



What Customers, Communities and Stakeholders Want

A summary of our customer, community and stakeholder insights

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EXTRACT



About this document

To ensure our plans and strategies deliver what customers, communities and stakeholders want, we periodically consolidate what we know about their needs and expectations in our **What Customers, Communities and Stakeholders Want** document.

It provides a consistent and robust evidence base for our decision making.

What customers, communities and stakeholders want

The current view of what customers, communities and stakeholders want can be broken down into 10 Wants.

Delivering life's essential service so our **Customers**, **Communities** and the **Environment** can thrive

For Customers

CS1. I want an easy customer experience and tailored support

AF1. I want fair and affordable bills

WT1. I want safe, high quality drinking water

WT2. I want a reliable supply with minimal disruption

WS1. I want you to prevent sewer flooding and take waste away safely

For Communities

CI1. I want you to have a positive impact on the community

For the Environment

ENV1. I want you to reduce your impact and restore the environment

WT3. I want you to fix leaks and ensure there is enough water now and in the future

WS2. I want you to stop polluting rivers and to improve their quality

WS3. I want you to reduce emissions and reach net zero

Combined customer ranking of Wants

We have assigned a relative priority ranking of the 10 customer wants by triangulating scores from several sources where customers ranked priorities

Want

High priority

- 1 I want safe, high quality drinking water
- 2 I want fair and affordable bills
- 3 I want a reliable supply with minimal disruption

Medium priority

- 4 I want you to prevent sewer flooding and take waste away safely
- 5 I want you to fix leaks and ensure there is enough water now and in the future
- 6 I want you to stop polluting rivers and to improve their quality
- 7 I want you to reduce your impact and restore the environment

Lower priority

- 8 I want you to reduce emissions and reach net zero
- 9 I want an easy customer experience and tailored support
- 10 I want you to have a positive impact on the community

Key  For customers  For communities  For the environment

Linked to our Vision 2050 themes

Our customers' expectations (1 / 4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For Customers

| Wants | Topics | Summary of customers' expectations |
|--|-----------------------------|--|
| CS1. I want an easy customer experience and tailored support | Customer experience | Customers expect to be able to contact us easily, via their preferred channel and to have their queries solved on first contact by knowledgeable staff. If this is not possible, they expect to be provided with the requested information and not have to chase us repeatedly for an answer. During interruptions to our service, customers expect proactivity from us, both in terms of fixing the issue and communicating progress and timescales with them. There is an expectation that our customer services are accessible to all and tailored to the individual needs of different customer types, particularly those in vulnerable situations. Customers expect us to be aware of and empathetic to their situation and respond accordingly in a friendly manner. |
| | Billing | Customers expect charges on their bills to be transparent and easy to understand. Customers expect us to ensure our bills are accessible to all, including providing inclusive communications e.g. Braille, large print etc. |
| | Vulnerable customer support | Customers expect us to design services and propositions that help those who could otherwise be disadvantaged due to factors such as low income, mental health challenges or physical disabilities. Vulnerable customers expect us to understand and be able to respond effectively to their specific needs. There is also an expectation for us to better promote the existence and benefits of those services to those who may be eligible, rather than add to the existing available support and services to vulnerable customers. |
| AF1. I want fair and affordable bills | Affordability | Customers expect us to deliver services which offer good value for money and that we would seek to provide financial support to those who are struggling to pay, particularly in light of the cost-of-living crisis and the likelihood of future bill increases. Customers expect us to be more proactive in contacting them at an earlier stage and better promoting available support. Customers expect their bills to be accurate, consistent (i.e. not higher than they might be expecting) and for any significant increases to be communicated to them in advance. |
| | Social tariffs | Customers generally accept the need to help those who struggle to pay their bills, and expect us to provide discounted tariffs which they are generally willing to contribute towards. They expect us to better promote all forms of financial support, including discounted tariffs, to those who are eligible. |

Our customers' expectations (2/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For Customers

| Wants | Topics | Summary of customers' expectations |
|--|-------------------------------|--|
| WT1. I want safe, high quality drinking water | Water quality | Customers expect to be provided with high quality, safe drinking water and place a high priority on ensuring no deterioration in service. Customers want to see action from us to replace lead pipes, particularly when informed about the health risks to children. Most are dissatisfied with the hardness of their water, however, instead of wanting water to be softened centrally, they expect advice and information from us about how to deal with and reduce it in their homes. |
| WT2. I want a reliable supply with minimal disruption | Water supply interruptions | Most customers have not experienced significant supply issues in the past, however, customers expect us to maintain and improve the network so that it functions 24/7 with minimal disruption; they expect that it 'just works' and that they rarely have to think about or interact with us. Customers expect us to put emergency measures in place and provide alternative supplies of water if their supplies are disrupted. |
| | Water network resilience | Customers expect us to continually improve and upgrade the network to ensure it is resilient in the long-term, particularly to future challenges such as population growth and climate change. Customers and stakeholders expect us to invest in the system now and to take a 'replacement over repair' approach, particularly in relation to distribution pipes and trunk mains to reduce basement flooding, despite some highlighting the narrow benefits and high costs. |
| WS1. I want you to prevent sewer flooding and take waste away safely | Wastewater network resilience | Customers expect to be able to rely on the wastewater system functioning 24/7. They expect us to maintain and improve it to ensure its reliability today, as well as in the face of future challenges such as increasing demand from population growth and climate change. Customers expect us to invest in wastewater infrastructure and implement solutions which will address future challenges. |
| | Sewer flooding | Sewer flooding, particularly into/near homes and properties, is amongst the highest of customer priorities to address. Given the severe impact incidents of sewer flooding have on affected households, there is an expectation for us to take action to end this as soon as possible and protect all customers from experiencing this issue. |
| | Blockages | Customer awareness of the role of their behaviours can have on causing blockages has increased with time, however, customers generally expect continued engagement and information from us relating to what waste and materials they should not dispose of down toilets and drains. |

Our customers' expectations (3/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For Communities

| Wants | Topics | Summary of customers' expectations |
|--|--|--|
| C11. I want you to have a positive impact on the community | Corporate Social Responsibility and local impact | Customers expect us to 'give back' to and reinvest in the communities who we serve; this could range from charitable donations to local causes, to training and employment opportunities for local people, and educational programmes and events. Customers also expect us to minimise the impacts of our operations on local communities, including the safety and security of our sites, behaviour of our employees, and disruption caused by roadworks. Customers expect advanced notice of works where possible and clear timescales for the completion of work. |
| | Transparency | Customers expect accountability and transparency from water companies, particularly around finances, shareholders and profits, as well as how their money is spent. Perceptions of our business are largely impacted by wider issues, such as pollution incidents, and customers expect us to act transparently and demonstrate our plans to address key issues. |
| | Biodiversity | Whilst not a priority for improvement for most, some customers expect us to provide more wild spaces in their local communities and access to more of our sites for recreation. Customers care about biodiversity and expect us to take action to preserve it. |

Our customers' expectations (4/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For the Environment

| Wants | Topics | Summary of customers' expectations |
|---|-------------------------|--|
| WT3. I want you to fix leaks and ensure there is enough water in the future | Water resources | Customers expect us to secure water resources and plan to mitigate against future challenges, such as population growth and climate change. They expect us to explore and invest in a range of options to improve resilience of supply, including recycling and water transfers. Customers expect us to assess water source options by balancing efficacy of the solution with the cost and time to implement and impact on the environment. |
| | Water demand management | Customers expect us to implement a range of measures, both on the supply and demand-side, in order to reduce consumption and improve water efficiency. For example, customers generally accept they could reduce the amount of water they use, however, they expect us to provide them with the necessary information and tools i.e. smart meters and water saving devices to help them, as well as reducing the amount of water wasted through leakage. |
| | Sustainable abstraction | Customers and stakeholders expect us to reduce the impact of our operations on the environment, including relying on vulnerable rivers and streams, as well as groundwater as water sources. They expect us to take action to secure alternative water supply options, such as reservoirs and transfers. |
| | Leakage | Customers see reducing leakage as a top priority amongst core water service improvements and in improving the efficiency of the water supply system. When informed about the costs of fixing leaks, they expect us to determine an acceptable balance between reducing leakage, bill impacts and disruption. |
| WS2. I want you to stop polluting rivers and to improve their quality | River health | Awareness and concern relating to pollution and health of rivers has increased in recent years. Customers expect us to make efforts to reduce and eradicate incidences of storm overflows and pollution events, and clearly demonstrate our progress on achieving this. Customers also expect us to improve the quality of river water, both for the benefit of wildlife and habitats, as well as people who use them for recreational purposes. |
| WS3. I want you to reduce emissions and reach net zero | Net zero carbon | Customers place increasing importance on issues relating to climate change and emissions; they generally expect us to pursue options to reduce our operational emissions to achieve net zero as soon as possible, such as generating our own green energy and becoming self-sufficient. They expect us to achieve this without increasing their bills. |

ENV1. I want you to reduce your impact and restore the environment cuts across the other three wants within 'For the Environment'