



# Understanding Legacy

Insight to support the water industry's future investment plan

Prepared for Scottish Water and the Customer Forum

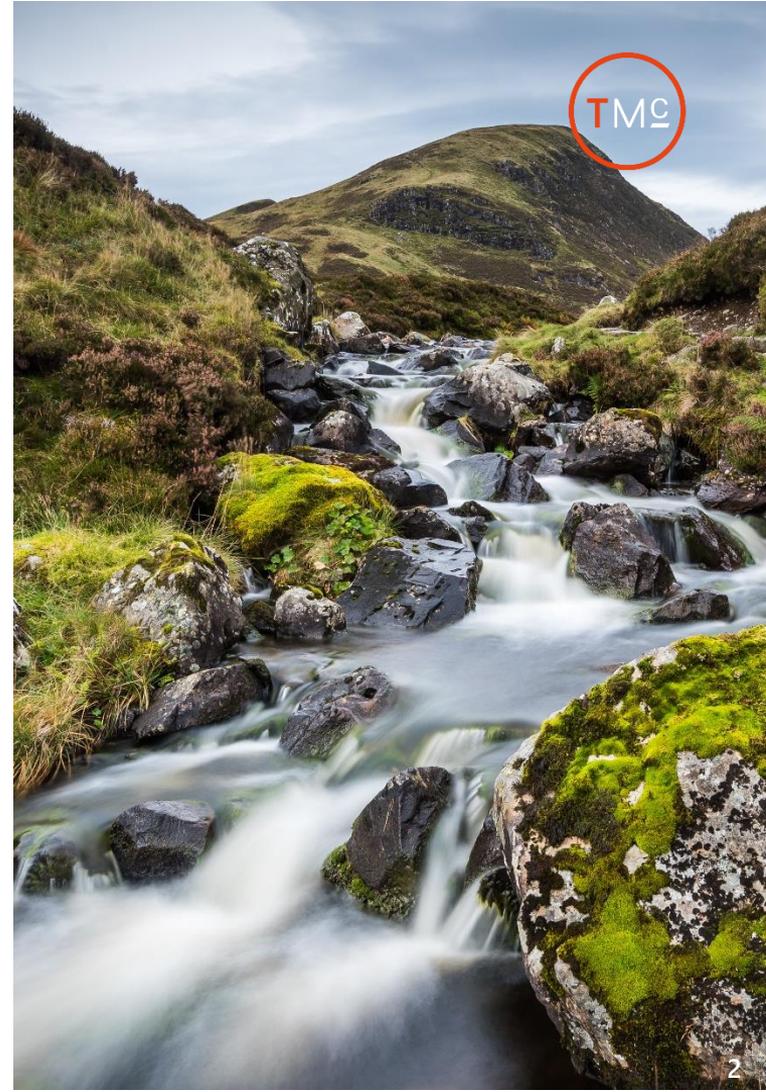
May 2019

TRINITY  
MCQUEEN

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# Background, objectives and approach

As part of the SR21 programme, this research will uncover how different generations plan for legacy, what the current service expectations are for the water industry and how domestic and business customers would like to prioritise future investment

# The research objectives in detail



The research explored the intergenerational relationship when it comes to legacy and how Scottish Water fits in. The broader subject of 'legacy' was addressed first, before understanding how the water industry plays its part

## OVERARCHING OBJECTIVES

## DETAIL

Do customers plan for the future?

**Consideration of the future:** Exploring how customers plan and think about future generations - actual behaviours displayed

What does 'legacy' mean to customers?

**Legacy:** Understand views and priorities for legacy across generations and different customer types

Historical context

**Context:** Through considering previous legacies such as Victorian infrastructure and the NHS – how these shape what customers think should be left behind by the current generation

Scottish Water's role in the priorities for legacy

**In relation to the water industry:** Discover where the water industry, and therefore Scottish Water, fits into the bigger legacy picture

Current service levels

**Current foundation:** Question whether current service levels are in line with building towards this legacy, exploring both praise and areas to improve

Future

**What should Scottish Water do in the future?** Pinpoint what Scottish Water should focus on in terms of investment, understanding what is achievable, highlighting what customers class as the most important, and how this differs between generations and different customer types

# Multiple methodologies were employed



## Digital Immersion

40 participants, over 1-week, completing online tasks to give us a porthole into their day-to-day life and thoughts



## Semiotic Analysis

Understanding how people's cultural environments shape their beliefs, expectations, attitudes and behaviours at an unconscious level



## Business Depths

12 x 15 min telephone interviews to gain industry views and opinions through a business lens



## Family Immersions

6 x 2-hour Intergenerational family immersion sessions to understand where consensus and disagreement lies across the topics



## Conflict Session

2 x 2-hour sessions with 10 people from a variety of backgrounds brought together to discuss and debate legacy topics



## Online Survey

1000 participants, 800 households + 200 businesses. A 15-minute survey with maximum difference analysis

Throughout this document this key will be used to highlight views from different customer groups



**Pre-family  
/ (future  
bill payers)**

**Family**

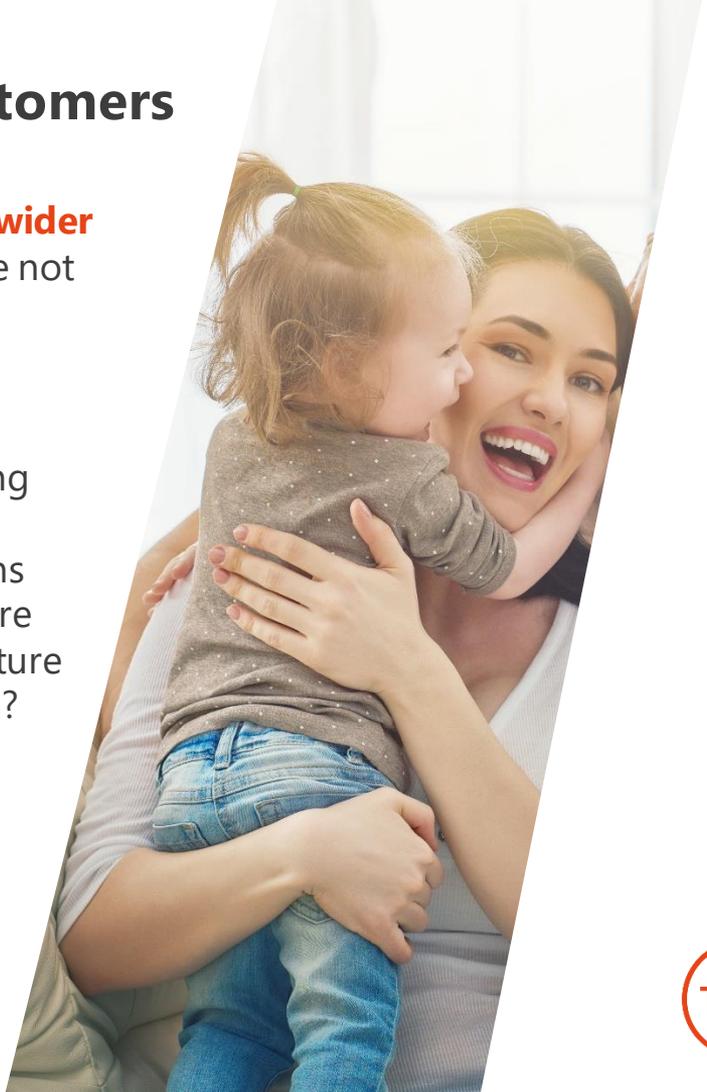
**Post-family**

**Customers  
with  
vulnerabilities**

# Key insights – what legacy means to customers

**Legacy is what people 'leave behind' for their family and wider society.** The actions taken today that leave a future legacy are not conscious; it's all part and parcel of everyday life

- ✓ **Planning for the future differs across generations**
  - Younger generations:** Securing own future and protecting the environment
  - Families:** Working hard today to set the right foundations for future generations. Those in financial hardship are more likely to worry about the here and now rather than the future
  - Older generations:** Reflect and reset – what's left to plan?
  
- ✓ **The most important personal legacies are intangible:**
  - ✓ Family held traditions
  - ✓ Morals and values – be a nice person/work hard
  - ✓ Making a positive contribution to society – helping others/looking after the environment



# Key insights – how customers experience water

## The water industry and its assets are largely hidden

The water industry works efficiently in the background, largely out of sight, affording customers the luxury of rarely needing to consider it

## ✓ The legacies that customers would like to be left for Scotland as a whole form the 'Scottish identity'.

### Water plays a part in all three:

**The Scottish landscape** – the hills and the lochs enjoyed by customers and attract tourists - made great by the plentiful supply of rain

**Art, culture and community** – friendly hard working people, quality drinking water, food and drink

**Industry and innovation** – the water industry has a part to play in carrying on the legacy of Scotland as a place of innovation



### Differences between customer types:

**Current bill payers, businesses and those with vulnerabilities** want the water industry to continue the legacy of working efficiently in the background

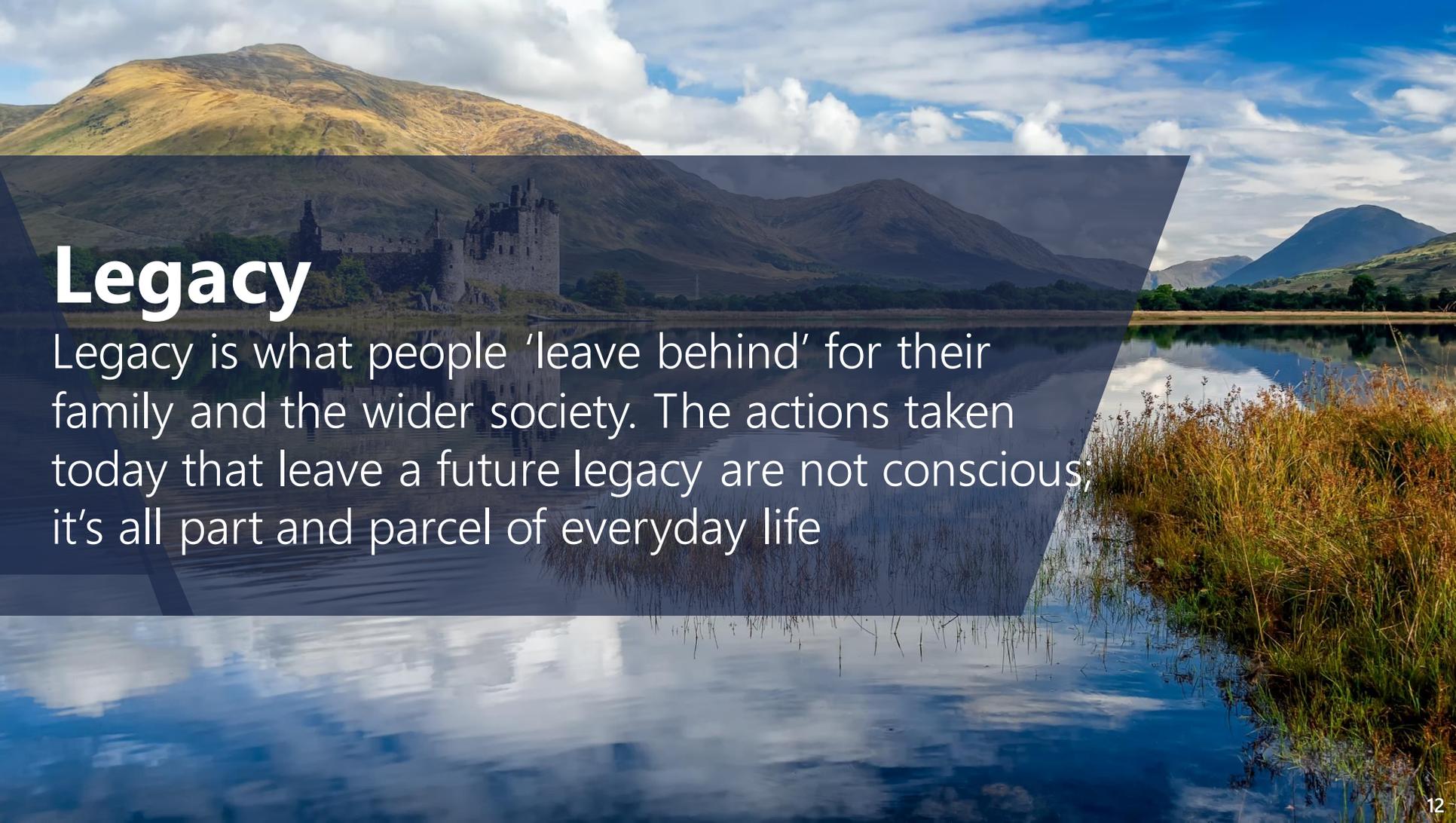
Some **future bill payers** are more tuned into the water and innovation agenda – there's a keenness to learn how industry is working to support the environment

# How domestic and business customers would like to prioritise future investment

## Top five overall priorities (Statistical MaxDiff exercise):

- 1 All of Scotland has high quality drinking water**  
Top priority for current bill payers
- 2 All of Scotland has a consistent supply of water**  
A priority area for both current and future bill payers
- 3 Replace ageing assets to maintain services and protect the environment**  
A priority area for both current and future bill payers
- 4 Collect, treat and recycle waste water**  
Generating income appeals to current customers and protecting the environment appeals to future bill payers
- 5 Provide services at a fair and equitable price**  
An average priority for current bill payers

The Water Industry is trusted to make the right investment decisions to maintain the status quo and also has permission to innovate solutions that will benefit future generations



# Legacy

Legacy is what people 'leave behind' for their family and the wider society. The actions taken today that leave a future legacy are not conscious; it's all part and parcel of everyday life

Legacy is not an intuitive topic that customers plan for consciously. However there are differences in how it is viewed across a lifetime

How the future is planned for:



**PRE-FAMILY**  
(future customers)

Those starting out into adulthood are in a planning frame of mind. They're thinking about education, housing and work



**FAMILY**

Customers are busy with work and families and the focus shifts on to the "here and now" and getting through the day-to-day. Planning takes a back seat



**POST FAMILY**

Have less to plan for longer-term. Planning becomes more reflective: *What else is there left to do in my life? For my family? For my community?*

# Morals, traditions and values are what customers want to leave behind, rather than tangible assets



**Planning for a legacy is less about the ability to pass forward material wealth and more about maintaining shared values and beliefs**

PRE-FAMILY

- Find it hard to articulate what legacy means. They place emphasis on preserving the environment, and combatting climate change

FAMILY

- Want to ensure future generations are left with the right mental and financial legacy: education, health, housing, jobs, values and morals

POST FAMILY

- Want to leave behind security, values and traditions for their family, the wider community and Scotland as a whole

THOSE WITH VULNERABILITIES

- Are more focused on the here and now

# Customers are united by a strong sense of Scottish heritage and identity; these form priority legacies



Individuals, communities, businesses and organisations all have a part to play in securing the aspects of Scottish identity that are most important, and should be left as a legacy for future generations



Scottish Landscape

*Our country is so scenic – we're lucky to have that and we'd be mad to ruin it*



Art, culture & community

*I'm proud of Scotland for its people, we're friendly, warm, creative, welcoming*



Industry and innovation

*Scotland has a lot of industry and inventions to be proud of – I'd like to think that's how we'll continue*

# Whilst all want to secure a future for Scotland, there is a generational divide on how best to achieve this



**CURRENT BILL PAYERS**

Want Scotland to thrive through **financial and economic security**, and continue as a **skilled, knowledgeable** and **inquisitive** nation

*I'm making plans to ensure my will is in order*

*I'd like to see the industry and ingenuity of Scotland make a come back*



**FUTURE BILL PAYERS**

Are focused on **the environment**. They want to see more businesses and organisations actioning these values

*Everyone I know carries a reusable water bottle now*

*I don't want to be known as the generation that let the planet down*

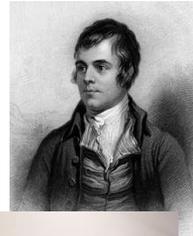
**Those with vulnerabilities**

For customers with vulnerabilities, the focus is on the aspects of legacy that have the biggest personal impact, i.e. housing, education and skills

# Let's hear from some participants on the topic of legacy...



## Images and videos from community



Scottish Landscape

Art, culture & community

Industry and innovation



# The water industry

it works efficiently in the background, largely out of sight, affording customers the luxury of rarely needing to consider it

CAN'T SEE WHY IT COSTS  
ANYTHING



BLOODY HELL ...  
... I MEAN HOW CAN  
WATER COST SO MUCH  
IT FALLS OUT OF THE  
BLOODY SKY

# Future planning for the water industry is an abstract concept for customers, little thought is given to how it should be prioritised



## Current bill payers

Little thought is given to how much water charges are and how the money is spent



*The water in Scotland is great...but it's not something I have thought about before this research*

## Older customers

Accustomed to high levels of water quality and consistent supply. They don't see this changing for any reason



## Natural resource

Hard to contemplate Scotland running out of clean water



## Hidden infrastructure

Pipes are hidden beneath ground: out of sight, out of mind. Treatment works are also largely out of sight



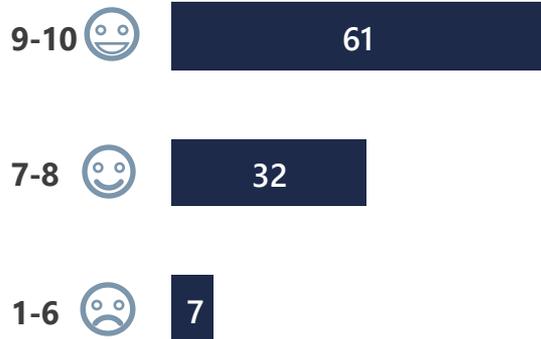
## Hotter summers

Last year's hot summer was the first time some customers considered that they might need to start being more conservative

# The water industry is performing as expected for now, but can't rest on its laurels



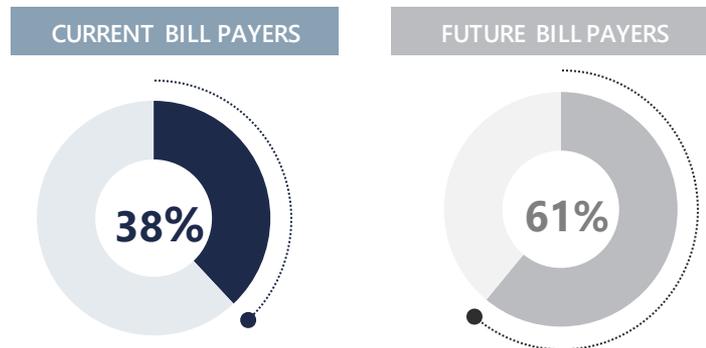
Water and waste water services are performing to a sufficient level



*% giving each rating (1-10) to the current service they receive*

Q4b. Please rate the current service that you receive from your water provider. (Base: Current Bill Payers - 704)

Future bill payers are more acutely aware that water shortages in the future could affect them



Q3. For each statement below, please select the option that best describes your feelings. (Base: Future Bill Payers - 99; Current Bill Payers - 704; Vulnerable - 206; Non-vulnerable - 597)

*It's alright for saying that we always had the best quality water but it might not last!!*

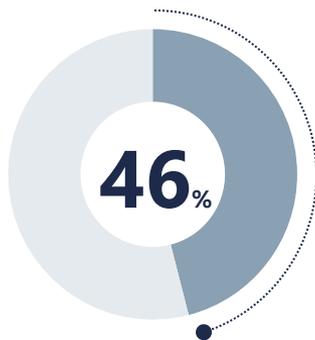
# Future bill payers are more concerned about the impact of climate change on Scotland's water supply



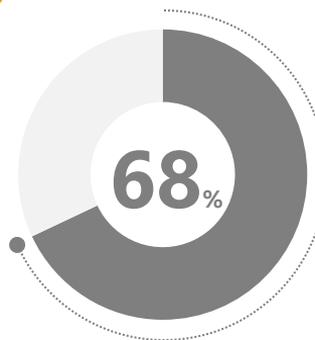
*% agree: I am concerned about the impact of climate change on Scotland's water supply*



CURRENT BILL PAYERS



FUTURE BILL PAYERS



**Those with vulnerabilities** are significantly more likely than non-vulnerable customers to agree (**55% vs. 47%**)

# Future bill payers are future-thinking and are less likely to prioritise short-term gains over sustainability



*% agree: It is more important to focus on fixing current problems than it is to think about sustainability and renewable energy*



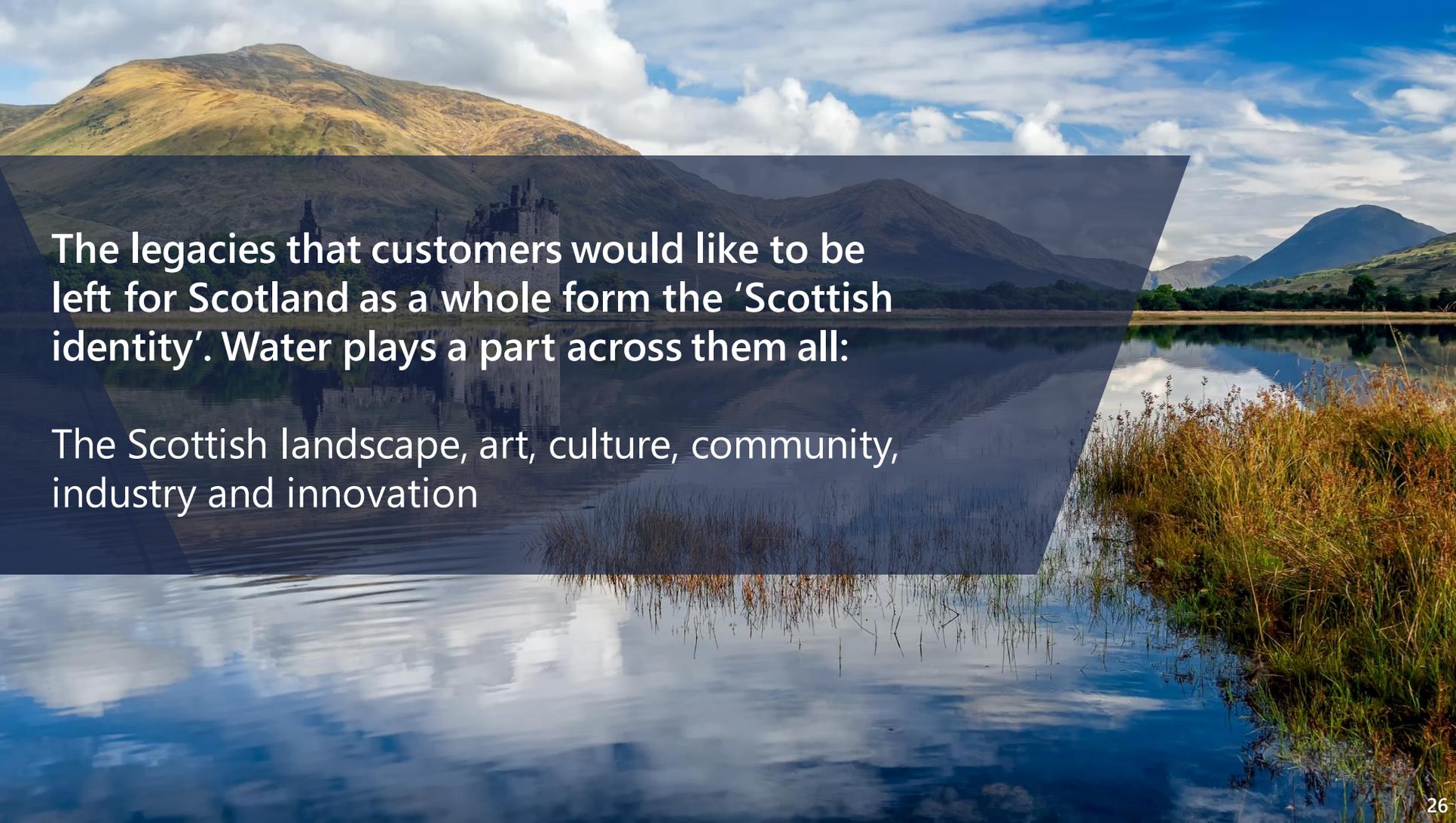
## CURRENT BILL PAYERS

Agree	<b>28%</b>
Disagree	<b>39%</b>
Neutral	31%
Don't know	1%



## FUTURE BILL PAYERS

Agree	<b>11%</b>
Disagree	<b>62%</b>
Neutral	24%
Don't know	3%



The legacies that customers would like to be left for Scotland as a whole form the 'Scottish identity'. Water plays a part across them all:

The Scottish landscape, art, culture, community, industry and innovation



***“Water is very important to Scotland.  
It is needed daily within our lives,  
and it is such a beautiful natural  
asset within Scotland. This attracts  
tourists so boosts our economy”  
– male, family life stage, Glasgow***

# There are a number of potential changes to the landscape, culture and industry that could influence the water industry

Image from community



The Scottish landscape

**Customers know that the climate lends itself to a beautiful landscape that is enjoyed by all.**

**However:**

- / Water is becoming less reliable and increasingly unstable
- / Population shifting to urban areas may put more pressure on the infrastructure
- / There's concerns for climate change

Image from community



Art, culture & community

**The people and the food and drink industry are core to the Scottish identity. However:**

- / Households are getting smaller
- / Food and drink trends – could Whisky lose popularity?
- / Could people move back to drinking bottled water?
- / Health focusses change – i.e. 2 litres of water a day!

Image from community



Industry and innovation

**There's great pride in Scotland's industriousness and innovation.**

**However:**

- / When employment becomes more uncertain, people are less optimistic about innovation
- / Technology helps some people to cope and control household resource but also leaves some people behind - i.e. metering, apps for utilities



Illustration from conflict sessions

# The water industry has permission to go beyond just 'maintaining'. There's a role to play in innovating and influencing



## Infrastructure



Image from community

Innovative, forward thinking tech approaches are all welcome to ensure a robust water supply in the future

## Circular Economy



Image from community

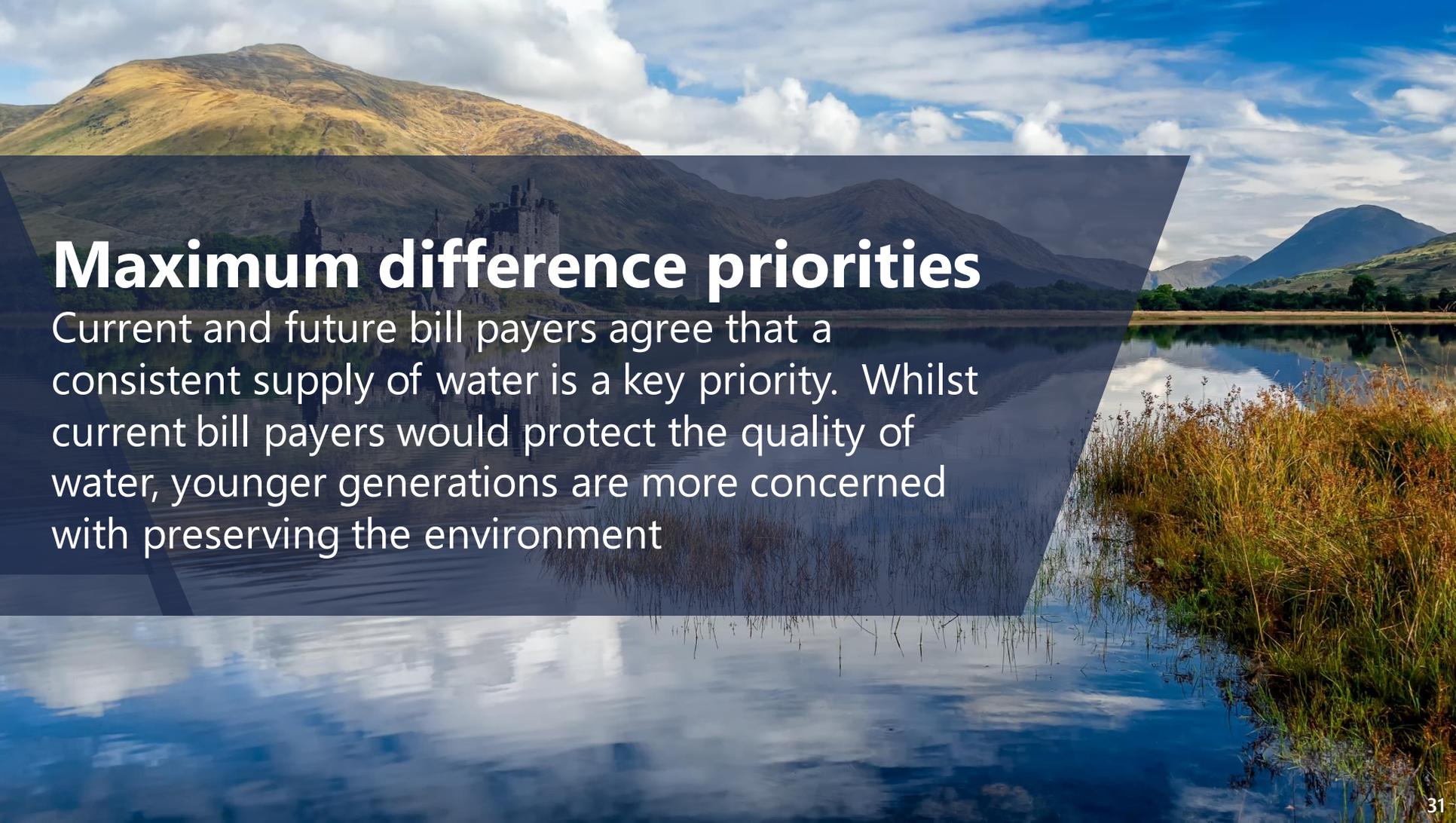
Carbon neutrality is a key focus for many customers. As more companies take this approach, it is becoming an expectation

## Influence and policy



Image from community

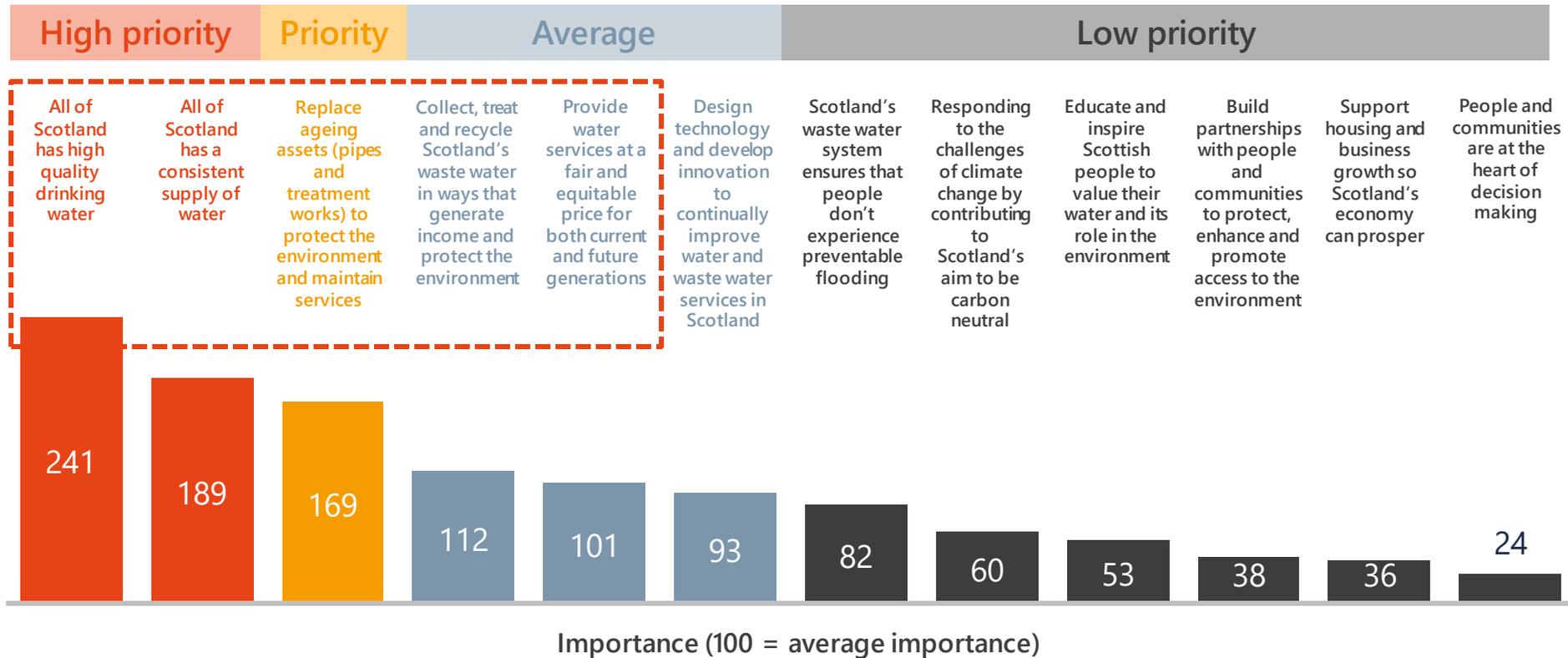
The water industry has permission to influence and push for legislation and business best practice to secure the future of water in Scotland

A scenic landscape featuring a calm lake in the foreground, reflecting the sky and surrounding mountains. In the middle ground, a large, ancient stone castle with multiple towers stands on a hillside. The background consists of rolling mountains under a bright blue sky with scattered white clouds. The overall scene is peaceful and natural.

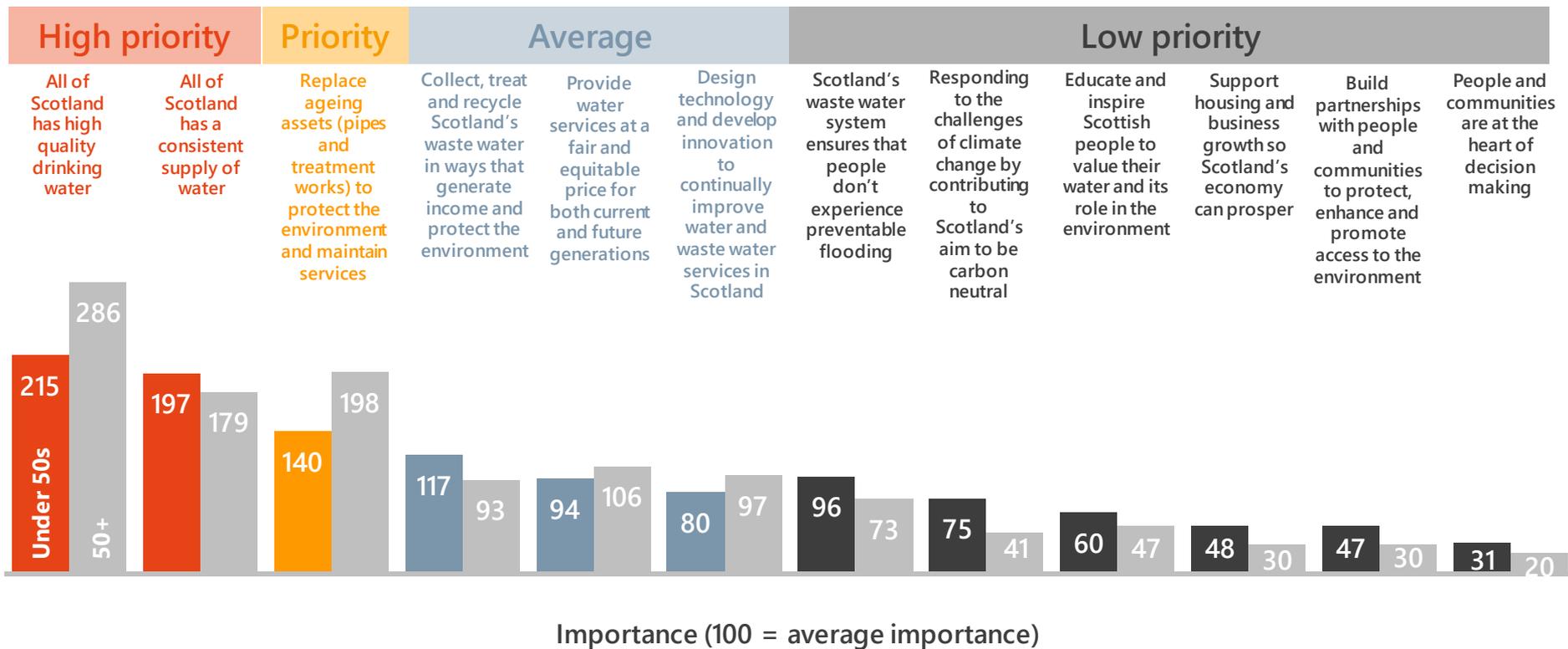
# Maximum difference priorities

Current and future bill payers agree that a consistent supply of water is a key priority. Whilst current bill payers would protect the quality of water, younger generations are more concerned with preserving the environment

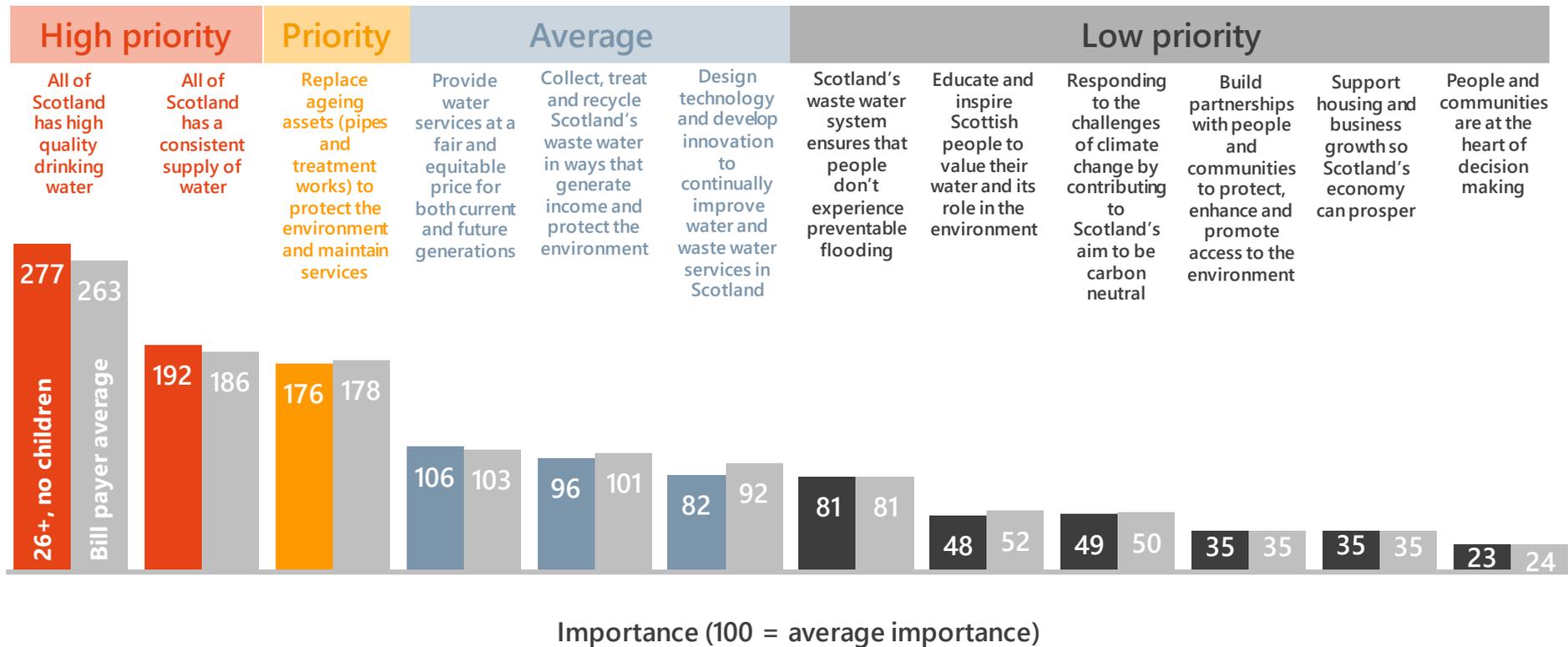
# Overall, customers consider high quality and consistent water supply to be the greatest priority



# Within current bill payers, priorities do not differ significantly between under 50s and those aged 50+



# The priorities of bill payers aged 26+ without children are not significantly different to the average bill payer



Q6. On each screen, please tell us which you think is the most important, and which you think is the least important. (Base: Current bill payers – 704; Those aged 26+ without children – 222)

**Priorities change across generations.**

**Let's hear from some customers...**

### Current bill payers:

- / Want to protect the quality of the drinking water above anything else
- / Are accustomed to the water and waste supply as it is, and are rooted in the status quo – they are resistant to change
- / Find it hard to imagine that the water industry will ever be unable to maintain supply and waste services

### Future bill payers:

- / Are more willing to compromise on water quality to ensure a consistent supply for generations to come
- / Are tuned in to the messages they hear through the media and friends about Scotland becoming carbon neutral
- / Place the environment above all else

Top 3 priorities for current bill payers

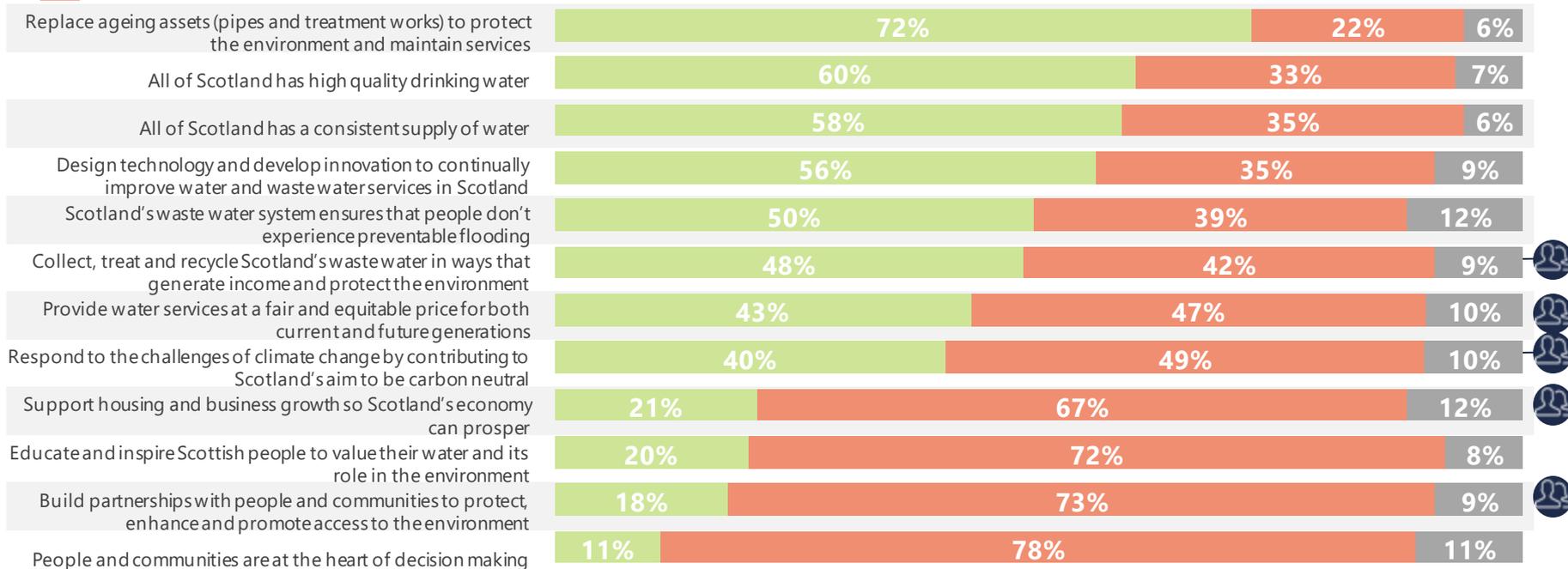
Quality drinking water	Consistent supply of water	Replace ageing assets
263	186	178

Top 3 priorities for future bill payers

Recycle waste water	Being carbon neutral	Consistent supply of water
201	199	184

Importance (100 = average importance)

# There's an understanding that bill payers may need to contribute to protect current levels of service



 **Post-family** customers are significantly less willing to pay for these than other customer types

- This would justify a slight increase in water and waste water charges
- This would not justify a slight increase in water and waste water charges
- I don't know

# Future bill payers are more open to price increases on a number of key priorities



*% who feel a slight increase in water charges is justified*

	Domestic - Overall	Current bill payers	Future bill payers
Replace ageing assets (pipes and treatment works) to protect the environment and maintain services	<b>72%</b>	72%	75%
All of Scotland has high quality drinking water	<b>60%</b>	59%	71%
All of Scotland has a consistent supply of water	<b>58%</b>	56%	75%
Design technology and develop innovation to continually improve water and waste water services in Scotland	<b>56%</b>	54%	72%
Scotland's waste water system ensures that people don't experience preventable flooding	<b>50%</b>	48%	60%
Collect, treat and recycle Scotland's waste water in ways that generate income and protect the environment	<b>48%</b>	44%	77%
Provide water services at a fair and equitable price for both current and future generations	<b>43%</b>	41%	59%
Respond to the challenges of climate change by contributing to Scotland's aim to be carbon neutral	<b>40%</b>	36%	69%

**Those with vulnerabilities**

**Are more willing to pay more for...**  
 Respond to the challenges of climate change by contributing to Scotland's aim to be carbon neutral  
 (46% vs 38%)  
 Educating and inspiring Scottish people to value their water and its role in the environment  
 (28% vs. 17%)

*I would be willing to pay to protect the environment*

*I would like to see metering so that those who are using the water most are paying more for it*

Q7. For each of the statements that you have just seen, please select the option that best represents your feelings. (Base: 99)

# Current bill payers aged 26+ with no children do not differ in their willingness to pay more for key priorities

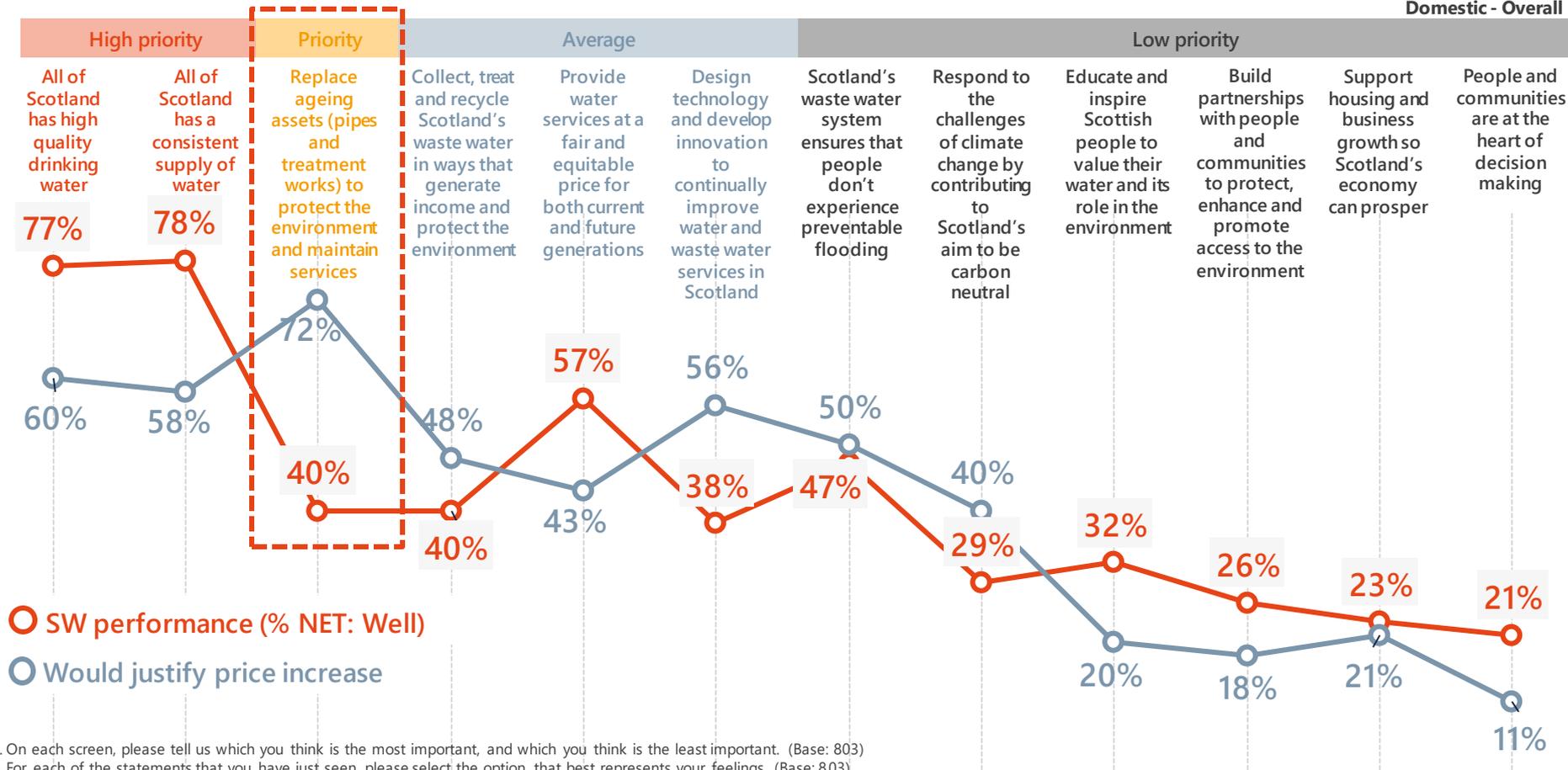


<i>% who feel a slight increase in water charges is justified</i>	Current bill Payers - Average	Current bill Payers – 26+, no children
Replace ageing assets (pipes and treatment works) to protect the environment and maintain services	<b>72%</b>	70%
All of Scotland has high quality drinking water	<b>59%</b>	63%
All of Scotland has a consistent supply of water	<b>56%</b>	60%
Design technology and develop innovation to continually improve water and waste water services in Scotland	<b>54%</b>	50%
Scotland's waste water system ensures that people don't experience preventable flooding	<b>48%</b>	50%
Collect, treat and recycle Scotland's waste water in ways that generate income and protect the environment	<b>44%</b>	48%
Provide water services at a fair and equitable price for both current and future generations	<b>41%</b>	38%
Respond to the challenges of climate change by contributing to Scotland's aim to be carbon neutral	<b>36%</b>	36%

Q7. For each of the statements that you have just seen, please select the option that best represents your feelings. (Base: Current bill payers – 704; Those aged 26+ without children – 222)

# Replacing assets justifies increases, but performance is low

Domestic - Overall



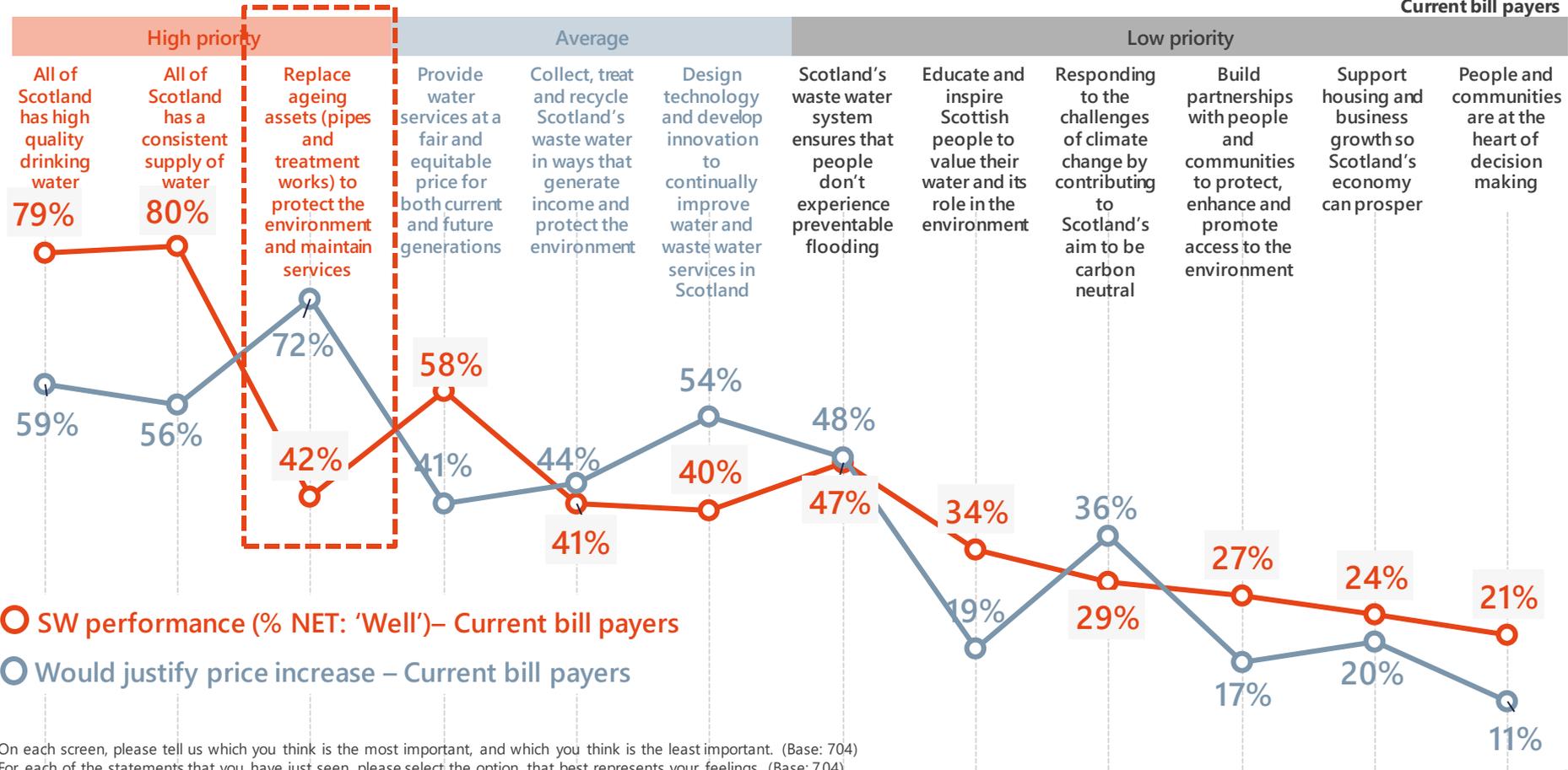
Q6. On each screen, please tell us which you think is the most important, and which you think is the least important. (Base: 803)

Q7. For each of the statements that you have just seen, please select the option that best represents your feelings. (Base: 803)

Q8. Finally, please can you tell us how you believe your water provider is currently performing on each of these things? (Base: 803)

# Replacing assets justifies increases, but performance is low

Current bill payers



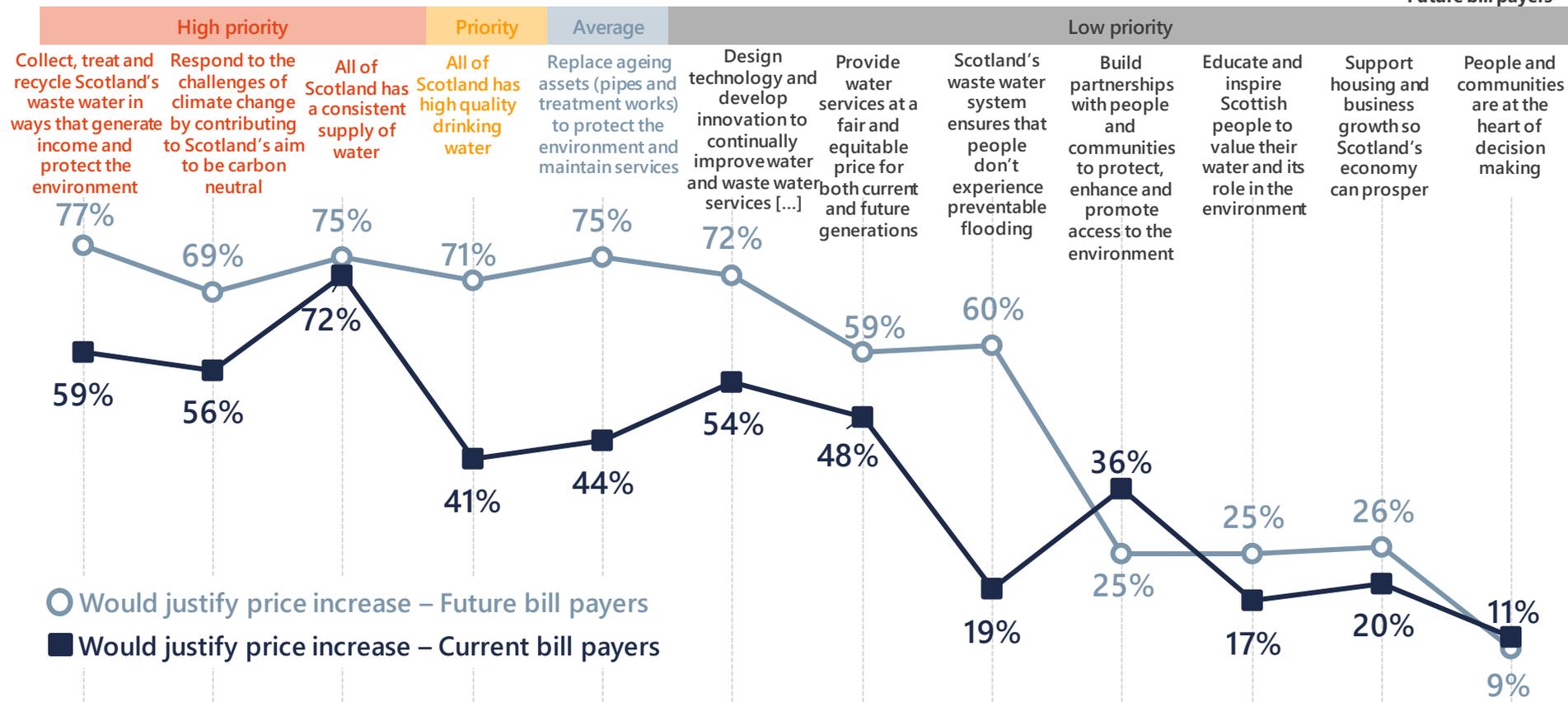
○ SW performance (% NET: 'Well')- Current bill payers

○ Would justify price increase - Current bill payers

Q6. On each screen, please tell us which you think is the most important, and which you think is the least important. (Base: 704)  
 Q7. For each of the statements that you have just seen, please select the option that best represents your feelings. (Base: 704)  
 Q8. Finally, please can you tell us how you believe your water provider is currently performing on each of these things? (Base: 704)

# Future customers are more amenable to price increases

Future bill payers



○ Would justify price increase – Future bill payers  
 ■ Would justify price increase – Current bill payers

Q6. On each screen, please tell us which you think is the most important, and which you think is the least important. (Base: 803)  
 Q7. For each of the statements that you have just seen, please select the option that best represents your feelings. (Base: 803)

# Many customers do not feel sufficiently well-informed to rate Scottish Water on many of the priorities

Current bill payers

	Priority rank	NET: 'Well'	NET: 'Poorly'	NET: 'DK'
All of Scotland has high quality drinking water	1	79%	2%	7%
All of Scotland has a consistent supply of water	2	80%	2%	9%
Replace ageing assets (pipes and treatment works) to protect the environment and maintain services	3	42%	13%	21%
Provide water services at a fair and equitable price for both current and future generations	4	58%	7%	13%
Collect, treat and recycle Scotland's waste water in ways that generate income and protect the environment	5	41%	6%	29%
Design technology and develop innovation to continually improve water and waste water services in Scotland	6	40%	4%	29%

	Priority rank	NET: 'Well'	NET: 'Poorly'	NET: 'DK'
Scotland's waste water system ensures that people don't experience preventable flooding	7	47%	7%	23%
Educate and inspire Scottish people to value their water and its role in the environment	8	34%	15%	21%
Respond to the challenges of climate change by contributing to Scotland's aim to be carbon neutral	9	29%	5%	36%
Build partnerships with people and communities to protect, enhance and promote access to the environment	10	27%	8%	35%
Support housing and business growth so Scotland's economy can prosper	11	24%	6%	38%
People and communities are at the heart of decision making	12	21%	14%	31%

# Some future customers feel Scottish Water is performing poorly on environmental priorities

Future bill payers

	Priority rank	NET: 'Well'	NET: 'Poorly'	NET: 'DK'
Collect, treat and recycle Scotland's waste water in ways that generate income and protect the environment	1	35%	5%	44%
Respond to the challenges of climate change by contributing to Scotland's aim to be carbon neutral	2	26%	9%	43%
All of Scotland has a consistent supply of water	3	66%	-	24%
All of Scotland has high quality drinking water	4	65%	5%	24%
Replace ageing assets (pipes and treatment works) to protect the environment and maintain services	5	28%	11%	41%
Design technology and develop innovation to continually improve water and waste water services in Scotland	6	23%	4%	53%

	Priority rank	NET: 'Well'	NET: 'Poorly'	NET: 'DK'
Provide water services at a fair and equitable price for both current and future generations	7	47%	4%	32%
Scotland's waste water system ensures that people don't experience preventable flooding	8	42%	6%	38%
Build partnerships with people and communities to protect, enhance and promote access to the environment	9	17%	23%	37%
Educate and inspire Scottish people to value their water and its role in the environment	10	18%	34%	27%
Support housing and business growth so Scotland's economy can prosper	11	18%	9%	54%
People and communities are at the heart of decision making	12	17%	28%	37%

# Bill payers aged 26+ without children do not rate Scottish Water significantly differently than average

Current bill payers (average) vs. 26+, no children

	Priority rank (average)	NET: 'Well' – Current Bill Payers (average)	NET: 'Well' – Current Bill Payers (26+, no children)		Priority rank (average)	NET: 'Well' – Current Bill Payers (average)	NET: 'Well' – Current Bill Payers (26+, no children)
All of Scotland has high quality drinking water	1	79%	76%	Scotland's waste water system ensures that people don't experience preventable flooding	7	47%	45%
All of Scotland has a consistent supply of water	2	80%	75%	Educate and inspire Scottish people to value their water and its role in the environment	8	34%	28%
Replace ageing assets (pipes and treatment works) to protect the environment and maintain services	3	42%	40%	Respond to the challenges of climate change by contributing to Scotland's aim to be carbon neutral	9	29%	25%
Provide water services at a fair and equitable price for both current and future generations	4	58%	57%	Build partnerships with people and communities to protect, enhance and promote access to the environment	10	27%	24%
Collect, treat and recycle Scotland's waste water in ways that generate income and protect the environment	5	41%	37%	Support housing and business growth so Scotland's economy can prosper	11	24%	22%
Design technology and develop innovation to continually improve water and waste water services in Scotland	6	40%	35%	People and communities are at the heart of decision making	12	21%	22%

# Replacing ageing assets and recycling waste water are priorities that have not yet been fulfilled and would justify an increase in charges



## Replacing ageing assets

### Priority No 3

40% believe SW perform well

*You do hear about pipes bursting. You'd hope that they would lay new pipes that will last a long time*



## Replacing assets

- Not already covered within water charges
- Justifies a charge increase
- Helps to protect the supply, quality and environment

## Recycling waste water

### Priority No 4

40% believe SW perform well

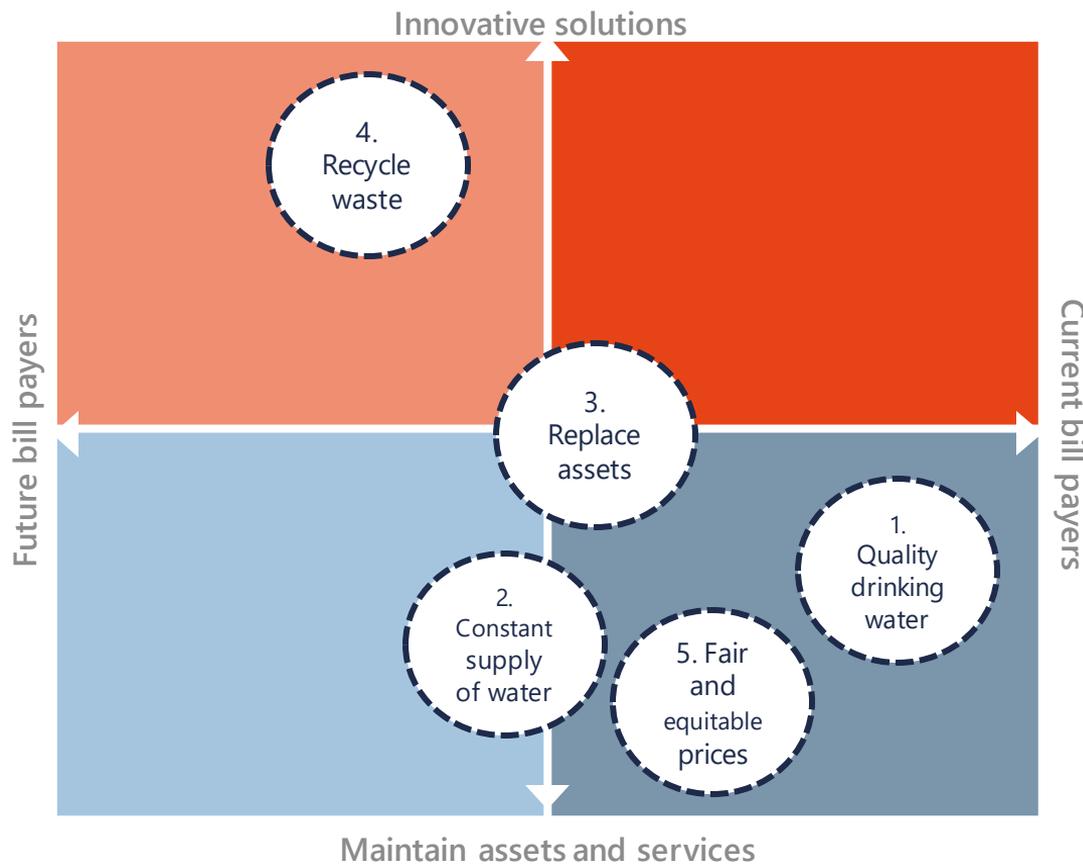
*I don't think turning waste water into renewable energy is something they do already, but they should*



## Recycling waste water

- Circular economy is a popular concept
- Appeals to current bill payers - generating income
- Appeals to future bill payers - protects environment

# Replacing ageing assets is a 'sweet spot' priority area that meets the needs of current and future bill payers



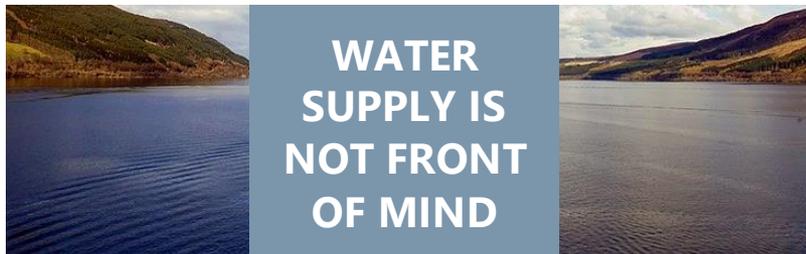
- Current bill payers will always expect **quality drinking water** to be maintained
- Future bill payers are open to messages about innovative solutions to **protect the environment**
- Replacing ageing assets** is a priority area that ticks a number of boxes for both current and future bill payers:
  - Helps ensure consistent supply and waste services
  - Protects the environment by minimising leakages/flooding
  - There's an understanding that charges may need to increase to cover replacement – if it's more than just maintenance



# **Business customers**

Business customers align with domestic customers on investing in a high quality and consistent water supply for the future

# Businesses consider water a plentiful resource and an important social and economic asset for Scotland



## WATER SUPPLY IS NOT FRONT OF MIND

There is little concern that water will run out or need managing in the future

*Loch Ness is deep enough to supply the world with water. We never face the same issues that England has with water and hosepipe bans etc.*



## GREAT WATER IS EXPECTED

However a continual supply of clean, good quality water, and waste water management is expected

*Businesses rely on water at many levels to keep things ticking over – Scotland needs a continued supply*

# Business customers can struggle to foresee how their relationship with water might change in the future



## SMALL BUSINESSES

Small businesses worry about balancing service and business costs, with urbanisation, a decline in the high street and reduced footfall

*We have a little café reliant on water. I worry that people won't be visiting as much in 15 years time – it's a balance of running costs vs. not ripping customers off*

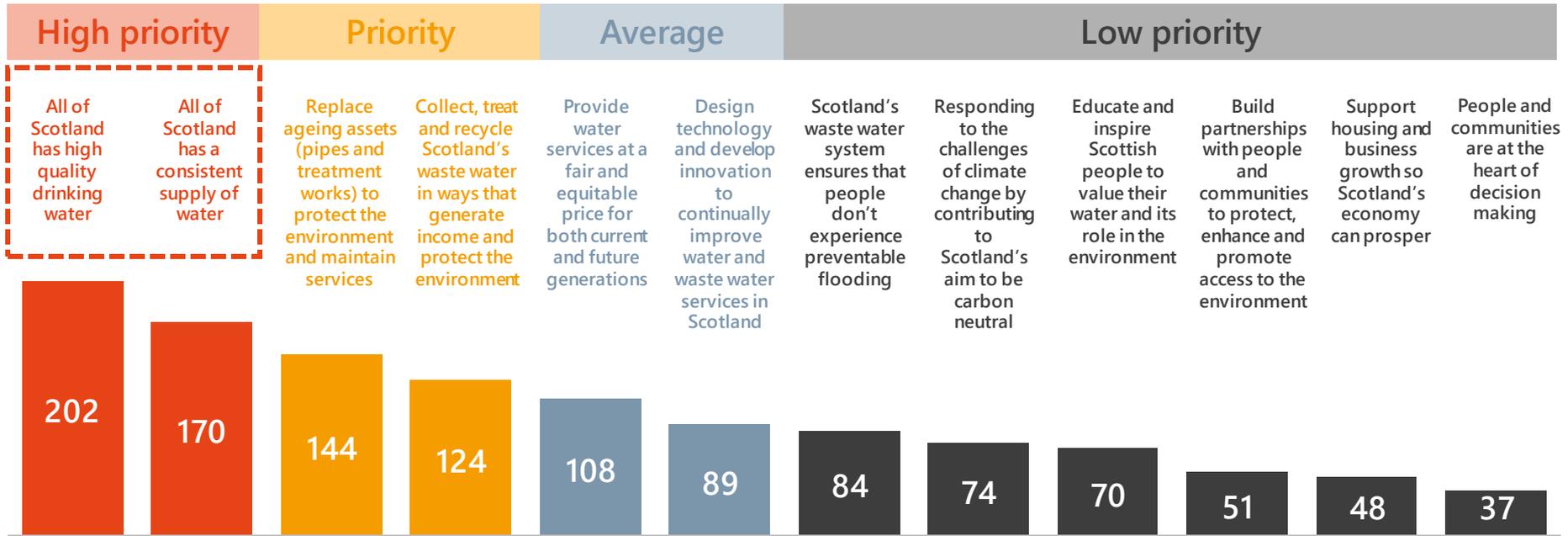


## LARGE BUSINESSES

Larger organisations that rely heavily on water expect growth, and have concerns about the rising costs of utilities, including water

*My hope is that we've opened other warehouses, and the business has grown, this will of course increase our use of water so we would need a reliable supply*

# Businesses deem a high quality and consistent water supply the greatest priority for the future



Importance (100 = average importance)

# There is appetite from larger businesses to be included in future conversations for investment planning

As businesses grow, efficiency, planning and future investment become more front of mind

## SMALLER BUSINESS

Smaller businesses have a more inward view and are focused on the day to day, they are pulled in multiple directions and are often 'fire-fighting'

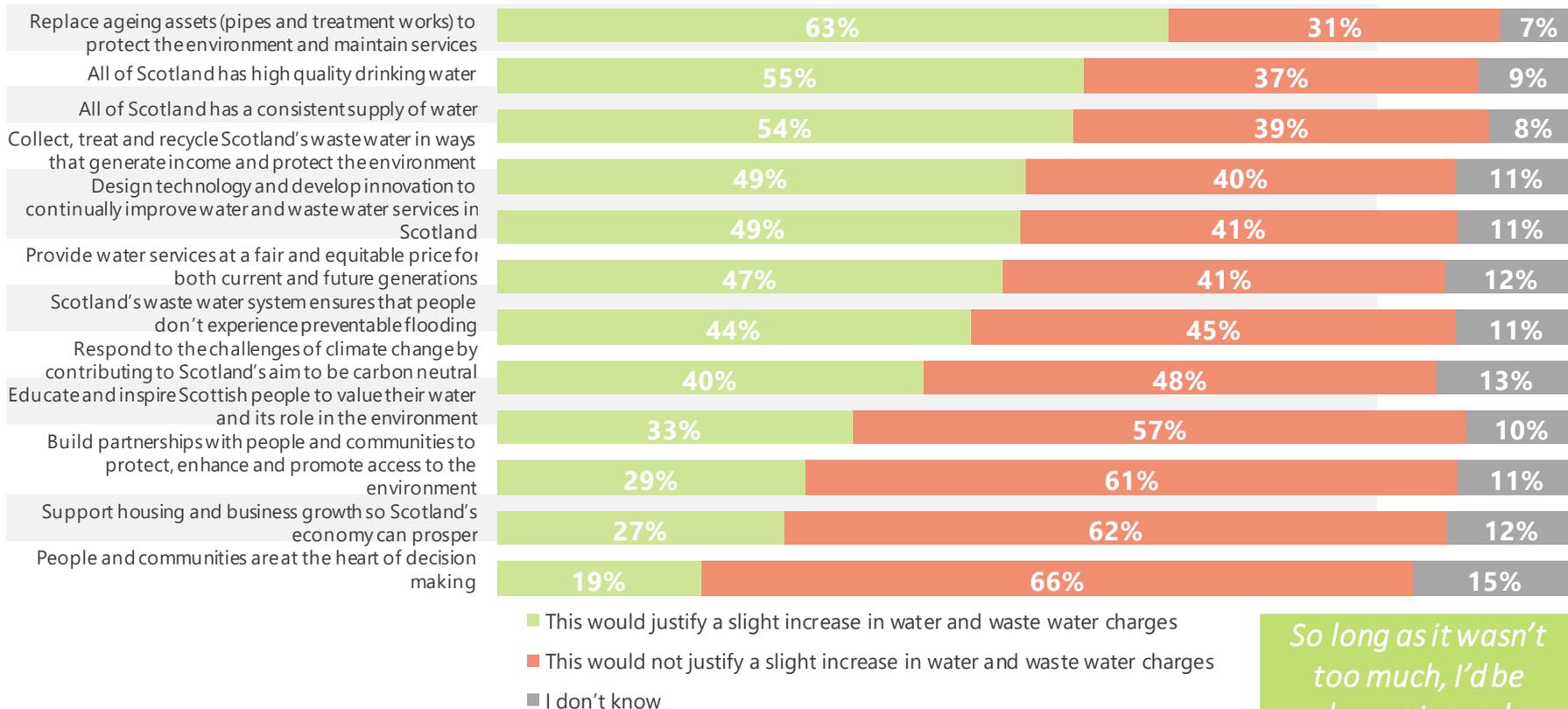
*I expect that the people in charge of water, have plans in place to keep things ticking over*

## LARGER BUSINESS

As businesses grow, they start to look beyond this. The plans they make become longer term

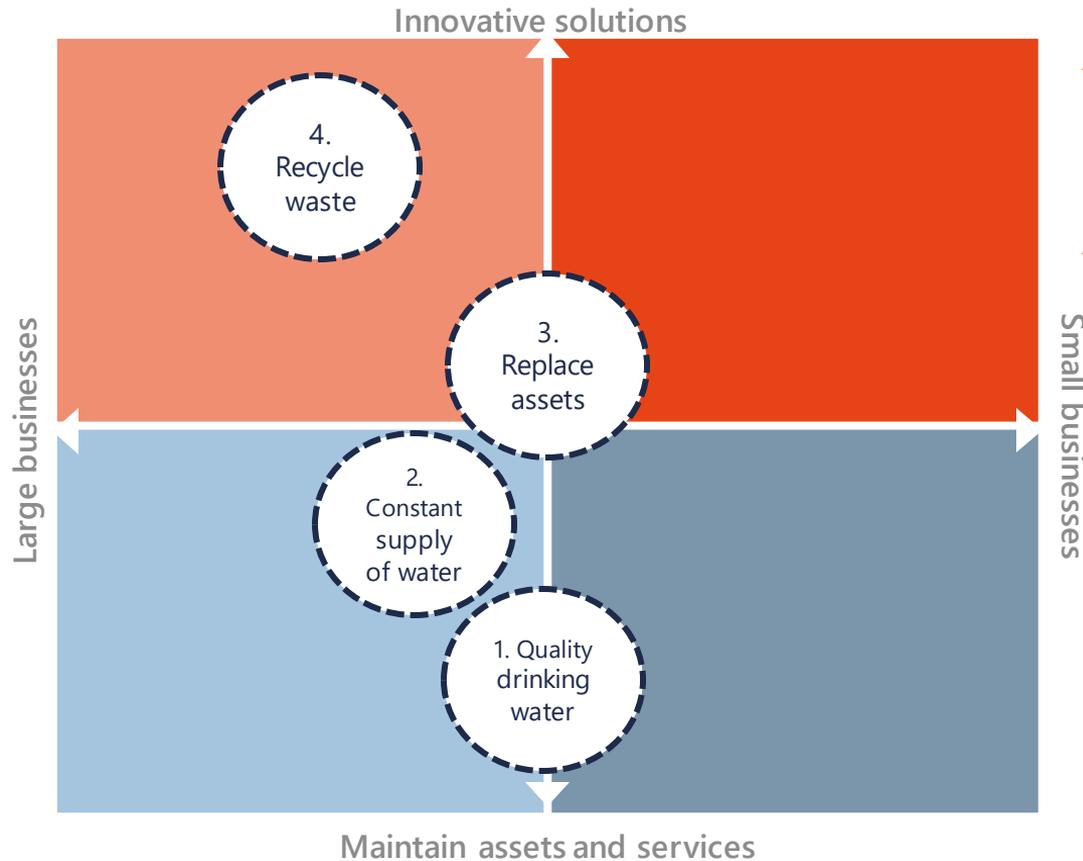
*I would be interested in working with the board to understand how we can be more efficient as a business*

# Although not as high as domestic customers there is still an acceptance that charges may increase to meet priorities



*So long as it wasn't too much, I'd be happy to pay!*

# Maintaining current supply, and replacing ageing assets is important for business customers



Business expect **quality drinking water and water supply** to be maintained so that day-to-day running of the business can continue

**Replacing ageing assets** is also a priority area for businesses:

- ✓ Helps ensure business can function as usual
- ✓ Protects the environment and minimises waste, meaning Scotland is an attractive place to visit and spend money
- ✓ There's an understanding that charges may need to increase to cover replacement – if it's more than just maintenance

## CALL OUT

There is some fear from business that future investment costs will be pushed on to them



# Recommendations

Action points to support the water industry with developing the future investment strategy

# To recap, how domestic and business customers would like to prioritise future investment

## Top five overall priorities (Statistical MaxDiff exercise):

- 1 All of Scotland has high quality drinking water**  
Top priority for current bill payers
- 2 All of Scotland has a consistent supply of water**  
A priority area for both current and future bill payers
- 3 Replace ageing assets to maintain services and protect the environment**  
A priority area for both current and future bill payers
- 4 Collect, treat and recycle waste water**  
Generating income appeals to current customers and protecting the environment appeals to future bill payers
- 5 Provide services at a fair and equitable price**  
An average priority for current bill payers

The Water Industry is trusted to make the right investment decisions to maintain the status quo and also has permission to innovate solutions that will benefit future generations



Getting the language, tone of voice and emphasis right when planning for the future investment strategy



### **Maintain and innovate**

For current customers, ensure quality and supply service levels are maintained. Future customers are in a planning frame of mind; talk to them about plans to innovative that will protect supply and contribute to the aim for a circular economy



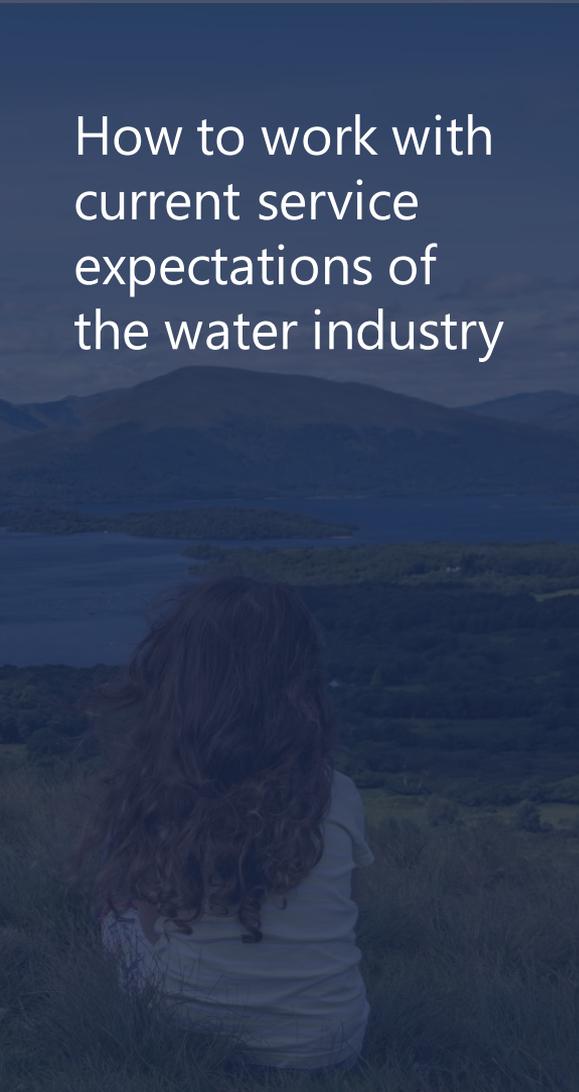
### **Use language that communicates the right values**

Talk about the legacy that the water industry plans to 'leave behind' for future generations. Place emphasis on aspects of the legacies that will work to support customer's hopes and resonates with three pillars that makes up Scotland's identity the landscape, arts, culture & people and industry and innovation



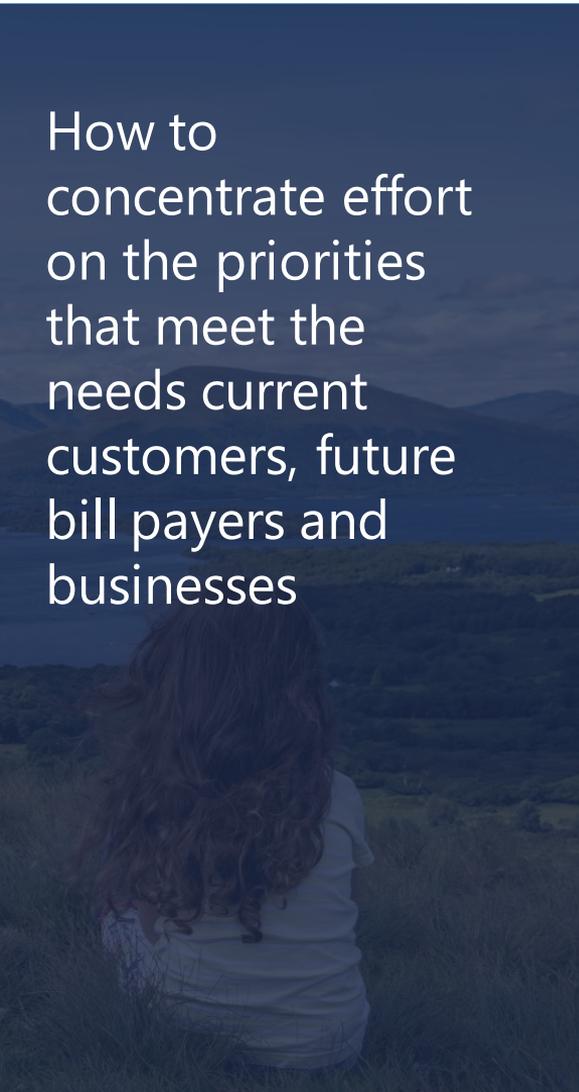
### **Link to Scottish heritage and identity**

Demonstrate how future investment plans feed into the important elements of what it means to be Scottish: the landscape, community, the food and drink industry and innovation



## How to work with current service expectations of the water industry

- +** **Maintain the status quo**  
Use current charge levels to maintain the quality of the core service – good water and waste water services for all
- +** **Work with the messages that people already hear**  
Open up conversations with future generations by talking to them about the things that water industry does to support the country's work on becoming carbon neutral
- +** **Make it easy for current customers**  
Those with families, those with vulnerabilities and small businesses are less keen to get involved in conversations about future investment; reassure them that they can trust the water industry to make the right decisions on their behalf



How to  
concentrate effort  
on the priorities  
that meet the  
needs current  
customers, future  
bill payers and  
businesses



### **Quality and supply**

Work on initiatives that protect the quality of the water for current customers and consistent supply for future bill payers i.e. replacing ageing assets



### **Innovate for the future**

Customers and future bill payers are open to the message that they will need to contribute to update the ageing pipework system. Communicate to current customers how this will secure the service they are used to and communicate to future bill payers how this will protect the environment. In the longer term, push forward on innovations for renewable energies



### **Businesses**

Invite larger businesses to be involved in future investment planning and communicate to them how they can work to support priorities

# Get in touch

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## Rob Nicolson

✉ r.nicolson@trinitymcqueen.com

☎ 07815 920830

## Joanna Brown

✉ j.wbrown@trinitymcqueen.com

☎ 07494 848949

### Trinity McQueen London

1.08 Clerkenwell Workshops  
27 – 31 Clerkenwell Close  
Clerkenwell  
London  
EC1R 0AT

+44 (0) 203 176 8041

### Trinity McQueen Leeds

Victoria Wharf  
4 The Embankment  
Sovereign Street  
Leeds  
LS1 4BA

+44 (0) 113 451 000

