

TRINITY  
MCQUEEN

# Scottish Water

SR21 Customer Engagement Programme  
Research Stage One – Qualitative

# Contents:

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A circular logo with the letters 'TMC' inside, positioned in the top right corner of the slide. The background of the slide features a stylized map of Scotland with various geographical features and place names like 'Dunblane', 'Alloa', and 'Callander' visible. There are also some abstract geometric shapes in shades of orange and blue on the right side of the slide.

## 1. Background

*Aims and objectives and research approach*

## 2. Utilities

*Perceptions of utilities and Scottish Water*

## 3. Internal aspirations

*Customer impressions of Scottish Water's internal aspirations*

## 4. Priorities

*Priorities and customer coping scenarios*

## 5. The future

*Scottish Water's role*

## 6. Scottish Government objectives

*Where Scottish Water can support*

## 7. Key Insights

*Scottish Water's role*

# Background



# Aims and objectives

To update customer views to feed into the strategic review of charges for 2021-27



## Future gazing

To gain an understanding of what customers think about when they think of the future in terms of their personal position, their community and Scotland as a whole. Furthermore, to understand Scottish Water's perceived role within that



## Scottish Water's 20 year plan

To understand from current and future customers where Scottish Water should be focussing their efforts and how this fits with the Scottish Government's objectives for the next 20 years



## Internal aspirations and priorities

To explore perceptions of Scottish Water's Internal aspirations and priorities and to understand how they can be improved to better meet customers' needs in the future

# Key research & sample considerations



Our sampling and methodologies ensured a rounded understanding of the issues



## GOAL ORIENTATION

According to Regulatory Focus Theory a.k.a. goal pursuit theory, people tend to fall broadly into two camps: **those who are motivated towards an outcome** and have a promotion focused orientation and **those who are motivated away from an outcome** and have a prevention orientation. Including both types of people in the research ensured **we kept a balance of responses that didn't tip too far in either direction on the scale of negativity to positivity**



## SELDOM HEARD CUSTOMERS

**Vulnerable, hard to reach groups and future bill payers were included in the research.** Elderly customers, those with a disability, those living in remote areas and those on very low incomes are key and were reached via a more intimate 121 depth interview approach. Younger, future bill payers were included in the workshop sessions and **findings specific to these groups are highlighted throughout the report**



## BUSINESS END USERS

Ensuring a good representation by business size and sector is key as this is linked to water usage and dependency which will impact on their views. In addition, given competition within Scotland within the water industry **we spoke to a broad representation of users of different suppliers** including former Scottish Water business. **These customers have been reported as a separate section within the report**

# Research approach



## An integrated three-stage approach



1

### Workshops

- /// 7 in total across Glasgow, Stirling and Elgin
- /// Coverage of all lifestages, including current and future bill payers



2

### Tele-depth interviews customers

- /// 12 in total with vulnerable and hard to reach current bill payers across Scotland



3

### Tele-depth interviews businesses

- /// 14 in total with a range of business types and sizes across Scotland

# Domestic customers

Current and future customers start with a rudimentary understanding of water, Scottish Water's internal aspirations, priorities and the relevance of the Scottish Government's objectives. Knowledge and ability to actively contribute to the solutions grows throughout the research process



# Utilities

Customers are quick to think about the role utilities play in their day-to-day life when considering value for money



# Utilities and essential services:

## Reliability and consistency is key

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- ✓ **Minimal customer input**  
Customers don't want to engage with utilities more than is necessary
- ✓ **Reliable and trustworthy supply**  
Consistency is key – product, service and price
- ✓ **Good customer service**  
A quick and effective resolution when things go wrong
- ✓ **Value for money**  
Transparency in what is provided for the money paid



### Spontaneous mentions of utilities and services:

- Gas
- Electricity
- Water
- Council tax
- Broadband
- Phone

# There is a learning curve when customers consider the value for money of their water/waste water services



Spontaneously, other utilities like broadband are perceived to offer better VFM. Water's value becomes more apparent once its role has been considered in detail

Prior to the research, few had given much thought to their water supply and waste water services. They are utilities which are expected, trusted and relied upon. Many customers don't know how much they pay for water

By the end of the session customers realise water's importance and it's comparative VFM

# On first consideration, customers associate choice and control with value for money



## Water & Waste

Not spontaneously thought of as offering 'Value for Money'

The **equitable, plentiful nature of water supply** makes people positive about it

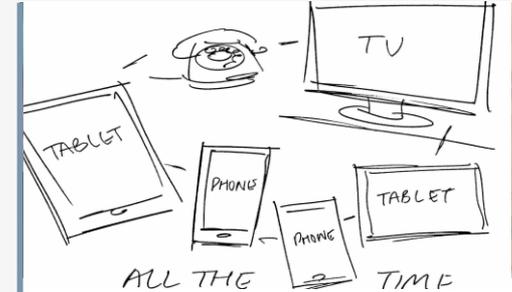
No choice of provider = negative connotations around monopoly supply



## Gas & Electricity

The ability to **compare and swap** puts the consumer in **control** and makes them feel they have sought '**best value for money**'

New culture of checking and swapping providers



## Phone & Broadband

Relative **low cost** compared to other utilities/services

Maximum impact on the **whole family** – opens up **access to other services**

Competitive market = best value deals

# Water as a utility: High quality and equitable in nature



**Top quality water**  
A sense of pride in the level of quality of the water compared to the rest of the UK

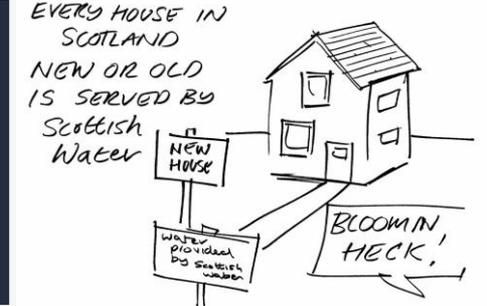


*"Whether you live at the top of a mountain or in the city, it's the same water"*

**Good customer service**  
Those who have had contact with SW report positively



**Plentiful supply**  
One price for all no matter how much is used. Seen to be equitable



**Reliable & trustworthy**  
SW maintain the status quo well



*"You take it for granted. You just trust that you turn on the tap and there's water"*

# Utilities: No single utility meets all expectations



## Value for money

Pay the lowest amount for the highest gain – either in product or service



## Community focused

Work to make local Scottish communities safe, healthy and prosperous

## Good customer service

Quick and effective resolutions to questions and problems



## Reliable

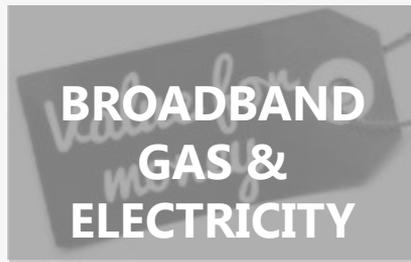
A trustworthy and consistent service and product

# Utilities: Water is spontaneously described as reliable



## Value for money

Pay the lowest amount for the highest gain – either in product or service



## Community focused

Work to make local Scottish communities safe, healthy and prosperous

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Quick and effective resolutions to questions and problems



## Reliable

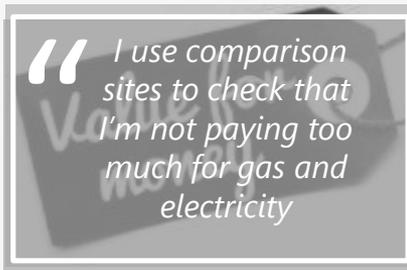
A trustworthy and consistent service and product

# Utilities: Reliability relates to both product and service for water



## Value for money

Pay the lowest amount for the highest gain – either in product or service

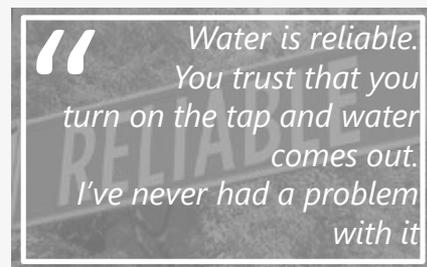


## Community focused

Work to make local Scottish communities safe, healthy and prosperous

## Good customer service

Quick and effective resolutions to questions and problems



## Reliable

A trustworthy and consistent service and product

# Vulnerable and hard to reach customers have lower engagement with utilities overall

They rarely engage with utilities providers as they are less likely to swap and change. There's greater emphasis on consistency and reliability



## Utilities

All have limited engagement with their utilities providers - contact only takes place when there is a problem



## Expectations

Value and customer service expectations are high (especially amongst those from lower SEGs). This group are looking to keep costs down but still expect top class customer service



## Independence

Older and rural customers are especially keen to be (and to be seen to be) independent. Handling their own utilities is a way to do this



## Support Networks

Many live nearby to friends and family or in an area with a strong community spirit – Some reported how they look out for those even more vulnerable than themselves in their community

“

*Rates are really low considering what you're getting. It's always there and the quality is probably taken for granted*

## Customer service holds higher importance for vulnerable and hard-to-reach customers in terms of value for money



### Cost

For all customers, but especially those on **lower incomes**, cost is the main component of value for money



### Additional Support

There is a strong sense of independence amongst vulnerable and hard to reach customers. However, support services are vital if anything goes wrong



### Customer Service

Some **older and rural customers** have experienced poor call centre services and welcome UK based customer services



### Communication

**Customers with disabilities** feel they can cope with most scenarios if they are kept informed and a clear procedure is in place to ensure minimum impact

# Perceptions of Scottish Water

Perceptions are shaped by the length of custom and past interactions with Scottish Water





# Scottish Water

Trusted to Serve Scotland

Scottish Water is seen as a trustworthy, honest, diligent organisation who work quietly in the background

## Linked to local



### LINK TO COUNCIL TAX

Payment as part of council tax heightens 'public' status and reduces connotations of being 'corporate'



### PUBLIC SECTOR?

People expect Scottish Water to work for the good of Scottish residents both in terms of product and service

## Part of Scotland's heritage:



### PRIDE IN WATER

The quality of the water in Scotland is something all Scots can be proud of - links to tourism (Lochs and river walks)



### SELF RELIANCE

Water and waste services provided by a Scottish company proves an ability to be self-reliant as a country

# Those who have been a customer for at least five years hold positive perceptions of Scottish Water



The more experience and contact the customer has, the more positive their perception of Scottish Water

The visibility of Scottish Water employees and vehicles provides positive reinforcement

Quick and effective resolution of problems reinforces this positivity further



*"You phone them up with a problem and they deal with it quickly"*

*"I've never had a problem. They're just reliable"*



*"You always see them working"*

# Future bill payers vary in their outlook, depending on their current situation

Future bill payers can be disengaged with water services. It's low down on their priority list – especially those living in remote areas such as Elgin – who are more likely to focus on issues that effect them directly such as employment, affordable housing and transport links

University students living in less rural areas also have low awareness of Scottish Water – they do however recognise its importance for the future of Scotland, especially in terms of the 'Green agenda'



*"Even when I moved I can't remember thinking about the water..."*

*"There's other things that come to mind first when you mention utilities"*



*"I pay £70 a month for my phone... but don't know what I pay for water"*

# Knowledge of Scottish Water as a company is higher amongst vulnerable and hard to reach customers

Those who have contacted Scottish Water with a problem are positive about the customer service they received and response times they experienced

## Mostly Positive (majority)

**Reliable** – water is always there, **Older customers and those with disabilities** interruptions minimal. are accepting that there will be problems from time to time

Several accounts of **excellent customer service** experience

Becomes a source of **national pride** when cost and quality is compared with England

“When my friends from London visit they always say, ‘you’re so lucky, it’s like bottled water!’”

## Ambivalent

Some **do not differentiate** water services from council tax

**Low awareness** of Scottish Water and their activities, particularly among **low SEG** customers

A few are **not engaged** at all or do not know who their supplier is – again this tends to be **low SEG** customers

“As long as we’ve got access to water then to be honest I don’t really care who supplies it”

## Suspicious

Lack of knowledge breeds **scepticism** of Scottish Water -  
Who owns them? What are they doing with my money?

**Apathetic towards monopoly** – those with greater involvement in their community, especially **elderly** customers, are concerned at the lack of choice

“We’re just lumbered with one monopoly. Who else are they competing with?”



# Internal aspirations

The sentiment expressed by the aspirations resonates, however a lack of tangible evidence undermines their credibility

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# Internal aspirations – report notes

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The internal aspirations are not designed to be customer facing

These were shared with customers to understand their associations & seek comparative feedback

They were also used to explore how Scottish Water might optimise the wording of the aspirations and expand them further

**SERVING** - We delight our customers by showing that we care

**STRONG** - We work hard to keep customers' prices low

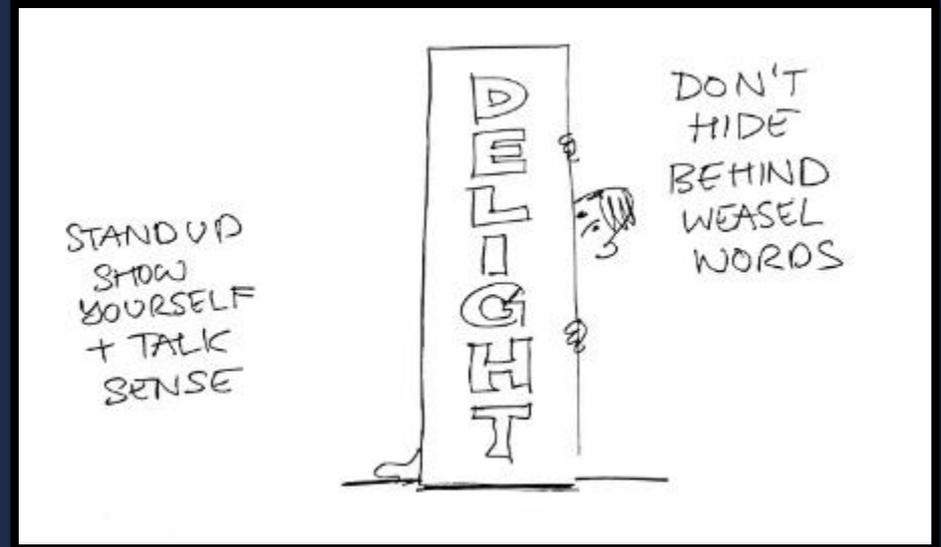
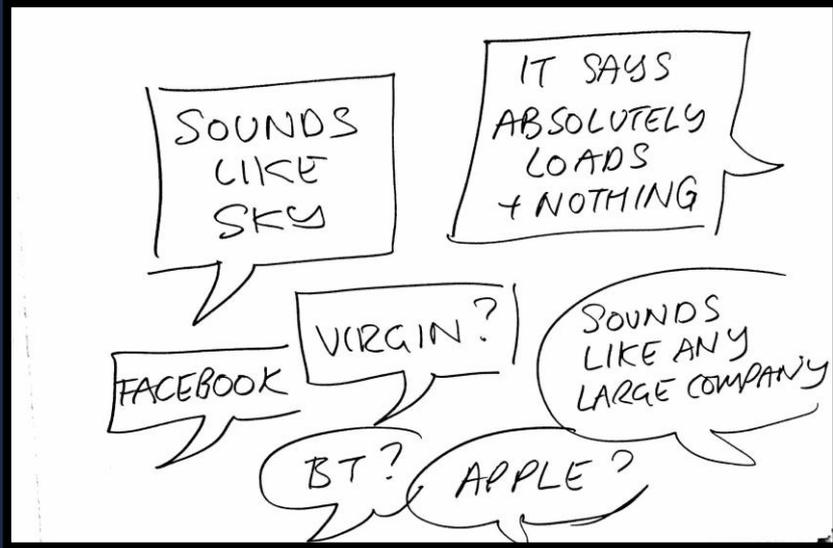
**RESPONSIBLE** - We always do the right thing for Scotland

**LEADING** - We shape our future for the benefit of customers

**GROWING** - We enable a thriving Scotland

**COMMITTED** - Together we are Scottish Water

# Cynical reaction to the internal aspirations is due to the way they are expressed rather than their sentiment



# The Internal aspirations are appealing in principle – customers are keen to understand how Scottish Water will achieve them



## Serving

Intuitive: Scottish Water provide clean water for the Scottish people. A lack of awareness and contact with Scottish Water led some to ask, “how are they serving me?”

I don't see how they show they care because we have so little contact with them

You'd probably want a bit more of a presence in the local community

## Responsible

Scottish Water's provision of quality water and environmental consciousness chimes with the idea of 'responsibility', but some question who they are *responsible to* and who should be *held responsible* when things go wrong

I'd say they're pretty responsible - they're on the ball when it comes to the environment

I don't know who actually owns Scottish Water – are they just using “Scottish” to seem responsible?

## Strong

There was consensus that this objective is being achieved due to the low cost of water and perceived value for money, but customers do want greater transparency over spending

I'd want to know what they are doing on a day-to-day basis. I want to know where my money is going

It's difficult because we don't have anything to compare it with

# The Internal aspirations are appealing in principle – customers are keen to understand how Scottish Water will achieve them



## Leading

A positive objective but the wording (*'shape our future'*) is considered too vague. Some referenced to the physical shaping of the future with regards to through responsible environmental actions but generally awareness is low

I agree with this – they need to make sure the infrastructure is capable and let the customer know why what they're doing is in our interest

That's a bit open-ended. The sub-line makes more sense but the strapline by itself is meaningless

## Growing

This is again considered too vague and many were unsure how a water company can help Scotland to thrive. Scottish Water International chimes with the hope that Scotland will stand on its own feet, but awareness of this arm of the company was low

I'm not sure how they're helping Scotland to 'grow' – I don't understand that objective

It makes sense in terms of helping Scotland to get there and grow, but I can't say if they're meeting that objective

## Committed

A 'nice-to-have' objective with little tangible worth – there is confusion over the phrasing and the purpose of the objective, i.e. Who benefits from this objective? How will it be achieved?

What do they mean by that word 'together'? It's difficult because we don't know enough about them

I'd say they're meeting that objective – I've had really positive experiences with their customer service



*They need to talk about what they actually DO... give examples that relate to their behaviour. I want to know I am a priority for them*



## Even with supporting information customers demand more

- Customers want the internal aspirations to link to tangible behaviour which everyone can relate to
- They also want the internal aspirations to be expressed in simple, concise & concrete terms e.g. Pillar > brief explanation > behaviours e.g.
- Serving – We deliver consistently good customer service and an ever improving experience for our customers and communities ...

*...we invested £x million back into the communities we served last year*

*...we don't keep you on hold when you phone us*

*...we resolve billing queries within X hours*

There's a general cynicism about company vision statements – even amongst future customers

//

*...we are used to being let down, from referendum promises to Brexit. Energy companies say they'll keep prices low and every year they go up. Switching is exhausting... deliberately exhausting!*

Waitrose **TESCO**



## Best practice relates to tangible experiences where *companies 'live their values'*

- Customers find it difficult to think of similar company visions to compare and contrast, instead focussing on tangible interactions with companies they transact with regularly, for example:
  - Aldi:** pay staff above minimum wage; perceived positively, and assumed to filter through to better service
  - Tesco:** profit from 5p carrier bag charge goes to local causes; out of date products go to local charities; stores work with local primary schools on food education
  - BT/ Virgin/John Lewis/Waitrose:** Place emphasis on treating their staff well – that filters down to customer service, ultimately benefiting the customer
  - On the flipside, an example of a 'least admired company' is Scottish rail because they are perceived to rarely deliver against their aspirations, objectives and values



*Don't say "trust me" – that automatically makes me suspicious*



## Customers suggest supporting themes to enhance the internal aspirations

- /// **Sustainable:** A leading role in greener policies for Scotland, via infrastructure maintenance and development, healthy lifestyles (combating sugar) & sustainability (not bottled water)
- /// **Innovative:** Scottish Water have a core role to play in Scotland's Renewable Energy agenda and should promote this
- /// **Transparent:** Being 'transparent' is held in higher regard than being 'honest'. The latter can cause suspicion ("trust me")
- /// **Proud:** A proud (management) team - this feeling of pride has a filter down effect that ultimately benefits the customer
- /// **Generous:** Keeping prices low and looking after employees
- /// **Accountable:** Demonstrating regulatory practice underpins every pillar: a foundation of trust;

“

I think they need to be more transparent – they say they're doing all these things but people just don't know

## The sentiment behind the objectives is acknowledged, but issues of vagueness and concerns over delivery persist

- Overall positive reaction – there is a good range with a clear focus on Scotland and the Scottish people
- Straplines on their own, e.g. “Committed – together we are Scottish Water”, can be confusing and non-specific – who is this benefiting? How does this affect me?
- The supporting information works to clarify the point – meaning each pillar is received more positively
- Lack of engagement with utilities leads to a lack of engagement with Scottish Water – customers do not know what Scottish Water are doing to achieve these objectives

DAD NEMO'S  
DEAD!

# Service preferences

Customers reiterated that the quality of the product and minimising flooding was particularly important

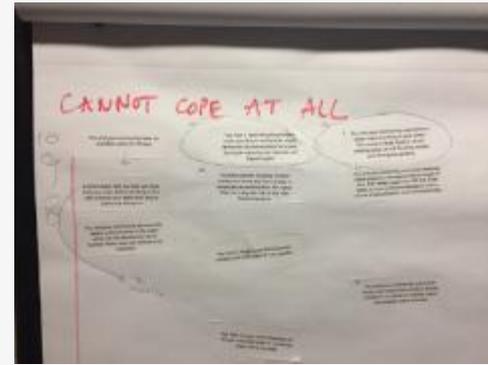
BLAME  
SCOTTISH WATER  
SON

# Service preferences – report notes

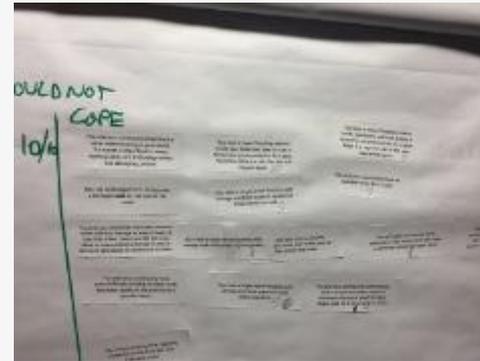
Customers were shown a range of coping scenarios and asked how easy each would be to cope with

Following an intense debate and lengthy discussion, a series of service areas were introduced and debated

The aim was to understand customer impressions of the service areas – which are most important and why



Future bill payers, Stirling



Older customers, Stirling

# Coping scenarios: a steep learning curve and a broad consensus

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## ✓ Initially, most seem important

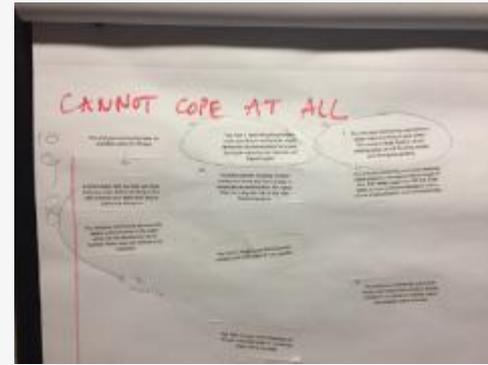
Priority order emerges when considered side by side – and a forced choice is made

## ✓ Property ownership affects priorities

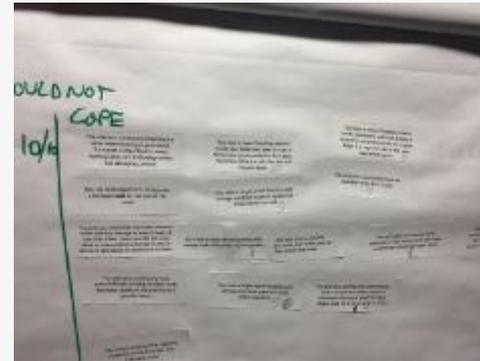
Property ownership & the cost of running a household is top of mind for families. This is not the case for future bill payers & empty nesters. They have a heightened concern for environmental issues (pollution incidents and river water quality)

## ✓ A broad consensus emerges

The top 5 priorities were clear (see over)

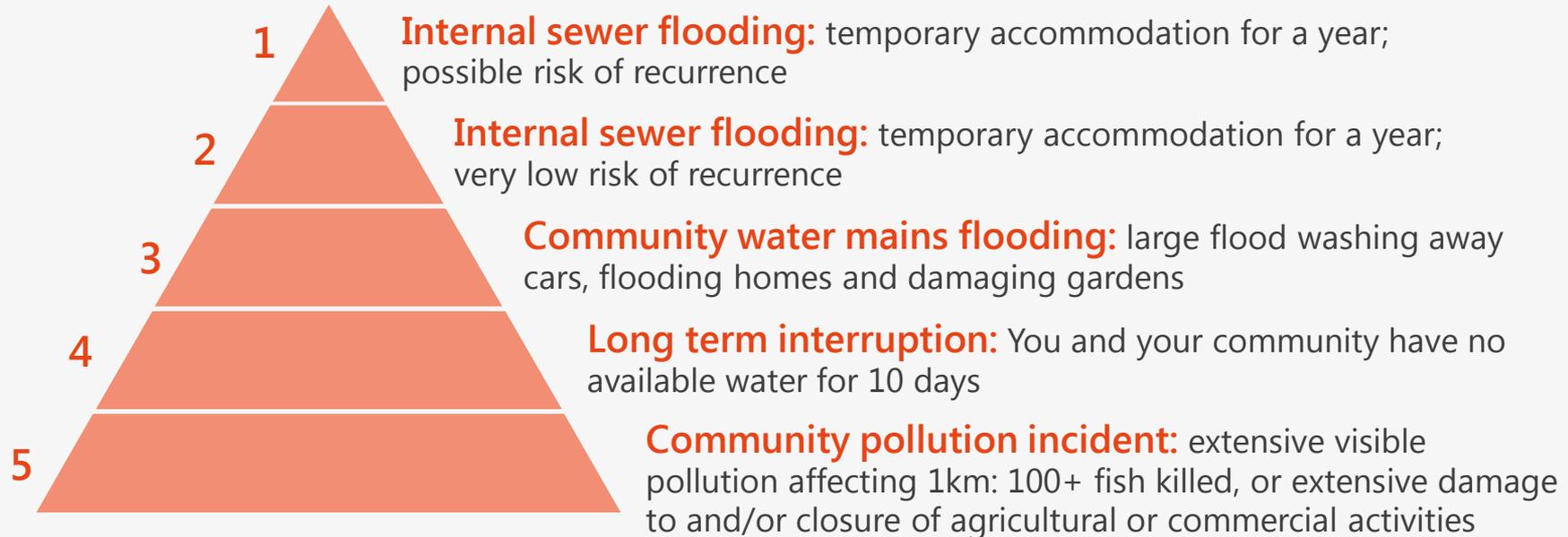


Future bill payers, Stirling

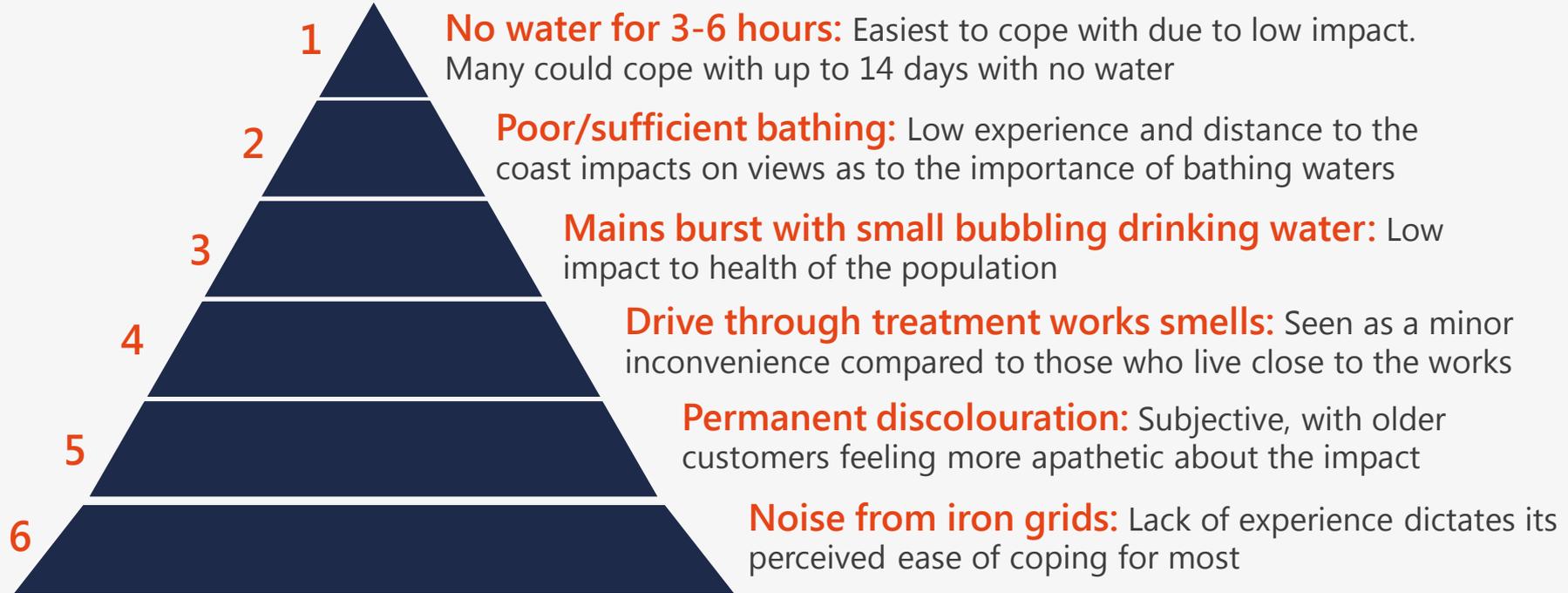


Older customers, Stirling

# Scenarios *least* able to cope with: **Severity, longevity, and likely recurrence are key factors in coping**



# Scenarios *most* able to cope with: Those that have minimal impact or are harder to set into context



# Customer understanding of scenarios: **Some adjusting and/or additional information would make them clearer**

## Scenario

You and your community have no available water for 3-6 hours

### Understanding level

Easily understood by all

### Additional insight

Responses differed but 2 weeks was the maximum that participants felt they could cope without water

## Scenario

You and your community have poor/sufficient bathing in waters with low water quality in the summer in a popular beach

### Understanding level

Confusion around word 'bathing'. Low experience = low understanding of the impact. Further explanation of 'sufficient' may be needed

### Additional insight

Polarising - potentially dependent on proximity of home to beach or frequency of going to the beach. When discussed some were alarmed by idea of sewage pollution

## Scenario

You and your community experience a small water mains bursting in your street. This causes a small bubbling pool of drinking water to form in your street

### Understanding level

Potentially need to emphasise that this is 'fresh drinking water' and therefore wasteful

### Additional insight

None

## Scenario

You drive through a community and encounter smells from the local treatment works where there are high levels of traffic and experiences

### Understanding level

Easily understood by all. Younger participants may understand 'Sewage Works' better

### Additional insight

None

# Customer understanding of scenarios: **Some adjusting and/or additional information would make them clearer**

## Scenario

You and your community permanently detect a discoloration in the water which are not harmful but which Scottish Water does not remove in its treatment

## Understanding level

Easily understood by all. Potential to expand 'treatment' to a lengthier explanation. What is involved?

## Additional insight

Highly subjective. Younger people are more "squeamish" about this; older have perspective. Urban less likely to have experience than rural.

## Scenario

You and your community has permanent noise from traffic over an iron grid in the roads

## Understanding level

Most have no experience of this issue - meaning less consideration / empathy of the impact. Younger participants may not know what an 'Iron Grid' is.

## Additional insight

Compared to other scenarios seems less serious - however it depends on previous experience. One participant in particular had experienced this and was vocal about its impact.

## Scenario

You and your community have permanent high pressure in your taps and shower which damages pipes

## Understanding level

Impact of this is a little unclear to those with little experience. Potentially need to emphasise the level of damage to pipes to contextualise the scenario better.

## Additional insight

Most familiar (thus associate concern) with low rather than high pressure.

## Scenario

You and your community have permanent low pressure in your taps and shower affecting the heating system and temperature of the water in the shower

## Understanding level

Participants had to "fill in the blanks" around the likely impact on the heating system and shower. Could add a sentence to explain.

## Additional insight

Participants with experience living with an issue (e.g. of an intermittently working shower) on a daily basis recognise it would impact on quality of life.

# Customer understanding of scenarios: **Some adjusting and/or additional information would make them clearer**

## Scenario

You and your community encounter extensive visible pollution, damage an area of length of 1km (0.62 miles), cause over 100 fish to be killed, or cause extensive damage to and/or closure of agricultural or commercial activities.

## Understanding level

Easily understood as a concept: Customers need to think about scale - imagining a 1km area in their locality. Consider linking the scenario to a well know river/area of natural beauty/fishing/farming to help

## Additional insight

None

## Scenario

Your car is damaged from driving over a damaged over an iron grid in the roads

## Understanding level

Easily understood - people however question a) was I driving at the time b) the specific level of damage to the car as this is not clear. 'Iron grid' is a term which some younger participants are unclear on - as in previous scenario.

## Additional insight

Older / car owners saw this as more of an issue. Potential impact on you as an individual and hassle in claiming back compensation. Tangible compared to some other scenarios.

All other scenarios were easily understood and needed no further explanation

# Customers debated the importance of several of the service area statements

These included...



Taste and odour (H) – highly subjective, more important to young. Chlorine 'sounds horrible'



Sewer maintenance (H) can be a root cause of other issues



During incidents customer service (H) becomes vital – less so in normal times



Communication, low pressure, river water quality & pollution incidents (all L>M) were heavily debated points

# Service areas where there was debate (to be prioritised in the quantitative research)

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## High

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- Long term interruptions to water supplies
- Drinking water quality
- Internal flooding
- External flooding
- ↓ • **Short term interruptions**
- ↓ • **Visible leakage**

## Medium

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- ↑ • **Sewer maintenance**
- ↑ • **Customer Service**
- Carbon Emissions
- Business price issues
- ↑ • **Taste and odour**
- • \*Pollution incidents\*
- Bathing water quality
- Discolouration

## Low

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- • \*River water quality\*
- Iron works/Covers
- • \*Low pressure\*
- • \*Communication\*
- Odour



*...really they should be looking at these together as sewers link to flooding and pollution, and the rest*

## Many of the priorities are intrinsically linked



- /// The cyclical impact of some priorities e.g. sewer maintenance is seen to lead to pollution and a negative impact on the environment, health/hygiene and water quality increasing it's importance as a priority
- /// This links to SW's environmental stewardship – working tirelessly in the background to maintain the water supply and ensure you never need to think about your water/waste water
- /// It also has relevant themes which can be linked back to the Internal aspirations: tangible examples of SW's actions - which engender trust



# Impact on health is a concern for older and more vulnerable customers

## Key considerations by customer type



### Health & Hygiene

The **elderly** and those with families are more concerned about potential threats to health than other groups



### Communication

The **elderly** and **those with disabilities** see communication from utilities companies as an integral part of planning and coping with incidents



### Customer Service

**Low SEG** customers have higher expectations of utilities companies and their service – customer-oriented priorities are significant for them



### Environment

Environmental issues are of the greatest concern for **rural** customers - minimising impact of activities on Scotland's landscape

# Hygiene and customer-oriented statements are particularly important

Possibly move up...

Possibly move down...



**Sewer Maintenance**  
(M→H)

Hygiene-related priorities was important for all and sewer maintenance was seen as a safeguard of public health



**Communication (L→M) and Customer Service (M→H)**

Not needed all the time but vulnerable customers need to know someone is there when there is a problem



**Odour (L→M)**

Many had experienced the smell from sewage treatment works – the constant smell affected their quality of life



**Short-term interruptions**  
(H→M)

Customers are sympathetic – they know nothing is perfect and they can deal with short-term interruptions if they are kept well-informed

# Coping Scenarios: Communication from authorities is key to how well vulnerable and hard-to-reach can cope

- ✓ **Low SEGs...**  
...are most concerned about physical damage to their property and belongings. The expense of buying bottled water and food that does not require boiling becomes increasingly difficult during long-term interruptions, especially with children to feed/bathe
- ✓ **Elderly and disabled...**  
...fear they could not protect their home in the event of flooding. Moving belongings to a safe place is virtually impossible without support. Concerned about health-threatening incidents like sewers flooding – anything that isn't resolved quickly can develop into serious concern
- ✓ **Rural customers...**  
...feel they could cope most easily across the scenarios. Many already live in challenging environments and are better equipped to deal with water outages and incidents where boiling is necessary, e.g. rain-collection equipment, nearby rivers. Communication is still needed

## How Scottish Water can help?

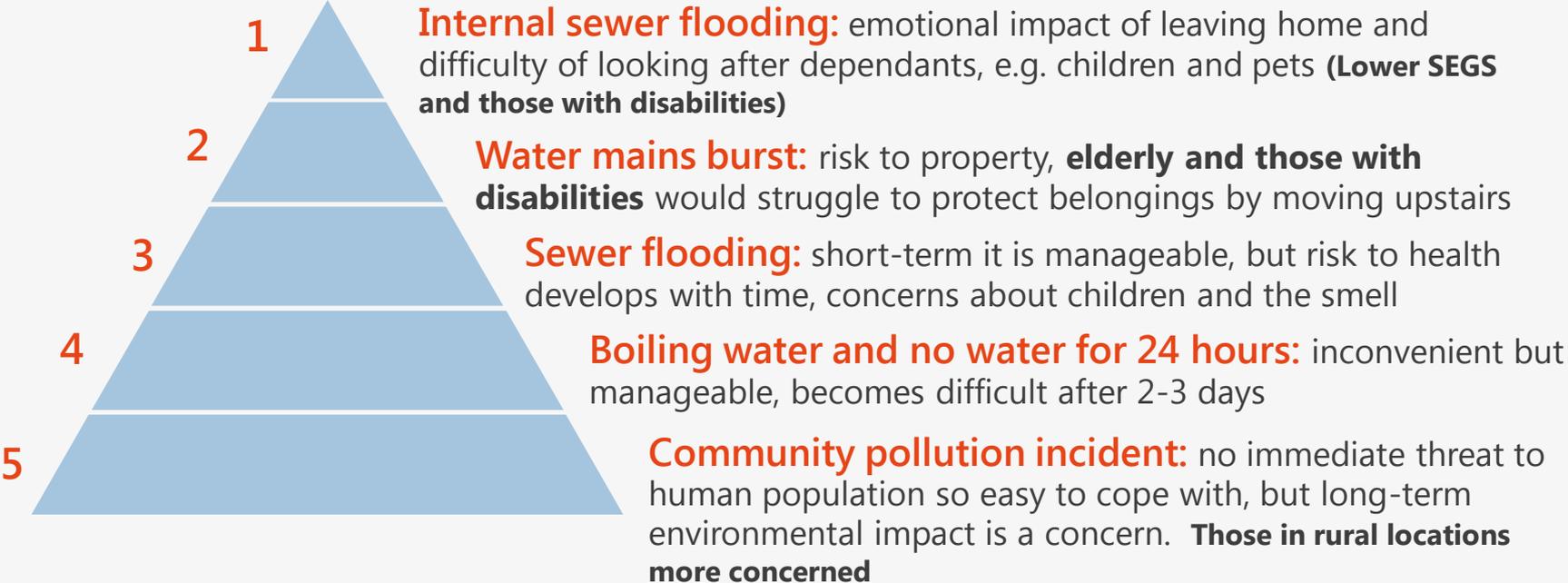
Customers feel there is little more Scottish Water can do beyond fixing the problem quickly, but...

...they could support in developing action plans by clear communication of what the problem is, what is being done to solve it and the timeline to solution

That is why most would like to see **communication** and **customer service** included as higher priorities



# Scenarios least able to cope with: Longevity and the fear of property damage are key considerations for vulnerable and hard-to-reach customers



# Customer understanding of scenarios: **Additional notes on understanding for those more vulnerable**

## Scenario

You have a sewer flooding incident inside your home and have to stay in temporary accommodation for a year. You know there is a risk that this will happen again

## Understanding level

Some confusion over what temporary accommodation consists of, i.e. rehoused with help from authorities? or must they find their own accommodation, incurring costs

## Additional insight

Customers are concerned about property damage, becoming a burden to friends and family and the welfare of dependents

## Scenario

You and your community experience a water mains bursting in your street. This causes a large flood in the street, flooding homes and damaging gardens

## Understanding level

Easily understood by all

## Additional insight

Potential damage to property and belongings drove concern over this scenario. Disabled customers feared they would not be able to salvage belongings, e.g. by moving upstairs

## Scenario

You and your community have no available water for 24 hours

## Understanding level

Easily understood by all

## Additional insight

Responses differed but 3-4 days was the maximum that participants felt they could cope without water, particularly those with children or other dependents. Communication from authorities in this scenario is key

## Scenario

You have a single sewer flooding with sewage and toilet paper in residential areas where you walk

## Understanding level

Easily understood by all

## Additional insight

Hygiene in this scenario and potential health implications was a concern to elderly and disabled customers, and to those with families and young children

# Customer understanding of scenarios: **Additional notes on understanding for those more vulnerable**

## Scenario

Scottish Water tells you that you must boil your water before drinking it. It is safe to brush your teeth with and to bathe and shower in

## Understanding level

Easily understood by most. Some were concerned that the water was not safe to start with and would need greater reassurance and information

## Additional insight

Most see this as an inconvenience but could cope easily for a few days at least. Those with families are more concerned about potential health implications, as are elderly customers

## Scenario

You and your community encounter murky river water that smells in places, there are limited or no plants or wildlife near the river and the water is not suitable for any water activities

## Understanding level

Easily understood by all

## Additional insight

Rural customers claimed they would struggle more in this scenario as their local economies are heavily dependent on tourism. Most other customers felt they could avoid and ignore the problem just by taking alternative routes

## The future

Customers are hopeful of a stable political landscape  
and a prosperous future for Scotland



# Customers are concerned most about the local economy but still have high hopes for a thriving Scotland

## Myself

- Impact of Brexit and IndyRef2 on personal finances and employment opportunities – this is of particular concern to Low SEGs and families

## My community

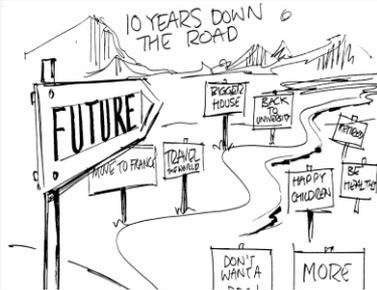
- Restore and maintain community spirit – fears it is being lost
- Remote customers want improved connection to essential services, e.g. broadband, electricity, transport

## Scotland

- Scotland to stand on its own feet on a global stage
- Showcase Scotland's natural resources to the people of Scotland and the world

### What is Scottish Water's role?

- To maintain the status quo
- To push forward on renewable energy
- To improve life for Scots
- To educate and empower
- To play their part in tourism
- To become a global role model



# Maintain the status quo

Maintain the status quo for current bill payers. Perception is high and experience is good amongst these customers.

### Expectations:

- /// Clean water in plentiful supplies
- /// Effective waste services
- /// Work quietly in the background
- /// One low cost for every household
- /// Good customer service when things do go wrong



The next 20 years...

For current bill payers, nothing needs change in terms of product and supply

*Just provide clean water. Just be reliable*

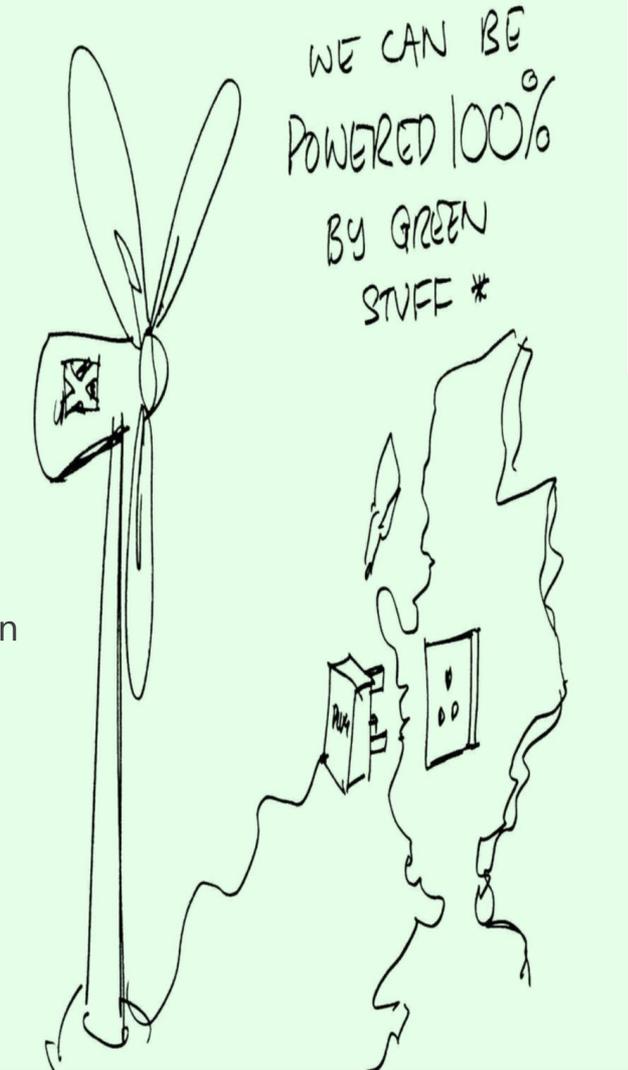


# Renewable energy

There's a high level of confidence in Scottish Water's ability to push forward on the 'Green' agenda and this is particularly attractive to some future bill payers

### Expectations:

- Continue to minimise pollution through activity
- Remain sympathetic to the environment in development work
- Play a key role in developing renewable energy solutions – Hydro Power



## The next 20 years...

Hopes that Scotland could be entirely self sufficient in terms of renewable energy, with the help of Scottish Water

***“ We know that as a country we can be self reliant when it comes to energy ”***

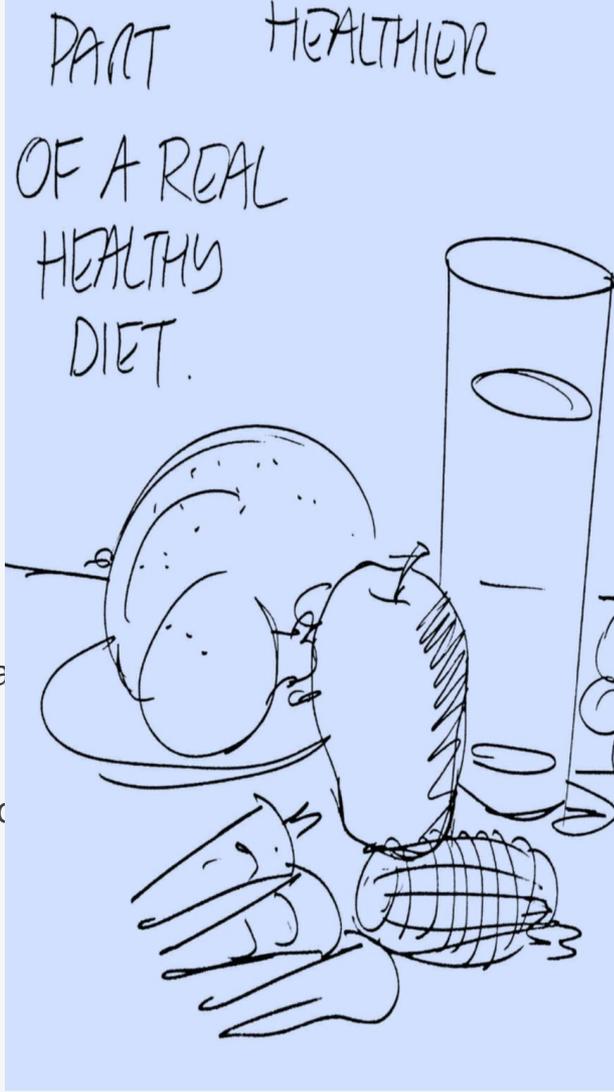


## Improve life for Scots

Even when engagement with Scottish Water 'the company' is low, there's a sense of pride in the quality of the water and it's plentiful supply

### Expectations:

- /// Clean drinking water to maintain good health
- /// Employ & train locally
- /// Work across agencies to provide training and employment opportunities



The next 20 years...

Scottish Water as a major contributor in training and employment opportunities for Scottish people

“ They should provide apprenticeships

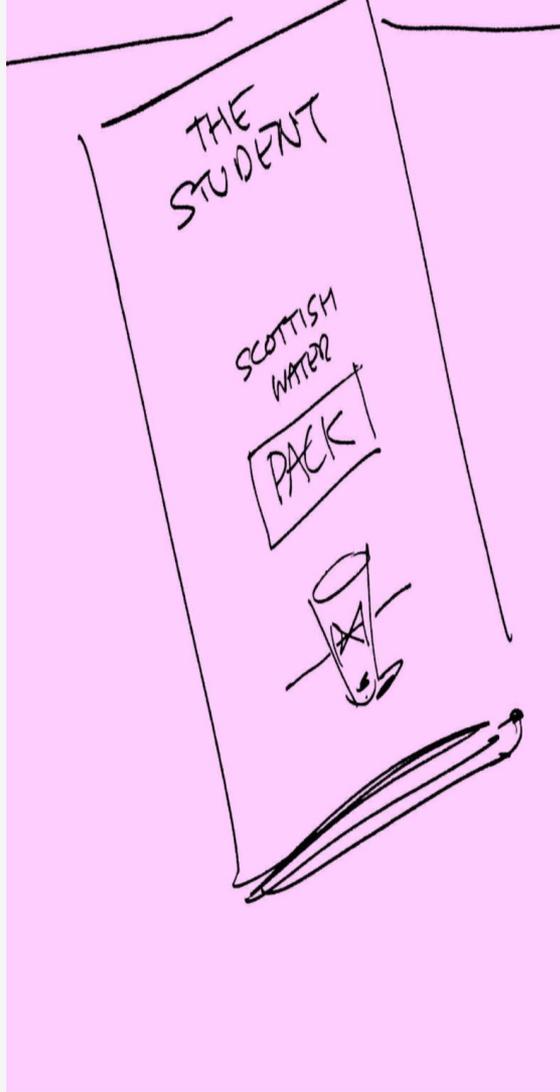


# Educate and empower

There's opportunity to educate across both current and future bill payers to increase awareness and give residents a role to play in maintaining their pride in water

## Expectations:

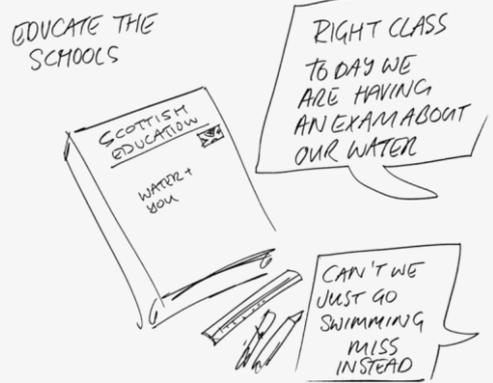
- Continue to educate to impact positive change in consumer behaviour
- Link with schools to increase engagement with future bill payers
- Expand education further to include Scottish Water's role in the Green agenda to provide a 'hook' for many future bill payers



The next 20 years...

With a solid education programme in place, Scottish people are empowered to make good choices when it comes to water

**It's important to know about water because we're all responsible in some way**

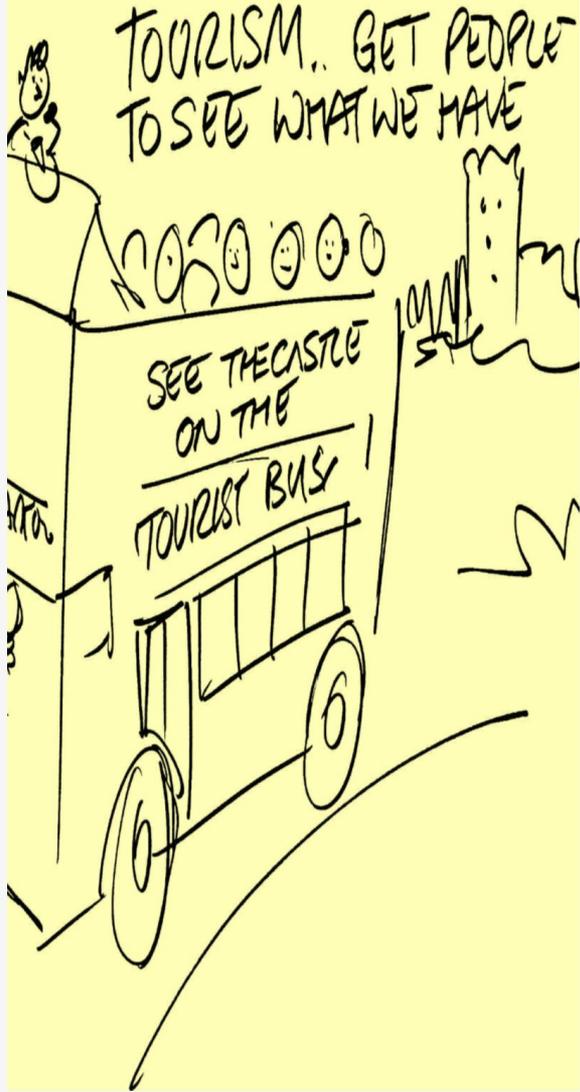


# Put Scotland on the global map

Both in terms of tourism and business, there's appetite for Scottish Water to play their part in ensuring Scotland stays relevant, especially amongst more long standing bill payers

### Expectations:

- Promote the link between water and tourism – both in terms of drinking water and open water
- As a business, be a global role model both in terms of top class customer service and innovation of new technologies



The next 20 years...

Scottish Water are a key player in promoting tourism whilst holding resonance globally as a role model for other businesses

## Scottish Water could lead the way



# Scottish Government 20 year objectives

Scottish Water should play a pivotal role in supporting 'Greener' and 'Healthier'

# Scottish Government objectives - overview

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**Wealthier &  
Fairer**



**Smarter**



**Healthier**



**Safer &  
Stronger**



**Greener**

# Greener and Healthier are most relevant objectives for Scottish Water to concentrate on



## Greener



Improve Scotland's natural and built environment and the sustainable use and enjoyment of it

## Healthier



Help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care



Being greener and healthier are high on the radar for future and current billpayers. Water services have a larger and more obvious role on these agendas

## Safer & Stronger

Help local communities to flourish, becoming stronger, safer place to live, offering improved opportunities and a better quality of life

## Wealthier & Fairer

Enable businesses and people to increase their wealth and more people to share fairly in that wealth

## Smarter

Expand opportunities for Scots to succeed from nurture through to lifelong learning ensuring higher and more widely shared achievements



Less relevant to water services, but Scottish Water can still play a role

“Everyone has a responsibility”

## **Greener:** Scottish Water should play a key role across all areas of the business



### **Minimise pollution**

Through good waste services and reduced carbon emissions



### **Renewable energy**

The water industry hold a responsibility to actively source better options to benefit the environment - such as hydro power solutions



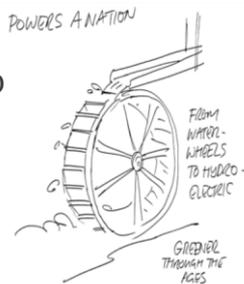
### **Educate future billpayers**

On how to be green, and empower them to make the right decisions when it comes to water



### **Communicate on green issues**

It's a topic that resonates well with domestic customers and is likely to increase engagement



### **Other industries responsible:**

- Energy
- Farming
- Construction
- Oil
- Healthcare
- Local Authority Services

# Healthier: serving the health industry and providing good quality water

Reliability is key in terms of:

✓ Providing clean drinking water throughout Scotland

✓ Safe disposal of waste water  
To ensure communities are kept healthy

✓ Allow customers to make healthier choices

Educate on the key benefits of water, i.e. healthier vs fizzy drinks, how much should be drunk per day etc.

✓ Communication  
If/when things go wrong, communicate what to do, to ensure communities remain healthy



“Keep us healthy with your services and encouragement”

## Other industries responsible:

- Local Authority Services
- Healthcare
- Farming

## Less important objectives

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'Wealthier & Fairer', 'Smarter' and 'Safer & Stronger' objectives can be supported by Scottish Water, but seen as less relevant for water services





# Vulnerable and hard-to-reach customers also include 'Smarter' as a key objective for Scottish Water

## Greener

- Be a responsible company – minimise environmental impact by, for example, not building on green belt

## Healthier

- Educate and raise awareness
- Maintain bathing water quality for swimming and other sports

## Smarter

- Invest in smarter technology
- Educate schoolchildren through talks and site tours
- Promote apprenticeships and graduate schemes

## Safer & Stronger

- Everybody should be doing more to support local communities
- Scottish Water can run/sponsor community events

## Wealthier & Fairer

- A great objective but unsure where Scottish Water can support
- Focus on renewables and pass on savings

 **Less relevant to water services, but Scottish Water can still play a role**

A woodcock bird with a long, straight beak and mottled brown and black feathers is standing in a field. The background is a soft-focus landscape with some small plants and a light sky. The entire image has a dark blue overlay.

# Key insights

Domestic customers

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# Key insights

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## Utilities and value for money

- /// Few give much thought to their water supply and waste water services. They are utilities which are expected, trusted and relied upon. Many customers don't know how much they pay for water
- /// Spontaneously other utilities like broadband are perceived to offer better VFM. Water's value becomes more apparent once its role has been considered in detail. There was a significant learning curve within the research sessions. At the end of the session customers are aware of water's importance and it's comparative VFM.
- /// Scottish residents are proud of the quality and plentiful supply of fresh drinking water and the effective protection of their environment. Because of this, water is regarded as a equitable utility - especially important given the uncertainties within the current political landscape.

**Recommendation:** When promoting Scottish Water emphasise value for money, the quality of the water & plentiful supply, reliability of water and waste services & best in class customer service. Scots are proud of their water – this too can be reflected. Innovation & development activity over the next 20 years will reinforce perceptions of value.

# Key insights

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## Internal aspirations

- // The sentiment expressed by the internal aspirations resonates, and is the foundations of an organisation most would want to be customers of
- // The lack of tangible evidence for the internal aspirations can undermine credibility, making them feel generic

**Key recommendation:** Amend and update the Internal aspirations. Make them simple, concise & concrete. Give tangible examples of the ways Scottish Water are 'living' these values. Bringing out the ways Scottish Water *innovates* also demonstrates future orientation & work globally, especially within the renewable energy agenda. This has a natural fit.

# Key insights

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## Service preferences

- /// The current service areas feel broadly right to customers, with concentration on maintaining the quality of the product and minimising flooding
- /// For many, activities relating to reducing pollution and conducting development work that remains sympathetic to the environment should take higher priority

**Key recommendation:** Quantitative research will give a more definitive ranking. Test priorities further against specific coping scenarios, adding in breadth, depth and longevity to 'stress test' the priorities and where they currently sit. Scottish Water should also continue to adapt their priorities to meet up and coming needs of future customers, who place a greater emphasis on environmental and innovation strategies.

# Key insights

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## Vulnerable and hard to reach customers

- Older customers, those from lower SEG groups and those living with disabilities are unlikely to see themselves as any different in terms of their support needs from utilities companies. However there is higher importance for customer service and communication
- Those living in rural locations see themselves as highly resistant, with good community level measures in place to deal with problems with water. These customers expect Scottish Water to work with them in developing coping strategies as and when there is activity that will impact on day to day life

**Key recommendation:** Continue to work with community groups to identify vulnerable and hard to reach customers and support them at a community level, utilising the resistance strategies already in place there. Ensure the continued inclusion of vulnerable and hard to reach customers in customer engagement work to develop flexible strategies that meet changing needs.

# Key insights

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## Scottish Water's role in Scotland

- Water and waste services may be taken for granted day-to-day, but customers know the important role Scottish Water plays in ensuring that people can live wherever they want to live in Scotland
- Infrastructure is important in communities – making people feel secure that they will receive the same high quality product and service no matter where they live

**Key recommendation:** Ensure customers that they will continue to receive the same quality service and product over the next 20 years whilst also pushing forward to innovate.

# Key insights



## Scottish Water and the Scottish Government's objectives

- /// Most find it difficult to make the connection between Industry, Scottish Water and the Scottish Government's objectives for the next 20 years. 'Greener' and 'Healthier' are the two key agendas for Scottish Water to contribute to
- /// Customers (especially the young) and future bill payers are keenly tuned into environmental issues in Scotland – both in terms of protecting the environment and pushing forward the use of renewable energy
- /// Clean drinking water and effective waste services are intrinsically linked to health

**Key recommendation:** Focus on 'Greener' as this provides an engaging hook for many whereas 'Healthier' naturally ties in with high expectations for quality of product and service. Continue to innovate in these areas and promote through education and awareness raising.