 6 and 7) to conduct the conversation with respondents which broadly reflected that used in the household workshops.

In order to recruit stakeholders, NWG provided Explain with a database of contacts who were emailed and invited to take part. In addition, NWG directly contacted a number of business respondents and Explain supported with recruitment for SME's by carrying out desk research to identify and approach SME's in both operating areas.

Each in-depth interview was audio recorded and transcribed. These transcriptions were then used as the basis of qualitative analysis to identify any relevant themes and distinctions in the findings along with those identified in the household workshops. All transcripts can be found in the appendix section of this document.

Notes on analysis

General

Where possible, results have been presented holistically by topic throughout the report, however due to differences between audience types (e.g. household and non-household), in places results have been provided separately. The audience which findings relate to is indicated throughout the report.

The difference in methodologies between the two audiences should also be taken into account when interpreting results in this report. For example, the workshop approach to household customers was of a more deliberative nature, with time spent on clarifying understanding and the opportunity for questions throughout. The in-depth interviews, however, were much more 'self-guided' in terms of the pre-task and a much shorter time was spent on discussion.

Please note throughout, all percentages may not add up to 100% due to rounding.



Outcomes

Appendices 1 and 2 show the counts of which 'pot' each outcome was allocated to.

Please note, outcomes surrounding sewerage services were not asked to those in ESW groups as they were not relevant based on service provision in that region.

Throughout the outcomes task, household respondents completed the task collectively within their breakout rooms, whereas stakeholders and business customers allocated outcomes individually. Throughout the outcomes section of the report, therefore, it should be taken into account that references to household allocations are based on the views of the majority of individuals within each breakout room.

If respondents were collectively unsure of where to allocate outcomes, then these were left outside the Miro board 'pots' and were classed as 'don't know' in the analysis of results.

Where respondents felt that outcomes should be included in more than one pot, these were placed between the relevant two pots on the Miro board and were included within both pots for overall counts, therefore allocation numbers vary.

Please note that counts for outcome allocations amongst non-household customers are slightly higher than for those we spoke to for an in-depth interview. This is because we observed some dropouts after respondents had completed the pre-task and therefore their pre-task responses were kept and included for analysis.





Respondent profile

An overview of the profile of respondents who participated in the research.

Respondent profile

Household customers

In each workshop, a variety of demographic profiles were represented across socio-economic group (SEG), age group, and urban/rural/coastal area of residence. A proportion of respondents in each household workshop were 'future customers', i.e. not currently responsible for their household water bill.

In total, **100** household customers attended a workshop. The number of attendees per workshop was as follows: Newcastle/Northumberland: 18 attendees, Durham/ Darlington/ Teesside: 20 attendees, Essex: **27** attendees, and Suffolk: **24** attendees. We held an additional, smaller-scale session for Newcastle/Northumberland and Durham/Darlington/Teesside customers with 11 attendees; this session was put on to boost representation of customers in SEG groups C2DE, which had dropouts in the earlier NW events. The table below gives a breakdown of the demographic profiles of attendees at each workshop.

	ABC1 Age 20-45	ABC1 Age 46+	C2DE Age 20-45	C2DE Age 46+	Future customers	TOTAL
Newcastle/Northumberland	7	4	3	0	4	18
Durham/Darlington/Teesside	2	4	3	6	5	20
Additional NW	-	-	8	3	-	11
Essex	7	8	3	2	7	27
Suffolk	7	7	5	3	2	24

Due to variances in levels of attendance between demographic groups on the day (i.e. non-attendance from some demographics) some attendees - who most closely aligned with other demographic profiles - were allocated into other breakout rooms. This was to ensure that participants had the fairest opportunity to share their opinions in each discussion, whilst maintaining profile alignment as closely as possible.

In total, there were 19 breakout rooms across the sessions conducted.

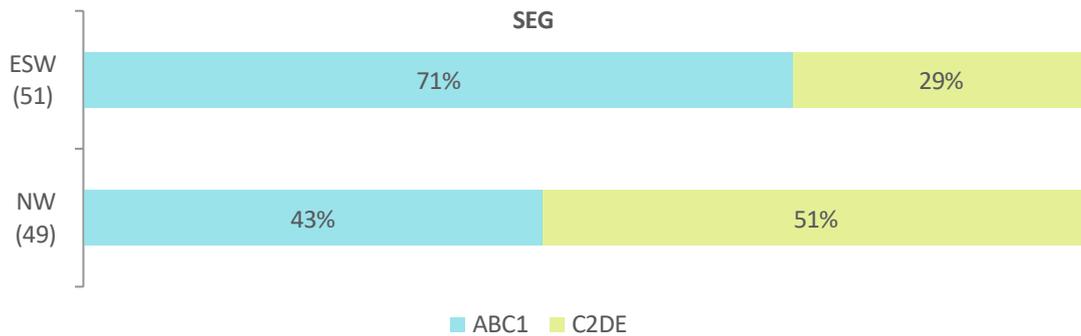
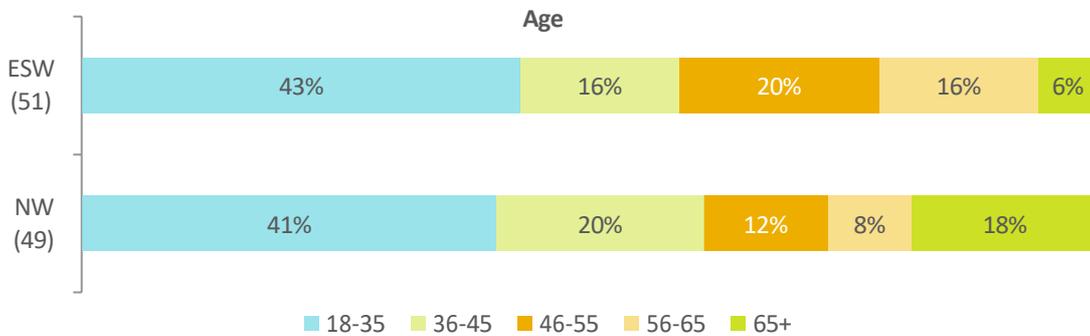


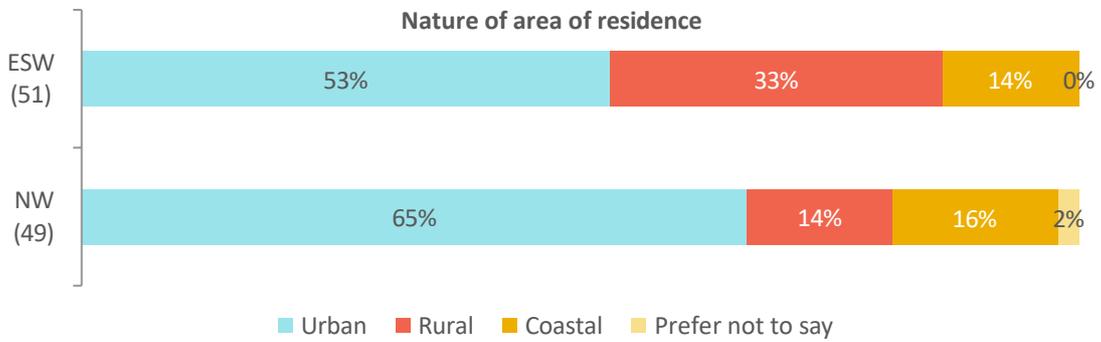
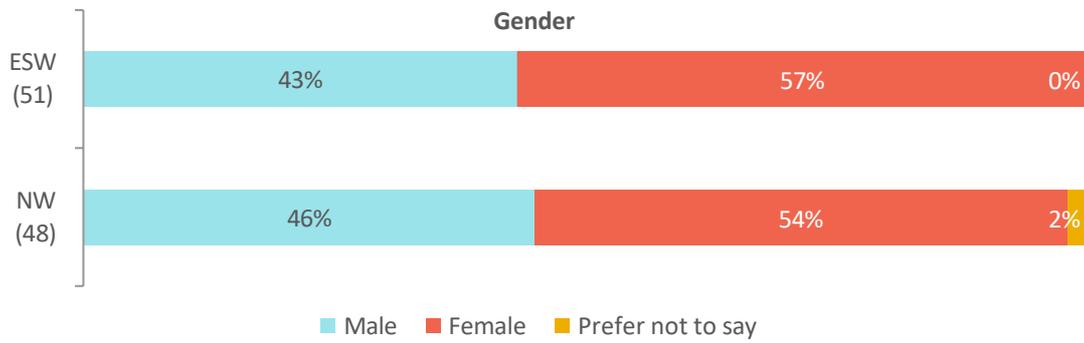
The table below outlines the number of attendees within each breakout room.

	Breakout 1	Breakout 2	Breakout 3	Breakout 4	Breakout 5	TOTAL
Newcastle/Northumberland	7	4	2	5	-	18
Durham/Darlington/Teesside	5	6	4	5	-	20
Additional NW	5	6	-	-	-	11
Essex	4	6	7	5	5	27
Suffolk	6	7	4	7	-	24

Demographic profiles per NW/ESW

The graphs which follow display the demographic make-up of the household customer samples, split by the NW and ESW operating areas. Deliberate effort was made to obtain a spread of NWG customers to ensure for a holistic base of insight from a broad customer sample, representing a variety of different demographic profiles.





Stakeholders

In total, 27 in-depth interviews were conducted via telephone with stakeholders from a diverse range

of companies across both of NWG's operating areas, the details of which can be found below:

Region	Name	Role	Organisation
NW	[REDACTED]	[REDACTED]	Tees Valley Nature Partnership
NW	[REDACTED]	[REDACTED]	Stockton on Tees council
NW	[REDACTED]	[REDACTED]	County Durham and Darlington Fire and Rescue Service
NW	[REDACTED]	[REDACTED]	Groundwork
NW	[REDACTED]	[REDACTED]	Heritage Coast
NW	[REDACTED]	[REDACTED]	Tyne Rivers Trust
NW	[REDACTED]	[REDACTED]	Stockton-on-Tees Borough Council
NW	[REDACTED]	[REDACTED]	Tweed Forum
NW	[REDACTED]	[REDACTED]	Gentoo
NW	[REDACTED]	[REDACTED]	Bernicia
NW	[REDACTED]	[REDACTED]	FSB
NW	[REDACTED]	[REDACTED]	Business in the community
ESW	[REDACTED]	[REDACTED]	Community action Suffolk
ESW	[REDACTED]	[REDACTED]	Essex Chamber of Commerce
ESW	[REDACTED]	[REDACTED]	Norfolk and Suffolk Local Nature Partnership
ESW	[REDACTED]	[REDACTED]	Norfolk Rivers Trust
ESW	[REDACTED]	[REDACTED]	Suffolk Wildlife Trust
ESW	[REDACTED]	[REDACTED]	Basildon council
ESW	[REDACTED]	[REDACTED]	Braintree District Council
ESW	[REDACTED]	[REDACTED]	Alzheimer's Society
ESW	[REDACTED]	[REDACTED]	Southend-on-Sea Borough Council
ESW	[REDACTED]	[REDACTED]	Maldon District Council,
ESW	[REDACTED]	[REDACTED]	London Borough of Havering
ESW	[REDACTED]	[REDACTED]	National Energy Action
ESW	[REDACTED]	[REDACTED]	Chelmsford City Council

*Two of the in-depth interviews conducted are not listed in the table above as they chose to be anonymous.



SMEs

For SME business customers, a series of seven telephone interviews were conducted across both the NW and ESW regions. Details of SME respondents are shown below (note, all were happy to be listed as organisations who took part):

Region	Organisation	Business type
NW	Recyke y'bike	Bicycle store
NW	Y Salon	Hairdresser
NW	KO Bathrooms	Bathroom renovator
NW	Geo Michie Ltd	Locksmiths
ESW	Fusion Hair	Hairdresser
ESW	Gleneagles Guesthouse	Hotel / Hospitality
ESW	Peaberries coffee shop	Coffee shop

Large businesses

A series of six in-depth telephone interviews were also conducted with respondents who represented larger organisations, in order to achieve an overall sample of business customers of various sizes and industries. Details of the larger organisations interviewed are outlined below:

Region	Organisation
NW	Ward Hadaway
NW	Ryder Architecture
NW	Womble Bond Dickinson (UK) LLP
NW	Thirteen Group
NW	Greggs
NW	Beamish Museum





Results

An in-depth review of the findings of the research programme.

Results

Customer or citizen

In the water sector and beyond, organisations are being encouraged (for example, by regulators including Ofwat) to think about their consumers and service users from a broader perspective, as citizens of local communities. NWG wanted to test this idea with customers and stakeholders through this research, to understand how they thought of themselves (as customers or as citizens) and how they wanted NWG to think of them.

To open discussions, we asked respondents to consider their relationship with NW/ESW, and with support from definitions and analogies developed in partnership with NWG we asked them to think about whether they saw themselves as customers or citizens.

Household customers

Overall, a notable majority of household customers engaged considered themselves customers rather than citizens.

There were several common reasons for this, namely considering their relationship with the organisation to be transactional in nature, in conjunction with not having experienced issues related to NW/ESW's services which may have provided an opportunity for them to engage with NW/ESW beyond receiving a bill. Where respondents had directly experienced NW/ESW's customer service experience, they typically mentioned this had been resolved in a positive manner. It was highlighted by respondents in the Durham and Darlington group that from the position of a customer in a financial transaction they felt more empowered to have expectations around the service they receive.

- *"In my opinion, the definition of a customer is that I pay money for the service, Northumbrian Water provides me with water and wastewater treatment and sewage, and I pay for the privilege of that. So by and large, I view myself as a customer" (Newcastle/Northumberland, household group)*
- *"For me it would be customer, for me it's just a purely transactional basis. Beyond that, I really don't have much desire to go beyond that" (Essex, household group)*
- *"I would prefer to be a customer rather than a citizen. Because as a customer, I believe that I have the right to be able to contact Northumbrian Water and speak to somebody on a one-to-one basis to try to get any problems I may have sorted out. As a citizen, the Northumbrian Water*



supply service to the whole of the community. And as a citizen, I wouldn't have as much right to be able to contact the water authority and discuss any problems I had. So, I'd prefer to be a customer." (Durham/Darlington/Teesside, household group)

Not having a choice of water services provider was also highlighted by some, in that respondents felt that the lack of choice they had encouraged a transactional feel to their relationship.

□ *"It's sort of forced onto you. So, you become a customer by that relationship" (Essex, household group)*

A minority liked the idea of being thought of as citizens by NW/ESW, to reflect the importance of water in our lives and the wider role of the organisation. For example, they noted interest in understanding any sustainability and environmental protection aspects of the organisation's role.

□ *"I feel citizen will be the better word than customer. Customers is a sense of 'Okay, job done', you are paying the bill, but when you feel you're a citizen, you feel that the water is the main thing in your entire living life, so I would love to be considered a citizen rather than a customer" (Essex, household group)*

□ *"I do lean a little bit more towards the citizen side as I do want to know that the companies that I may be forced to use, or that I'm choosing to use, are making good choices, and especially with sustainability and everything being pushed on us lately. I would say I would probably lean more towards citizen because I want to know that other stuff is going around as well" (Essex, household group)*

Some NW household respondents had a mixed view, suggesting that they wanted to be considered a customer primarily, for example with costs to consumers considered to prevent them being less affordable for bill payers, but wanted to be considered as a citizen in its wider work such as environmental protection.

□ *"The fact that they have to be environmentally aware and do things to improve water quality, sewerage removal, quality and all the rest of it automatically makes you a citizen of the system. First and foremost as a customer I'm going to get the best price I can for what they're doing" (Newcastle/Durham/Darlington, household group)*

Future customers had a different perspective to offer, as they were not yet bill payers and therefore typically didn't consider themselves to have a relationship with NW/ESW. Future customers in Essex said they would like to be seen as a customer if they were dealing with ESW in a way in which there was a transaction, for example if they needed to speak to someone about their water quality, whereas on occasions which did not involve a direct contact with ESW they were happy to be seen as a citizen.



Business customers

From the perspective of business customers, their views were mixed. Some wanted to be treated as citizens, or a bit of both, with a more holistic view of their needs considered, such as the organisation's impact on their local environments.

- *"I think as citizens. In terms of supplying clean water, which I guess is what we both socially require, then that's more of a customer relationship. But the more holistic, making sure that waste is dealt with appropriately and that our residencies are protected and all those things then probably as citizens." (SME – Recyke y'bike)*
- *"On the basis you've described I think citizens because certainly I think they need to have regard to things like creating disruption outside of the office, not just delivering clean water. I suppose it would [differ] because you've said the citizen thing is what they do in the wider environment. Certainly, within the building it's very much a customer, we want water, so the associated sewerage type services being properly managed and we're a customer for that. But certainly, in terms of disruption and managing other facilities, then I suppose that's more of a citizen thing, so I think the answer is yes." (Large business – Ward Hadaway)*
- *"Within sort of the context of how that's described, probably the latter in terms of the citizens, because I can see why they would like to make the distinction between customers and citizens. We have a similar debate in our business" (Large business – Thirteen Group)*

A minority of business representatives reflected the household audience in that their preference was to be treated as a customer rather than citizen. This was linked to service expectations and maintaining a professional relationship between the two parties.

- *"I think customers because I know this sounds cynical, but this is a business point of view. This is business. To know that we're paying now, our businesses need to know that they're paying their water rights and they want the best possible price... I think if you're talking about citizens, that's when you know, obviously they do an awful lot with WaterAid and people like that. And then they would apply to their citizens. Citizens sounds more friendly but customers is very business focused, and I know that might sound harsh, but you're not going to have a cup of tea with your local water supplier, are you? You're going to want to do business with them" (Stakeholder - Anonymous)*



□ Stakeholders

When the same question was posed to stakeholders, the majority wanted to see NWG treat service users as citizens rather than customers.

Some noted that they welcomed this outlook from the organisation. There were various reasons why stakeholders felt this way, but this largely centred on the view that NW/ESW should be thinking more broadly about the nature of the service it delivers and how this impacts on local people, and this change in viewpoint would support this.

The most common reason was around the level of involvement of service users – it was suggested that a citizen relationship implied greater involvement or engagement with NWG and the role played in communities. There was a sense that this was considered a positive thing.

- *“If I was running Essex & Suffolk Water, I would see them as citizens, because you can move away from the command economy. Which is, you will only pay £450 for your water, and you could engage with them at a totally different level, because you can ask for their views... A customer implies a delivered service, a citizen creates involvement” (Stakeholder - Norfolk Rivers Trust)*
- *“As citizens you would feel more invested in it. If the water board are out and about in the community and people see their signs and staff out and about, if they have a problem I think that makes them feel more comfortable to be raising that” (Stakeholder – Alzheimer’s Society)*
- *“I think more citizens, because I think if you're going to build that relationship with the residents and businesses, it's great for them to know, I suppose it puts a bit more personable [lens] on it so that they know that and what they're doing in the area as well. So they have a bit more of a connection, I would say” (Stakeholder – Braintree District Council)*
- *“My instinct would be citizens, as water is a fundamental human right. I think the water industry is obviously privatised in this country, meaning that there are investors and shareholders to be considering. But my thought would be that priority should go to the individuals who are receiving water in the region, and that it is their fundamental right to receive that water” (Stakeholder – Business in the Community)*
- *“I think the move from consumer or customer to citizen or steward, so more involved with you... it is a strong step forward” (Stakeholder – Heritage Coast)*
- *“Customers of Essex & Suffolk Water have no choice but to buy their water from them. It's not something we choose to do. It's not only the best company it's the only one. So, I think they have a huge social responsibility to be considering their customers as people and communities in all the areas that they work in” (Stakeholder – Suffolk Wildlife Trust)*



Another angle on this was the perception that a more macro view of service provision, i.e. thinking about the customer base as citizens, would ensure the best service for greatest number of customers. For example, it was asserted that ensuring that infrastructure is the best it can be would help to ensure reliability for the highest number of service users, which should be a focus rather than bespoke customer service provision:

- *"I would say citizen. I would say that the provision of the infrastructure over the individual... I think if you focus on the customer, the individual, your services will decline because you will forever have to adapt your service to individual need, and that's impossible to do with the various cutbacks and funding problems that we all suffer from. I am a firm believer that if you provide a good service from the start the customer shouldn't need to contact you, in the same way that you hope you never have to call the police, but they're there, that kind of thing" (Stakeholder - Maldon District Council)*
- *"I think people understand more where they stand when they are considered a customer, they know that they've been provided with a service, and they've got certain expectations of that organisation if they are served as a customer and treated as a customer. But I do understand the point around these citizens being affected by all the other situations that can happen with water incidents. So, if there was, like a pipe burst, or something, which has happened quite a few times in London, and in particular when it comes, we had flooding didn't we a few months ago in London. And people living in basements flats, and them being flooded out and things like that. But then I think if they still thought of themselves as customers, they would know that there was a responsibility from the organisation that they'll be looked after" (Stakeholder - Anonymous)*

Some felt it would differ depending on which element of NWG's role they were thinking about.

- *"I suppose depending on what element you're looking at is whether they're treated as a customer or a citizen, is going to depend on that really" (Stakeholder – Anonymous)*
- *"I suppose I'm thinking about a personal experience now, I wouldn't think of myself as a customer if Northumbrian Water were carrying out some sort of repair or installation outside my home. Whereas I would think of myself as a customer when I was using the household water supply" (Stakeholder - Bernicia)*

Environmental impacts, sustainability, maintenance of local water environments, and long-term water resource planning were aspects most highlighted in relation to a citizens view, in the sense that stakeholders felt a citizens view was more appropriate when thinking about these due to the potential wider public benefit they would derive:



- *“The maintenance of reservoirs and things like that, they’re all public spaces, and natural spaces where people go to enjoy nature, but also where biodiversity thrives as well. So, it is all very much in the public interest, I think, that these services are well-conducted and these spaces are well looked after. I think the public have a vested interest in keeping these areas well looked after, because they are ultimately the ones who are going to enjoy them and benefit from them”*
(Stakeholder - Business in the Community)

- *“I think citizenships are very much now the twenty-first century approach to customer service. So, it’s a fairly easy answer that, you know, it’s a citizenship role. For instance, mitigation of climate change, community work, are not related to tap water, they’re related to managing the water resource, both in terms of extreme weather management because of the extremities from heavy flooding to drought. But also of course, to wider security of supply and those off-model linkages. So, on that level I think, from certainly how the council operates, we very much operate as community servants, rather than anything more narrow. So, a broader brush approach is very much the way forward”* (Stakeholder – Anonymous)

- *“I suppose as a customer, I would want them to deal with my specific and particular issue. I suspect that would be narrow and to the point rather than wide and multi aspect. So as a customer you would expect them to deal with the issue that you have, as a citizen, you would be talking about and expecting them to deal with bigger issues that wouldn’t necessarily be in your day-to-day life, like climate change, availability in the region”* (Stakeholder - Norfolk and Suffolk Local Nature Partnership)



Some stakeholders flagged an expectation that there would be differing resource requirements of taking a citizens view rather than customer, namely that treating customers as citizens would need greater resource, due to the expectation of greater involvement. It was suggested that the volume and level of information it would be appropriate to share with someone considered a citizen would be greater than that to share with a customer, and one stakeholder, who had experienced similar conversations within their own organisation, noted the need to have parameters around what a citizen view would look like in practice.

- *“I think they’d expect to be a bit more involved and receive a bit more information as a citizen. And as a citizen I would assume that they wouldn’t expect to be as sensitive towards matters, they’d have to be more understanding if they were treated as a citizen rather than a customer” (Stakeholder - County Durham and Darlington Fire and Rescue Service)*
- *“I think there needs to be realism, so being realistic around the citizen approach, so the resources to do that. But then also bearing in mind that some people would just want to be a customer, they won’t want to get involved with the context” (Stakeholder - Community Action Suffolk)*
- *“I think the key to the citizen element is just to make sure that it’s kind of within reason, in it’s got a boundary around it. Otherwise, it can become too wide and too all-encompassing, and then you find yourself serving a lot of people and trying to meet the needs. It’s probably too many diverse groups or individuals. So I think yeah, they’ll understand the distinction between the two groups between a customer and a citizen, but I think it has to be within reason” (Large business – Thirteen Group)*

One noted a preference for the term “consumer” instead of “citizen”, however also expressed that treatment should differ depending on which topic is up for discussion.

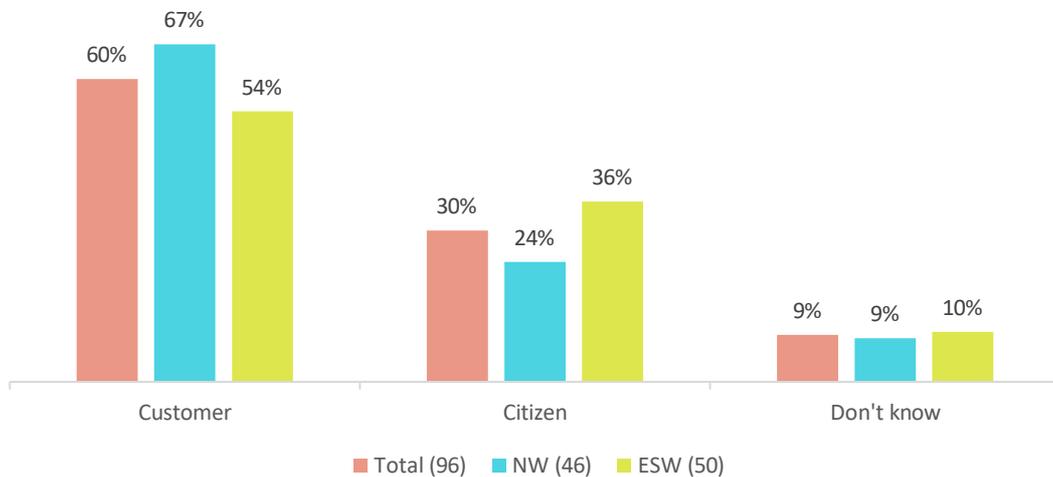
- *“As I’d say that a customer in my eyes is the bill payer and the person that has the individual relationship with the water company, a consumer could be anybody who accesses or utilises any of the services. So, whether that’s water from a tap, or they’re impacted by something like you say, like roadworks or something that’s going on, I would say that that will be based on the consumer relationship. I don’t really like citizen. I think a customer, it would be a person with a direct relationship, so when you’re talking billing that would be who you’d be having the billing conversation with. But if you were talking supply interruption, or as I say they’re impacted by it, indirectly impacted as well, by something else that the water company’s doing within the area, then I would say that it would be the consumer relationship that would apply in that instance” (Stakeholder - National Energy Action)*



Customer or citizen polling (household customers only)

When the idea was revisited in the household customer workshops following detailed discussion of NWG’s outcomes (the results of which follow in the remainder of this report) qualitative preferences were broadly reflected in the quantitative results gathered via Zoom polling.

In terms of how NW/ESW think about you in their decision making, do you want to be treated as a customer or a citizen?



Overall, over half of household respondents voted that they wanted to be treated as a customer in NW/ESW’s decision making (60% = 58 customers). The split of customer versus citizen amongst NW respondents was clearer cut than amongst ESW respondents, with over a third (36%) in ESW voting that they would like to be treated as a citizen. When looking at the results by geography as shown in the table below, ‘customer’ was the most common response across most regions with the notable exception of Essex, where ‘citizen’ was preferred.

	Newcastle, North'land	Durham, Darlington, Teesside	Additional NW	Essex	Suffolk
Base	18	17	11	26	24
Customer	89% (16)	65% (11)	36% (4)	35% (9)	75% (18)
Citizen	6% (1)	24% (4)	55% (6)	54% (14)	17% (4)
Don't know	6% (1)	12% (2)	9% (1)	12% (3)	8% (2)

Please be cautious of the small sample sizes when considering the % results above. Not all attendees voted in the poll.



Pillars and priorities

In this section, respondents were asked to think about customer experience, including discussion around NWG's priorities and KPMG Nunwood's pillars.

What makes a customer experience outstanding? *(household customers only)*

Within the workshops, customers were asked to write in the chat function any words or ideas that they associated with the concept of outstanding customer service in general (i.e. not specific to NW / ESW).

The following key areas emerged:

- High-quality communication: communication needs to be friendly and courteous, focused on a key point of contact and framed within a local understanding.
- A responsive service: communication should be timely and any action necessary be undertaken quickly and efficiently.
- A personal service: the service needs to ensure that the customer feels valued and understood, with genuine care and concern shown.
- A reliable service: appointments should be kept and promises fulfilled.



Pillars and priorities

Participants were asked their opinions of the six pillars model of customer service developed by KPMG Nunwood and the six priorities of excellent customer service developed by NW/ESW. Both can be seen below:

Six pillars – KPMG Nunwood

 <p>Using individualised attention to drive an emotional connection.</p> <ul style="list-style-type: none"> • Understand my needs • Recognise our history together • Individualise what you do 	 <p>Being trustworthy and engendering trust.</p> <ul style="list-style-type: none"> • Do what you say • Keep me informed • Stand for more than profit
 <p>Turning a poor experience into a great one.</p> <ul style="list-style-type: none"> • A warm and sincere apology • Go the extra mile • Give me options 	 <p>Managing, meeting and exceeding customer expectations.</p> <ul style="list-style-type: none"> • Guide me through the process • Use plain english not jargon • Fulfil your promises
 <p>Understand the customer's circumstances to drive deep rapport.</p> <ul style="list-style-type: none"> • Invest time to listen to me • Treat me as your priority • Respond appropriately 	 <p>Minimising customer effort and creating frictionless processes.</p> <ul style="list-style-type: none"> • Give me clear instructions • Advise me of pitfalls ahead • Provide me the answers I need

Six priorities – Northumbrian Water Group

 <p>STAY CONNECTED TO WHAT MATTERS MOST</p> <p>We make sure our services are accessible, available and intuitive for our customers to use. We design our systems and processes around customer journeys and we build emotional intelligence into them so it's easy to use the channels chosen, all the time.</p>	 <p>KEEP OUR PROMISES</p> <p>Anticipate customers' needs. Deliver solutions and tell them what they need to know before they have to contact us. Do what we say we will – getting it right first time, fast time, every time.</p>
 <p>OWN THE CUSTOMER'S PROBLEM</p> <p>Be accountable, understand the full issue and put it right quickly, completely and without fuss. Make sure customers are wowed by what we do to say sorry.</p>	 <p>PROMOTE OUR GREAT WORK LOCALLY</p> <p>Our customers see us as their business, providing their family and community with the services they need, now and in the future. Sustainably, ethically and in trusted partnership.</p>
 <p>SHOW EACH CUSTOMER THEY ARE SPECIAL</p> <p>Do the basics brilliantly. Show customers you know them. Make it clear we know what matters to them and focus on it. Be brave in creating new experiences and journeys.</p>	 <p>MAKE IT EASY</p> <p>Our customers enjoy interacting with us because we make it simple and effortless.</p>



Hereafter, the KPMG Nunwood model is referred to as the pillars and Northumbrian Water's priorities as the priorities.

For both the pillars and priorities, participants within stakeholder and business in-depth interviews were asked to rank the pillars in order of importance to them. The overall rankings were then established by calculating mean scores. They were then asked to explain their ranking of the most and least important pillar. They were also asked whether they felt the pillars or priorities resonated the most with them. In addition, some customers in the focus groups also ranked the priorities when time allowed.

In interpreting the rankings, it should be noted that participants sometimes found it difficult perform the task, because they found all the pillars / priorities to be important:

□ *"To be honest the order, I think it's difficult to rank them 1 to 6. I think they're all important in their own individual ways. It's very much dependant on that, that individual, isn't it? Like I said before, if you're a vulnerable customer, then you could probably argue that customer special would probably be top of the list. It just depends on who you're talking to, I suppose"*
(Stakeholder – Gentoo)

It is possible that this difficulty is reflected in the closeness of the mean scores, indicating that there was a high level of variation in individual rankings.

Ranking of the priorities

The **overall** ranking of the priorities is shown below, with mean score shown in brackets:

- 1) Keep our promises (2.1)
- 2) Own the customer's problem (2.7)
- 3) Make it easy (3.1)
- 4) Stay connected to what matters most (3.2)
- 5) Promote our great work locally (4.8)
- 6) Show each customer they are special (5.0)



The rankings varied slightly by region, with participants from the ESW area ranking ‘show each customer’ in 5th place and ‘promote our great work locally’ in 6th position, however, be cautious that sample sizes are low when considering this finding. The mean score broken down by region is show in the below table:

Priority	NW ranking (mean score)	ESW ranking (mean score)
Keep our promises	1 (2.2)	1 (2.0)
Own the customer’s problem	2 (2.6)	2 (2.8)
Make it easy	3 (3.0)	4 (3.1)
Stay connected to what matters most	4 (3.4)	3 (2.9)
Promote our great work locally	5 (4.5)	6 (5.4)
Show each customer they are special	6 (5.2)	5 (4.8)

‘Keep our promises’ was felt to be integral to the - something that was fundamental to the formation of outstanding customer service. Participants felt that keeping promises was critical to the formation of trust with customers. Without trust, there is nothing. With trust, all the other priorities can develop:

□ *“The keep our promises. Because for all the services that are around, I mean it's like phone services, water services, any service of that magnitude, people go on the phone, and they report something. And no one connects them or they're waiting days or something like that. So, keep the promise. If a customer phones, or you phone a customer and say I'm going to phone back, I'm going to get this sorted, do it. Don't talk rubbish and then come back and expect people to not be jumping up and down. If you say we keep our promises, they've got to be kept” (Stakeholder – Anonymous)*

Conversely, ‘show each customer they are special’ was felt to be the least important priority because it did not reflect the nature of the interaction between NWG and its customers, which was felt to be transactional. It was questioned how important it was for a customer to feel special and also how feasible it would be for NW / ESW to achieve this:

□ *“I guess this maybe sounds a little bit fluffy to me. Yeah, I mean, it's a transaction, at the end of the day, and I don't understand exactly how that would be enacted and how really an organisation as huge as Northumbrian Water with as many customers as they have would really be able to have that understanding” (Stakeholder – Business in the community)*

□ *“It's like all organisations, I'm not sure how you treat an individual as special. And whether anybody would actually feel special on that, it's a difficult one, isn't it? Because if they're showing empathy and the people are professional on the telephone, you will, you will create that one to*



one with them and create that rapport. But whether you can go out of your way to make them feel special, when they're phoning up and saying, I can't afford my bill or I haven't had any water for 10 weeks, I don't know" (Stakeholder - Norfolk and Suffolk Local Partnership)

Appropriateness of the priorities

Both customers and stakeholders / businesses felt the priorities were appropriate. In particular, both groups appreciated the strong customer focus within the priorities:

- *"I like the fact that they're very, again, customer focused, and they want to make sure that the customer is happy with the service that they're providing" (Newcastle/Northumberland group)*
- *"I felt like it included the basics of what you would expect a water company would deliver. But not only just to deliver those, but to do it well. And that's really important that they do that. There was a good customer focus within there" (Stakeholder - National Energy Action)*

However, there was some discussion amongst both customers and stakeholders / businesses that the priorities would benefit from an acknowledgement of environmental concerns:

- *"As far as I can see there's absolutely nothing about the environment in there, you seem to think of Northumbrian Water from your point of view as a supplier of water, you also get rid of the sewerage and what do you do with it and how many times has Northumbrian Water been contacted say, in the last three years about discharges of sewage into the waterways and I think we've got to think about that as well..."(Newcastle/Northumberland group)*

In addition, some stakeholders / businesses expressed a desire to understand more fully how the priorities seek to be inclusive, meeting the varied needs of a wide customer base in general and, specifically, the more complex needs of vulnerable customers:

- *"Just really on that calling out that inclusivity side of things, customer experience and customer journeys should always acknowledge the fact that we are different, and that people have different needs and requirements. And that is something that I think they could probably bring out and make a little bit clearer" (Stakeholder - National Energy Action)*
- *"The only thing which I think maybe needs to be a little stronger is if people have got those additional needs about how you identify that. I think if you look on the website and you find things ... I think that needs to be if you've got those issues or you need extra support how you get it" (Stakeholder – Alzheimer's Society)*



Finally, there was also a desire amongst all participant groups to ensure that strategy becomes action and to evidence this process:

- *“The only thing I would say is how are you then going to link this to actually your service delivery? And then how are you then going to measure? If you're actually achieving these, then that'll be the hardest thing. And I think that's the hardest thing with any strategy. And it's easy to put those out there. And we're going to do this, this this, but how is it going to be doing on the ground? And I suppose, how are we going to measure that we're actually achieving in all these key areas and doing the best for our customers and community?” (Durham/Darlington group)*
- *“I suppose the devils in the detail, isn't it? Behind the high-level principle priorities” (Stakeholder - Bernicia)*

Ranking of the pillars

As with the priorities model, the overall rankings given for each pillar is shown below and the mean score shown in brackets.

1. Integrity (2.5)
2. Expectation (3.1)
3. Empathy (3.6)
4. Time and Effort (3.7)
5. Resolution (3.9)
6. Personalisation (4.1)

There was some variation between regions, with respondents from ESW areas ranking empathy as the least important pillar. The mean score broken down by region is show in the below table:

Pillar	NW ranking (mean score)	ESW ranking (mean score)
Integrity	1 (2.6)	1 (2.2)
Expectation	2 (3.2)	2 (3.0)
Empathy	3 (3.3)	6 (4.1)
Time and Effort	4 (3.6)	3 (3.7)
Resolution	5 (3.9)	4 (3.9)
Personalisation	6 (4.1)	5 (4.0)



The overall ranking of both the pillars and priorities are summarised below:

PILLARS RANKING		VS	PRIORITIES RANKING	
1	Integrity		Keep our promises	1
2	Expectations		Own the customer's problem	2
3	Empathy		Make it easy	3
4	Time and effort		Say connected to what matters most	4
5	Resolution		Promote our great work locally	5
6	Personalisation		Show each customer they are special	6

The reasons why integrity was listed as the most important pillar and personalisation as the least aligned to the reasons given for the priorities rankings.

Integrity was viewed in a similar way to keep our promises and, therefore, was considered to be the foundation of outstanding customer service:

□ *“For me in terms of the services that my teams provide the key thing that keeps on coming up when we talk to our customers is that they feel they need to trust us and believe us when we say we’re going to do something. If they don’t trust us then when we say we’ll come out and we’ll monitor this noise or this particular issue or we’ll look into your housing circumstance, then the whole customer interaction is busted, we’re not going to get a good experience from it. That’s why I believe integrity is very important to how we provide our services” (Stakeholder – Maldon District Council)*



Similarly, personalisation was understood to be synonymous 'with show each customer they are special'. Participants questioned whether this was both necessary and feasible:

- *"If you're delivering a service of the sort which Northumbrian Water does, even when you're being a citizen it doesn't really need to be personalised. Sticking water through the taps for instance, is not a personalised service. It's not like you're delivering me financial services when I do want them very personalised. This is a service being delivered to hundreds of thousands of people, I think personalising it is not the issue, it's more about the reliability of the service than it being personalised. I don't want the water coming out with my name printed in it" (Large business – Ward Hadaway)*

Did priorities or pillars resonate the most?

When participants were asked to discuss whether priorities or pillars resonated with them the most strongly, there was a general sense that the person specific language of the priorities was more appropriate. They felt that it seemed more unique to NW / ESW. In contrast, the pillars model was felt to be appropriate but was framed in a business language that made it feel too high brow:

- *"I think probably the second one. The six pillars was fine, but I think the six priorities model, I think that was more, it was less academic in its theory and more applied. If that makes sense? I think I got the six pillars model, but it is that. It is a model, and I think the key to it is the application. So I think within the six priorities that we apply, you can see elements of those six pillars coming through, but it's how you make that more real for people, which is much too much what they're trying to do within the six priorities model. But it was the second one that sort of struck more of a chord because it kind of it said, this is what we'll do, and then we'll kind of try and stand for if you like" (Large business – Thirteen Group)*
- *"They were definitely better I think. Definitely more suited, more bespoke to Essex & Suffolk Water. And some of them are more specific, so as I was saying about problem resolution there's one specifically for owning problems and being accountable and fixing them, so that's bang on, keeping promises again. I think they definitely, they do link with the other ones but they're much better" (Stakeholder - Southend-on-Sea Borough Council)*
- *"Yeah, I think my preference was the second one to pick out of the two if I had to pick. And one of the reasons I think is because of the length, with the choice of language and the way that [we] talk as a company. We have a specific way of talking to customers and stakeholders that is a very genuine way of talking rather than a bit more high level, you can put it out there. The first example is probably a little less relatable and the second one is more relatable without being condescending though. I think sometimes you go too far on that side and trying to be like*

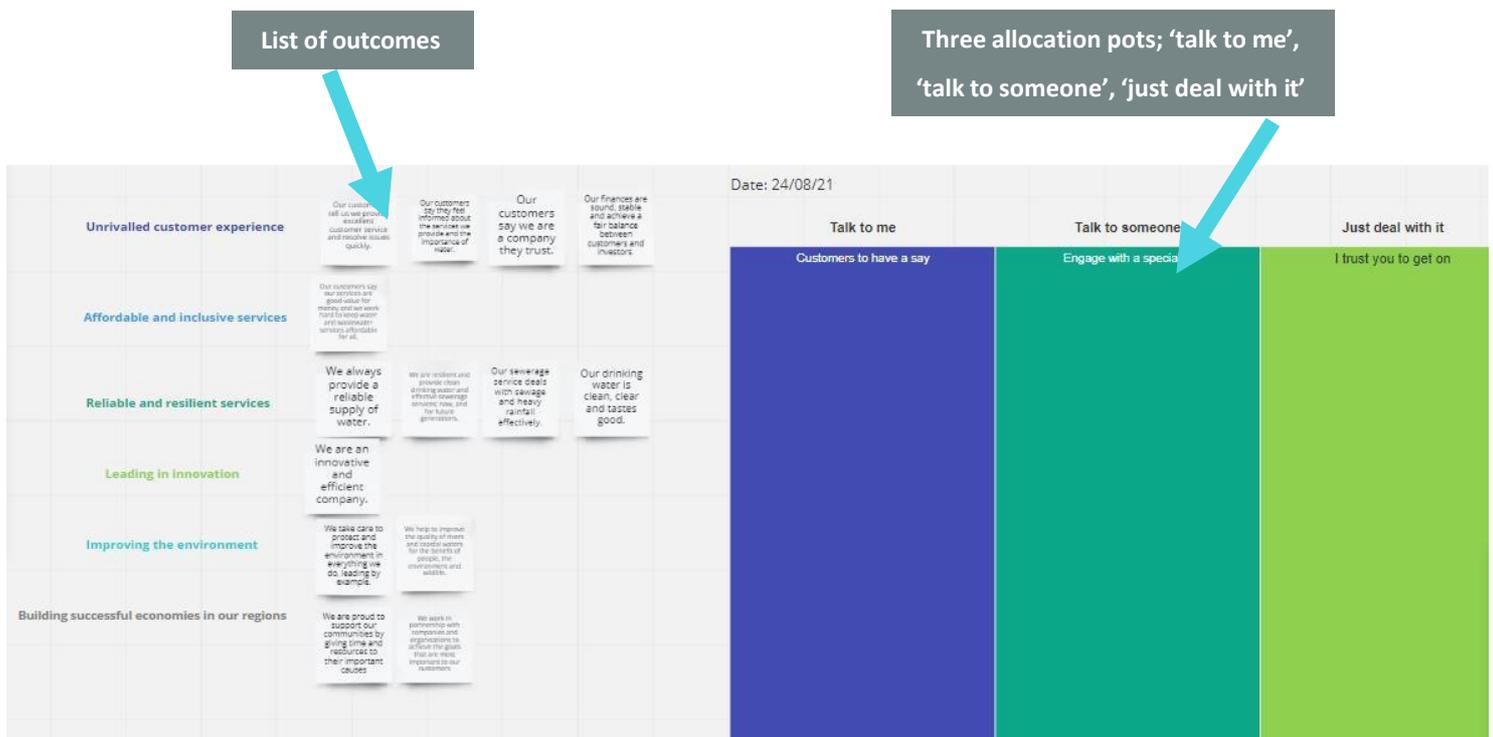


laughable, or down to earth laughable, that it can sometimes look like you're talking down to somebody, I don't think it's the case with Northumbrian, I think it's a good balance of being down to earth versus being condescending” (Large business – Greggs)

Company outcomes

This section of the discussion was designed to reflect the conversations in the DtC research in 2016, although, please note, company outcomes have slightly differed since then. As with in DtC, in order to understand which of NWG's outcomes household customers, business customers and stakeholders were most interested to influence and play a role in the way that services are shaped and delivered, they were engaged in an outcomes sorting exercise.

Respondents were introduced to the company's high-level aims (outcomes) as they had been in the DtC research. To ensure the sessions remained interactive, whilst being held online, an online sorting exercise in the household customer workshops was conducted using the online platform, Miro. The facilitator for each breakout session shared their screen with respondents in each breakout room with the list of outcomes on one side and the three allocation ‘pots’ on the other side. An example can be seen below:



In total, there were **19** breakout rooms across the household workshops. Household workshop respondents worked collectively within their breakouts to allocate each outcome into one of the three 'pots'. Where there were some conflicting views, allocations were made based on majority views per breakout. Where respondents were collectively unsure of where to allocate outcomes, these were left outside of the board and classed as 'don't know' in the analysis – these results are included where they occurred.

Where breakout groups felt that outcomes should be allocated to more than one pot, these have been counted in both pots for analysis. For these reasons, the number of allocations vary throughout this section of the report, though the number of breakout rooms remains the same (19).

For non-household customers and stakeholders, an online survey pre-task was used which can be found in appendix 9 of this document. The pre-task was reflective of the household customer allocation task, asking respondents to allocate each outcome to one of the three 'pots'. All respondents were provided with the same level of information. Please note, three stakeholders/business customers who did not go on to take part in an interview completed the online exercise, two of whom completed the outcomes categorisation section.

The categories used for the exercise were as follows:

'Talk to me'	<ul style="list-style-type: none">• This category was for the outcomes that customers / stakeholders would like NWG to engage with them about so they could have a say on what the company should be providing to offer a great service
'Talk to someone'	<ul style="list-style-type: none">• This category was for the outcomes that customers / stakeholders would prefer NWG to engage with someone else, i.e. another specialised organisation that could use their expertise to speak on their behalf
'Just deal with it'	<ul style="list-style-type: none">• This category was for the outcomes that customers / stakeholders trusted NWG to get on and deliver using their internal expertise without having to consult with customers, stakeholders or external specialists

Once respondents had categorised the outcomes, moderators probed the reasons for their choice.



If time allowed, at the end of the outcome allocation exercise, household respondents were also asked to rank those that they had allocated to the 'talk to me' in order from most important to least important, based on how important it is they speak to and engage with them.

The table below demonstrates which pot [household](#) customers were most likely to place each outcome in:

HOUSEHOLD	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (75%)	3 (15%)	2 (10%)	-
Our customers say we are a company they trust.	12 (63%)	1 (5%)	6 (32%)	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	18 (78%)	2 (9%)	3 (13%)	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	1 (4%)	17 (68%)	6 (24%)	1 (4%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	16 (84%)	-	3 (16%)	-
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	9 (43%)	5 (24%)	7 (33%)	-
Our sewerage service deals with sewage and heavy rainfall effectively.	2 (15%)	7 (54%)	4 (31%)	-
We always provide a reliable supply of water.	2 (11%)	2 (11%)	13 (68%)	2 (11%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	1 (7%)	9 (60%)	5 (33%)	-
Leading in innovation				
We are an innovative and efficient company.	1 (5%)	5 (26%)	11 (58%)	2 (11%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	3 (14%)	15 (68%)	3 (14%)	1 (5%)
We take care to protect and improve the environment in everything we do, leading by example.	2 (10%)	16 (76%)	2 (10%)	1 (5%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	12 (60%)	2 (10%)	5 (25%)	1 (5%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	4 (20%)	8 (40%)	6 (30%)	2 (10%)



The table below demonstrates which pot stakeholders and business customers were most likely to place each outcome in:

STAKEHOLDERS AND BUSINESS CUSTOMERS	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (36%)	11 (26%)	13 (31%)	3 (7%)
Our customers say we are a company they trust.	15 (36%)	6 (14%)	17 (40%)	4 (10%)
Our customers tell us we provide excellent customer service and resolve issues quickly.	15 (36%)	8 (19%)	16 (38%)	3 (7%)
Our finances are sound, stable and achieve a fair balance between customers and investors.	6 (14%)	8 (19%)	20 (48%)	8 (19%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	11 (26%)	18 (43%)	9 (21%)	4 (10%)
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	8 (19%)	11 (26%)	19 (45%)	4 (10%)
Our sewerage service deals with sewage and heavy rainfall effectively.	5 (22%)	6 (26%)	7 (30%)	5 (22%)
We always provide a reliable supply of water.	10 (24%)	8 (19%)	20 (48%)	4 (10%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	8 (19%)	9 (21%)	22 (52%)	3 (7%)
Leading in innovation				
We are an innovative and efficient company.	6 (14%)	18 (43%)	10 (24%)	8 (19%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	10 (24%)	19 (45%)	9 (21%)	4 (10%)
We take care to protect and improve the environment in everything we do, leading by example.	11 (26%)	25 (60%)	3 (7%)	3 (7%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	19 (45%)	15 (36%)	4 (10%)	4 (10%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	24 (57%)	11 (26%)	4 (10%)	3 (7%)



The table below shows how allocations were made between audience types. Please consider the differing approach taken to this allocation exercise between audience types when comparing results - household customer base sizes refer to the number of breakout rooms that allocated the outcome to each pot based on the majority views of people within that breakout, whereas stakeholder and business respondents allocated outcomes individually. Please note differing base sizes.

Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)	HOUSEHOLD (allocations 13 - 25)	STAKE/BUS (respondents - 42)	HOUSEHOLD (allocations 13- 25)	STAKE/BUS (respondents - 42)
Our customers say they feel informed about the services we provide and the importance of water.	75%	36%	15%	26%	10%	31%	-	7%
Our customers say we are a company they trust.	63%	36%	5%	14%	32%	40%	-	10%
Our customers tell us we provide excellent customer service and resolve issues quickly.	78%	36%	9%	19%	13%	38%	-	7%
Our finances are sound, stable and achieve a fair balance between customers and investors.	4%	14%	68%	19%	24%	48%	4%	19%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	84%	26%	-	43%	16%	21%	-	10%
Our drinking water is clean, clear and tastes good.	43%	19%	24%	26%	33%	45%	-	10%
Our sewerage service deals with sewage and heavy rainfall effectively.	15%	22%	54%	26%	31%	30%	-	22%
We always provide a reliable supply of water.	11%	24%	11%	19%	68%	48%	11%	10%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	7%	19%	60%	21%	33%	52%	-	7%
We are an innovative and efficient company.	5%	14%	26%	43%	58%	24%	11%	19%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	14%	24%	68%	45%	14%	21%	5%	10%
We take care to protect and improve the environment in everything we do, leading by example.	10%	26%	76%	60%	10%	7%	5%	7%
We are proud to support our communities by giving time and resources to their important causes	60%	45%	10%	36%	25%	10%	5%	10%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	20%	57%	40%	26%	30%	10%	10%	7%



The table below shows how allocations were made by [household](#) customers in this research compared with the way allocations were made in the DtC research. It is important to note that the list of outcomes differed between research – this was mostly wording changes but in some cases more significant changes to the sentiment of the outcomes were made, therefore this should be considered when interpreting results. Please also consider differing base sizes.

HOUSEHOLD Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	DtC (tables 15–19)	DtF (allocations 13–25)						
Our customers say they feel informed about the services we provide and the importance of water.	87%	75%	-	15%	7%	10%	7%	-
Our customers say we are a company they trust.	40%	63%	7%	5%	47%	32%	7%	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	47%	78%	-	9%	47%	13%	7%	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	42%	4%	16%	68%	26%	24%	16%	4%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	67%	84%	7%	-	20%	16%	7%	-
Our drinking water is clean, clear and tastes good.	27%	43%	20%	24%	53%	33%	-	-
Our sewerage service deals with sewage and heavy rainfall effectively.	33%	15%	22%	54%	44%	31%	-	-
We always provide a reliable supply of water.	18%	11%	12%	11%	71%	68%	-	11%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	7%	7%	14%	60%	79%	33%	-	-
We are an innovative and efficient company.	40%	5%	7%	26%	53%	58%	-	11%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	11%	14%	56%	68%	33%	14%	-	5%
We take care to protect and improve the environment in everything we do, leading by example.	-	10%	69%	76%	25%	10%	6%	5%
We are proud to support our communities by giving time and resources to their important causes	27%	60%	20%	10%	47%	25%	7%	5%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	13%	20%	60%	40%	27%	30%	-	10%



The table below shows how allocations were made by [stakeholders and business customers](#) in this research compared with the way allocations were made in the DtC research. It is important to note that the list of outcomes differed between research – this was mostly wording changes but in some cases more significant changes to the sentiment of the outcomes were made, therefore this should be considered when interpreting results. Please also consider differing base sizes.

STAKEHOLDERS AND BUSINESS CUSTOMERS Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	DtC (respondents – 16)	DtF (respondents – 42)						
Our customers say they feel informed about the services we provide and the importance of water.	-	36%	44%	26%	50%	31%	6%	7%
Our customers say we are a company they trust.	6%	36%	44%	14%	44%	40%	6%	10%
Our customers tell us we provide excellent customer service and resolve issues quickly.	13%	36%	50%	19%	38%	38%	-	7%
Our finances are sound, stable and achieve a fair balance between customers and investors.	25%	14%	13%	19%	56%	48%	6%	19%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	13%	26%	38%	43%	44%	21%	6%	10%
Our drinking water is clean, clear and tastes good.	13%	19%	25%	26%	63%	45%	-	10%
Our sewerage service deals with sewage and heavy rainfall effectively.	25%	22%	17%	26%	58%	30%	-	22%
We always provide a reliable supply of water.	13%	24%	31%	19%	56%	48%	-	10%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	38%	19%	31%	21%	31%	52%	-	7%
We are an innovative and efficient company.	13%	14%	38%	43%	44%	24%	6%	19%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	44%	24%	25%	45%	31%	21%	-	10%
We take care to protect and improve the environment in everything we do, leading by example.	38%	26%	19%	60%	38%	7%	6%	7%
We are proud to support our communities by giving time and resources to their important causes	25%	45%	13%	36%	63%	10%	-	10%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	13%	57%	31%	26%	56%	10%	-	7%

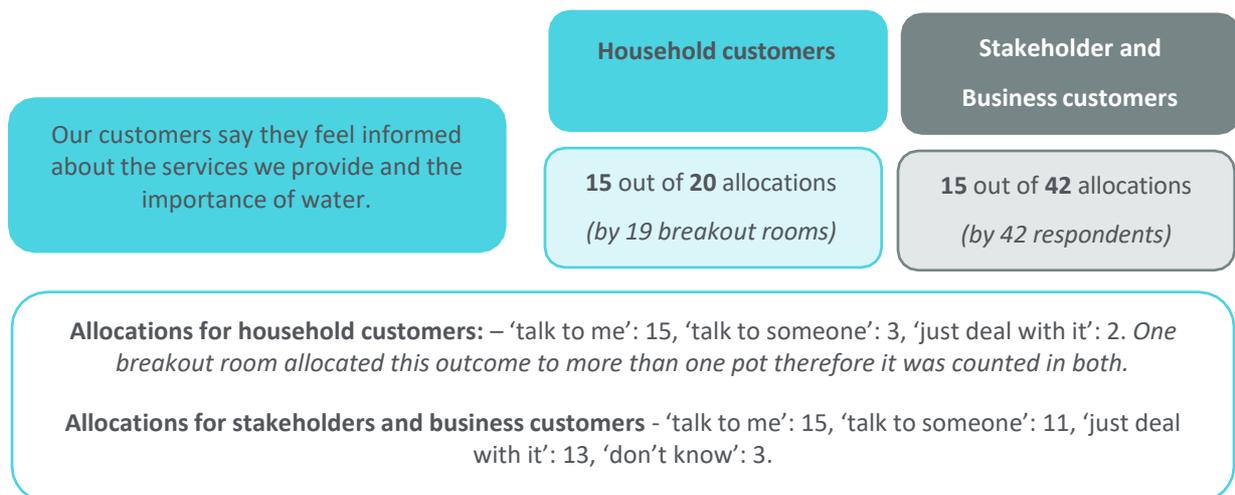


'Talk to me'

Looking at the outcomes that were most likely to be placed in the 'talk to me' pot by household customers, there were clear areas that stood out. Household customers were particularly interested in engaging with NWG around outcomes that related to customer experience and affordable and inclusive services. In addition, they were interested in the outcomes relating to ensuring drinking water is clean, clear and tastes good and that NWG are proud to support communities. These findings were fairly similar to those in the DtC research in 2016, where household customers were most interested in influencing customer service and affordability/value for money focused outcomes.

In this research, stakeholders and business customers were less interested in influencing customer experience and affordability/value for money focussed outcomes other than that around feeling informed. Fewer outcomes were likely to be placed in the 'talk to me' pot by non-household customers than household customers. Non-household customers were also interested in engaging with NWG themselves about the outcome relating to partnership working.

The outcomes that were placed in the 'talk to me' pot most often in the research are outlined in the following section.



Throughout discussions, household respondents commented that they didn't feel informed about many of the services NWG provide and that the only real interaction they have with NWG is in terms of paying their water bill. This was like the findings from the DtC research in 2016, whereby respondents also felt quite uninformed. Stakeholders and business customers also felt fairly



uninformed and were actively keen to become more informed about what NWG do outside of providing a water (and wastewater in NW operating areas) service.

Household respondents were interested in engaging with NWG about this outcome as they felt best placed to voice what customers want/need, with being a customer themselves.

-  *"I think this should be customers again because you can only really get that kind of feedback off of customers..." (Newcastle/Northumberland household group)*
-  *"Yeah, I was thinking we ought to go into the customers have a say. I'm not quite sure how, because I'm not a big one for endless surveys but I think that might be the way to provide feedback on that one as well. So, I think it needs to go into customers have a say" (Essex household group)*
-  *"It's all about customer feedback again, so talk to me" (Essex household group)*
-  *"Customers should be involved in shaping that because as I said earlier, in the last outbreak thing, we don't get an awful lot of information through from them. It's maybe only once a year, or twice a year you get something through. You would need to set up something more to say okay, can you give us a general feedback say every month, or every two months or whatever. So, they would need customers input to say that yes, we have been informed. We know it's happening and we're happy with what's going on, or we're not happy with what's going on" (Newcastle/Northumberland household group)*
-  *"Need the feedback from the customers to make sure that is how they're feeling, you know, they can't just say we're doing this great job without anybody actually saying, Oh, yeah, you know, we agree, and this is our experience" (Durham/Darlington household group)*

Stakeholders felt that they would like to be involved in engaging with NWG around this outcome as they felt they would be able to then inform others and share with businesses, residents, and people in the local community.

-  *"Obviously then I feel that I can share it with agencies to keep them up to date with what they're delivering on, where any issues are. We don't need to do every little bit, we could just have monthly updates on what's going on. I think that would be quite helpful for partners to understand" (Stakeholder - County Durham and Darlington Fire and Rescue Service)*
-  *"For me as a stakeholder in my role, because I'm engaging with council members, I'm engaging with businesses in the district, residents etc. so if I have all that information and I'm really well informed then I can tell other people about it" (Stakeholder - Braintree District Council)*



Some household and non-household customers also felt that the language used within the outcome itself leaned towards the fact that customers should be involved.

- *“Our customer... it’s in the language” (Stakeholder - Norfolk Rivers Trust)*
- *“I would have thought anything that refers to the customers should be down to the customers to say what information is relevant as opposed to the company tweaking the answers to what they want” (Essex household group)*

It was mentioned amongst household respondents that they were particularly keen for NWG to engage with younger generations around the topic of the importance of water from an environmental perspective.

- *“I think a good thing would be as well the importance of water, the way with global warming and all that sort of thing. It would be good if Northumbrian Water perhaps went round schools and maybe talk to younger children about the value of water and saving it and the importance of water in general” (Newcastle/Northumberland household group)*
- *“I mean like something when you first read it, the importance of water it sounds a bit silly really, doesn’t it because we all need water to survive. But, especially with things that are happening with climate change and things like that. Everybody is trying to make, everybody I know anyway, is trying to make the effort to save water in some ways. Yes, they could go around schools, that was sort of mentioned earlier when I was at school, we went on a day trip to a water treatment works and although it wasn’t the most exciting thing, shows you where it comes from and the whole lot of work behind the scenes” (Newcastle/Northumberland household group)*





Our customers say we are a company
they trust.

Household customers

12 out of 19 allocations
(by 19 breakout rooms)

Allocations for household customers – ‘talk to me’: 12, ‘talk to someone’: 1, ‘just deal with it’: 6.

Allocations for stakeholders and business customers - ‘talk to me’: 15, ‘talk to someone’: 6, ‘just deal with it’: 17, ‘don’t know’: 4.

Household customers felt that it was important for NWG to hear directly from the household customer around their outcome relating to trust. Household respondents wanted to know that they could trust NWG and felt that this would be by being informed that NWG had met/were meeting their objectives and that the company were doing what they said they would do.

“It is something that if we get the reliable water, as we spoke about the beginning if we get that, then I will say yeah I trust the company to deliver on what I pay for it to do for me. But as X said, it comes down to the company delivering on its objectives that you build the trust” (Essex household group)

“I think it's important for them to find out from the customer, if they are a trusted company” (Newcastle/Northumberland household group)

One respondent in Newcastle/Northumberland also commented that NWG already had asked customers to engage on this through sharing their list of priorities and asking for customer opinions on them earlier in the session.

“You’ve shown the priority page, that Northumbrian Water already use. So, some of the elements mentioned in the priority list was about trusting as well wasn't it there was some referral to it. So, they're already, by yourself showing the priority list to us, are actually asking customers opinion on how a company can be trusted more. So, I would say speak to me” (Newcastle/Northumberland household group)

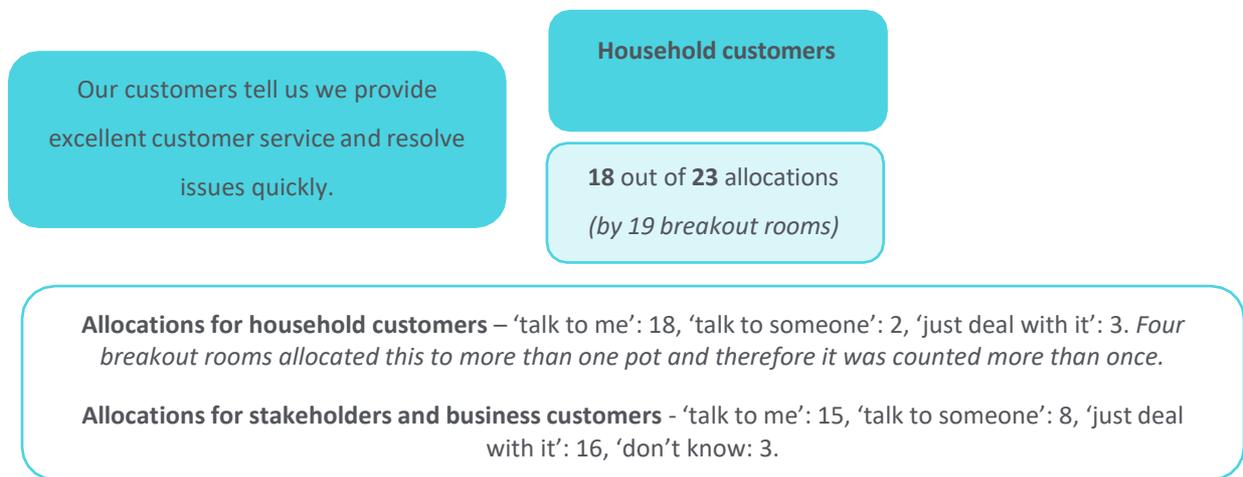
It was mentioned across several breakout rooms that there was uncertainty around how NWG can achieve this outcome when this is no other option for people living within their operating areas in terms of a water supplier and that they had no choice in trusting NWG because they simply felt they had to.



- *"If you don't trust them, I suppose you haven't got much choice when it comes to water"*
(Newcastle/Northumberland household group)
- *"We've never been with another water company to see what they're like. You know, we don't know any comparison"* (Essex household group)

Some felt that it may be also useful to engage with external parties on this outcome but felt that was more in terms of measuring whether the outcome had been achieved or not. Customers felt that this was important for an unbiased view and suggested that this would involve a specialist research company and that this was communicated with customers.

- *"Sorry, just a little bit of an argument that they might want to involve a specialist, because sometimes when we're gathering feedback in my company, we hire an external party to handle our feedback stuff, who actually deals with surveying, rather than us. Like, if we survey someone people might think, oh, they're going to write it in the way that suits them. Whatever, I don't know"* (Essex household group)



Similar to the previous outcomes, household customers felt they were best placed to influence this outcome as it was customer-service based and they felt they should have a say on whether customer service was meeting their expectations or not.

- *"Yeah it's only really the customers who can give opinions on what the customer service is like..."*
(Newcastle/Northumberland household group)
- *"I mean, you can only ask the customers if that's true. You can't make that up. So, you've got to, you can only really ask the customers themselves"* (Durham/Darlington household group)
- *"It's all about customer feedback again, so talk to me"* (Essex household group)



- *“The customers are the only ones who can say what is excellent service...”*
(Newcastle/Northumberland household group)

It was mentioned across groups that this could be done via research surveys and learning from complaints that had been made. References made to providing feedback via surveys, for example, were typically transactional, for example surveying a customer once they had dealt with NWG to gain feedback on their experience.

- *“I would say that will go into the customers have a say in the talk to me section. In my head, that would be like, any satisfaction surveys that they do or like, learning from complaints”*
(Newcastle/Northumberland household group)
- *“I think the same I think I would appreciate more they talk to me about it, as well, maybe at the end of a conversation, telephone conversation, they will send me like a survey or something to provide feedback”* *(Newcastle/Northumberland household group)*

Some already had a prior expectation that they would be given the opportunity to provide feedback after a transactional experience with NWG.

- *“If you had an issue, I would expect to have to provide feedback on whether I thought the issue was resolved quickly. And then if I had to contact customer service, I would expect to provide feedback on that as well as to whether that was excellent. I think maybe that's the way around for that one”* *(Essex household group)*



Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.

Household customers

16 out of 19 allocations
(by 19 breakout rooms)

Allocations for household customers – ‘talk to me’: 16, ‘just deal with it’: 3.

Allocations for stakeholders and business customers - ‘talk to me’: 11, ‘talk to someone’: 18, ‘just deal with it’: 9, ‘don’t know’: 4.

It was important for household customers to have a say on the affordability/value for money outcome. Some household customers wished to influence this outcome by informing NWG what they felt would define an ‘affordable’ service and what good value for money meant to them as household customers.

- *“I would say the customer again, because it's something that you would find out via feedback, speaking to the customer” (Newcastle/Northumberland household group)*
- *“Honestly, if they're saying our customers say our services are good value then to measure that they've got to ask the customer” (Essex household group)*
- *“If they're saying that our customers say our services are good value, then they have to do whatever they can to measure that. Now that could be that they could be sending a survey out to customers, could be telephone survey, could be an online survey, but unless you ask your customers, you can't make that statement” (Essex household group)*

In particular, respondents felt it would be important to speak with those in financially vulnerable situations, e.g. those on universal credit, those living off their pension etc. to understand how their water bill impacts them financially.

- *“I'd say the same. I think it'd be important to talk to customers who like on Universal Credit or living off pensions, things like that, like think about those on fixed income and how you know, they can still afford to pay for the water” (Newcastle/Northumberland household group)*

The main areas that customers wanted to know more about were what their monthly bill was, how it was broken down and why. Some customers were also interested in engaging more with NWG about company profits and wanted NWG to be open and transparent with customers about this.



- *“I would be quite interested just to know exactly what you're paying for, how it gets broken out. And then the way the bill like the sending of an email and you've got to log into your account or sometimes I don't even look at it because it's not coming in the post. So, I'm honestly not sure what my monthly bill is but I would be very interested to know and to get more of an explanation” (Newcastle/Northumberland household group)*
- *“Talk to me in terms of transparency. And yeah, I mean, either just get an idea or talk to me, I would like them to obviously be as affordable as possible and be transparent in terms of profits and stuff” (Newcastle/Northumberland household group)*

As with those who took part in the DtC research, some respondents found it more difficult to gauge their thoughts on this outcome given that NWG had a monopoly in their area and so they were unable to compare prices.

- *“I wouldn't even have a clue, I'm just like, because we've got no choice around here, of who we use” (Essex household group)*
- *“There's no competition really within an area is there, you can't switch over to Yorkshire Water or something. So, what do you do?” (Darlington/Durham household group)*



Our drinking water is clean, clear and tastes good.

Household customers

9 out of 21 allocations
(by 19 breakout rooms)

Allocations for household customers – ‘talk to me’: 9 ‘talk to someone’: 5, ‘just deal with it’: 7. *Two breakout rooms allocated this to more than one pot and therefore it was counted more than once.*

Allocations for stakeholders and business customers - ‘talk to me’: 8, ‘talk to someone’: 11, ‘just deal with it’: 19, ‘don’t know’: 4.

In the DtC research in 2016, the majority of household customers allocated this service-related outcome in the ‘just get on with it’ pot as they were satisfied with what NWG were doing and felt happy for them to continue as they were without consulting customers. However, in this research, household respondents wanted to have a say on this outcome as they felt that NWG would need to directly hear from customers in order to know what they thought of the quality and taste of drinking water and felt that this was important for customers to feedback on as those who receive the service.

- *“I think the customer because, again, they need the customers feedback. They need to know that. Obviously, that is what it is. They wouldn't know that unless they were a customer themselves, obviously” (Newcastle/Northumberland household group)*
- *“Well, that's got to be customers have their say, isn't it really?” (Essex household group)*
- *“Well, we are the ones using the water, so we'd probably have a good idea of if it does taste good and I'm sure anyone would tell them quite quickly if it wasn't clean, clear and tasting good” (Essex household group)*
- *“I agree thinking it should be talking to the customers because it's their opinion, they're the ones using the water so you should get their opinions...” (Newcastle/Northumberland household group)*

This was particularly in reference to the ‘taste’ aspect of this outcome, which household customers felt more able to have a say on than water quality itself.

- *“I would say I think they need to speak to the customer, especially with the bit about tastes good. Yes, there are parameters for how the water should be clean and clear. But for providing water that tastes good, I think it will vary from person to person. So maybe a customer survey may be*

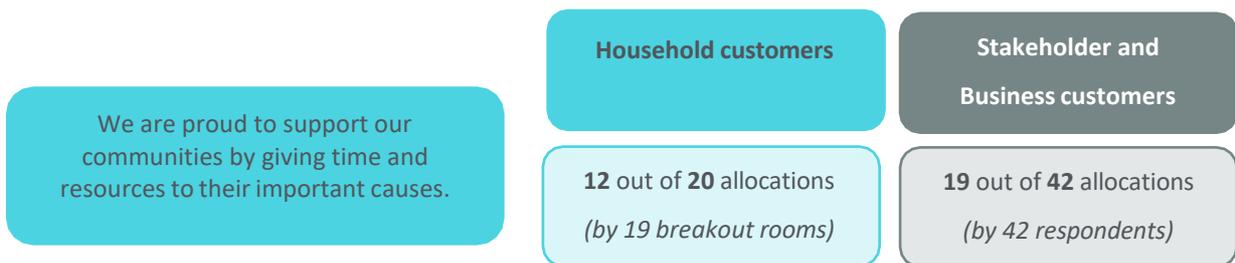


required in order to have a sense of what the majority of people think about the water that the company provides for known as good taste, just to confirm it maybe”

(Newcastle/Northumberland household group)

In terms of water quality specifically, many felt that that part of the outcome specifically may be better suited in the ‘talk to someone’ pot, for example a water quality specialist that has the expertise to understand ‘good’ water quality.

- *“They should be having someone quality check and constantly just making sure the level is up to scratch and like the baseline standard of clarity and cleanliness in it. Especially with the pandemic, you want the cleanest water possible” (Durham and Darlington household group)*
- *“I think definitely a specialist because obviously, they’re going to be mixing chemicals in our water and I think also customers...” (Newcastle/Northumberland household group)*
- *“I’d say I’ll be leaning towards a specialist, because, again, they could be specialists themselves, we don’t know who they employ, but it could be a specialist, so they employ, but equally they need someone who’s more knowledgeable than the customer at the end of the day” (Essex household group)*



Allocations for household customers – ‘talk to me’: 12, ‘talk to someone’: 2, ‘just deal with it’: 5, ‘don’t know’: 1. *One breakout room allocated this to more than one pot and therefore it was counted twice.*

Allocations for stakeholders and business customers - ‘talk to me’: 19, ‘talk to someone’: 15, ‘just deal with it’: 4, ‘don’t know’: 4.

It was important to both household customers and stakeholders and particularly large businesses that NWG engage with those living within communities to achieve the outcome of supporting communities by giving time and resources to important causes. This differed from findings in the DtC research whereby community-based outcomes were typically viewed as something that NWG were trusted to ‘just deal with’ by household customers.



- *"I would fully agree, I think that's only something that really can be done if they took the answers from customers..." (Newcastle/Northumberland household group)*
- *"I think it's a very good topic to talk about because supporting the fellow humans like us, it's very important for society" (Essex household group)*
- *"I think they need to be talking to customers then they'll get some views but they really need to understand the things that are important to their customers and I think that's the only way they can know that they're investing in the things that do actually matter in their eyes" (Stakeholder - National Energy Action)*
- *"If they are going to be supporting important causes then no doubt it'll be part of their plan, whether it's part of their social mission or whether it's part of their business plan they need to be speaking to those people" (Large business - Ward Hadaway)*

In general, stakeholders were open to being more involved in influencing this outcome, for example by working together to provide opportunities to support within local communities. In addition, larger businesses were also open to engaging with NWG to work collaboratively to achieve this outcome.

- *"From our point of view if there was any facility to get people out to do promotional work or charitable work then we would certainly have plenty of venues and organisations that we work with who would be willing to accept some 'give a day' work or something like that" (Stakeholder - London Borough of Havering)*
- *"The reason why I think we can also be useful in that place is because Greggs has what we call Greggs Foundation, it's a charity where primarily we help out communities in need. Every year we put millions of pounds into the Greggs Foundation and the amount of breakfast we buy for children who otherwise wouldn't, maybe their only meal of the day they'll have is a free school lunch and the amount of work we do with other companies like Children in Need and stuff like that. I'm not saying we do it better than NWG because I don't know what NWG are doing but I do think it's a conversation that could be had and we want to continue building the area and helping the communities they are in through a charity or something like that then it might benefit them to speak to our dedicated team" (Large business - Greggs)*

In terms of stakeholders, it was important to some to be involved:

- *"Talk to the community stakeholders, not necessarily the individuals" (Stakeholder - Tweed Forum)*



Whereas others felt it was important to not just speak with the local community stakeholders but to also engage people at an individual level;

- *"We could be classed as the local community and some people think there we are, whereas I think if it's truly community then it should be the community and not as a professionally paid person that should be representing their place" (Stakeholder - Heritage Coast)*

Some stakeholders were unsure what NWG currently do in this area and a minority of environmental representatives felt that there was more that NWG could be doing here.

- *"I'd like them to double their effort, or quadruple them I said. I'd like them to spend more money in this area" (Stakeholder - Norfolk Rivers Trust)*
- *"I wasn't sure what they referred to, is that branch out or are they pure charitable donation? I wasn't quite sure what that refers to" (Stakeholder - Anonymous)*

The main area that household customers wanted to speak about was *who* they felt NWG should support, for example they would like to be able to have a say/nominate which causes/charities they think NWG should give time and resource towards. Customers felt best placed to have a say on this as they would be informed about what is most important to themselves and their local communities.

- *"I think this one should be down to the customers because they could be supporting their communities, their customers are obviously in the communities and they're going to know what needs their time and resources..." (Newcastle/Northumberland household group)*
- *"I mean, you've got to speak to customers to know what causes are important to them, you know, they can't support those things if you've got no idea what matters? So, I think that's a speak to customer one" (Durham/Darlington household group)*
- *"But how would they know what is important to us unless they talk to us? That's why I would say talk to us, because then they'd know. It reminds me of that thing when you go to the supermarket and sometimes you get those little coins" (Essex household group)*
- *"Yeah, I think the customers are the ones living in the community, so they would be the ones to know what exactly the community need. So yeah, I think it's better if you talk to the customers that live in the community" (Essex household group)*
- *"I guess in a way because people would often like nominate like their own charities or you know Northumbrian Water might communicate we're thinking about you know, doing this, this and this in your area, like you know, do you feel it would kind of affect you or benefit you, do you feel this*



is good? I think that one would be a good engagement one. Like with me personally”

(Newcastle/Northumberland household group)

- *“Northumbrian Water obviously covers a large area, but there's very different causes for very different localities. And that would make customers feel like they're being supported. Don't get me wrong, big charities are great, but that doesn't feel like it's trying to support me. Whereas in a charity called the Angel Trust, like I said, around me, that literally helps everyone in Durham and Darlington for like loads of a variety different situations. And if we support that, that would feel to me like they're actually trying to support me rather than something that might not actually affect me at all” (Durham/Darlington household group)*



We work in partnership with companies and organisations to achieve the goals that are most important to our customers.

Stakeholder and
Business customers

24 out of 42 allocations
(by 42 respondents)

Allocations for household customers – ‘talk to me’: 4, ‘talk to someone’: 8, ‘just deal with it’: 6, ‘don’t know’: 2. *One breakout room allocated this to more than one pot and therefore it was counted more than once.*

Allocations for stakeholders and business customers - ‘talk to me’: 24, ‘talk to someone’: 11, ‘just deal with it’: 4, ‘don’t know’: 3.

Finally, allocated in the ‘talk to me’ section by stakeholders and business customers was the outcome around working in partnership with companies and organisations to achieve goals that are most important to customers.

One of the large business customers felt that this outcome tied in with the previous outcome around giving time to support local communities. In particular, he suggested that the previous outcome was more around understanding what customers want, but that this outcome was more in relation to how to put what customers want into practice and that they should engage with people in the community to do so.

□ *“I think that ties into that first one. That first one is kind of an outline and what customers want and what it is that matters to the community more. I think the next bit is kind of how we’re going to do that. So if the community was to tell them the biggest thing affecting them was educational attainment or crime rates or something like that, then that may not be intrinsically linked but it wouldn’t necessarily be intrinsically linked into NWG. So then you’re going to have to talk to somebody about what actually can be done with other agencies or organisations to solve these problems that customers are telling us are affecting them in their community” (Large business - Thirteen Group)*



There was a general consensus amongst stakeholders and larger business customers that partnership working was extremely important and that their organisation would be willing to work with NWG to influence this outcome.

- *“Partnerships are extremely important. There may be more that can be done, and we are just one of a number of those organisations that could do that for their customers. So, it would be a talk with me but also talk to other organisations and make sure they’ve got partnerships that cover over the breadth of issues that customer may face in order to be able to engage with customers and their representatives appropriately” (Stakeholder - National Energy Action)*
- *“Those are things which I think have the possibility to be relevant to me and my business. I can see that this is an instance where a one to one conversation may be relevant. It won’t be in every case but there are instances where I can see that this would be something where I think a one to one engagement might be relevant” (Large business - Ward Hadaway)*

A number of stakeholders referenced the importance of communication in partnership working and that this was key for achieving this outcome.

- *“It’s to build that communication, it’s to have someone that I can talk to at NWG that understands the district and understands our strategic goals and vision to enable us to work in partnership” (Stakeholder - Braintree District Council)*
- *“This should be about communication, it should be about open communication. I think at the moment I feel that we’re feeding lots of information into NWG, this conversation included, and it’s making sure it comes back out so we can see the benefit of that and we see how what has changed what we’re doing” (Stakeholder - Anonymous)*

Some felt that it was particularly important to look to engage with younger people in this area, particularly in terms of environmentally based partnership working.

- *“There could be some more thought given to look at specific sectors of the community that could become a little bit more vocal and engaged, through a project or case study. In Durham we have the County Durham Youth Council, which I’ve started to recently engage with and it’s all people under eighteen who are in full time education, school or college and they have got a huge amount of interest and energy across a whole sphere of areas, and not surprisingly, environment and particularly climate change is right up there. So, it’s perhaps to be aware that there are, even with certain strata of communities, there are areas that could be quite instrumental in helping steer how some services are considered and young people is a very strong one” (Stakeholder - Durham City Council)*



Discussion of priorities of the 'talk to me' outcomes (*household customers only*)

As mentioned previously if time allowed, household customers were asked within their breakout rooms to rank the outcomes they had placed in the 'talk to me' pot collectively as a group. These discussions only took place if moderators had time remaining in this section (this was agreed with NWG from the outset of fieldwork). Customers were asked to consider which of the outcomes that they had allocated to the 'talk to me' pot were most important for NWG to engage with customers and what they felt was least important. In total, 12 breakout rooms engaged in these discussions.

Due to time limitations, facilitators in breakout rooms approached this task in different ways and therefore a full breakdown of priorities has not been provided. For example, some groups only had time left to discuss the outcome that they felt was most important, some the least and some to consider where they would place all. In addition, each breakout room had different priorities allocated to this pot – with some only allocating a small amount and some allocating a large amount.

For those who did engage in this exercise, it was clear that customer service and affordability/value for money related outcomes were particularly important to household customers in terms of engagement with NWG.

It was most important for respondents to engage on the outcome 'our customers say our services are good value for money and we work hard to keep water services affordable for all', although the other customer-service related outcomes were also ranked highly.

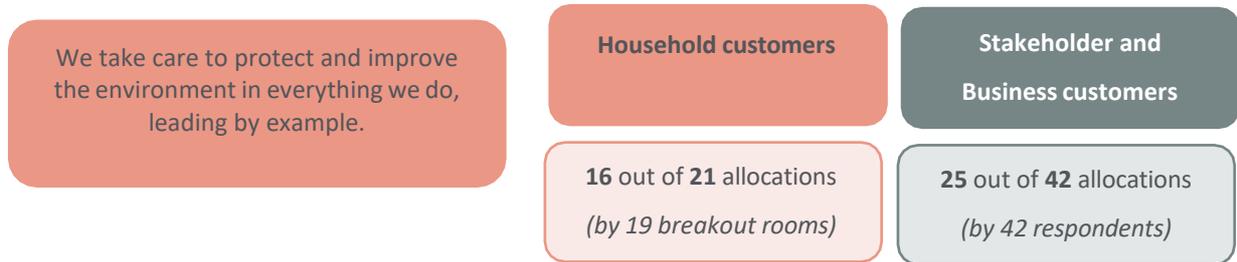
- *"So, I personally value one purely and simply because what I touched on earlier, in terms of, ultimately for anything you pay for, you want good value for" (Essex household group)*
- *"For me, I would say the most important would be the affordable one"*
(Newcastle/Northumberland household group)

In terms of least priority for engagement with customers, there was a mix of views on this per breakout room and therefore no clear finding as to what household customers tended to feel was lesser priority than others, indicating that overall, all of the outcomes in this section were important to customers to engage with NWG about and have their say in.



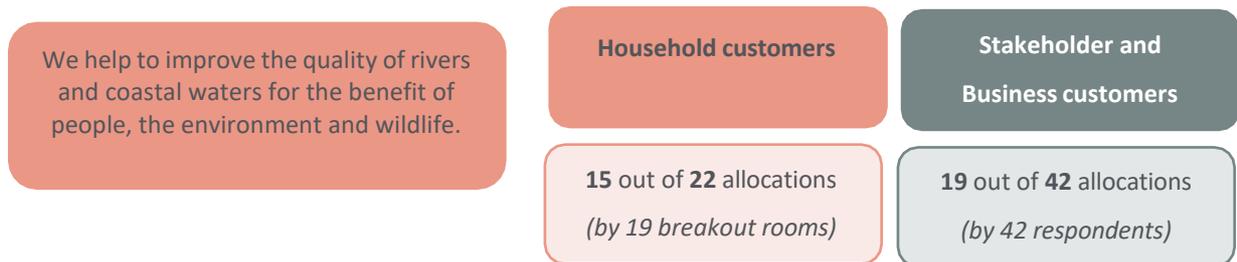
'Talk to someone'

There were two outcomes that were most likely to be placed in the 'talk to someone' pot by both household and non-household customers. The same as in the DtC research, both outcomes that were most likely to be placed in this pot were in relation to the environment as can be seen below.



Allocations for household customers – 'talk to me': 2, 'talk to someone': 16, 'just deal with it': 2, 'don't know': 1. *Two breakout rooms allocated this to more than one pot and therefore it was counted more than once.*

Allocations for stakeholders and business customers - 'talk to me': 11, 'talk to someone': 25, 'just deal with it': 3, 'don't know': 3.



Allocations for household customers – 'talk to me': 3, 'talk to someone': 15, 'just deal with it': 3, 'don't know': 1. *Three breakout rooms allocated this to more than one pot and therefore it was counted more than once.*

Allocations for stakeholders and business customers - 'talk to me': 10, 'talk to someone': 19, 'just deal with it': 9, 'don't know': 4.

Respondents across all audience types felt that it was important for both environmental outcomes that NWG were supported and guided by experts in the field.



Household and business customers felt that experts would have the specialist knowledge to engage on this outcome and felt that household and business customers would not have this level of knowledge.

- *“Well, we could take all that information from scientific experts on the subject. So, they could talk to them about it before they proceed, so that they know what they’re doing is going to be the correct method for getting the job done” (Newcastle/Northumberland household group)*
- *“I think the same, I think that it's best left to be dealt with by some organisation that has a greater depth of knowledge in the area” (Durham/Darlington household group)*
- *“How do they know that they’re improving the rivers and coastal by just going in by themselves? It’s an external thing that they need to measure I think, specialists” (Essex household group)*
- *“Yeah, I think it's one of those things where it would help, I think, to have an external view on that. Not the customers again, because I don't know the customer would know anything more than you in that case, but someone who's an expert in that area by all means” (Large business - Greggs)*

Some felt that it would be useful for local communities to have a say first and foremost with regards to *what* needs to be done within the local environment but that it would then be up to specialists to take this forward in terms of *how* these environmental outcomes would be achieved.

- *“It would be both because people who live in a local area know what the environment’s like and what needs doing in their environment. So, things like questionnaires to say what’s the water like, what’s the environment like in your area? Then, you could have an input on that, but then it would be up to scientists and people like that to decide how they would go about doing that. Do you know what I mean?” (Newcastle/Northumberland household group)*
- *“I'm sort of stuck between asking customers and asking an expert? Okay because I feel like some customers will probably want to have a say, on the things that they do and how things are impacted environmentally around them and in their area. But obviously, you would need to speak to somebody as an expert who knows more what they're doing. So, I'm sort of stuck between the two” (Durham/Darlington household group)*
- *“Well, first of all I thought, oh, just let the experts get on with it, but I suppose if you got some input from the locals, I thought that was a good idea” (Newcastle/Northumberland household group)*



One SME respondent also felt that it would be important to engage with local businesses who may also be impacted within the local community.

- *“I suppose that could also be talk to me, particularly for businesses that are impacted. So, if you were running a B&B by the coast, then that’s probably an important one to talk to businesses about. So, I’m on the fence with that one. It could be talk to me or talk to someone” (SME - Recyke y’bike)*

When asked who NWG should talk to about these environmental outcomes, suggestions across household customer, business customers and stakeholders included the following:

The Environment Agency	Environmental and sustainability charities	The National Trust	International Water Association	Ofwat
Local Authorities	Scientists/experts	Water Council	Local Wildlife Trusts	Carbon Trust

- *“I assume that they already do speak to people like the Environment Agency, and things, don't they? I'm not sure what other organizations are. But yes, I think for the kind of looking after the quality of the coastline and rivers, I guess they should be talking to people like National Trust people like that, who own land” (Durham/Darlington household group)*
- *“International Water Association, Ofwat for regional monitoring, Water Council maybe depending on what solutions you’re implementing, because the Water Council don't only deal with international solutions, they also deal with individual water companies around the world and helping them to implement innovative solutions” (Essex household group)*
- *“It all comes down to who has responsibility for the rivers and the coastline, which is mostly the Environment Agency but it's local flood authorities as well. So, in our area it would be, the way the catchments works are a bit funny, so it'd be Essex County Council and Environment Agency and us, probably mostly the Environment Agency, because they tend to focus more on the water quality side of things” (Stakeholder - Southend-on-Sea Borough Council)*
- *“I can make recommendations from some thoughts of that I've looked at companies like, you know, Carbon Trust, was the one that really springs to mind” (Large business - Greggs)*

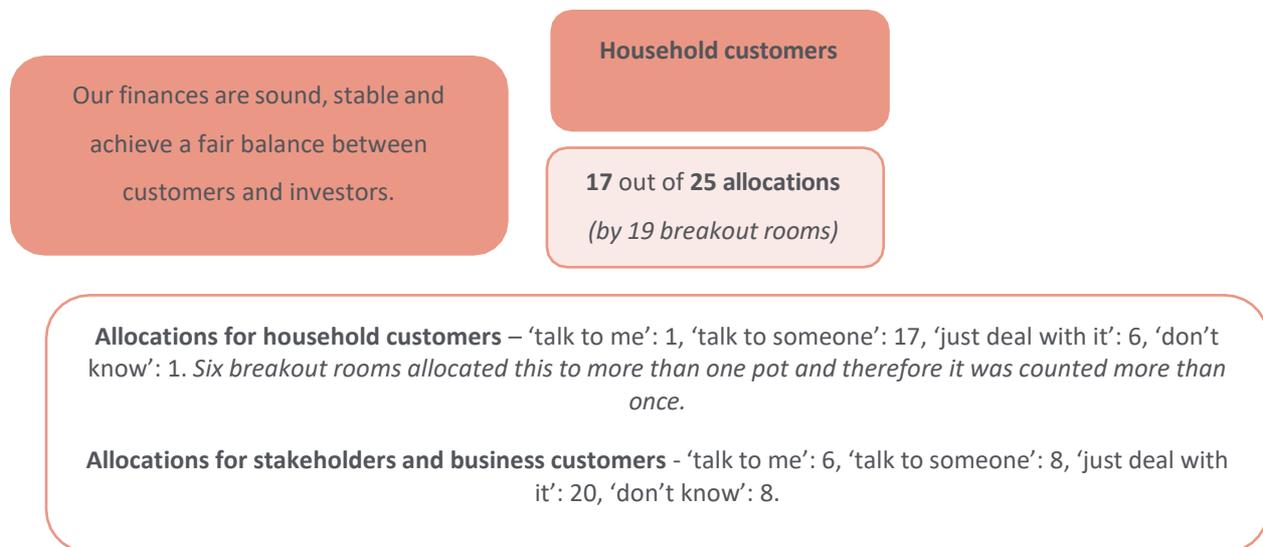


There was a clear openness and willingness across stakeholders themselves to engage with NWG around this outcome. This was particularly prevalent amongst environmental representatives who felt that their organisation, or organisations they work in partnership with, could support NWG to take this outcome forward.

- *“It’s pretty much the same answer, yes. Northumbrian Water can’t do that alone. They are not solely responsible for rivers, beaches, and wildlife. So, clearly, they have to work in partnership and talk to other organisations that are working in that space. And they do. It’s about talking to us. But the bit that I think I want to really drive home with these two questions is that I think there is a real leadership role for Northumbrian Water because it is a large organization and it’s got the capacity, and it could really help to support the capacity of the whole environment sector” (Stakeholder - Tees Valley Nature Partnership)*
- *“Because again that’s something that we would feel we could help them, we could challenge them, and we could also influence them” (Stakeholder - Norfolk and Suffolk Local Nature Partnership)*
- *“So that’s something that we work directly on with the Wildlife trust. We have rivers advisors, we work directly with river restoration techniques. We work in partnership with the environment agency. So, if it was something that assistance, we’re keen to support. And I understand they do fund small grants for this sort of work, then we would definitely be wanting to engage with them further on and this isn’t something that they’re not talking to us about. I must say. So just keep talking to us, I think” (Stakeholder - Suffolk Wildlife Trust)*
- *“That’s the area in which I work. So, yeah, Northumbrian Water, they do a lot of river catchment and environmental work in house themselves, and I think that’s great, what they’re doing, but I think they could do more, and I think they could also, rather than looking inwards, they could be looking outwards more and be doing more partnership working and helping to fund partnership projects as well, rather than just finding their own work. They do fund partnership projects, to clarify, but I think they could do more” (Stakeholder - Tweed Forum)*
- *“This is an area that we speak with a lot of companies about and support them in developing strategies and engaging with communities to ensure that they’re doing the right thing essentially and that their plans are future-proof and resonate with the communities and with their customers. So, yeah, that’s something that we would definitely be able to support them with and like to discuss with them” (Stakeholder - Anonymous)*



There were also a number of outcomes that were more likely to be placed in the 'talk to someone' pot by household customers only, these can be seen below.



Household customers were most likely to allocate this financial outcome into the 'talk to someone' pot, whereas in the DtC research, customers were more likely to want to engage with NWG themselves about this.

Household customers wanted to ensure fairness between dividends for investors and keeping customers' bills low and felt that this should be regulated/audited by an external company to ensure NWG are achieving a fair balance for all.

- *"To me they're talking about audits and things. That they've been audited properly and they're doing things by the book" (Essex household group)*
- *"Yeah, because they could say anything at Northumbrian waters. Is it their sound stable and achieve fair balance? How do we know if that's what they're telling us? It would be a third party that would have to be open and honest and give us the honest answer" (Durham/Darlington household group)*
- *"I'm thinking like more of the audit side. Like FCA side, just to have a bit of segregation of duty and just a bit" (Essex household group)*
- *"Talk to someone, maybe not the general public because I'm not sure you want to be trusting particularly people that you don't know, outside of the company, with personal and business finances" (Essex household group)*



It was also important to household customers that NWG are transparent and open with this information for customers.

- *“That’s like you say about being transparent isn’t it, putting the stuff out there so we can read it”
(Newcastle/Northumberland household group)*
- *“Yes. It’s again about being transparent, as long as you’re transparent, honest about what’s going on in your business then it’s not like we can have an input on that”
(Newcastle/Northumberland household group)*

It was suggested that it was most important for independent bodies, and in particular, the regulator, to have a say on this outcome.

- *“Yeah, speaking to specialists, and it’s also about regulators as well. You know, they’re the ones who are, you know, they regulate stuff to make sure that companies aren’t going to go bust. And that they’re also, you know, paying out the appropriate number of dividends to investors, but also keeping bills low for the customers, and to treat people who are on low incomes fairly. So, there’s a regulation aspect. So, I would have thought that falls under talk to a specialist”
(Newcastle/Northumberland household group)*
- *“I think they ought to be. overseen by an independent body? I mean, it’s a Chinese owned company. And but they’re providing a valuable service to people in England. So, the country’s driven by profit, the need to be held to account to have a satisfactory service”
(Durham/Darlington household group)*
- *“I don’t know if there’s already one. I’m sure there was one that exists, but something like OFCOM where they look at it impartially” (Essex household group)*



Our sewerage service deals with sewage and heavy rainfall effectively.
(NW only)

Household customers

7 out of **13** allocations
(by 10 breakout rooms)

Allocations for household customers – ‘talk to me’: 2, ‘talk to someone’: 7, ‘just deal with it’: 4. *Three breakout rooms allocated this to more than one pot and therefore it was counted more than once.*

Allocations for stakeholders and business customers - ‘talk to me’: 5, ‘talk to someone’: 6, ‘just deal with it’: 7, ‘don’t know’: 5

Northumbrian Water household customers felt that the above outcome relating to dealing with sewage and rainfall effectively was also something that NWG should engage with specialists about. In particular, they suggested that NWG should look to engage with the Environment Agency, Rivers Authority, Local Authorities and regulatory bodies.

- *“Well, again, I think you know, the Environment Agency, the rivers authority, that type of thing those regulatory bodies” (Durham/Darlington household group)*
- *“I think they need to talk to the local councillors about this as well because they need to work with them and liaise with them. One of the problems we have in the area I live, is that after the reorganisation of local government, most of the plans where the sewerage pipes ran disappeared. And we have in the past had problems with the sewerage overflowing. I will give credit to Northumbrian water, when we rang them up, they got somebody out as soon as possible. But I think it’s a thing up until the mid-70s, all the stormwater and everything went into the sewerage system. Now it goes into separate drainage. So, I think they need to liaise with not just the local authorities, with builders as well who are building new properties” (Durham/Darlington household group)*
- *“I would think that they may need to use a specialist service in order to do studies for any future climate changes, Currently, the capacity of sewage that they have may be able to deal with the rainfall that we get now. But five years down the line, it could be a different scenario. So, they may need to be prepared in advance and hence get external companies to do simulations and studies for future climate changes” (Newcastle/Northumberland household group)*



- *“I wouldn't trust now there'll be a way to get on with it all, I would need an external agency looking at that, because the flood defences that have been provided in this area, people have ended up being flooded out, nothing's being done about it, and they're being flooded out again. So, they're not doing their job effectively. I can't comment on sewage, but there has been raw sewage gone into rivers. So again, you will need someone external looking at that”*
(Durham/Darlington household group)

Some comments were made by Newcastle/Northumberland respondents about finding it difficult to gauge their thoughts on this outcome without a knowledge of the background of experts that NWG employ internally who deal with this area. They felt that if NWG employed experts who had a substantial amount of knowledge and expertise around dealing with sewage and rainfall effectively then this would be sufficient and they would not need to then engage with external experts, highlighting the importance of engaging with *experts* rather than necessarily *'external' experts* around this outcome.

- *“I think I find it very difficult to judge between the two categories without knowing how expert the experts existing within Northumbrian Water are”* (Newcastle/Northumberland household group)
- *“You would think in their business that they've got people in the field who would be able to look after this without going around like an external person or provider to look at it”*
(Newcastle/Northumberland household group)



We work in partnership with companies and organisations to achieve the goals that are most important to our customers.

Household customers

8 out of 20 allocations
(by 19 breakout rooms)

Allocations for household customers – ‘talk to me’: 4, ‘talk to someone’: 8, ‘just deal with it’: 6, ‘don’t know’: 2. *One breakout room allocated this to more than one pot and therefore it was counted twice.*

Allocations for stakeholders and business customers - ‘talk to me’: 24, ‘talk to someone’: 11, ‘just deal with it’: 4, ‘don’t know’: 3.

Although stakeholders and business customers were more likely to allocate this outcome into the ‘talk to me’ pot, household customers tended to feel that this outcome relating to partnership working was something that NWG should engage with others about, particularly to ensure that their common goals were also in line with and reflected customers’ needs.

- *“Like it’s been said the beliefs and the values need to be aligned, you can’t have anything conflicting there with you know, the different companies but also you know, that the kinds of reflect what the customer wants as well” (Durham/Darlington household group)*
- *“I would say external, because they’re working with other organizations. They do need to speak to the customers to see what the important goals are. They need to have an understanding of that as well” (Newcastle/Northumberland household group)*

Some household customers across groups felt that it was important to firstly understand from customers themselves what it is that is most important to them to then go on to work with others to achieve the outcome.

- *“I think that’s sort of someone out of house then isn’t it? If it’s already stated that we work in partnership with other companies, then that’s sort of that’s where that would fit. And then I’m thinking, you’ve got to ask customers as well what’s important” (Durham/Darlington household group)*
- *“I think they’d have to talk to the customers to know what the things that are important to the customers are” (Essex household group)*



When thinking about who NWG should engage with, it was clear that household customers were thinking slightly differently to the way that they were when thinking of who NWG should engage with about environmental outcomes. For example, they didn't think this necessarily needed to be specialists with expertise and knowledge, but more community organisations or those who represent the local community.

- *"I would say community based. Obviously, there are organisations that their job is to deal with that, and like, helping companies do that. But I would say this is more of a community approach, so it could be put under deal with it. Like, if they're dealing with it might come into community, but I would say this is probably more of putting into the speciality box. It's a hard thing with some of these umbrella terms, but I would say specialist for the community" (Essex household group)*
- *"I would say this is more of a specialist thing, because a specialist isn't just like a specialist who deals with this, it just is an outside source. So, outside source being the community, so I would say obviously all three have to deal with this. But I'd say this is more of a specialist approach, the outside source" (Essex household group)*

Some household customers also felt that this was something that NWG should be talking to stakeholders and/or local businesses about.

- *"I was thinking maybe they can talk to a specialist or maybe the stakeholders, because it has to do with, they having to work with companies and organisations. So, maybe when it comes to funding, probably they might be funding from companies or organisations, maybe the stakeholders will be the right people to advise them on what to do. That is what I'm thinking" (Essex household group)*
- *"I think that's more businesses talking amongst each other, isn't it? Saying how they can work together to achieve what's needed in your area, I think" (Newcastle/Northumberland household group)*



We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.

Household customers

9 out of 15 allocations
(by 10 breakout rooms)

Allocations for household customers – ‘talk to me’: 1, ‘talk to someone’: 9, ‘just deal with it’: 5. *Five breakout rooms allocated this to more than one pot and therefore it was counted more than once.*

Allocations for stakeholders and business customers - ‘talk to me’: 8, ‘talk to someone’: 9, ‘just deal with it’: 22, ‘don’t know’: 3.

It was also preferred by household customers that NWG engage with others around the above service-related outcome. One of the main reasons for allocating this outcome to the ‘talk to someone’ pot was because they felt it was important to be able to compare/check against others in terms of whether NWG are resilient and are providing these services at the level they should be or say that they are. Again, they felt that this was something that needed involvement from regulatory bodies.

- *“Somebody has got to give a check and balance to that...” (Newcastle/Northumberland household group)*
- *“Sometimes it's useful to have benchmark, you know, as you are the only supplier in the region. How do you compare yourself with somebody that's actually giving them a better service? And for that reason, maybe a benchmark is useful” (Newcastle/Northumberland household group)*
- *“I think you need an external person looking at that and measuring what they're doing. Because if you rely on in service people in companies, you're not going to necessarily get the true facts. It's got to be someone external. Now don't ask me who that would be. I think you need an external person looking at that, because at the moment, those companies have considerable leakage in their systems and they can't put it right yet” (Durham/Darlington household group)*
- *“No, I definitely feel like that'd be a third-party thing. Maybe the water regulator would have certain measures to measure something like that. But I don't think that as a customer we would be able to answer that to the level they want us to” (Essex household group)*

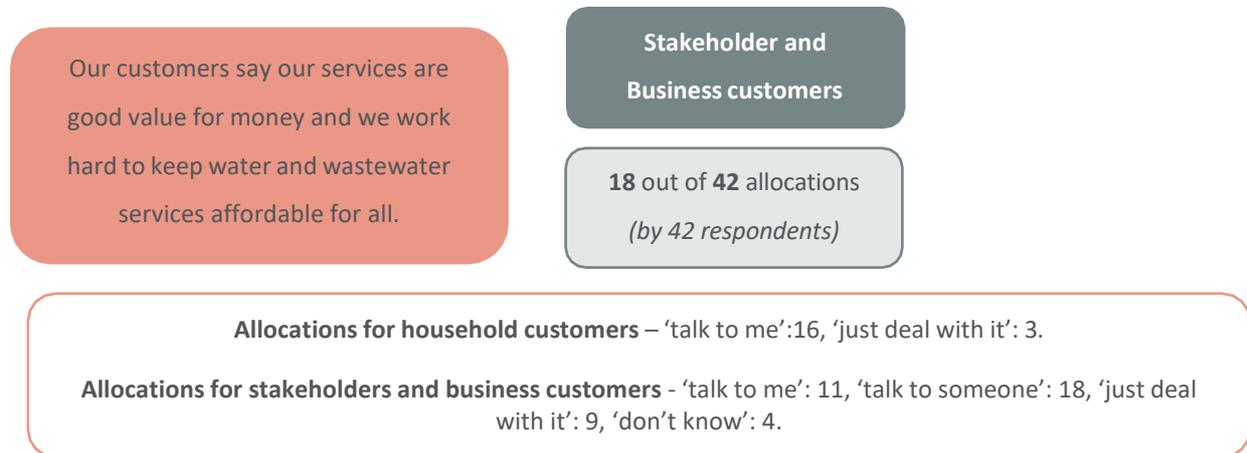


It was particularly important for household customers to have external involvement when thinking about the ‘future generations’ aspect of this outcome. Customers didn’t feel as though they had the expertise and knowledge to comment on this but really valued that NWG were considering future generations and sustainability.

- *“I mean, I’m not going to know if a customer, if they came to me and said, hi X, how can we make this work in 50 years. I’d go, I don’t know, I’m just drinking it, you need to speak to someone else” (Essex household group)*
- *“But you know, maybe at some point they do need to speak to an expert, you know, to maybe find out how we could make things better for future generations, maybe” (Durham/Darlington household group)*
- *“I was thinking more like, along the road of, especially when it’s about future generations, along the road of like newly graduated engineers, there’s always new stuff coming out that helps, you see all these magical things that engineers can make it something that they could work together on and doing maybe a little bit of a collaboration. Like you might think of this magic new solution that’s going to clean sewerage better. It takes a lot less processing time, saving electricity, i.e., stuff like that, and talking outside services to just ensure we’ve always got the best processes. And obviously, yes, we’ll have people in-house but you’ve got to constantly collaborate to make sure you’re at the top of the field and stuff like that” (Durham/Darlington household group)*
- *“Yeah, future generations is definitely important. You need to make sure that the water that is actually provided as well, it doesn’t only affect you, it also affects your future generations and the children of the household as well” (Essex household group)*



In addition, there were also two outcomes that were most likely to be placed in the 'talk to someone' pot by stakeholders/business customers only, these can be seen below.



Although household customers were more likely to want to have a say on this outcome, stakeholder and business customers were more likely to suggest that NWG speak with others about this affordability/value for money outcome.

Business customers tended to suggest that it would be best for NWG to speak to someone else about this as it would not be something that they would directly typically have a want/need to be involved with. Stakeholders felt that it was important for NWG to involve independent third parties and Ofwat to monitor this.

- *"So, I guess part of that will be with the regulator" (Anonymous)*
- *"I would imagine possibly a focus group or a panel of auditors or independent users, rather than shareholders or anyone that has an interest within the business. So, for example, it's not something that can be done by its own board of directors, it needs to be done by somebody independent" (Stakeholder - anonymous)*
- *"Yeah, I think you'd have to talk to the customers, see what they think, and also the regulators" (Stakeholder - Tweed Forum)*

In addition, some stakeholders felt that NWG should be talking with representatives of financially vulnerable customers or those representing deprived communities. Examples of who stakeholders felt NWG could engage with included: community groups, credit unions, third sector organisations, charities and local administrators.



- *“Part of that will also be understanding your community, getting feedback from the community. But actually, that probably is, ‘ask somebody else’ actually, because it’s good to know or be in touch with organizations that are working on the ground and the reality of some of the communities within the Northumbrian Water area being identified, I think, somewhere in this research, as some of the most deprived communities in the country. So, actually getting an understanding of your communities and affordability would probably be something, on hindsight, that you’d need to be in touch with other specialist organisations, community organisations that are more aware” (Stakeholder - Anonymous)*
- *“Because of the affordability element of it. I feel that they need to be engaging with customers, especially vulnerable customers or customers on lower incomes about that. Or groups that represent those people” (Stakeholder - Suffolk Wildlife Trust)*
- *“I’m just thinking – even if there’s a sampling in certain communities, because you won’t be able to cover the whole of the north-east necessarily, but there will be some community groups or organisations or credit unions or third sector organisations that work on poverty – I mean, conventionally with fuel poverty, but it was very interesting that you actually raised the issue of water poverty. It’s not just paying your fuel bills; it’s paying your other utility bills as well. So, there are specific voluntary sector organisations that deal with those. I can’t list them all as it’s not my area (Stakeholder - Anonymous)*
- *“I don’t know, again, because I don’t have that, that connection through to those areas of society, but I would suspect a good place to start would be some of the local administrations. Local need” (Stakeholder - Suffolk Wildlife Trust)*

Additionally, some stakeholders, particularly vulnerable customer representatives, felt that their organisation would be suitable for engaging and working with NWG on this outcome and welcomed further engagement/conversations around this with NWG.

- *“This comes on to areas we’d like to work with Essex & Suffolk Water on. So obviously working in flooding that’s pretty much dealing with the times when there’s too much water, where we are in the country and the way things are going with climate change there’s going to be very quickly more interest on the times when there isn’t enough water and how the two can be linked more together to make better use of water. So that was my thinking for this one in that we’d like to probably engage a bit more surrounding water reuse, drought measures and water harvesting and stuff like that. That kind of links to that” (Stakeholder - Southend-on-Sea Borough Council)*
- *“So, water poverty or water affordability is my day job, that’s what I do. I’m the only person at NEA that focuses on water, but NEA are really the only charity or consumer group that speak about water poverty in the UK. So, we do feel that we have quite a wealth of knowledge here and*



under level of influence now that we can provide, challenge, appropriate challenge to Essex & Suffolk Water where they're doing something that we maybe don't think's quite right or could be better. And likewise, we'd also be able to call out best practice, as well. So, I do feel like we're well placed for that conversation" (Stakeholder - National Energy Action)

- *"Yeah, I mean I think that links back to affordability, basically, and if there's any way that we can work with Northumbrian Water, to help our customers save on water charges if they've got metered supplies. Or, if there's discount schemes that they offer to customers who meet certain criteria" (Stakeholder - Bernicia)*



Allocations for household customers – ‘talk to me’: 1, ‘talk to someone’: 5, ‘just deal with it’: 11, ‘don’t know’: 2.

Allocations for stakeholders and business customers - ‘talk to me’: 6, ‘talk to someone’: 18, ‘just deal with it’: 10, ‘don’t know’: 8.

Stakeholders and business customers were also more likely to allocate the outcome relating to innovation and efficiency to the ‘talk to someone’ pot. In general, they felt that specialists would be best placed to have an input on this outcome as they would have the knowledge and expertise to advise NWG on how to take this outcome forward. Many stakeholders themselves didn’t feel that they would be the right person/organisation to engage with on this outcome.

- *"Because I don't think I'm the right person to be going to for that, but I do think they should be working with other organisations" (Stakeholder - County Durham and Darlington Fire and Rescue Service)*
- *"No. I don't think the customers would necessarily know that, but I don't know, you'd have to speak to an independent... I don't know what an organisation would be. An independent assessment of that" (Stakeholder – Tweed Forum)*
- *"Yeah, again, it's just areas that probably myself or others in my organisation wouldn't be too knowledgeable about to support with." (Stakeholder – Business in the community)*



Suggestions as to who NWG should be engaging with about this outcome included the following:



□ *“I think efficiency needs to be something that's audited externally. So again, we'd be looking at the likes of someone like KPMG or Deloitte. And that will be something that they'd have to speak to them to actually understand what efficient means. And they'll also be others that are specialists to say efficiency methodologies such as lean methodologies, for example, that they may be able to implement. Innovation, it's a difficult one to meet innovation, Ofwat are trying to encourage more innovation in the sector with their recent innovation competitions. You also have the UK water industry Research, UKWIR, who have worked with the water industry to deliver their strategy for innovation. I think they'll be important to make sure that they're linked into anything in regard to that. To make sure it's meeting what the industry have agreed is innovative, or what good innovation looks like” (Stakeholder - National Energy Action)*

□ *“They should be talking to universities, the statutory body for the government, data specialists. Data and technology is such a massive field for innovation that can improve the systems and how we use that infrastructure” (Stakeholder – Heritage Coast)*

One large business respondent felt that NWG could engage with others on the ‘innovation’ element of this outcome and felt that this didn’t necessarily need to be other companies in the sector, but that NWG could also engage and learn from other businesses who were leading in innovation.

□ *“Yeah, so that one could easily have been, talk to someone else as well. Again, I don't know. I don't think consulting with Greggs, for example, would make Northumbrian Water more efficient. We don't pretend to know how to run a water company. Innovation wise, there's always competition from other companies. And I guess internally, here at Greggs one of the things that we do, whenever we can, is speak to other companies to get a steer on what they're doing in different areas, not just on water but in a lot of different areas that I'm involved in. And if you're involved in Greggs as well. So, there's nothing wrong with speaking to other companies to get ideas about innovation” (Large business – Greggs)*

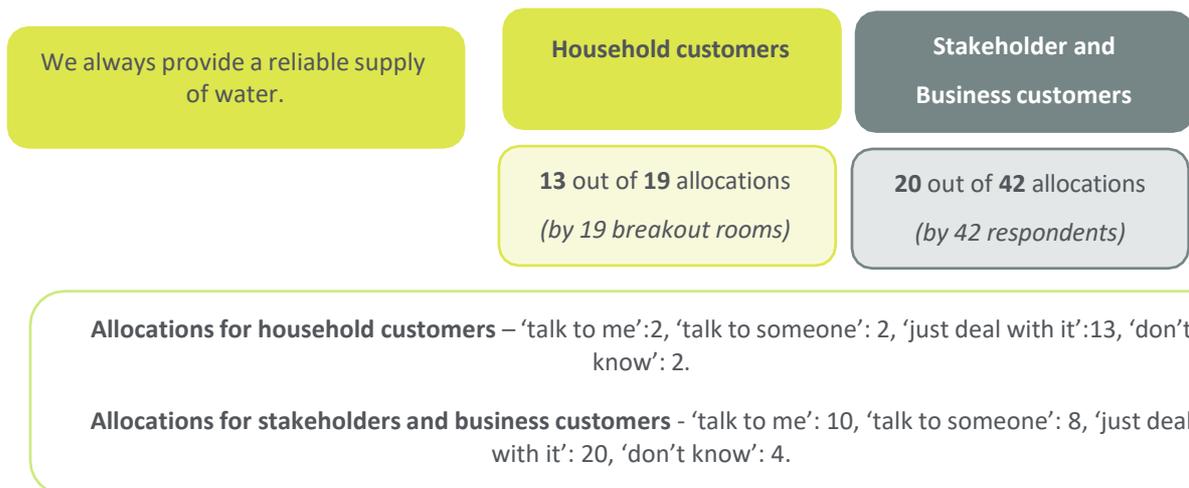


‘Just deal with it’

The two outcomes which household respondents categorised in the ‘just deal with it’ pot were around reliability and innovation, fewer than those that were allocated in this pot in the 2016 DtC research by household customers. In the DtC research, the majority of service-related outcomes were allocated to this pot by household customers, alongside people and community-based outcomes.

Stakeholders and business customers were more likely to place outcomes in the ‘just deal with it’ pot, particularly those that were in relation to customer experience and service-related outcomes.

The outcomes that were most likely to be placed in the ‘just deal with it’ pot can be seen below.



Household customers, stakeholders and business customers felt that providing a reliable supply of water was NWG’s key role as a water company and this was the main reasoning for placing this in the ‘just deal with it’ pot.

They felt that there would be sufficient knowledge and expertise within the company to work together around this outcome without the need for customer or specialist involvement. In addition, household and business customers felt that providing a reliable water supply was NWG’s main purpose and was what they were paying for in their water bill.

- *“I would say it’s just something they should deal with themselves, I don’t think that’s something that customers really want to have any input on whatsoever, it’s just that’s the service they provide so I think that’s just their prerogative really...” (Newcastle/Northumberland household group)*



- *"I think for me, that's the sort of deal with it. I think that's sort of their core business and core purpose. And that's up to them to sort out if the customer is paying for services and was saying you don't have much of a choice, and then you know, then you expect that kind of basic service, they provide a reliable supply"* (Durham/Darlington household group)
- *"Just deal with it. They should do that anyway"* (Suffolk household group)
- *"Because that's their job. Just get on with it. Provide me with water. There are no protocols about it. Your job is to provide me water. I pay you to provide me with water. Just get on with it"* (SME – Fusion Hair)
- *"Again, it's an established reputation that they've built for themselves and it's their job essentially, that we should be able to trust them to just do"* (Stakeholder - anonymous)
- *"That's sort of their whole job. So, yeah, probably they should be able to do that themselves."* (Suffolk household group)
- *"I think they should be able to do it themselves. I think it's something they've done for a long time, I think they've achieved it"* (SME – GEO Michie Ltd)
- *"I mean, given that that's what they provide is water they should know how to provide this constant supply of water so definitely in the just get on with it section"* (Durham/Darlington household group)
- *"I strongly think that one is down to them themselves because ultimately that's what you're paying for"* (Essex household group)
- *"Yeah, I mean, talked to me or just deal with it really I suppose just because that's what their main job is really, I suppose it would be their responsibility to ensure that that's happening"* (Stakeholder - Gentoo)

Although the consensus was for NWG to deal with this outcome without involvement from others, some did comment about the need to have regulation involved in reliability too.

- *"I presume that there are people who keep an eye on the fact that also be monitored. Other organisations must still look into whether it is reliable and tested and things like Ofwat, for instance, do they keep an eye on the fact that Northumbrian Water is still supplying regularly?"* (Durham/Darlington household group)
- *"But, there should be some tests taken still"* (Essex household group)
- *"Maybe, the water regulator would have certain measures to measure something like that"* (Essex household group)



Some household customers and stakeholders felt that NWG wouldn't need to actively engage with customers on this but that they would naturally receive feedback if customers weren't happy with the service provided in this area, for example if their water supply was unreliable customers felt that they would notify NWG about this anyway, and so feedback could be collected naturally this way.

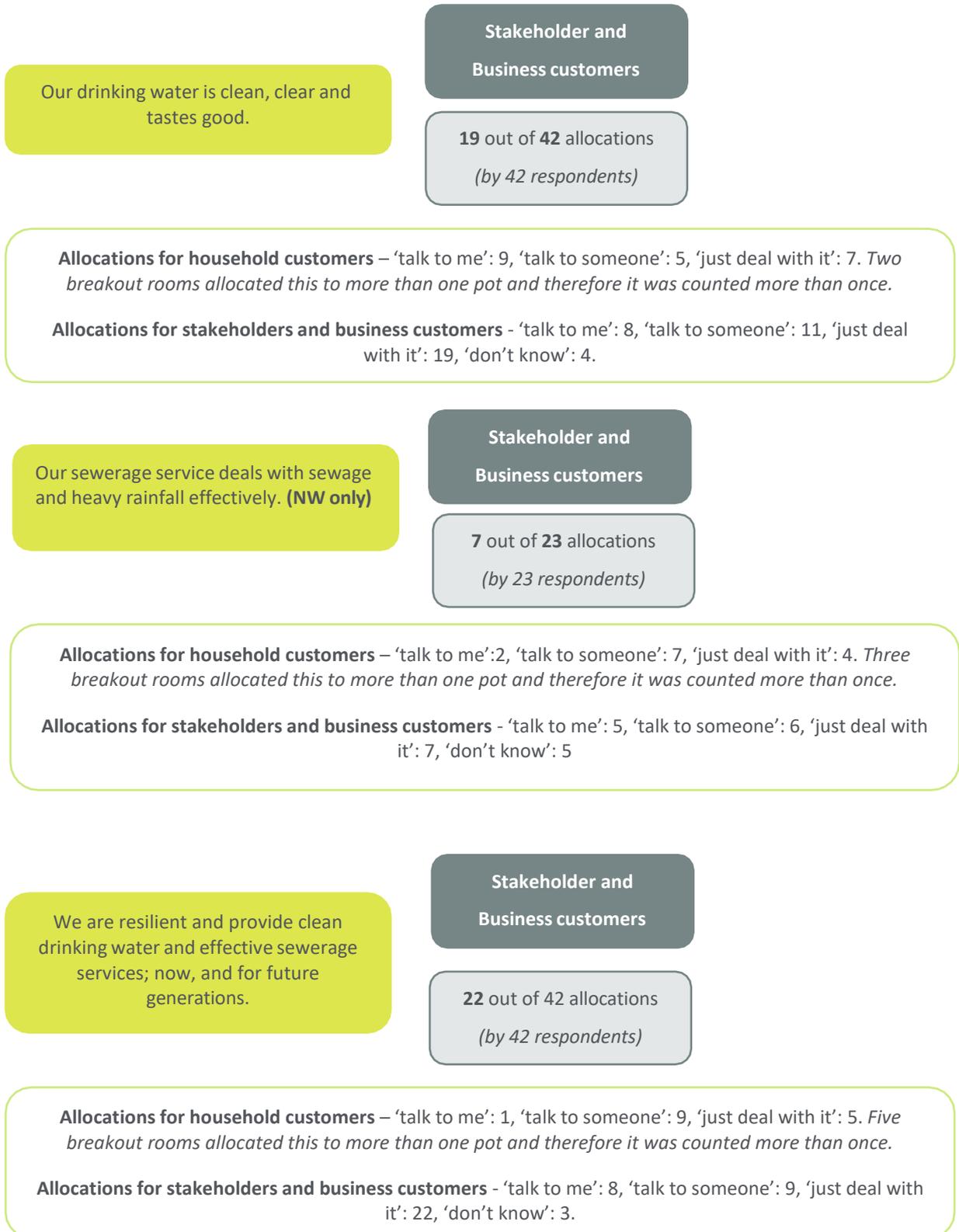
- *"I wonder if customers who aren't getting a reliable supply of water that they're probably complaining to the water company straight away. I don't think they're waiting for the water company to send them a survey. So, I would've thought that's a kind of self-fulfilling kind of feedback loop there. As soon as your water is off, you contact the water company"*
(Newcastle/Northumberland household group)
- *"Then obviously they'll get a lot of calls to say if it's not so they should know that anyway."* (Essex household group)
- *"The customer will be involved if there's a problem, I suppose"* (Durham/Darlington household group)
- *"If there's any queries around it you would expect customers to ring Northumbrian Water to deal with that"* (Stakeholder - Gentoo)

One household respondent also felt that it was key for NWG to encourage customers to let them know if there is a problem with the supply of their water and to make it easy for customers to do so that they could feed back to NWG if there were any issues, rather than proactively providing feedback on more of a relational basis.

- *"So obviously, people don't always complain. And people don't always fill out feedback forms, but I do feel like there's an element of they should try and get to know the customers, so the customer feels that if we have a problem, it's sort of gone back to the pillars at the beginning, getting to know them so well. So, they feel like if they've got any problem, no matter how small, they can come to them, so it's not like they go to them and say how is your water at that moment. It's more of a case of making sure the customer knows, they can let them know any small problems"* (Durham/Darlington household group)



Unlike household customers, stakeholders and business customers also allocated the three other service-related outcomes into the 'just deal with it pot' as follows:



Similar to the outcome around reliability, stakeholders and business customers were more likely to allocate these service-related outcomes to the 'just deal with it' pot because they felt that this was something that was just 'expected' of NWG as part of their primary role and service as an organisation and they didn't feel that these were outcomes that they needed or wanted to be involved with.

- *"Just really the same, that there are statutory obligations which you've got to comply regarding drinking water and what's in it and so on and so forth. Again, I just take the view that Northumbrian Water should be delivering something which meets all of the statutory requirements, and if it does so, then it will be perfectly drinkable, and therefore I don't need to be involved in the process of ensuring it. I pay my taxes, and I pay my water rates and everything else, and I assume that that will just be done. I want it to happen really without having any input"* (Large business - Ward Hadaway)
- *"I just think that should be a given"* (SME – Recyke y'bike)
- *"I would argue that it's a minimum sort of standard, it's not a we need to talk to our customers and figure out what that is. It's a do it sort of thing"* (Large business – Greggs)
- *"It's a responsibility that they have as the provider to deal with, rather than have to consult with stakeholders on"* (Stakeholder – FSB)

There were, however, some environmental stakeholders and a more environmentally focussed SME that felt that the water quality and sewerage-based outcomes were something that either they themselves would like to engage with NWG about or would like them to engage with environmental specialists in the field about.

- *"Well, I'd love to know what they're putting into it. What they're not putting into it, where they're taking it from and whether they could possibly take it from some areas and take it from others. Whether they're going to be using desalination, how that's going to be organized. There's a million and one things that need to be discussed"* (Stakeholder - Norfolk Rivers Trust)
- *"It's the impact of storm water specifically, on both the water quality and water quality in the sea. The development of new metrics around water quality in the sea. So, that relates back to the management planning process, and we do engage with them in it and would like to continue with that relationship"* (Stakeholder - Heritage Coast)
- *"If it has been separated out into just sewerage, then I would probably have answered it differently and say then it's talk to someone"* Stakeholder - (Heritage Coast)
- *"Back to the sewage issues, to make sure that those consulting with experts in that field to make sure that everything that should be done, is done"* (SME - Recyke y'bike)



- *“It’s a problem that needs to be solved. It’s not a problem that we can just sit on. There’s an identified problem there and it needs to be rectified. We’d like to talk to them about the fact that they’re discharging sewage into river” (Stakeholder - Tweed Forum)*

We are an innovative and efficient company.

Household customers

11 out of 19 allocations
(by 19 breakout rooms)

Allocations for household customers – ‘talk to me’: 1, ‘talk to someone’: 5, ‘just deal with it’: 11, ‘don’t know’: 2.

Allocations for stakeholders and business customers - ‘talk to me’: 6, ‘talk to someone’: 18, ‘just deal with it’: 10, ‘don’t know’: 8.

Household customers tended to feel that this outcome relating to innovation and efficiency was something they trusted NWG to get on with because they felt NWG would have the knowledge internally to have an input on this and didn’t feel that themselves, as household customers, would have the expertise to be able to influence this outcome.

- *“We’re not experts on water management so I’m not really going to be able to have much input on what they’re going to do to keep their efficiency and keep up with innovations, they’ll get that from their own experts and from other scientific body they confer with” (Newcastle/Northumberland household group)*
- *“We’re not experts on company efficiency, are we? Or, once again, innovation” (Essex household group)*
- *“I would hope that they are the specialists in this area. So, I don’t know anything about water really, so I don’t think you’d be much use talking to someone like me, just an average person. But again, I don’t know if they should be talking to a specialist because shouldn’t they be the specialist?” (Essex household group)*
- *“I think yes, it just should be just deal with it because respectively a customer isn’t going to be able to tell you how efficient unless they are professionals. I’m not going to be able to sit here and tell you how to do your job efficiently because I don’t know how to. So, I think it should just be dealt with internally” (Essex household group)*

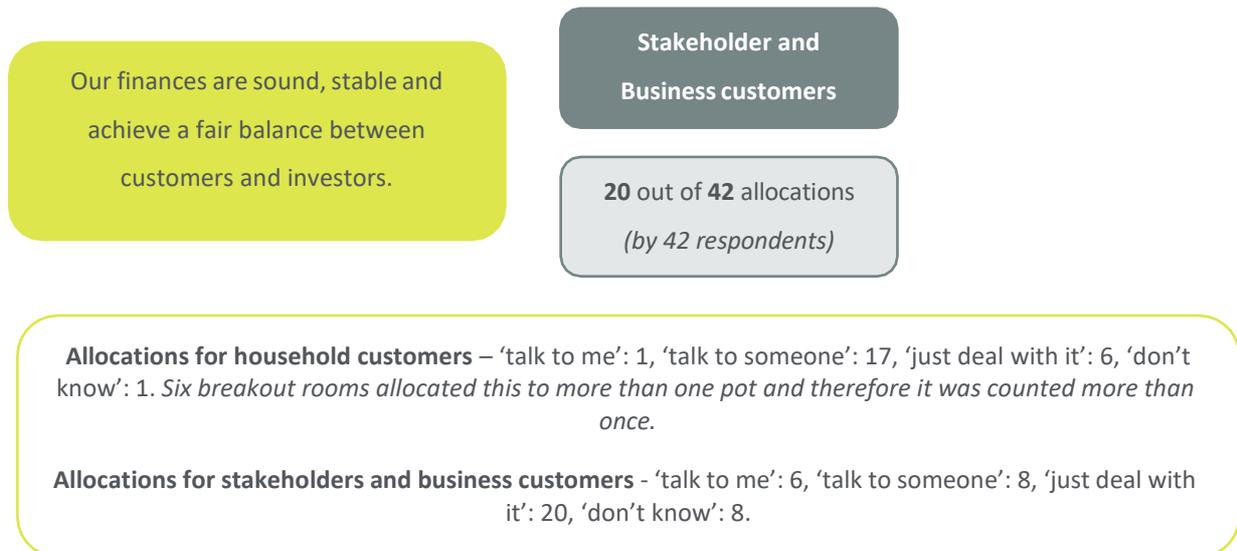
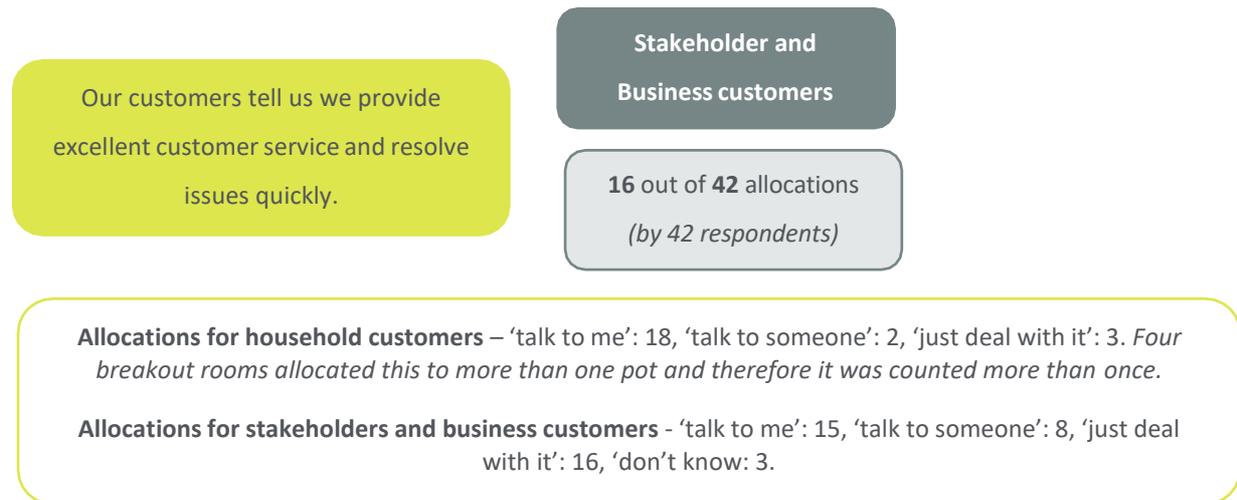
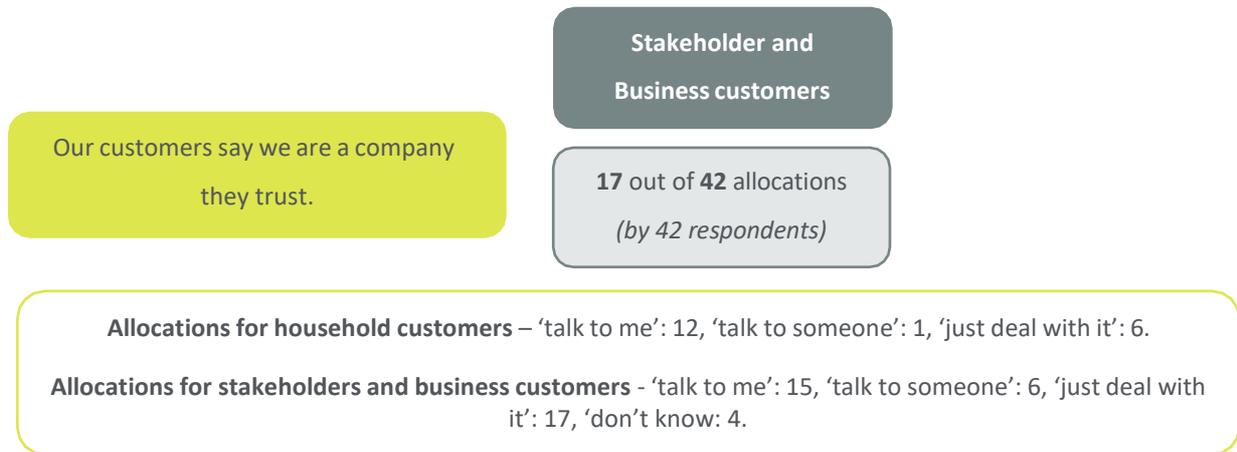


- *“As a customer, though, you probably don't know whether they are efficient or not really. You've got limited insight” (Newcastle/Northumberland household group)*
- *“I don't think it's the customer because I mean, how do we know? We've got no knowledge of what an efficient water company would be” (Durham/Darlington household group)*

Specifically, in relation to innovation, some household customers did feel that this area may need some outside involvement from specialists.

- *“Being innovative is more regarding technology and technology is run by specialists sometimes.” (Essex household group)*
- *“The middle one, I think, you know, to be innovative, you've got to involve environmentalists, and people like that, to make it more efficient and forward-thinking” (Durham/Darlington household group)*
- *“As if it's innovative, then maybe they need to talk to some specialists who are creating new inventions and things, that they might then want to use. But yeah, it's similar, I don't know enough about this area” (Essex household group)*
- *“Efficiency would be them to look at themselves, I think. It's just the innovation that possibly a specialist might be able to help them with” (Essex household group)*





These three outcomes under the 'unrivalled customer experience' theme were more likely to be placed in the 'just deal with it' pot by stakeholders and business customers, indicating that they trusted NWG to get on with these outcomes themselves without customer or external influence. Many felt that NWG were already a trustworthy company and therefore were happy for them to carry on as they are.

- *"I think from a stakeholder perspective it's not necessarily something that I would imagine Northumbrian Water need to consult stakeholders on. I think it's something that the company can manage and deliver on their own" (Stakeholder - Anonymous)*
- *"Yeah, I do trust Northumbrian Water, it's a good company and it does what it says, so they should just carry on. They don't need to speak to me or indeed anyone else about being trustworthy: they should just carry on being trustworthy" (Large business - Ward Hadaway)*
- *"I suppose because I do trust them to do the service. And if they're ticking all the other boxes in terms of they're coming to solve any issues or they're informing me about other information, just to get on with it on a day to day basis" (Braintree District Council)*
- *"Again, that's the same sort of thing where I think, especially given the area that you're in, and it's water, and it's potable, and it's vital for life, you should probably expect as a base level, rather than needing to be elaborated on more" (Large business - Greggs)*
- *"I think reputationally I think you build your own trust within your service delivery. I think if provide a customer with a good service, they're going to come back to you, they're going to trust that you do it right next time" (Stakeholder - Gentoo)*

They also felt that providing excellent customer service was just part and parcel of the service they already provide and therefore didn't feel the need to engage with NWG about this.

- *"I expect from an organisation like Northumbrian Water that they will deliver excellent service in the sense that I believe they'll deliver me clean water, and I believe that they'll deal with leaks. I don't need them to come and talk to me or indeed anyone else that should be just an integral part of their service and what they do. I don't think excellent customer service is an optional extra, it should just be part of the package" (Large business - Ward Hadaway)*
- *"Mainly because I thought that it's their job. And so I'd expect that to happen" (Stakeholder - Norfolk and Suffolk Local Nature Partnership)*
- *"I think that they should be able to resolve issues for customers as they arise. I think that that's something that shouldn't require outside influence. It should be something that's second nature to them. It's a business-as-usual element. If they come across problems that are unique or individual to those people, they're talking to then that's where they could talk to others. But all in*



all, I think the main element of their service should be manageable internally” (Stakeholder - National Energy Action)

Stakeholder and business respondents also allocated the financial outcome around achieving a fair balance between customers and investors into the ‘just deal with it’ pot. There was a mix of reasons as to why stakeholders/business respondents trusted NWG to get on with this outcome. Some felt that it was a ‘given’ and expected as part of the business-as-usual process. Others felt that NWG would have the knowledge and expertise to deal with this themselves and some simply were not interested in being involved in this from a stakeholder or business customer perspective.

- *“Because I think the nature of it is kind of Northumbrian water and their executive team will know what they need to do in terms of the balance between inward investment, helping the business to the growth and deliver better services. So, it’s kind of they need to sort all of that kind of stuff out” (Large business - Thirteen Group)*
- *“Again, I would just assume that was a given” (SME – Recycle y’bike)*
- *“I’m not an accountant. [Laughs] It’s good that we know that they’re sound and investment plans are there, but the scale and the detail are just not of interest to me personally or the organisation” (Stakeholder - Heritage Coast)*

One respondent commented that the way that the industry is set up and regulated is already in place to ensure that this is something that is dealt with by NWG with the input of Ofwat in terms of regulation, and therefore didn’t feel a need to be involved.

- *“Well, I presume a lot of this will be dealt with by the regulator, especially around finances. So, you’re tied into a big system already. So, Northumbrian Water will be dealing with it because they have to report to the regulator. So, the whole system is setup to deal with that already” (Stakeholder - Anonymous)*



Keeping customers informed about progress (household customers only)

At the end of the outcome sorting exercise, if time allowed, household respondents were asked within their breakout rooms how they thought NWG should keep customers informed about their progress towards their outcomes and whether there was anything that they wouldn't tend to pay attention to. In total, nine breakout rooms discussed this.

It was important to customers that the way that NWG inform customers about their progress was tailored to different generations. For example, they felt that the older demographic would be less likely to look at emails, websites and social media but that they may be more likely to listen to information provided by NWG in person, for example at events or if they had someone at their door providing them with information.

- *"I think they need to cater towards people, because they will have a whole range of people who want to know different amounts. Because there is only the one supplier there will be older people who might not be as good with technology so having it all online wouldn't be appropriate for them..." (Newcastle/Northumberland household group)*
- *"I mean, the only thing is it's a shame it's a lot of people aren't on social media or older generations, so they're not going to know. I think those are the two better ways to be able to speak all demographics, I think" (Durham/Darlington household group)*
- *"I suppose the easiest option is to say email, but then there's a lot of people, elderly and whatnot, who haven't got that email facility. So, they would have to rely on somebody else, to spread the word" (Essex household group)*

One of the most frequently mentioned channels that was suggested, was social media. This was suggested particularly by future customers, but also by other household customers of differing age profiles. For example, some suggested that NWG could inform their customer base via platforms such as Facebook, TikTok, YouTube ads and Instagram.

- *"For me probably Facebook or TikTok..." (Newcastle/Northumberland household group)*
- *"For me it would be more Instagram and maybe TikTok" (Newcastle/Northumberland household group)*
- *"YouTube ads" (Essex household group)*
- *"I think social media is a good way to contact the younger market..." (Newcastle/Northumberland household group)*



- *"I mean, you should because they're blooming expensive to make. No, I think if anything I'd pay more attention to like, probably the most thing I'd pay attention to is social media, if I saw it on a social media" (Essex household group)*
- *"So, from like my generational point of view, I just like to see stuff on like social media. I feel like I see a lot of stuff on social media or even like in person marketing" (Durham/Darlington household group)*

There were mixed views on leaflet drops and emails. Many said that they were unlikely to read a letter or leaflet that came through their door and therefore would have a preference towards receiving an email, but others felt that they wouldn't read emails in their entirety and often felt that these were often written to be too promotional, which customers didn't like.

- *"Email would be better because I'm more inclined then to at least look at it and see what it says whereas if it's within the bill paper just go in the recycling" (Essex household group)*
- *"I can't recall bothering to read every word of those leaflet" (Essex household group)*
- *"More email if it was emailed to me, chances are I'd probably fill it in more than I would if it was posted" (Newcastle/Northumberland household group)*
- *"If it's just like a leaflet you're just going oh this is junk mail along with a load of takeaway leaflets and stuff and chuck it in the bin" (Essex household group)*
- *"I was going to say sort of emails but then now that X's pointed out that you don't really read them in their entirety you don't always look through them or you don't want to feel like they're doing like what X said the bragg of all look what we've done" (Durham/Darlington household group)*
- *"I feel like just seeing them have a presence to me is the big bigger than emailing me saying this is what we're doing" (Durham/Darlington household group)*

Other channels that were suggested included: TV adverts, radio adverts, independent reviews and interviews, text messages with video links and having the information readily available on the NWG website. One respondent also suggested that the use of jingles, such as the Dwayne Pipe advertising, was one of the most successful ways of ensuring information is absorbed by people.

- *"To see interviews on the TV with independent journalists or newspaper articles, rather than just something that you produce saying we're marvellous, I like somebody to question them and test them" (Durham/Darlington household group)*
- *"Obviously TV ads, it's like really hard hitting like clever. So, I always remember Dwayne pipe. And the little jingle that goes with it. And like, I remember that and that's a Northumbrian Water*



jingle. funny little ads like that stick in your brain. And that's probably a sort of, like, get people talking and it could create more from it. Obviously, it's just the initial stage of raising awareness of Northumbrian water, but that had a really important message behind about don't flush wipes and stuff down the toilet. Yeah, like, no, I remember that. Like, I mean, I knew anyway, but like, I just remember, that's what the whole advert was about" (Durham/Darlington household group)

- *"I think if you for example if you were sent a...see how they send us text messages every so often. So, if that text message like here's your next bill or here's your latest bill, and you went on a link to that and then between the bill and the link is a twenty, thirty second video, not longer than that because, again, we'd known no one has a time to kind of sit through anything more than a minute. Then that might be a useful way you can also have a thirty second video that there's the topic the next three months and it explains what they've achieved, and then you get to your bill" (Essex household group)*



Long term strategy – ambitious goals

As the final exercise in both the virtual workshops with household customers, and the pre-task sent to business customers, respondents were provided with an explanation of NWG's 'ambitious goals' and asked whether or not they agreed with them. There were 14 goals in total spread across the six categories of NWG's business plan:



This exercise was not previously conducted within DtC, so was a newly introduced element to this programme, though Explain previously tested early iterations of the ambitious goals in a piece of long term strategy research conducted in 2018. At that time, the ambitions were perceived positively and a majority of respondents voted in agreement for each of the 14 ambitions they were presented. Where comparisons to these results can be drawn (i.e. the ambitious goal remained as it was tested in 2018), these are noted in the commentary which follows. Caution should be taken when considering the comparison, as the long term strategy research involved deliberative discussion groups focused on the ambitious goals, therefore customers had ample opportunity to hear about each goal through presentation from an NWG representative and ask questions to support their understanding; in DtF, less time was available and the goals were presented by Explain.

In the 2021 DtF research, the Explain chair within the virtual workshop presented key facts on each ambitious goal under each of the six themes, and then asked the question 'Do you agree with the ambition that Northumbrian Water / Essex & Suffolk Water is striving to deliver this ambition?'. For in-depth interviews with business customers this information was included in the pre-task survey. Results from this exercise were collected in a poll vote format, which is presented in terms of quantitative figures in the following section.

The purpose of this exercise was to see to what extent customers endorsed the ambitious goals included in NWG's long-term strategy. We used a benchmark of 70% to determine a level of overall acceptance as this has been used previously in acceptability research. Conclusions from these polls are drawn at an overall level for both the NW and ESW operating areas with household, business, and



stakeholder customers combined. The graphs also show a breakdown of household customers vs business customers and stakeholder (as a combined sample).

In general, business customers and stakeholders showed lower levels of agreement, however the difference in methodology should be considered. Business customers and stakeholders shared their responses to this exercise initially via a self-completion survey format, before taking part in a qualitative interview with an Explain researcher, in contrast to household customers who took part in this exercise through a deliberative workshop with NWG representatives present and therefore had more opportunity to ask questions before voting on the poll. This is reflected in the higher proportion of respondents selecting 'I'm not sure' amongst the stakeholder and business customer groups. Please note, three stakeholders/business customers who did not go on to take part in an interview completed the online exercise, one of whom completed the ambitious goals section only.

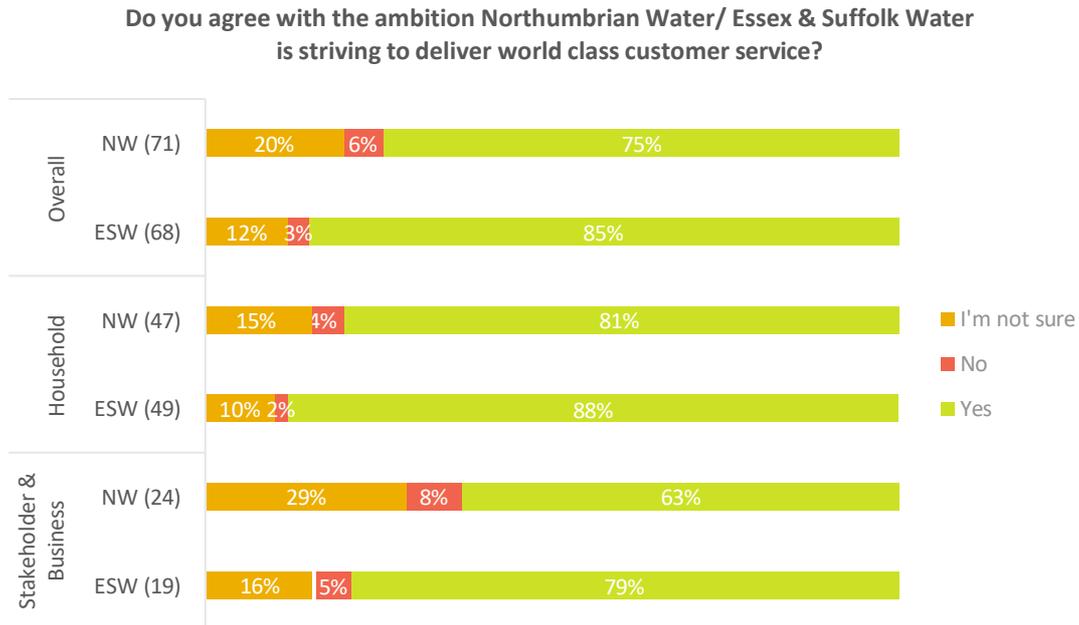


Ambitious goal	NW agreement %			ESW agreement %		
	Overall (41-71)	Household (17-47)	Stakeholder and business (21-24)	Overall (64-68)	Household (45-49)	Stakeholder and business (19)
Deliver world class customer service	75%	81%	63%	85%	88%	79%
Give every single customer the opportunity to have a strong voice and engage with them, with at least 2 million customers participating by 2025	73%	88%	63%	68%	73%	53%
Eradicate water poverty in their operating areas by 2030	80%	87%	67%	79%	81%	79%
Have the lowest levels of leakage in the country in their water-stressed ESW operating area	77%	87%	58%	94%	91%	100%
Have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040	62%	73%	42%	67%	69%	63%
Promote confidence in their drinking water so that nine out of ten of their customers choose tap water over bottled water	83%	87%	86%	91%	93%	84%
Eradicate sewer flooding in the home as a result of their assets and operations	92%	100%	79%	N/A	N/A	N/A
Be leading in innovation within the water sector and beyond	86%	93%	71%	94%	91%	100%
Be leading in the sustainable use of natural resources, through achieving zero avoidable waste by 2025 and being carbon neutral by 2027	90%	94%	88%	88%	87%	89%
Demonstrate leadership in catchment management to enhance natural capital and deliver net gain for biodiversity	91%	96%	83%	77%	79%	74%
Have the best rivers and beaches in the country	89%	89%	88%	86%	85%	89%
Have zero pollutions as a result of their assets and operations	90%	87%	92%	88%	87%	89%
Spend at least 60p in every £1 with suppliers in their regions	75%	82%	63%	85%	83%	89%
Be the most socially responsible water company	89%	89%	88%	91%	92%	89%



Deliver world class customer service

The graph below displays the polling results for the ambitious goal relating to world class customer service, split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.



There was a high level of overall agreement with this ambitious goal, with 75% of NW respondents and 85% of ESW respondents voting in support of it.

As the above graph shows, this ambitious goal had the highest level of agreement with ESW household customers (88%). Otherwise, levels of agreement with this ambitious goal were relatively high (all above 60%), however lowest levels of agreement were shown for NW Stakeholder and Business customers with 8% stating that they did not agree with this, and 29% stating that they were unsure.

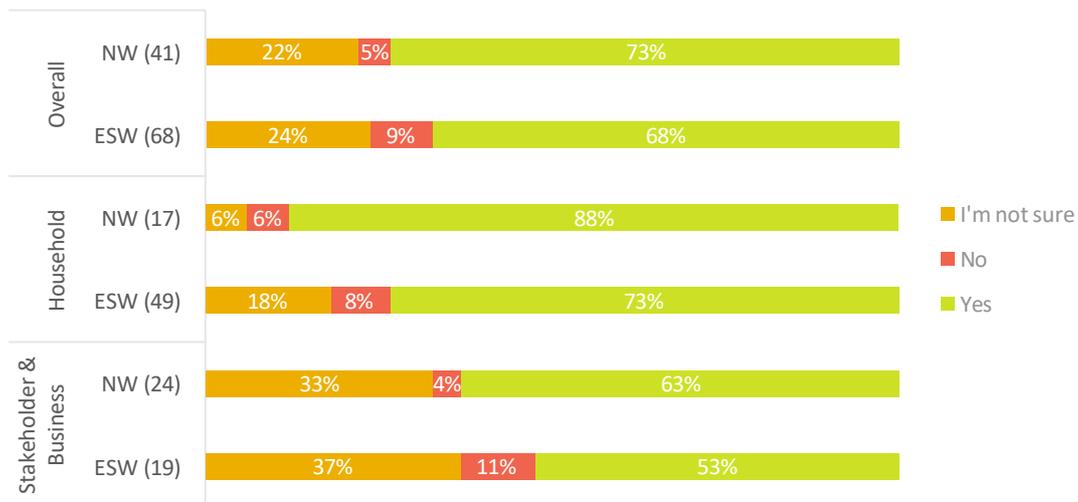
- *“I almost thought it was a statement that's like impossible to want to disagree with and not say, yes. You know, striving to deliver a world class customer service. Who wouldn't want that? But what does it mean in detail later on, when we're all a captive audience? And how will we measure it and see it?” (Newcastle/ Northumberland household group)*
- *“I see them as a fairly innovative and open company who are constantly at the high end of their peer reviews. So, they do seem to be constantly wanting to do better. Hence me talking to you today, a company that didn't want to go forward probably wouldn't do this” (Stakeholder, Norfolk and Suffolk Local Nature Partnership)*



Give every single customer the opportunity to have a strong voice and engage with them, with at least 2 million customers participating by 2025

The graph below displays the polling results for the ambitious goal relating to NWG striving to give every customer a strong voice and engage with at least 2 million customers by 2025. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to give every single customer the opportunity to have a strong voice and engage with them, with at least 2 million customers participating by 2025?



There was a high level of overall agreement with this ambitious goal in NW, with 73% of respondents in that region voting to support it. Agreement was slightly lower amongst ESW respondents at 68% overall.

As the above graph shows, this ambitious goal had the highest level of agreement with NW household customers (88%). Otherwise, levels of agreement with this ambitious goal were mixed (although all above 50%). Lowest levels of agreement were shown for ESW stakeholder and business customers with 11% stating that they did not agree with this, and 37% stating they were unsure.

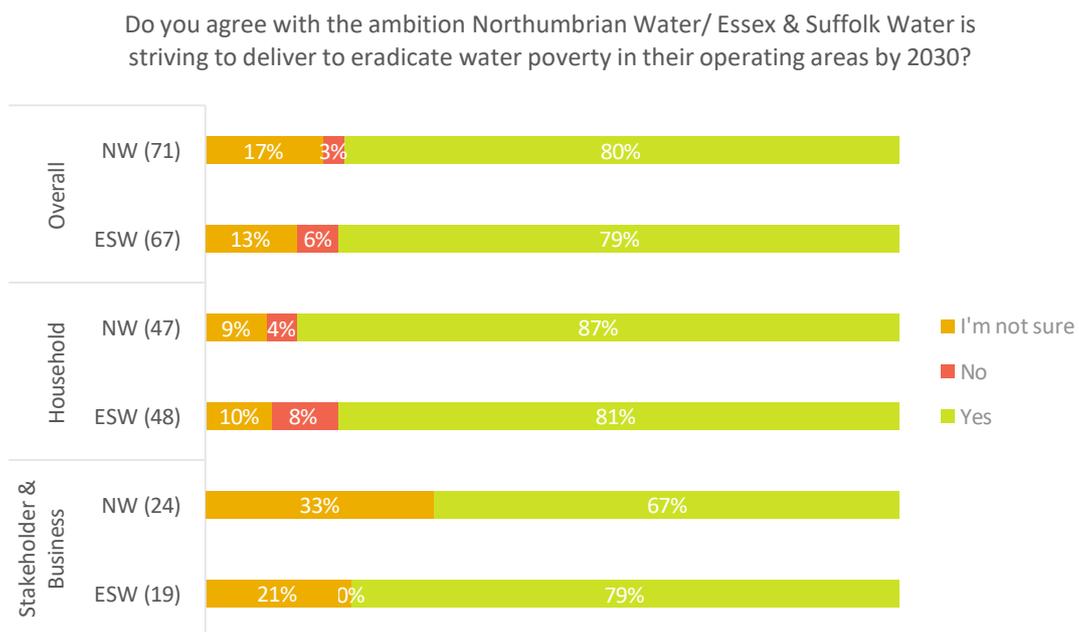
“I think it was just a lack of confidence from me because I’ve not dealt with anybody in that customer base knowingly. It sounds really good making sure everybody gets a voice and everything” (Stakeholder, London Fire Services)



“I think engaging or having two million participating is a phenomenal target to do, that many people. I suppose for Essex, sorry, I keep that head on. But, for Northumbria, working area of the Northeast, that’s near enough everybody, so that’s the thing that got to me is that... I really don’t understand the reasoning behind having a hundred percent sample was probably the reason for my reaction” (Stakeholder, Heritage Coast)

Eradicate water poverty in their operating areas by 2030

The graph below displays the polling results for the ambitious goal relating to NWG striving to eradicate water poverty by 2030. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.



There was a high level of overall agreement with this ambitious goal, with 80% of NW and 79% of ESW respondents voting to support it.

As the above graph shows, this ambitious goal had the highest level of agreement with NW household customers (87%), and ESW Household customers (81%). Otherwise, levels of agreement with this ambitious goal were relatively high (all above 67%).

“Just because everyone should be entitled to clean water. Everyone should, every single person could potentially stop child poverty as well within the local area, and what have you. Just because



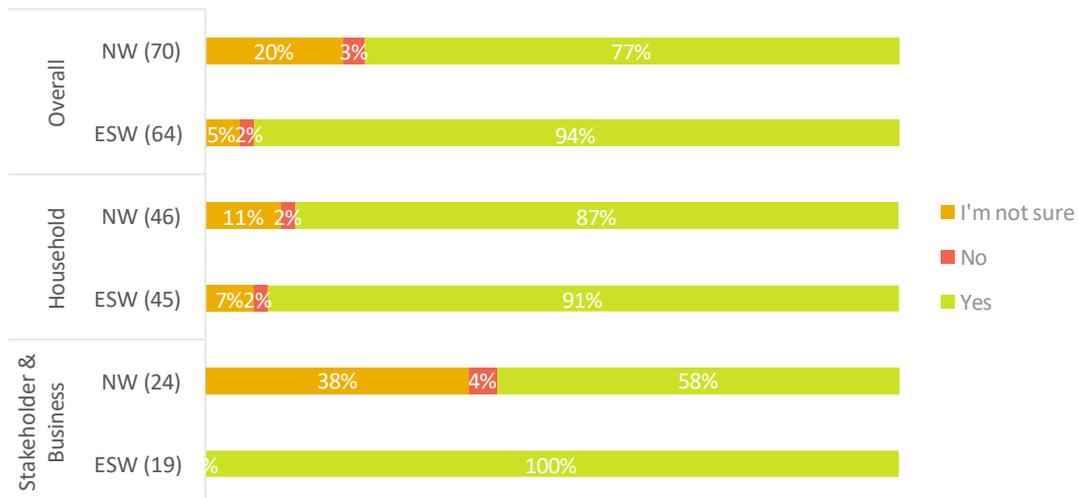
there is, obviously, water is one of the main things that you cook with. So, I believe that water poverty, everyone should be entitled to have water, regardless of the money and everything that they're going through at the time" (SME - KO Bathrooms)

In the previous long term strategy research, the goal to ‘achieve zero water poverty by 2030’ was supported by 92% of household respondents, so there is lower support in this DtF research – however, support is still strong overall.

Have the lowest levels of leakage in the country in the water-stressed ESW operating area

The graph below displays the polling results for the ambitious goal relating to NWG striving to have the lowest levels of leakage within their ESW area. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to deliver to have the lowest levels of leakage in the country in their water-stressed ESW operating area?



There was a high level of overall agreement with this ambitious goal, with 77% of NW respondents and 94% of ESW respondents voting to support it, with the exception of stakeholders and business customers in NW of whom 58% agreed with the ambition.

As the above graph shows, this ambitious goal had the highest level of agreement with ESW stakeholder and business customers (100%), and ESW customers overall (94%). Otherwise levels of agreement with this ambitious goal were mixed, with lowest levels of agreement seen for NW

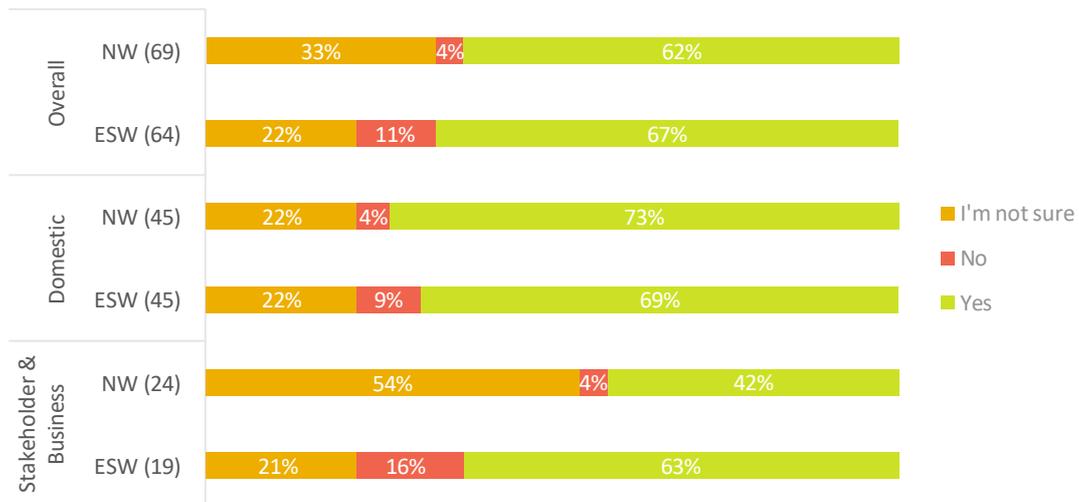


stakeholder and business customers with 38% stating that they were unsure – this is potentially due to the goal relating specifically to the ESW operating area.

Have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040

The graph below displays the polling results for the ambitious goal relating to NWG striving to have a per capita consumption for water use of 118 litres per person per day by 2040. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian/ Essex and Suffolk Water is striving to deliver to have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040?



There was a lower level of overall agreement with this ambitious goal. 67% of ESW respondents and 62% of NW respondents agreed with it; agreement was lowest amongst stakeholders and business customers of NW of whom 54% weren’t sure whether they agreed with it.

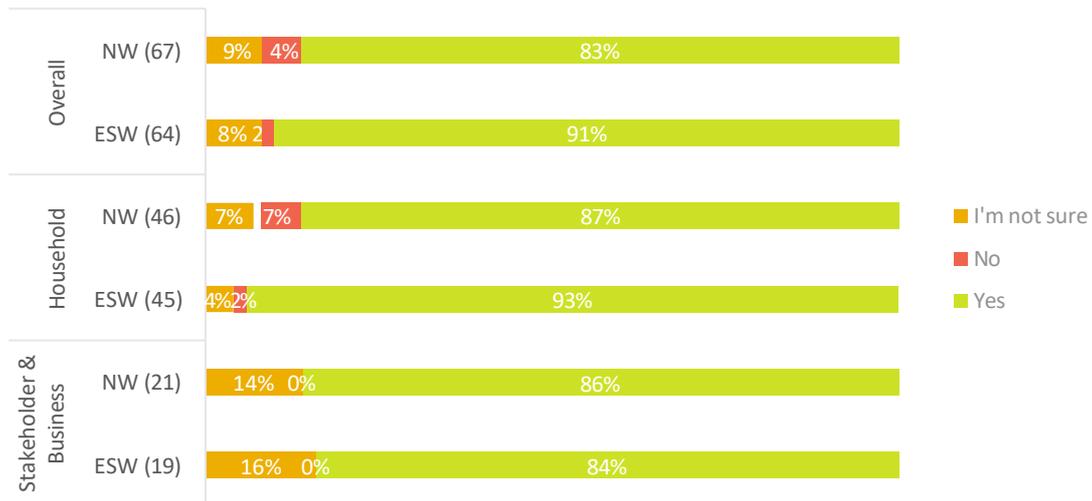
As the above graph shows, this ambitious goal had the highest level of agreement amongst NW household customers (73%). Otherwise, levels of agreement with this ambitious goal were mixed with higher levels of votes for ‘I’m not sure’, particularly amongst NW stakeholder and business customers. Highest levels of disagreement were seen amongst ESW stakeholder and business customers with 16% stating that they did not agree with this goal, and 21% stating that they were unsure – this is potentially due to a lack of context and point of reference for the daily water usage figure.



Promote confidence in drinking water so that nine out of ten customers choose tap water over bottled water

The graph below displays the polling results for the ambitious goal relating to NWG striving to promote confidence in their drinking water. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to deliver to promote confidence in their drinking water so that nine out of ten of their customers choose tap water over bottled water?



There was a high level of overall agreement with this ambitious goal, with 91% of ESW and 83% of NW respondents voting to support it.

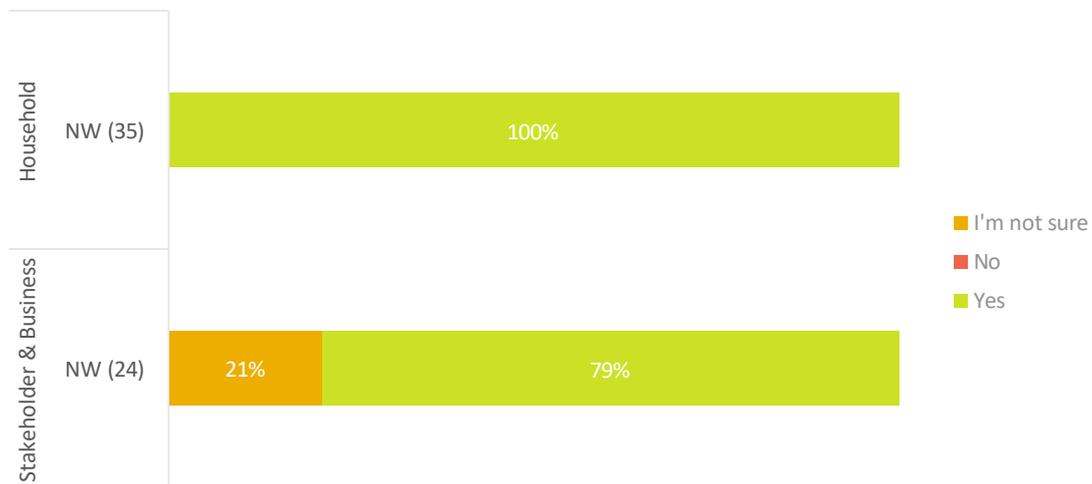
As the above graph shows, this ambitious goal had high levels of agreement across all customer types in both operating areas. Highest levels of agreement were shown for ESW customers overall (91%) with the remaining customer groups all showing levels of agreement above 80%.



Eradicate sewer flooding in the home as a result of assets and operations

The graph below displays the polling results for the ambitious goal relating to NWG striving to eradicate sewer flooding in the home. This ambitious goal was only presented to NW customers as customers in the ESW region do not receive wastewater treatment services from ESW. The results are split by the customer groups: household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water is striving to deliver to eradicate sewer flooding in the home as a result of their assets and operations?



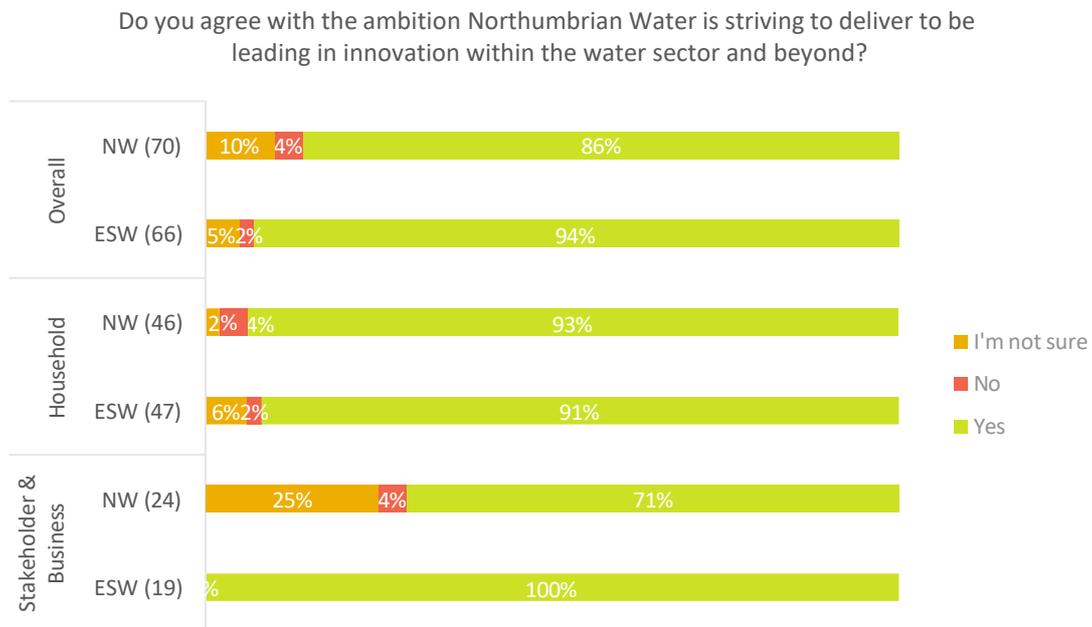
There was a high level of overall agreement with this ambitious goal, with 100% agreement amongst household customers and 79% of stakeholders and business customers voting to support it.

As the above graph shows, there was high levels of agreement reported with this ambitious goal, with no respondents disagreeing with the goal across NW household, stakeholder and business customers. 100% of NW household customers agreed with this ambitious goal, however stakeholder and business customers both had respondents voting 'I'm not sure' with 21% stating this.



Be leading in innovation within the water sector and beyond

The graph below displays the polling results for the ambitious goal relating to NWG striving to be leading in innovation for the water sector and beyond. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.



There was a high level of overall agreement with this ambitious goal, with 86% of respondents and above voting to support it in both NW and ESW overall, including 100% of ESW stakeholder and business customers.

As the above graph shows, the highest levels for agreement for this ambitious goal were reported amongst ESW stakeholder and business customers (100%), and NW household customers (93%). 25% of NW stakeholder and business customers voted ‘I’m not sure’.

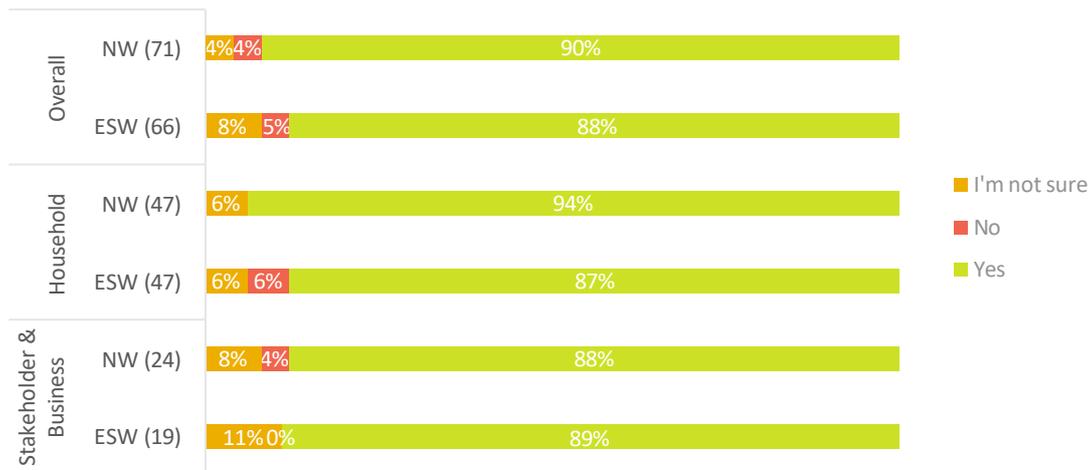
In the previous long term strategy research, the goal to ‘be leading in innovation, both within and outside the water sector’ had 100% agreement from household customers – support is lower in this phase of research, but it still strong for this goal.



Be leading in the sustainable use of natural resources, through achieving zero avoidable waste by 2025 and being carbon neutral by 2027

The graph below displays the polling results for the ambitious goal relating to NWG striving to be leading in the sustainable use of natural resources and being carbon neutral by 2027. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to deliver to be leading in the sustainable use of natural resources, through achieving zero avoidable waste by 2025 and being carbon neutral by 2027?



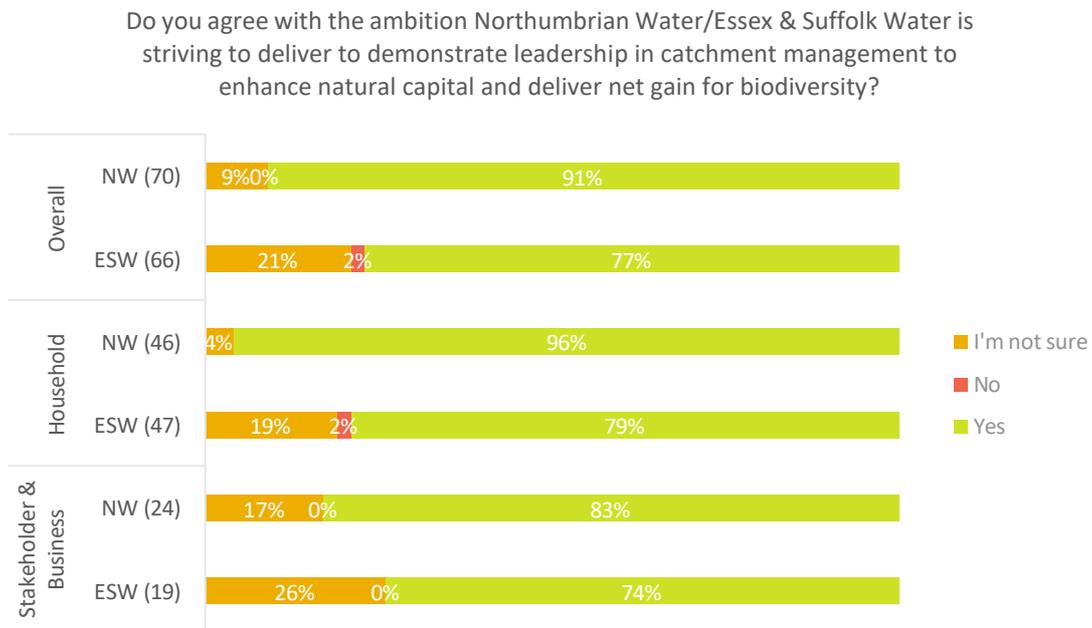
There was a high level of overall agreement with this ambitious goal, with 87% of respondents and above voting to support it in across the respondent audiences engaged (90% of NW and 88% of ESW respondents overall agreed with it).

As the above graph shows, the ambitious goal was well supported across all subgroups of respondents, most notably NW household customers, of whom 94% voted in agreement with the goal.



Demonstrate leadership in catchment management to enhance natural capital and deliver net gain for biodiversity

The graph below displays the polling results for the ambitious goal relating to NWG striving to demonstrate leadership in catchment management to enhance natural capital and deliver net gain for biodiversity. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.



There was a high level of overall agreement with this ambitious goal, with 91% of NW and 77% of ESW respondents voting to support it.

As the above graph shows, high levels of agreement for this goal were shown amongst NW customers overall (91%), in particular NW household customers (96%). Levels of agreement for the other customer groups were all above 70%, however, 26% of ESW stakeholder and business customers stated that they were unsure in their agreement of this ambitious goal.

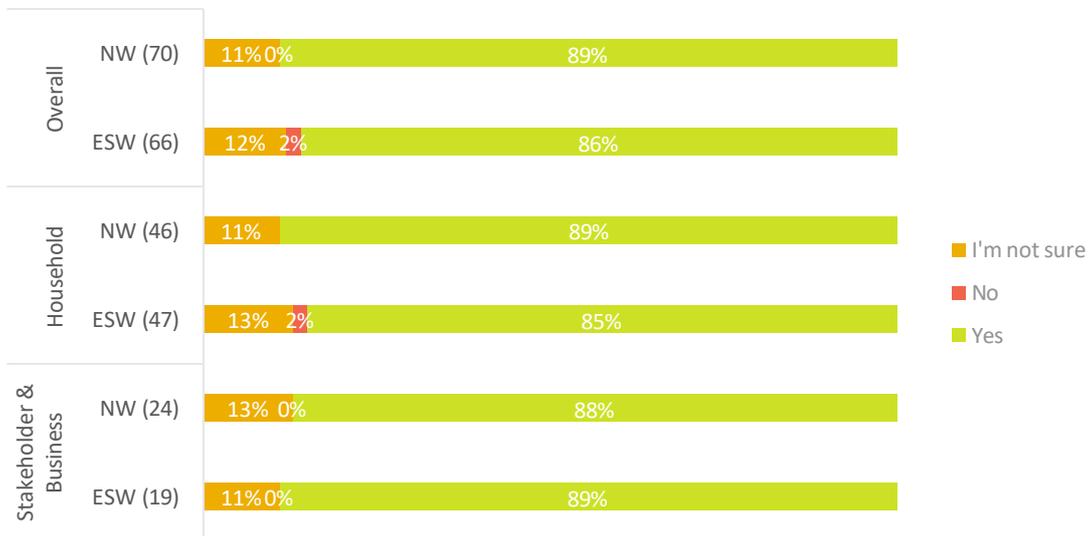
In the previous long term strategy research, the ‘protect and enhance natural capital in our catchments’ goal saw 100% agreement from household customers engaged.



Have the best rivers and beaches in the country

The graph below displays the polling results for the ambitious goal relating to NWG striving to have the best rivers and beaches in the country. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to deliver to have the best rivers and beaches in the country?



There was a high level of overall agreement with this ambitious goal, with at least 85% of respondents voting to support it across all respondent groups.

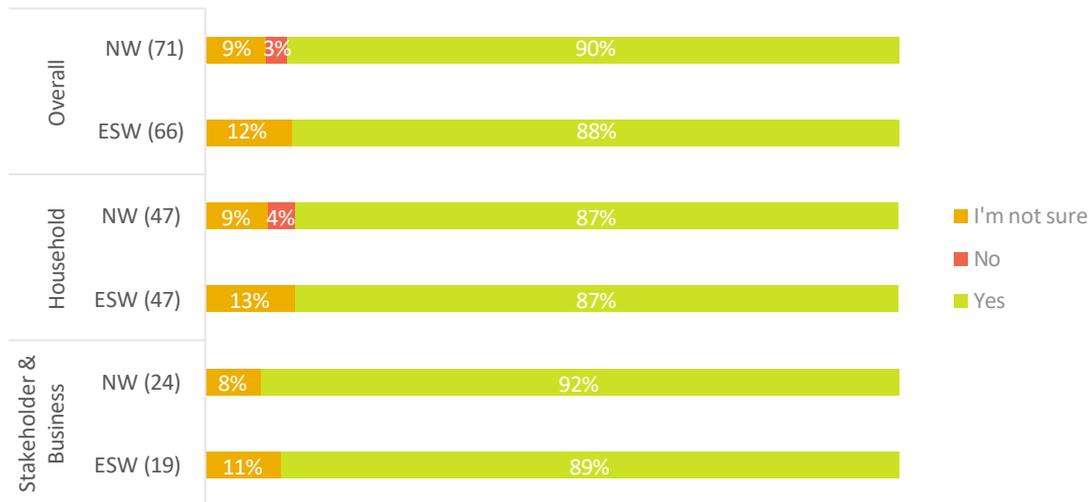
As the above graph shows, there were high levels of agreement for this ambitious goal, with 89% of NW household customers and 86% of ESW business and stakeholder customer stating they agreed with it. Amongst all groups engaged, there were slightly higher proportions of stakeholder and business customers voting ‘I’m not sure’, with 13% [NW] and 11% [ESW] of this audience reporting they were unsure.



Have zero pollutions as a result of their assets and operations

The graph below displays the polling results for the ambitious goal relating to NWG striving to deliver zero pollutions as a result of their assets and operations. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to deliver to have zero pollutions as a result of their assets and operations?



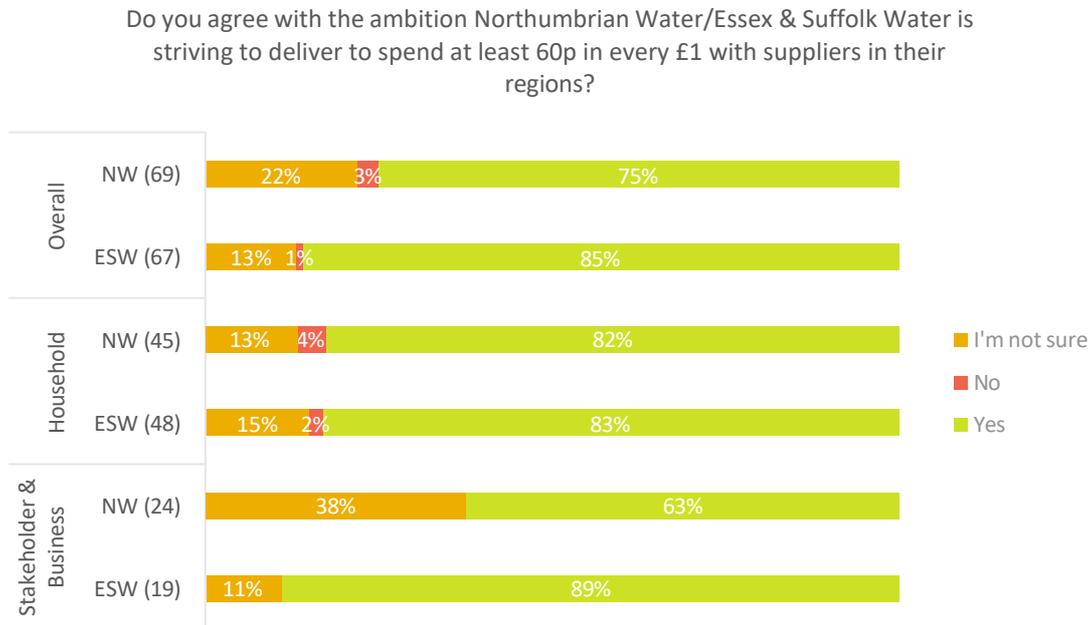
There was a high level of overall agreement observed again for this ambitious goal - 90% of NW respondents and 88% of ESW respondents voted in support. 92% of NW business and stakeholder customers supported this goal, as did 89% of ESW stakeholder and business customers.

Amongst all groups engaged, two NW household customers disagreed with this goal, and there were slightly higher proportions of ESW respondents voting ‘I’m not sure’ with 12% of ESW overall feeling unsure about their agreement.



Spend at least 60p in every £1 with suppliers in their regions

The graph below displays the polling results for the ambitious goal relating to NWG striving to spend at least 60p in every £1 with suppliers in their regions. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.



There was a high level of overall agreement with this ambitious goal, with 85% of ESW and 75% of NW respondents reporting that they did agree with it.

As the above graph shows, highest levels of agreement for this ambitious goal were reported by ESW business and stakeholder customers (89%) and ESW household customers (83%). There were relatively high levels of respondents voting ‘I’m not sure’ for this ambitious goal compared to the others, for example 38% of NW stakeholders and business customers and 15% of ESW household customers selecting this option when polled.

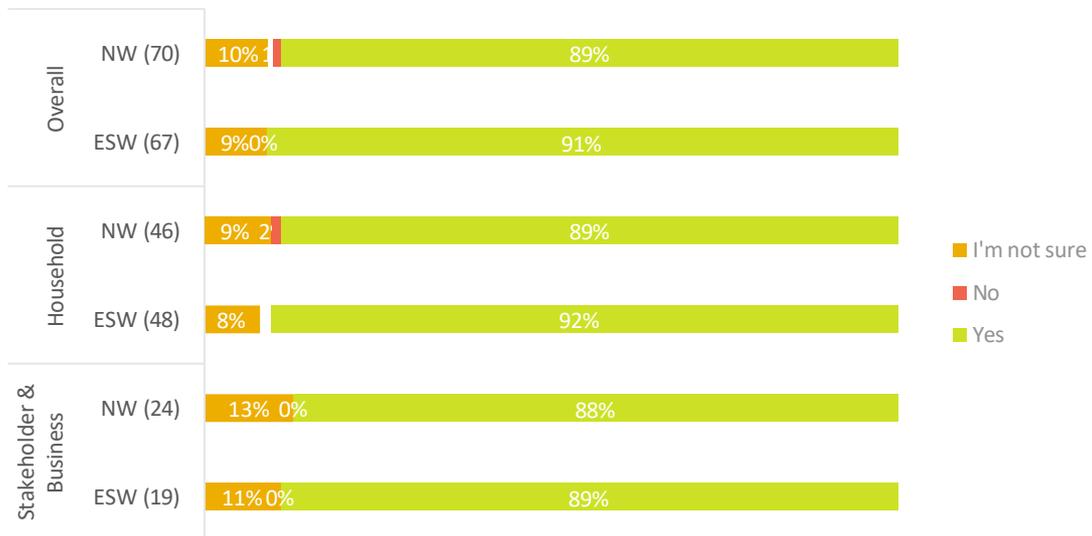
When comparing against the long term strategy research, in which the ‘maximise the income generated by our investment in local economies’ goal was tested, 97% of household customers engaged agreed with this goal, and the remaining 3% were unsure. The format of the strategy sessions could have supported the higher agreement with the sentiment seen previously, i.e. more opportunity to hear about the goal in more detail and ask questions to support their understanding of the aim.



Be the most socially responsible water company

The graph below displays the polling results for the ambitious goal relating to NWG striving to be the most socially responsible water company. This is split by NWG’s two operating areas in the north and south, for household, stakeholder and business customers.

Do you agree with the ambition Northumbrian Water/ Essex & Suffolk Water is striving to deliver to be the most socially responsible water company?



There was a high level of overall agreement with this ambitious goal, with 91% of ESW and 89% of NW respondents overall voting in agreement.

As the above graph shows, very high levels of agreement were shown for this ambitious goal particularly amongst both ESW and NW household customers (92%, 89%).





Conclusions and recommendations

A holistic review of the actionable insights.

Conclusion and recommendations

A summary of the key conclusions and our subsequent recommendations can be found below.

Conclusions

Customer or citizen

We asked respondents to consider their relationship with NWG and whether they preferred to be seen as customers or as citizens. Overall, household respondents most commonly saw themselves and wanted to be treated as customers. This was typically because they saw their relationship with NWG as predominantly transactional – paying their bill in return for their water (and wastewater) services.

However, stakeholders and business representatives were keen for NWG to consider service users as citizens, to reflect the broader role that the organisation plays within local communities, for example, environmental protection, sustainability practices and work in supporting communities.

Pillars and priorities

When household customers were asked for any words or ideas that they associated with the concept of 'outstanding customer service'. The following key areas emerged:

- High-quality communication: communication needs to be friendly and courteous, focused on a key point of contact and framed within a local understanding
- A responsive service: communication should be timely and any action necessary be undertaken quickly and efficiently.
- A personal service: the service needs to ensure that the customer feels valued and understood, with genuine care and concern shown.
- A reliable service: appointments should be kept and promises fulfilled.

Whilst both the KPMG Nunwood pillars model and the NWG customer service priorities were thought appropriate by household and non-household customers, the priorities was favoured because it was the most 'personal'.



When asked to prioritise the different elements of both pillars and priorities, in each case the reasons behind the top and bottom ranking elements aligned. Integrity and keep our promises were understood to be synonymous and the foundation of effective customer service and highly prioritised as a result. Personalisation was understood to be the same as 'show each customer they are special'; both the need and feasibility of these elements was called into question.

Company outcomes

'Talk to me'

Much fewer outcomes were likely to be placed in the 'talk to me' pot by non-household customers than household customers. Non-household customers were also interested in engaging with NWG themselves about the outcome relating to partnership working.

'Talk to someone'

There were two outcomes that were most likely to be placed in the 'talk to someone' pot by both household and non-household customers. As in the DtC research, both outcomes that were most likely to be placed in this pot across all respondents were in relation to the environment.

'Just deal with it'

Fewer outcomes were allocated to this pot in this research than they were in the 2016 DtC research by household customers. In the DtC research, the majority of service-related outcomes were allocated to this pot by household customers, alongside people and community-based outcomes.



The table below demonstrates which pot [household](#) customers were most likely to place each outcome in:

HOUSEHOLD	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (75%)	3 (15%)	2 (10%)	-
Our customers say we are a company they trust.	12 (63%)	1 (5%)	6 (32%)	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	18 (78%)	2 (9%)	3 (13%)	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	1 (4%)	17 (68%)	6 (24%)	1 (4%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	16 (84%)	-	3 (16%)	-
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	9 (43%)	5 (24%)	7 (33%)	-
Our sewerage service deals with sewage and heavy rainfall effectively.	2 (15%)	7 (54%)	4 (31%)	-
We always provide a reliable supply of water.	2 (11%)	2 (11%)	13 (68%)	2 (11%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	1 (7%)	9 (60%)	5 (33%)	-
Leading in innovation				
We are an innovative and efficient company.	1 (5%)	5 (26%)	11 (58%)	2 (11%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	3 (14%)	15 (68%)	3 (14%)	1 (5%)
We take care to protect and improve the environment in everything we do, leading by example.	2 (10%)	16 (76%)	2 (10%)	1 (5%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	12 (60%)	2 (10%)	5 (25%)	1 (5%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	4 (20%)	8 (40%)	6 (30%)	2 (10%)

When asked to rank the outcomes allocated to the 'talk to me' pot, it was most important for household respondents to engage on the outcome 'our customers say our services are good value for money and we work hard to keep water services affordable for all', although the other customer-service related outcomes were also ranked highly.



The table below demonstrates which pot stakeholders and business customers were most likely to place each outcome in:

BUSINESS AND STAKEHOLDERS	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (36%)	11 (26%)	13 (31%)	3 (7%)
Our customers say we are a company they trust.	15 (36%)	6 (14%)	17 (40%)	4 (10%)
Our customers tell us we provide excellent customer service and resolve issues quickly.	15 (36%)	8 (19%)	16 (38%)	3 (7%)
Our finances are sound, stable and achieve a fair balance between customers and investors.	6 (14%)	8 (19%)	20 (48%)	8 (19%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	11 (26%)	18 (43%)	9 (21%)	4 (10%)
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	8 (19%)	11 (26%)	19 (45%)	4 (10%)
Our sewerage service deals with sewage and heavy rainfall effectively.	5 (22%)	6 (26%)	7 (30%)	5 (22%)
We always provide a reliable supply of water.	10 (24%)	8 (19%)	20 (48%)	4 (10%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	8 (19%)	9 (21%)	22 (52%)	3 (7%)
Leading in innovation				
We are an innovative and efficient company.	6 (14%)	18 (43%)	10 (24%)	8 (19%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	10 (24%)	19 (45%)	9 (21%)	4 (10%)
We take care to protect and improve the environment in everything we do, leading by example.	11 (26%)	25 (60%)	3 (7%)	3 (7%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	19 (45%)	15 (36%)	4 (10%)	4 (10%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	24 (57%)	11 (26%)	4 (10%)	3 (7%)



Keeping customers informed about progress (*household customers only*)

It was important to customers that the way that NWG inform customers about their progress was tailored to specific generations. For example, they felt that the older demographic may be more likely to listen to information provided by NWG in person, for example at events or if they had someone at their door providing them with information.

One of the key channels that was suggested, was social media. This was suggested particularly by future customers, but also by other household customers of differing age profiles.

Other channels that were suggested included: TV adverts, radio adverts, independent reviews and interviews, text messages with video links and having the information readily available on the NWG website. One respondent also suggested that the use of jingles, such as the Dwayne Pipe advertising, was one of the most successful ways of ensuring information is absorbed by people.

Long term strategy – ambitious goals

In conclusion, the majority of respondents across household, stakeholder and business groups in both operating areas agreed with NWG's ambitious goals with high levels of agreement with the majority of the goals. The most agreed with ambition was the goal that Northumbrian Water/ Essex & Suffolk Water are striving to be the most socially responsible water company, with above 80% of all customer groups voting 'yes' in agreement with this poll, and particularly high levels amongst household customers (NW - 89%, ESW – 92%). This shows that NWG's levels of ambition for their long-term strategy are generally aligned to customer needs and perceptions of the correct areas to pursue improvement within.

However, the two ambitious goals that were least agreed upon by customer groups across both operating areas were the goals relating to daily per capita consumption and engaging with 2 million customers. Comments suggested that without additional context around the quantitative targets associated with these goals, respondents were unsure of the achievability of these goals. It is therefore suggested that further education is needed for customers with regards to the suitability of per capita/per day water usage in litres, and how NWG may plan to engage with a large sample of 2 million customers.



Recommendations

A summary of our recommendations based on the findings of this research are as follows:

- Maintain a “customer lens” with household consumers on the whole. However, as stakeholders wanted to be treated as citizens, consider how this could best be achieved, for example with focus on engaging local people around elements of NWG’s role such as sustainability and environmental stewardship, which household customers expressed particular interest in hearing about.
- Both the six priorities and six pillars models were endorsed, so there is support for both pillars and priorities to be implemented. However, prioritise use of the six priorities when striving for excellent customer experience, with a lesser focus on the six pillars developed by KPMG Nunwood.
- To plan towards PR24, there are clear areas which household customers wish to influence, which should be used to guide future engagement with this audience. Engage with household customers on the following outcomes to allow them to have a say on the service going forward:
 - ♣ Our customers say they feel informed about the services we provide and the importance of water.
 - ♣ Our customers say we are a company they trust.
 - ♣ Our customers tell us we provide excellent customer service and resolve issues quickly.
 - ♣ Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.
 - ♣ Our drinking water is clean, clear and tastes good.
 - ♣ We are proud to support our communities by giving time and resources to their important causes
- In addition, engage with stakeholders and business customers on the following outcomes to allow them to have a say on the service going forward:
 - ♣ We work in partnership with companies and organisations to achieve the goals that are most important to our customers.
 - ♣ Our customers say they feel informed about the services we provide and the importance of water.



- When communicating progress towards outcomes to customers, ensure that the means of communicating information is tailored for different audiences. In particular, consider the use of social media to inform customers as this was a preference across respondents, particularly future customers
- Consider engaging with specialists on the following outcomes:
 - ♣ We take care to protect and improve the environment in everything we do, leading by example.
 - In particular, consider environmental experts.
 - ♣ We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.
 - In particular, consider environmental experts.
 - ♣ Our finances are sound, stable and achieve a fair balance between customers and investors.
 - In particular, consider vulnerable customer representatives
 - ♣ Our sewerage service deals with sewage and heavy rainfall effectively.
 - ♣ We work in partnership with companies and organisations to achieve the goals that are most important to our customers.
 - ♣ We are resilient and provide clean drinking water and effective sewerage services: now, and for future generations.
 - ♣ Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.
 - ♣ We are an innovative and efficient company.
- Customers and stakeholders supported the majority of NWG's ambitious goals, so continue to strive to progress against these targets. Review the goals which had lowest support, as follows:
 - ♣ Engage with at least two million customers by 2025.
 - ♣ Have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040.





Appendices

Supporting documentation can be found in this section.

Appendices

Appendix 1 – Household customer outcomes

HOUSEHOLD	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (75%)	3 (15%)	2 (10%)	-
Our customers say we are a company they trust.	12 (63%)	1 (5%)	6 (32%)	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	18 (78%)	2 (9%)	3 (13%)	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	1 (4%)	17 (68%)	6 (24%)	1 (4%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	16 (84%)	-	3 (16%)	-
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	9 (43%)	5 (24%)	7 (33%)	-
Our sewerage service deals with sewage and heavy rainfall effectively.	2 (15%)	7 (54%)	4 (31%)	-
We always provide a reliable supply of water.	2 (11%)	2 (11%)	13 (68%)	2 (11%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	1 (7%)	9 (60%)	5 (33%)	-
Leading in innovation				
We are an innovative and efficient company.	1 (5%)	5 (26%)	11 (58%)	2 (11%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	3 (14%)	15 (68%)	3 (14%)	1 (5%)
We take care to protect and improve the environment in everything we do, leading by example.	2 (10%)	16 (76%)	2 (10%)	1 (5%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	12 (60%)	2 (10%)	5 (25%)	1 (5%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	4 (20%)	8 (40%)	6 (30%)	2 (10%)



Appendix 2 – Stakeholder and business customer outcomes

BUSINESS AND STAKEHOLDERS	Talk to me	Talk to someone	Just deal with it	I don't know
Unrivalled customer experience				
Our customers say they feel informed about the services we provide and the importance of water.	15 (36%)	11 (26%)	13 (31%)	3 (7%)
Our customers say we are a company they trust.	15 (36%)	6 (14%)	17 (40%)	4 (10%)
Our customers tell us we provide excellent customer service and resolve issues quickly.	15 (36%)	8 (19%)	16 (38%)	3 (7%)
Our finances are sound, stable and achieve a fair balance between customers and investors.	6 (14%)	8 (19%)	20 (48%)	8 (19%)
Affordable and inclusive services				
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	11 (26%)	18 (43%)	9 (21%)	4 (10%)
Reliable and resilient services				
Our drinking water is clean, clear and tastes good.	8 (19%)	11 (26%)	19 (45%)	4 (10%)
Our sewerage service deals with sewage and heavy rainfall effectively.	5 (22%)	6 (26%)	7 (30%)	5 (22%)
We always provide a reliable supply of water.	10 (24%)	8 (19%)	20 (48%)	4 (10%)
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	8 (19%)	9 (21%)	22 (52%)	3 (7%)
Leading in innovation				
We are an innovative and efficient company.	6 (14%)	18 (43%)	10 (24%)	8 (19%)
Improving the environment				
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	10 (24%)	19 (45%)	9 (21%)	4 (10%)
We take care to protect and improve the environment in everything we do, leading by example.	11 (26%)	25 (60%)	3 (7%)	3 (7%)
Building successful economies in our regions				
We are proud to support our communities by giving time and resources to their important causes	19 (45%)	15 (36%)	4 (10%)	4 (10%)
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	24 (57%)	11 (26%)	4 (10%)	3 (7%)



Appendix 3 – Allocations by customer type

Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	HOUSEHOLD (allocations 13 – 25)	STAKE/BUS (respondents – 42)	HOUSEHOLD (allocations 13 – 25)	STAKE/BUS (respondents – 42)	HOUSEHOLD (allocations 13 – 25)	STAKE/BUS (respondents – 42)	HOUSEHOLD (allocations 13 – 25)	STAKE/BUS (respondents – 42)
Our customers say they feel informed about the services we provide and the importance of water.	75%	36%	15%	26%	10%	31%	-	7%
Our customers say we are a company they trust.	63%	36%	5%	14%	32%	40%	-	10%
Our customers tell us we provide excellent customer service and resolve issues quickly.	78%	36%	9%	19%	13%	38%	-	7%
Our finances are sound, stable and achieve a fair balance between customers and investors.	4%	14%	68%	19%	24%	48%	4%	19%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	84%	26%	-	43%	16%	21%	-	10%
Our drinking water is clean, clear and tastes good.	43%	19%	24%	26%	33%	45%	-	10%
Our sewerage service deals with sewage and heavy rainfall effectively.	15%	22%	54%	26%	31%	30%	-	22%
We always provide a reliable supply of water.	11%	24%	11%	19%	68%	48%	11%	10%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	7%	19%	60%	21%	33%	52%	-	7%
We are an innovative and efficient company.	5%	14%	26%	43%	58%	24%	11%	19%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	14%	24%	68%	45%	14%	21%	5%	10%
We take care to protect and improve the environment in everything we do, leading by example.	10%	26%	76%	60%	10%	7%	5%	7%
We are proud to support our communities by giving time and resources to their important causes	60%	45%	10%	36%	25%	10%	5%	10%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	20%	57%	40%	26%	30%	10%	10%	7%



Appendix 4 – DtC vs. DtF outcomes (household customers)

HOUSEHOLD Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	DtC (tables 15–19)	DtF (allocations 13–25)						
Our customers say they feel informed about the services we provide and the importance of water.	87%	75%	-	15%	7%	10%	7%	-
Our customers say we are a company they trust.	40%	63%	7%	5%	47%	32%	7%	-
Our customers tell us we provide excellent customer service and resolve issues quickly.	47%	78%	-	9%	47%	13%	7%	-
Our finances are sound, stable and achieve a fair balance between customers and investors.	42%	4%	16%	68%	26%	24%	16%	4%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	67%	84%	7%	-	20%	16%	7%	-
Our drinking water is clean, clear and tastes good.	27%	43%	20%	24%	53%	33%	-	-
Our sewerage service deals with sewage and heavy rainfall effectively.	33%	15%	22%	54%	44%	31%	-	-
We always provide a reliable supply of water.	18%	11%	12%	11%	71%	68%	-	11%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	7%	7%	14%	60%	79%	33%	-	-
We are an innovative and efficient company.	40%	5%	7%	26%	53%	58%	-	11%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	11%	14%	56%	68%	33%	14%	-	5%
We take care to protect and improve the environment in everything we do, leading by example.	-	10%	69%	76%	25%	10%	6%	5%
We are proud to support our communities by giving time and resources to their important causes	27%	60%	20%	10%	47%	25%	7%	5%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	13%	20%	60%	40%	27%	30%	-	10%



Appendix 5 – DtC vs. DtF outcomes (stakeholders and business customers)

BUSINESS AND STAKEHOLDERS Outcomes	Talk to me		Talk to someone		Just deal with it		I don't know	
	DtC (respondents – 16)	DtF (respondents – 42)						
Our customers say they feel informed about the services we provide and the importance of water.	-	36%	44%	26%	50%	31%	6%	7%
Our customers say we are a company they trust.	6%	36%	44%	14%	44%	40%	6%	10%
Our customers tell us we provide excellent customer service and resolve issues quickly.	13%	36%	50%	19%	38%	38%	-	7%
Our finances are sound, stable and achieve a fair balance between customers and investors.	25%	14%	13%	19%	56%	48%	6%	19%
Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.	13%	26%	38%	43%	44%	21%	6%	10%
Our drinking water is clean, clear and tastes good.	13%	19%	25%	26%	63%	45%	-	10%
Our sewerage service deals with sewage and heavy rainfall effectively.	25%	22%	17%	26%	58%	30%	-	22%
We always provide a reliable supply of water.	13%	24%	31%	19%	56%	48%	-	10%
We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.	38%	19%	31%	21%	31%	52%	-	7%
We are an innovative and efficient company.	13%	14%	38%	43%	44%	24%	6%	19%
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.	44%	24%	25%	45%	31%	21%	-	10%
We take care to protect and improve the environment in everything we do, leading by example.	38%	26%	19%	60%	38%	7%	6%	7%
We are proud to support our communities by giving time and resources to their important causes	25%	45%	13%	36%	63%	10%	-	10%
We work in partnership with companies and organisations to achieve the goals that are most important to our customers	13%	57%	31%	26%	56%	10%	-	7%



Appendix 6 – Household workshop discussion guide

Discussion guide [workshops Aug 21, 135 mins]

Notes about this document

- This guide has been developed based on your research objectives, to help our interviewers get the most from each qualitative conversation
- As such, it's designed to give our interviewers guidelines around the structure, timing and content of their discussions
- However, we want to ensure that conversations feel natural and engaging for participants and thus allow conversations to flow and evolve as participants move through the conversations, within reason. We will ensure all key areas are covered, and will also explore new, interesting but relevant tangents if they arise
- Content won't necessarily be covered in the exact order it appears in this document, dependent on natural conversation flow
- Language will be adapted to suit the participants, as appropriate, determined by the moderator
- We find that the deepest insights often aren't found by asking direct questions, but by prompting and probing initial responses
- All interviewers have been well briefed on the project context and objectives, so will be able to probe into topics that come up and ask additional questions to reveal other relevant tangents as and when appropriate, and delve beneath initial reactions

6:30 - Opening (5 minutes)

CHAIR TO GIVE INTRODUCTIONS

- Hi everyone, my name is X. I'll be leading the session this evening and I'm here from Explain Research, with my colleagues X.
- **If observers present:** We have X and X from Northumbrian Water / Essex & Suffolk Water with us, to support in providing expert knowledge if we have questions during the session, and to observe first-hand the conversations we have too.
- Explain is conducting this research independently, on behalf of Northumbrian Water / Essex & Suffolk Water.
- The research is designed to help Northumbrian Water / Essex & Suffolk Water understand how you, their [customers / stakeholders] want to influence and have a say in what they do as an organisation in the future. We'll be discussing different aspects of the services they deliver, to understand how you think they should be involving and communicating with customers about these over the coming years.

- Some of the content shared in the group today is commercially sensitive, so Northumbrian Water / Essex & Suffolk Water would be grateful if you could avoid sharing details with others after the session please.
 - All of the researchers present work to the Market Research Society Code of Conduct. This means that everything you say will be anonymous. You don't have to answer any questions you don't want to and are free to leave at any point if you wish.
 - There are no right or wrong answers, so please answer honestly.
 - We need to hear from all of you – you are here to represent the voices of local people in your area.
 - We are audio and visually recording the discussions through the Zoom system. This will allow us to listen back and transcribe them for analysis. If you've got any concerns about the recording taking place, please let me know now.
- *tech support to turn recording on**
- Please make use of the chat box, there are lots of us on the session, so if you would like to share a view on something as we go through or ask a question please do so.

6:35 - Warm up (10 minutes)

- **ZOOM POLL:** Had you heard of Northumbrian Water / Essex & Suffolk Water before you were invited along today? (yes/no/unsure)

We provided some background on NW/ESW's role in the document we sent for everyone to read in advance, but to make sure we're all clear on their role and responsibilities as an organisation...

Chair to screenshare to show the water cycle graphic

In a nutshell, NW/ESW ensures you have high quality, clean drinking water when you turn on the tap. In the North East of England, Northumbrian Water also take the wastewater away from homes and businesses, treat it and release it back into the environment (rivers and the sea).

- Is their role all clear? Any questions? [NWG to support with any questions from attendees]

MOVE TO BREAKOUTS

MAKE SURE RECORDING ON

Some questions were posed in the reading materials, and I'd like to have a chat through your thoughts on those now to get us started.

- What comes to mind when you think of your relationship with Northumbrian Water / Essex & Suffolk Water?
- o How would you describe it?

We'd like to understand whether you would like NW/ESW to think of you as a customer or a citizen. To explain how they see these two 'relationships' as different:

MODERATORS TO READ OUT THE FOLLOWING DEFINITIONS PLEASE

Customer = you receive an individual service from them, you are billed for the service you receive, which includes clean water coming from your taps.

Citizen = you live in the area where NW/ESW operates, so you might be impacted by their day-to-day activities. For example, there might be roadworks in the town that you live in as a result of work on their pipes, they look after recreational facilities in your area like reservoirs, and you might see their teams out and about volunteering for community causes.

MODERATOR NOTE - if needed to help with clarification:

To help explain what we mean in the questions above and get you thinking about the idea of customers versus citizens in relation to Northumbrian Water, we've thought of some situations which could be relatable, for example:

- *Thinking of me as a customer, my electricity and gas supplier suggests the tariff which is cheapest for my living circumstances, but thinking about me as a citizen they tell me which tariff is 'greenest' and offers the highest proportion of renewable sources of energy.*
- *As a customer, my pension provider invests to grow my pension pot by the greatest amount of money, whereas thinking of me as a citizen they invest my pension in the most ethical way for wider benefit.*
- *With a focus on treating me as a customer, a clothes brand designs their t-shirts to be as cheap as possible, but treating me as a citizen they produce their t-shirts to be made in ethical factories with sustainable materials, and explain this to me to help me understand where my clothes come from.*
- Do you **see yourself** as a customer? Or do you see yourself as a citizen of the region that they provide water to?

- How do you want NW/ESW to see you?
- Does it **differ** depending on which aspect of their service you're thinking about?
 - ♣ When do you want them to think of you as a customer?
 - ♣ When do you want them to think of you as a citizen?
- Thinking generally about their service, what do you **expect** from Northumbrian Water / Essex & Suffolk Water when you contact them or when they contact you?
- What would you expect as a customer? What would you expect as a citizen?
- Are your expectations the same or different?
 - ♣ If different, how so?

6:45 - Pillars and priorities (20 mins)

FULL ROOM – CHAIR TO PRESENT

We're going to come back to the customer or citizen question again later in the session, so keep thinking about it.

We're going to think now about what makes a service experience great.

- I'd like you all to think about what qualities makes an experience with a company outstanding. Think about keywords or phrases – I'd like everyone to share these with the group in the chat box now please.

Group to share in the chat and chair to identify themes jumping out from answers.

Northumbrian Water / Essex & Suffolk Water want to identify the qualities which they want to form the basis of their relationships with their customers, to represent how they want to work.

What I'm going to share with you now is an expert model, developed by a company called KPMG Nunwood. They developed a model of six 'pillars'. NW/ESW looked at the pillars and felt they would be a good model for them to use. Though they can't be changed since they were developed by a different organisation, NW/ESW would like to know from you if you think they're the right ones for NW/ESW to use to shape their own service.

Chair to screenshare the pillars overview and run through each, then same for priorities



I'm now going to share their six Priorities – these are NW/ESW's end goals when it comes to the experience people have when dealing with them. They've been developed by NW/ESW through conversation with their customers, but they wanted to test them with you. There is a possibility to change them depending on what you and other customers and stakeholders think of them.



Now you've learned about their pillars and priorities, we're going to go into our breakouts to chat about what we've heard.

MOVE TO BREAKOUTS

- What do you think of the six priorities, developed by NW/ESW? [*Moderator to screenshare, probe for positives and negatives*]
- o Are they the right priorities for NW/ESW?
- o Do you agree these would deliver an exceptional experience with a company?
 - ♣ Would this differ depending on whether your perspective was as a customer or citizen?

- Are there any gaps?
- How would you rank these six in order of most important to least? [*Moderator to probe to uncover and use Miro board to capture their group's ranking, if time*]

IF TIME ONLY:

- What do you think of the six pillars – the model developed by KPMG Nunwood? [*Moderator to screenshare, probe for positives and negatives, keep this fairly brief*]
- Of the pillars and priorities, which language resonates most with you?
- Which best reflects what you want from the experience of service you get from Northumbrian/Essex & Suffolk Water?

7:05 - Outcomes sorting exercise (65 minutes)

BACK TO FULL ROOM – CHAIR TO SET CONTEXT

We're now going to get into the main exercise for this session. First, I'll give you some background on the ideas we're going to discuss and gather your opinions on.

From 2015 to 2019, Northumbrian Water / Essex & Suffolk Water went through a long and detailed process involving having conversations with more than 400,000 of their customers, on all sorts of different topics, which shaped their business plan for the period 2020-2025. The creation of this plan is something they were required to do by the water industry regulator, called Ofwat. All of the other water companies in England had to do the same thing and develop a plan, then Ofwat reviewed all of the plans to make sure they were happy with what the water companies were proposing to do, including how much money they were proposing to spend to improve their services.

Since we're now in 2021, NW/ESW is working towards delivering the plan they set out two years ago, based on what they heard from customers was important.

They are thinking about what they will plan to do from 2025 onwards. When they developed their plan for 2020-2025, it was vital to NW/ESW that they involved their customers throughout the development process, checking in to make sure their plans lined up with what customers and stakeholders thought was important. NW/ESW still consider it really important to engage with their customers about their plans, and they want to make sure that they're talking to customers about the things *you* want to talk to NW/ESW about, to make sure that topics are relevant to you and you feel you can share your opinions on them.

In their plan, they outline the big things they want to achieve as an organisation – they call each of these [14 – NW, 13 – ESW] targets their *outcomes*.

We're going to go through an exercise together now. We'll go through each of their outcomes, and we want to hear from you about whether you want to have a say and influence their plans in that area. It's an important exercise, because for each outcome we'll ask which of the following three options you would select, and your opinions will help NW/ESW make a plan about what to talk to customers about over the next few years.

- Pot one, named '**Talk to me**' - This pot is for the outcomes you would like Northumbrian Water / Essex & Suffolk Water to engage with you so you can have a say on what they should be providing to offer a great service.
- Pot two, named '**Talk to someone**' - This pot is for the outcomes you would like Northumbrian Water / Essex & Suffolk Water to engage with a specialised organisation who speaks on the public's behalf.
- Pot three, named '**Just deal with it**' - This pot is for the outcomes you trust Northumbrian Water / Essex & Suffolk Water to get on and deliver using their internal expertise without having to consult with customers or external specialists.

We'll go back into our breakouts now to complete the exercise in our smaller groups. As you go through, please keep in mind that our focus here is **what you want to have a say on and influence in NW/ESW's plans**.

MOVE TO BREAKOUTS

Moderators to discuss each outcome and complete allocations in Miro board, approx. 3/4 mins on each outcome - don't discuss don't knows

For each outcome...

For those of you that felt this outcome should go into the '**Talk to me**' pot:

- Why do you want to talk to Northumbrian Water / Essex & Suffolk Water about this outcome to influence their actions?
- What would you want to talk about?
- Do you want them to talk to and involve you as a customer, or as a citizen?

For those of you that felt this outcome should go into the '**Talk to someone**' pot:

- Why did you decide to put it in this pot?
- Who should Northumbrian Water / Essex & Suffolk Water speak to about these outcomes?

For those of you that felt this outcome should go into the '**Just deal with it**' pot:

- Why did you decide to put it in this pot?
- Why don't you want to talk to Northumbrian Water / Essex & Suffolk Water about these outcomes?

IF TIME:

- For our 'Talk to me' pot, which do you think is the most important for customers to have a say on? I'd like you to order them from most important to least important, based on how important it is they speak to and engage with you, **not** based on how important you think it is as a target. *[Moderator to move post-its on Miro through discussion with group, and keep on track re importance]*
- How do you think Northumbrian / Essex & Suffolk Water should keep customers informed about their progress towards their outcomes?
- o Is there anything that wouldn't work (e.g. particular mediums which you wouldn't pay attention to)?

8:00 – BACK TO FULL ROOM - CHAIR

Revisiting a question we touched on in the pre-session reading and in the discussions earlier, now we've heard more about the variety of things NW/ESW do as an organisation we want to come back to the customer or citizen question, remembering that the customer relationship is considered more about a transaction between a bill payer and NW/ESW, while the citizen relationship is about the wider impact NW/ESW's work could have on you:

- **ZOOM POLL (single response):** In terms of how NW/ESW think about you in their decision making, do you want to be treated as a customer or a citizen? (customer/citizen/don't know)

8:10 - Long term strategy – ambitious goals (35 mins)

FULL ROOM - CHAIR

We're now going to explore NW/ESW's 'ambitious goals' and we want to know if you agree with them.

Chair to present key facts on each goals under each theme, then pause after each theme to take the poll:

- **POLL PER GOAL:** Do you agree with the ambition Northumbrian Water / Essex & Suffolk Water is striving to deliver to **X**? (yes/no/I'm not sure)

If any 'no' or unsure responses:

- Could anyone who voted no/unsure share why you voted that way?
- o Please drop any other thoughts on why you voted that way in the chat, with a couple of keywords included to identify which goal you're talking about.

Unrivalled customer experience: *This is about meeting their customers' changing expectations and delivering what customers want.*

- Deliver world class customer service; and
- Give every single customer the opportunity to have a strong voice and engage with us, with at least 2m customers participating by 2025.

Affordable and inclusive services: *This is about making sure that water and sewerage services are affordable for all customers, whatever their circumstances, and also making sure that everyone has equal access to world class customer service.*

- Eradicate water poverty in our operating areas by 2030.

Reliable and resilient services: *This is about making sure they continue to deliver reliable and resilient services, by anticipating change, planning ahead, and by thinking carefully about the long term decisions they make.*

- Have the lowest levels of leakage in the country in our water-stressed ESW operating area
- Have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040
- Promote confidence in our drinking water so that nine out of ten of our customers choose tap water over bottled water
- Eradicate sewer flooding in the home as a result of our assets and operations

Leading in innovation: *This is about making innovation a big part of their culture, to help them meet rising customer expectations, advances in technology, and changes in the political and physical climates.*

- Be leading in innovation within the water sector and beyond.

Improving the environment: *This is about demonstrating leadership in protecting and improving the environment in their regions.*

- Be leading in the sustainable use of natural resources, through achieving zero avoidable waste by 2025 and being carbon neutral by 2027
- Demonstrate leadership in catchment management to enhance natural capital and deliver net gain for biodiversity
- Have the best rivers and beaches in the country
- Have zero pollutions as a result of our assets and operations

Building successful economies in our regions: *This is about being a leading and responsible business within their regions, and making a positive contribution to customers' lives and the local economies.*

- Spend at least 60p in every £1 with suppliers in our regions
- Be the most socially responsible water company.

Appendix 7 – Stakeholder in-depth discussion guide

Discussion guide [Stakeholder in-depths]

Notes about this document

- This guide has been developed based on your research objectives, to help our interviewers get the most from each qualitative conversation
- As such, it's designed to give our interviewers guidelines around the structure, timing and content of their discussions
- However, we want to ensure that conversations feel natural and engaging for participants and thus allow conversations to flow and evolve as participants move through the conversations, within reason. We will ensure all key areas are covered, and will also explore new, interesting but relevant tangents if they arise
- Content won't necessarily be covered in the exact order it appears in this document, dependent on natural conversation flow
- Language will be adapted to suit the participants, as appropriate, determined by the moderator
- We find that the deepest insights often aren't found by asking direct questions, but by prompting and probing initial responses
- All interviewers have been well briefed on the project context and objectives, so will be able to probe into topics that come up and ask additional questions to reveal other relevant tangents as and when appropriate, and delve beneath initial reactions

Opening

Thank you for agreeing to take part in an interview. My name is X and I work for a company called Explain, we're an independent research agency and have been commissioned by Northumbrian Water / Essex & Suffolk Water to talk to stakeholders like yourself to understand which of their activities you would like to influence and talk to the company about. This is running alongside research we're conducting with household customers on the same ideas. There are no right or wrong answers, I'm looking to get your honest opinions.

- MRS Guidelines - Right to refusal / anonymity
- Okay to record?

Can I check before we begin that you've completed the online exercise we sent over? (If no, reschedule for another time)

Warm up (5 minutes)

So I can understand the context of your responses as we go through the interview, could you clarify for me:

- Your role?
- The relationship that you have with Northumbrian Water / Essex & Suffolk Water?
- Do you feel you clearly understand NW/ESW's role and responsibilities?

Interviewer to share the following:

To clarify, Northumbrian Water / Essex & Suffolk Water is part of the Northumbrian Water Group who are responsible for providing water and sewerage services in the north and water services in the south in their two operating areas, Essex and Suffolk. In a nutshell, NW/ESW ensures customers have high quality, clean drinking water when they turn on the tap. In the North East of England, Northumbrian Water also take the wastewater away from homes and businesses, treat it and release it back into the environment (rivers and the sea).

Customer vs citizen

NW/ESW wants to understand if they should be thinking about and treating their customers as customers or as citizens. We've been asking customers this as part of this research, but would be interested in your thoughts as stakeholders.

Interviewer to share the following:

To explain how they see these two 'relationships' as different:

Customer = receive an individual service from them, billed for the service received, which includes clean water coming from the taps.

Citizen = live in the area where NW/ESW operates, so you might be impacted by their day-to-day activities. For example, there might be roadworks in the town that you live in as a result of work on their pipes, they look after recreational facilities in your area like reservoirs, and you might see their teams out and about volunteering for community causes.

MODERATOR NOTE - if needed to help with clarification:

To help explain what we mean and get you thinking about the idea of customers versus citizens in relation to Northumbrian / Essex & Suffolk Water, we've thought of some situations which could be relatable, for example:

- *Thinking of me as a customer, my electricity and gas supplier suggests the tariff which is cheapest for my living circumstances, but thinking about me as a citizen they tell me which tariff is 'greenest' and offers the highest proportion of renewable sources of energy.*
- *As a customer, my pension provider invests to grow my pension pot by the greatest amount of money, whereas thinking of me as a citizen they invest my pension in the most ethical way for wider benefit.*

- Do you think NW/ESW should be thinking of those living in their operating areas as customers or citizens?
- o Does your view **differ** depending on which aspect of their service you're thinking about?
 - ♣ If so, how?
- o Do you think expectations of their service would be different as a customer compared to a citizen? If so, how? Why?

Pillars and priorities (10 mins)

Interviewer to refer to interviewee's online responses

Northumbrian Water / Essex & Suffolk Water want to identify the qualities which they want to form the basis of their relationships with their customers, to represent how they want to work. We're going to talk about the two models which were shared with you in the online exercise – the pillars and priorities models.

The first was the expert model, developed by KPMG Nunwood. They developed a model of six **pillars**. NW/ESW looked at the pillars and felt they would be a good model for them to use. Though they can't be changed since they were developed by a different organisation, NW/ESW would like to know from you if you think they're the right ones for NW/ESW to use to shape their own service.

- What do you think of the six pillars – the model developed by KPMG Nunwood? [*probe for positives and negatives, keep this fairly brief*]

- I can see in your online exercise you ranked X most important – why was this?
- o Why X as least?

Now thinking about their six **priorities** – NW/ESW’s end goals when it comes to the experience people have when dealing with them. They were developed by NW/ESW through conversation with their customers, but they wanted to test them with you. There is a possibility to change them depending on what you and customers think of them.

- What do you think of the six priorities, developed by NW/ESW? [*probe for positives and negatives*]
- o Are they the right priorities for NW/ESW, to help them to deliver an unrivalled customer experience?
- o Are there any gaps?

- I can see in your online exercise you ranked X most important – why was this?
- o Why X as least?

- Of the pillars and priorities, which language resonates most with you?
- o Which best reflects what you want from the experience of service from Northumbrian/Essex & Suffolk Water?

Outcomes sorting exercise (15 minutes)

We’re now going to get into the main area of discussion.

Thank you for taking a look through the outcomes task we sent over. We're going to work through each outcome to understand how you would categorise each. So just as a reminder we'd like to know where you would put each outcome in the following categories and please feel free to let us know if there are any that you're unsure of:

- o Category one, **'Talk to me'** - This category is for the outcomes you would like Northumbrian Water / Essex & Suffolk Water to engage with you a stakeholder so you can have a say on what they should be providing to offer a great service
- o Category two, **'Talk to someone'** - This category is for the outcomes you would like Northumbrian Water / Essex & Suffolk Water to engage with another specialised organisation who speaks on behalf of yourself

- Category three, '**Just deal with it**' - This pot is for the outcomes you trust Northumbrian Water / Essex & Suffolk Water to get on and deliver using their internal expertise without having to consult with stakeholders or external specialists

Our focus here is **what you want to have a say on and influence in NW/ESW's plans**.

Interview to refer to their online responses, discuss each outcome

'Talk to me' pot:

- Why do you want to talk to Northumbrian Water / Essex & Suffolk Water about this outcome to influence their actions?
- What would you want to talk about?
- Which would you consider most important to talk to them about?

'Talk to someone' pot:

- Why did you decide to put it in this pot?
- Who should Northumbrian Water / Essex & Suffolk Water speak to about these outcomes?

'Just deal with it' pot:

- Why did you decide to put it in this pot?
- Why don't you want to talk to Northumbrian Water / Essex & Suffolk Water about these outcomes?

Long term strategy – ambitious goals (5 mins)

Interviewer to refer to interviewee's online responses

Finally, I'd like to briefly discuss your thoughts on NW/ESW's ambitious goals, and again I'll refer to your online responses, thank you for completing that.

- **For any no or unsure responses:** Why do you not agree with X? / Why are you unsure about X?

Close and thanks

Do you have any further comments to make about anything we have discussed?

Thank you for taking part in the interview! I need to check before we go...

- Are you happy for us to list you as someone we have spoken to as part of this research?
- Are you happy to have your name attached to your comments?

Appendix 8 – Business in-depth discussion guide

Discussion guide [Business customer in-depths]

Notes about this document

- This guide has been developed based on your research objectives, to help our interviewers get the most from each qualitative conversation
- As such, it's designed to give our interviewers guidelines around the structure, timing and content of their discussions
- However, we want to ensure that conversations feel natural and engaging for participants and thus allow conversations to flow and evolve as participants move through the conversations, within reason. We will ensure all key areas are covered, and will also explore new, interesting but relevant tangents if they arise
- Content won't necessarily be covered in the exact order it appears in this document, dependent on natural conversation flow
- Language will be adapted to suit the participants, as appropriate, determined by the moderator
- We find that the deepest insights often aren't found by asking direct questions, but by prompting and probing initial responses
- All interviewers have been well briefed on the project context and objectives, so will be able to probe into topics that come up and ask additional questions to reveal other relevant tangents as and when appropriate, and delve beneath initial reactions

Opening

Thank you for agreeing to take part in an interview. My name is X and I work for a company called Explain, we're an independent research agency and have been commissioned by Northumbrian Water / Essex & Suffolk Water to talk to business customers like yourself to understand which of their activities you would like to influence and talk to the company about. This is running alongside research we're conducting with household customers on the same ideas. There are no right or wrong answers, I'm looking to get your honest opinions.

- MRS Guidelines - Right to refusal / anonymity
- Okay to record?

Can I check before we begin that you've completed the online exercise we sent over? (If no, reschedule for another time)

Warm up (5 minutes)

So I can understand the context of your responses as we go through the interview, could you clarify for me:

- Your role?
- The relationship that you have with Northumbrian Water / Essex & Suffolk Water?
- Do you feel you clearly understand NW/ESW's role and responsibilities?

Interviewer to share the following:

To clarify, Northumbrian Water / Essex & Suffolk Water is part of the Northumbrian Water Group who are responsible for providing water and sewerage services in the north and water services in the south in their two operating areas, Essex and Suffolk. In a nutshell, NW/ESW ensures customers have high quality, clean drinking water when they turn on the tap. In the North East of England, Northumbrian Water also take the wastewater away from homes and businesses, treat it and release it back into the environment (rivers and the sea).

Customer vs citizen

NW/ESW wants to understand if they should be thinking about and treating their customers as customers or as citizens. We've been asking customers this as part of this research, but would be interested in your thoughts as a business customer.

Interviewer to share the following:

To explain how they see these two 'relationships' as different:

Customer = receive an individual service from them, billed for the service received, which includes clean water coming from the taps.

Citizen = live in the area where NW/ESW operates, so you might be impacted by their day-to-day activities. For example, there might be roadworks in the town that you live in as a result of work on their pipes, they look after recreational facilities in your area like reservoirs, and you might see their teams out and about volunteering for community causes.

MODERATOR NOTE - if needed to help with clarification:

To help explain what we mean and get you thinking about the idea of customers versus citizens in relation to Northumbrian / Essex & Suffolk Water, we've thought of some situations which could be relatable, for example:

- *Thinking of me as a customer, my electricity and gas supplier suggests the tariff which is cheapest for my living circumstances, but thinking about me as a citizen they tell me which tariff is 'greenest' and offers the highest proportion of renewable sources of energy.*
- *As a customer, my pension provider invests to grow my pension pot by the greatest amount of money, whereas thinking of me as a citizen they invest my pension in the most ethical way for wider benefit.*

- Do you think NW/ESW should be thinking of those living in their operating areas as customers or citizens?
- o Does your view **differ** depending on which aspect of their service you're thinking about?
 - ♣ If so, how?
- o Do you think expectations of their service would be different as a customer compared to a citizen? If so, how? Why?

Pillars and priorities (10 mins)

Interviewer to refer to interviewee's online responses

Northumbrian Water / Essex & Suffolk Water want to identify the qualities which they want to form the basis of their relationships with their customers, to represent how they want to work. We're going to talk about the two models which were shared with you in the online exercise – the pillars and priorities models.

The first was the expert model, developed by KPMG Nunwood. They developed a model of six **pillars**. NW/ESW looked at the pillars and felt they would be a good model for them to use. Though they can't be changed since they were developed by a different organisation, NW/ESW would like to know from you if you think they're the right ones for NW/ESW to use to shape their own service.

- What do you think of the six pillars – the model developed by KPMG Nunwood? [*probe for positives and negatives, keep this fairly brief*]

- I can see in your online exercise you ranked X most important – why was this?
- o Why X as least?

Now thinking about their six **priorities** – NW/ESW’s end goals when it comes to the experience people have when dealing with them. They were developed by NW/ESW through conversation with their customers, but they wanted to test them with you. There is a possibility to change them depending on what you and customers think of them.

- What do you think of the six priorities, developed by NW/ESW? [*probe for positives and negatives*]
- o Are they the right priorities for NW/ESW, to help them to deliver an unrivalled customer experience?
- o Are there any gaps?

- I can see in your online exercise you ranked X most important – why was this?
- o Why X as least?

- Of the pillars and priorities, which language resonates most with you?
- o Which best reflects what you want from the experience of service from Northumbrian/Essex & Suffolk Water?

Outcomes sorting exercise (15 minutes)

We’re now going to get into the main area of discussion.

Thank you for taking a look through the outcomes task we sent over. We're going to work through each outcome to understand how you would categorise each. So just as a reminder we'd like to know where you would put each outcome in the following categories and please feel free to let us know if there are any that you're unsure of:

- o Category one, **'Talk to me'** - This category is for the outcomes you would like Northumbrian Water / Essex & Suffolk Water to engage with you as a business customer so you can have a say on what they should be providing to offer a great service
- o Category two, **'Talk to someone'** - This category is for the outcomes you would like Northumbrian Water / Essex & Suffolk Water to engage with another specialised organisation who speaks on behalf of yourself

- Category three, '**Just deal with it**' - This pot is for the outcomes you trust Northumbrian Water / Essex & Suffolk Water to get on and deliver using their internal expertise without having to consult with stakeholders or external specialists

Our focus here is **what you want to have a say on and influence in NW/ESW's plans.**

Interview to refer to their online responses, discuss each outcome

'Talk to me' pot:

- Why do you want to talk to Northumbrian Water / Essex & Suffolk Water about this outcome to influence their actions?
- What would you want to talk about?
- Which would you consider most important to talk to them about?

'Talk to someone' pot:

- Why did you decide to put it in this pot?
- Who should Northumbrian Water / Essex & Suffolk Water speak to about these outcomes?

'Just deal with it' pot:

- Why did you decide to put it in this pot?
- Why don't you want to talk to Northumbrian Water / Essex & Suffolk Water about these outcomes?

Long term strategy – ambitious goals (5 mins)

Interviewer to refer to interviewee's online responses

Finally, I'd like to briefly discuss your thoughts on NW/ESW's ambitious goals, and again I'll refer to your online responses, thank you for completing that.

- **For any no or unsure responses:** Why do you not agree with X? / Why are you unsure about X?

Close and thanks

Do you have any further comments to make about anything we have discussed?

Thank you for taking part in the interview! I need to check before we go...

- Are you happy for us to list you as someone we have spoken to as part of this research?
- Are you happy to have your name attached to your comments?

Appendix 9 – Stakeholder pre task

Defining the Future research

Thank you for agreeing to take part in our research for Northumbrian Water! As a stakeholder, they really value your input on this important conversation.

Ahead of our telephone conversation with you, we would like you to fill in this short exercise to help understand your thoughts on Northumbrian Water and their objectives, to help inform our discussion and get the most out of it.

This survey is estimated to take about 10-15 minutes to complete. The data gathered will be used by Explain Research, who are conducting this research including hosting this online survey; we will analyse your responses with the others gathered and this will be shared with Northumbrian Water in the form of a report.

Additional information has been provided to you separately on email - please have a read through this before completing this exercise as it will help you in understanding the context of the questions asked later in the survey.

Explain Research works to the Market Research Society Code of Conduct and all data gathered is done so in accordance with GDPR. By clicking through and completing the survey, you give your consent for Explain to process the data you share as part of this exercise.

First, please share your name and (if applicable) the name of the organisation you represent, so that Explain can find your responses ready for your interview.*

Six pillars for an unrivalled customer experience

Northumbrian Water has been thinking about what makes a great service and are considering use of an expert model developed by KPMG Nunwood. This model encompasses the following six pillars, which are a foundation towards providing a positive customer experience.

Northumbrian Water would like to understand your thoughts on these six pillars. Please read the information below which outlines what they are, and Explain will discuss these with you during your interview.



Thinking about this as a stakeholder...

Based on what you've read, please drag and drop the pillars to rank them in order from 1-6, with 1 being the highest priority and 6 being the lowest priority, in terms of what you consider to be most important for Northumbrian Water to think about to deliver an unrivalled customer experience.

_____ Personalisation

_____ Resolution

_____ Empathy

_____ Integrity

_____ Expectations

_____ Time and effort

_____ Don't know

Northumbrian Water's six priorities model

These are Northumbrian Water's six customer experience priorities.

They've been developed through conversation with their customers, as end goals when it comes to the experience people have when dealing with them. They want to test them with you.

Again, please read the information below which describes the model. Explain will discuss your thoughts on this model during your interview, so please consider the following questions:

- Are they the right priorities for Northumbrian Water?
- Are there any gaps?



Thinking about this as a stakeholder...

Based on what you've read, please drag and drop the priorities to rank them in order from 1-6, with 1 being the highest priority and 6 being the lowest priority, in terms of what you consider to be most important for Northumbrian Water to think about to deliver an unrivalled customer experience.

_____ Stay connected to what matters most

_____ Keep our promises

_____ Own the customers problem

_____ Promote our great work locally

_____ Show each customer they are special

_____ Make it easy

_____ Don't know

What aspect(s) of Northumbrian Water's plans do you want to influence?

The following exercise is the key area we need your input on. Northumbrian Water want to understand which areas of their activity you would like to have a say on and influence over the next few years.

Below are each of Northumbrian Water's key business outcomes and we would like to understand how you would categorise each one of the following:

'Talk to me'

This category is for the outcomes you would like Northumbrian Water to engage with you as a stakeholder so you can have a say on what they should be providing to offer a great service

'Talk to someone'

This category is for the outcomes you would like Northumbrian Water to engage with someone else i.e. another specialised organisation that could speak on your behalf

'Just deal with it'

This category is for the outcomes that you trust Northumbrian Water to get on and deliver using their internal expertise without having to consult with stakeholders, customers, or external specialists

Unrivalled customer experience

*Our customers tell us we provide excellent customer service and resolve issues quickly.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*Our customers say they feel informed about the services we provide and the importance of water.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*Our customers say we are a company they trust.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*Our finances are sound, stable, and achieve a fair balance between customers and investors.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

Affordable and inclusive services

*Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

Reliable and resilient services

*We always provide a reliable supply of water.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*Our sewerage service deals with sewage and heavy rainfall effectively.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*Our drinking water is clean, clear and tastes good.**

- 'Talk to me'

- 'Talk to someone'
- 'Just deal with it'
- Don't know

Leading in innovation

*We are an innovative and efficient company.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

Improving the environment

*We take care to protect and improve the environment in everything we do, leading by example.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

Building successful economies in our regions

*We are proud to support our communities by giving time and resources to their important causes.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

*We work in partnership with companies and organisations to achieve the goals that are most important to our customers.**

- 'Talk to me'
- 'Talk to someone'
- 'Just deal with it'
- Don't know

Northumbrian Water's ambitious goals

We are now going to look at Northumbrian Water's ambitious goals. We would like to know whether you, as stakeholders, agree with them.

Please refer to the information provided separately on email which explains the ambitious goals a little more, to help you in answering the following questions.

Unrivalled customer experience: These goals are about meeting their customers' changing expectations and delivering what customers want.

*Do you agree with the ambition that Northumbrian Water is striving to deliver world class customer service?**

- Yes
- No
- I'm not sure

*Do you agree with the ambition that Northumbrian Water is striving to give every single customer the opportunity to have a strong voice and engage with them, with at least 2 million customers participating by 2025?**

- Yes
- No
- I'm not sure

(untitled)

Affordable and inclusive services: This goal is about making sure that water and sewerage services are affordable for all customers, whatever their circumstances, and also making sure that everyone has equal access to world class customer service.

*Do you agree with the ambition that Northumbrian Water is striving to eradicate water poverty in their operating areas by 2030?**

- Yes
 - No
 - I'm not sure
-

(untitled)

Reliable and resilient services: These goals are about making sure they continue to deliver reliable and resilient services, by anticipating change, planning ahead, and by thinking carefully about the long term decisions they make.

*Do you agree with the ambition that Northumbrian Water is striving to have the lowest levels of leakage in the country in their water-stressed Essex & Suffolk Water operating area?**

- Yes
- No
- I'm not sure

*Do you agree with the ambition that Northumbrian Water is striving to have a per capita consumption (PCC) for water use of 118 litres per person per day by 2040?**

- Yes
- No
- I'm not sure

*Do you agree with the ambition that Northumbrian Water is striving to promote confidence in their drinking water so that nine out of ten of their customers choose tap water over bottled water?**

- Yes
- No
- I'm not sure

*Do you agree with the ambition that Northumbrian Water is striving to eradicate sewer flooding in the home as a result of their assets and operations?**

- Yes
- No
- I'm not sure

(untitled)

Leading in innovation: This is about making innovation a big part of their culture, to help them meet rising customer expectations, advances in technology, and changes in the political and physical climates.

*Do you agree with the ambition that Northumbrian Water is striving to be leading in innovation within the water sector and beyond?**

- Yes
- No
- I'm not sure

(untitled)

Improving the environment: These goals are about demonstrating leadership in protecting and improving the environment in their regions.

*Do you agree with the ambition that Northumbrian Water is striving to be leading in the sustainable use of natural resources, through achieving zero avoidable waste by 2025 and being carbon neutral by 2027?**

- Yes
- No
- I'm not sure

*Do you agree with their ambition to demonstrate leadership in catchment management to enhance natural capital and deliver net gain for biodiversity?**

- Yes
- No
- I'm not sure

*Do you agree with their ambition to have the best rivers and beaches in the country?**

- Yes
- No
- I'm not sure

*Do you agree with their ambition to have zero pollutions as a result of their assets and operations?**

- Yes
- No
- I'm not sure

(untitled)

Building successful economies in our regions: These goals are about being a leading and responsible business within their regions, and making a positive contribution to customers' lives and the local economies.

*Do you agree with their ambition to spend at least 60p in every £1 with suppliers in their regions?**

- Yes
- No
- I'm not sure

*Do you agree with their ambition to be the most socially responsible water company?**

- Yes
- No
- I'm not sure

Thank You!

Thank you for completing this online exercise. Your response is very important to this process and we look forward to speaking to you in your interview soon!

Appendix 10 – DtC and DtF outcomes wording comparison

Defining the Conversation outcomes	Defining the Future outcomes
Our customers are well informed about the services they receive and the value of water	Our customers say they feel informed about the services we provide and the importance of water
We are a company that customers can trust	Our customers say we are a company they trust
We provide excellent service and impress our customers	Our customers tell us we provide excellent customer service and resolve issues quickly
Our finances are sound, stable and achieve a fair balance between customers and investors	Our finances are sound, stable and achieve a fair balance between customers and investors
Our customers consider the service they received to be value for money	Our customers say our services are good value for money and we work hard to keep water and wastewater services affordable for all
We supply clean and clear drinking water that tastes good	Our drinking water is clean, clear and tastes good
We provide a sewerage service that deals effectively with sewage and heavy rainfall	Our sewerage service deals with sewage and heavy rainfall effectively
We provide a reliable and sufficient supply of water	We always provide a reliable supply of water
We deliver water and waste water services that meet the needs of current and future generations in a changing world	We are resilient and provide clean drinking water and effective sewerage services; now, and for future generations
We are an efficient and innovative company	We are an innovative and efficient company
We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife (NW)	We help to improve the quality of rivers and coastal waters for the benefit of people, the environment and wildlife
We protect and enhance the environment in delivering our services, leading by example	We take care to protect and improve the environment in everything we do, leading by example
We are proud to contribute to the success of local communities	We are proud to support our communities by giving time and resources to their important causes
We work in partnership towards common goals	We work in partnership with companies and organisations to achieve the goals that are most important to our customers