

Customer Playback Sessions

Objectives

To validate the findings of the valuation research programme for PR24 via a series of customer workshops, as part of the agreed triangulation process. Also, to assess levels of customer support for the 2025-2030 business plan.

| Format | Workshops, focus groups, and Interviews |
|-------------------------|---|
| Households (number) | 58 |
| Non households (number) | 32 |
| Vulnerable customers | |
| Future customers | |
| Retailers | |
| Stakeholders | |
| South West Water | ✓ |
| Bournemouth Water | ✓ |
| Bristol Water | ✓ |

Impact on our plan and ways of working

These studies provided insights into the level of customer support for the 2025-2030 business plan, and whether customers support the valuations that underpin this plan.

Topics

| | | | |
|-----------------|---|--------------------------|---|
| Storm overflow | ✓ | Drinking water quality | ✓ |
| Water resources | ✓ | Net zero/ climate change | ✓ |
| Nature | ✓ | Affordability | ✓ |

Key messages – what matters most

What we did

- Invited 30 household and 16 non-household (NHH) customers to workshops to ensure that, in the views of customers, the findings of key valuation studies are appropriate for business planning
- Invited 28 household and 16 NHH customers to focus groups to assess levels of customer support for the business plan for 2025-2030. Including customers from the Isles of Scilly were interviewed.

What matters most

- Customers view the value of water company services in terms of their impact on all that use them, including bill payers, communities, and the environment.
- Customers emphasised that environmental impacts are a key concern.
- Generally, customers support valuations, but they feel that valuations of supply interruptions over two days and 'Do not use' notices do not reflect the severity of the impact on customers
- Household customers expressed little support for bill impacts, but this varied slightly between regions
- Customers were broadly in support of the overarching priorities and investment when individual priorities and investment areas were considered in isolation alongside associated bill impacts
- 'Maintaining High Quality, Resilient Water Supplies' is generally viewed as the most important priority area

Are there differing views?

- NHH customers expressed more support for bill impacts than household customers

Next steps

- We used this research to triangulate our willingness to pay research, which we are now using to develop our plan.

Date July & September 2023 Supplier ICS & Turquoise